

THE TYSON GROUP

NATIONAL RESEARCH FIRM

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FROM: Ryan Tyson, President of the Tyson Group

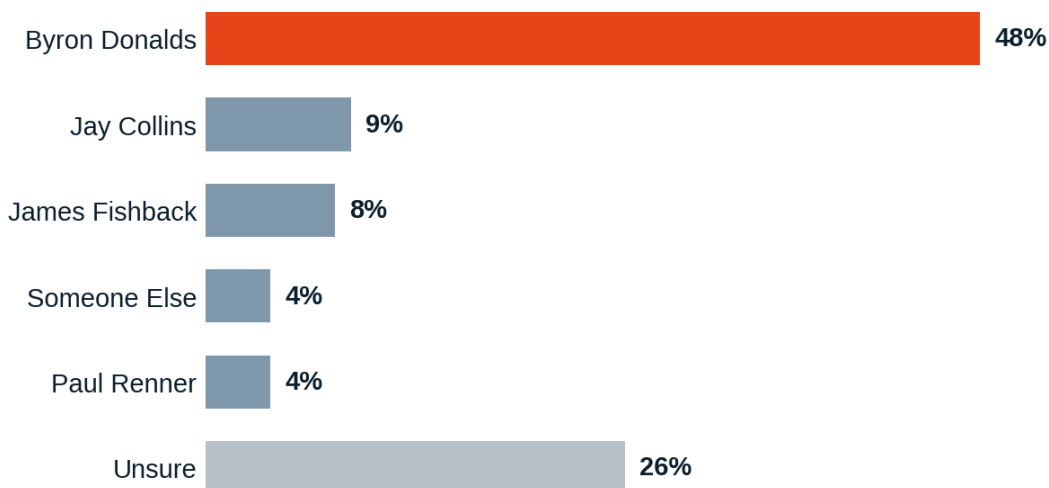
DATE: July 12, 2026

RE: Republican Primary for Governor of Florida

Bottom line. Byron Donalds is, for all practical purposes, the Republican nominee for Governor. On the ballot for Governor, he takes 48 percent of the primary electorate, no other candidate reaches double digits, and roughly a quarter of voters remain unsure. The question in this race is not who wins. It is how high Donalds' ballot share climbs before the primary. Every leading indicator in the data, combined with the paid media landscape over the coming month, points in the same direction: up.

THE BALLOT TODAY

Donalds sits at 48 percent on the ballot for Governor. Jay Collins is a distant second at 9 percent, James Fishback at 8 percent, and Paul Renner at 4 percent, even with Someone Else at 4 percent. Roughly 26 percent are still unsure. Donalds leads his nearest competitor by nearly 40 points, and no rival has yet shown the name identification or the resources to consolidate the field's remaining oxygen. Barring a serious and well-funded challenge, the shape of this race is set.

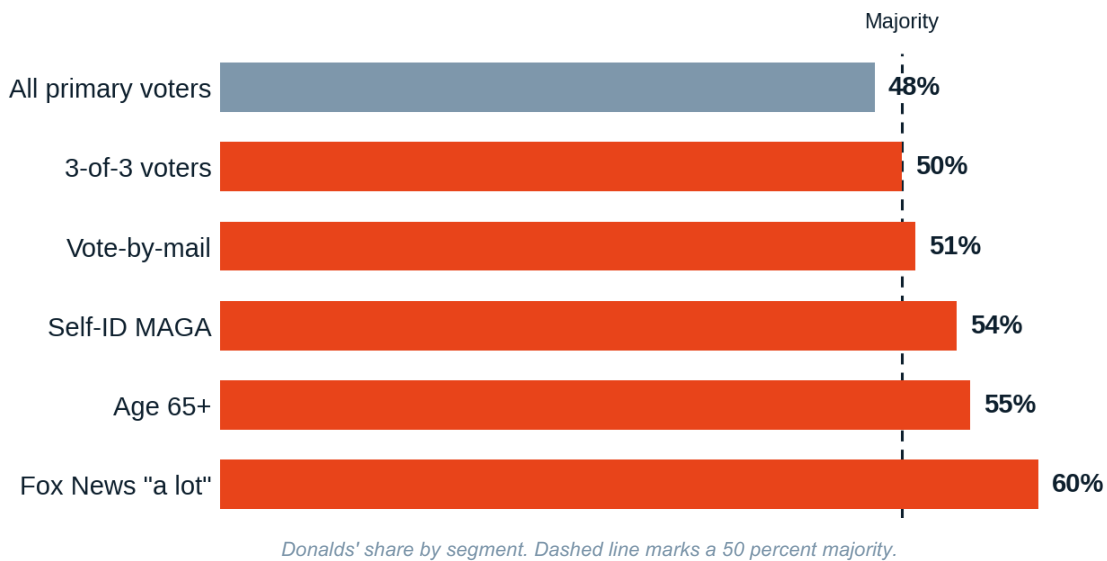


Ballot for Governor, Republican primary voters (n=600)

LEADING INDICATORS POINT UP

The composition of Donalds' support is the real story. He is strongest with the bulk of most reliable voters in a Republican primary. Among 3-of-3 voters he takes 50 percent. Among voters 65 and older, the most reliable primary cohort in Florida, he reaches 55 percent. Among voters who watch Fox News "a lot" he is at 60 percent, among self-identified MAGA voters' - 54 percent, and among vote-by-mail voters 51 percent. In every one of these high-propensity, high-turnout segments Donalds already sits at or above a majority. That means his ballot share grows as the electorate narrows toward the people

most likely to actually vote. Based on paid media reservations over the next month, we expect that share to keep climbing unless a competitor mounts a real challenge.



HISTORICAL CONTEXT

In the 20 years we've polled this state, this is the largest lead we have measured in an open Republican gubernatorial primary in Florida since 2006, when Charlie Crist defeated Tom Gallagher by 31 points. A margin of this size, this early, in a contest with no incumbent, is close to unprecedented in modern Florida politics. The historical comparison matters for expectation-setting: leads of this magnitude in open primaries do not tend to collapse, they expand.

METHODOLOGY

The Tyson Group surveyed n=600 likely Republican primary voters in Florida, 7/15-7/18. Margin of error ± 4.0 percent at the 95 percent confidence level; subgroup margins are larger. Interviews conducted via live phone and text-to-web.