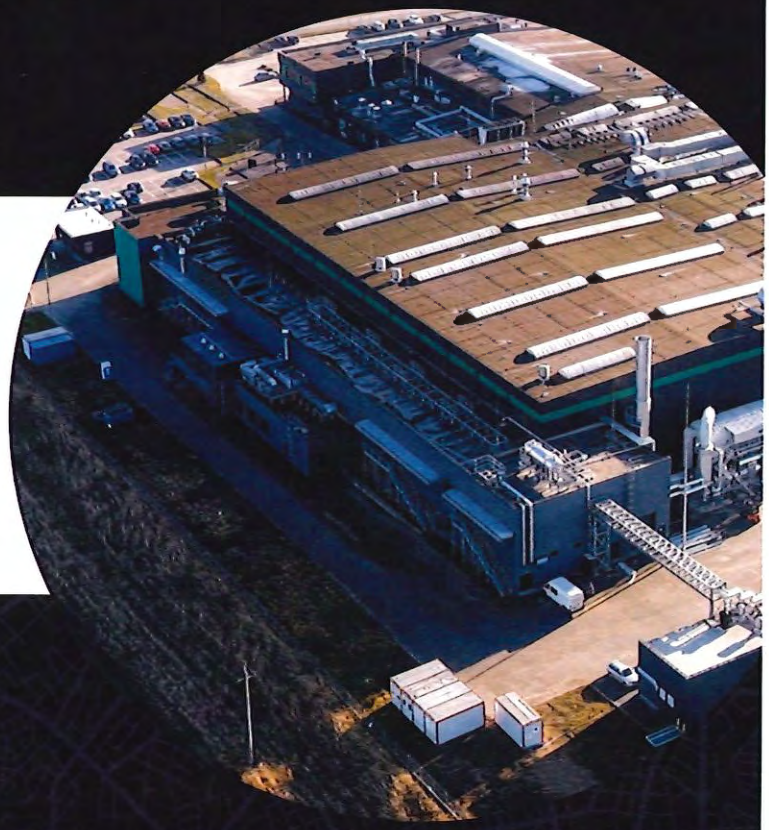
Attachment
“E”
Data Center Info from Symposium

Zencity

Data Centers National Survey Report

For local government leaders navigating the data center debate



Spring 2026

Power the Work of Government with Community Voices

Report Structure

01

Introduction

The Data Center Divide

Across the country, the data center conversation has shifted from the planning department to the front page. Council meetings are being overrun. Zoning hearings are running long. Ballot measures to ban data center development are gathering signatures in multiple states. Elected officials are facing organized recall efforts. State legislatures are advancing bills to constrain or block construction.

This is no longer a question of permits and economic impact studies. It has become a political question — one that is reshaping local elections, fracturing communities, and forcing leaders to defend decisions they thought would be routine.

Most leaders are responding to public sentiment they cannot fully see. The loudest residents — those who show up at council, who post, who organize — are visible. The broader population is not. Decisions are being made under pressure, with incomplete information about what residents across the community actually believe.

This report is designed to help close that gap.

As the digital economy matures, the demand for data centers has shifted from a technical requirement to a significant matter of public policy. Local governments are now tasked with navigating the tension between the high-growth potential of these facilities and the resident concerns regarding resource sustainability, neighborhood compatibility, and institutional transparency.

This report analyzes current sentiment across the United States to identify the specific "levers of support" that influence constituent approval. By moving beyond traditional economic metrics and examining the psychological drivers of trust, AI adoption, and environmental sensitivity, this analysis provides leaders with an evidence-based roadmap for planning infrastructure in a way that prioritizes community benefit and long-term service delivery.

Zencity surveyed a representative sample of 1,909 Americans on sentiment around data center development and AI adoption. This report provides nationally representative benchmarks to help leaders build an evidence-based case for infrastructure decisions and community engagement strategies.

> If you had asked me about data centers five months ago, I would have said, 'What's a data center?' Now it's everywhere. That's a short amount of time for people to fully form an opinion."

David Holt
Mayor, Oklahoma City (January 2026)

01

Key Findings

At a Glance

Water and electricity are the dominant concerns.

86% of residents rate the impact on local water supply as important, and 85% say the same about electricity costs—both significantly outranking job creation (65%) and tax revenue (61%) as decision factors.

Opposition is concentrated among older, more educated, and White residents.

Residents aged 55+, college-educated, and White report the highest opposition rates and the highest levels of concern around water and electricity.

AI familiarity is a strong predictor of resident support.

63% of AI-optimists and 48% of daily AI users support local data center development, compared to just 17% of AI-skeptics and 16% of non-users.

One in three Americans are unsure.

One in three Americans neither support nor oppose building more data centers. 35% of residents nationally support building more data centers vs. 30% oppose. With 33% neither supporting nor opposing — the national conversation remains genuinely unsettled

Local government is not the trusted voice on data center impacts.

Only 1 in 5 residents trust local government officials for accurate information on the impacts of a proposed data center (22%), nearly 3x less than independent environmental organizations (57%).

02

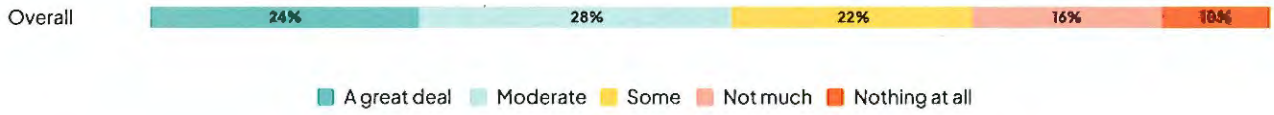
Awareness & Support

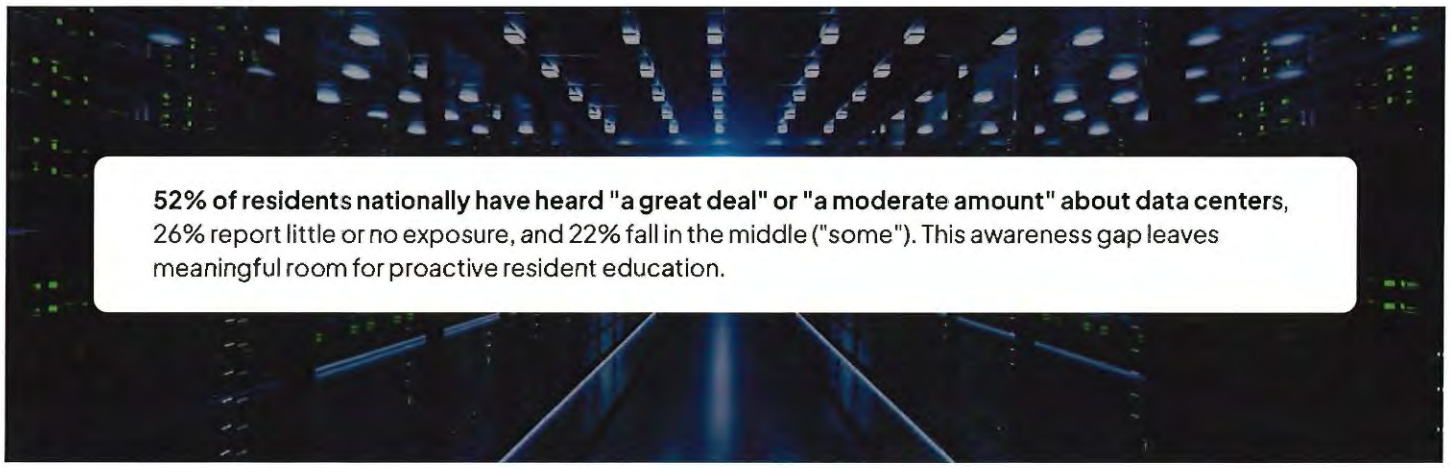
Understanding Resident Sentiment on Technology Infrastructure

This section analyzes resident awareness of data centers and their willingness to support country-wide and local development.

Q1: Before today, how much had you heard or read about data centers?

[A great deal->Nothing at all] [Single select. N=1909]





52% of residents nationally have heard "a great deal" or "a moderate amount" about data centers, 26% report little or no exposure, and 22% fall in the middle ("some"). This awareness gap leaves meaningful room for proactive resident education.

Overall Breakdowns: (N=1909)

National Insight:

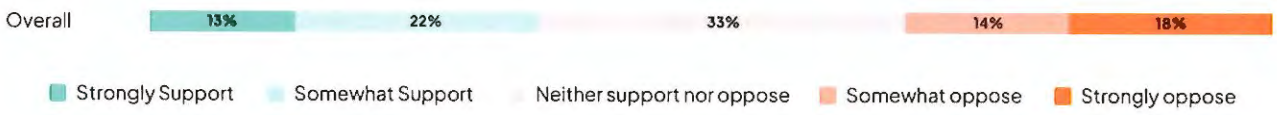
Awareness is highest among White residents (58%) and those aged 55+ (54%). Conversely, Asian and Black residents report lower high-level awareness, identifying a need for targeted outreach to ensure all demographic groups are equally informed about upcoming infrastructure.

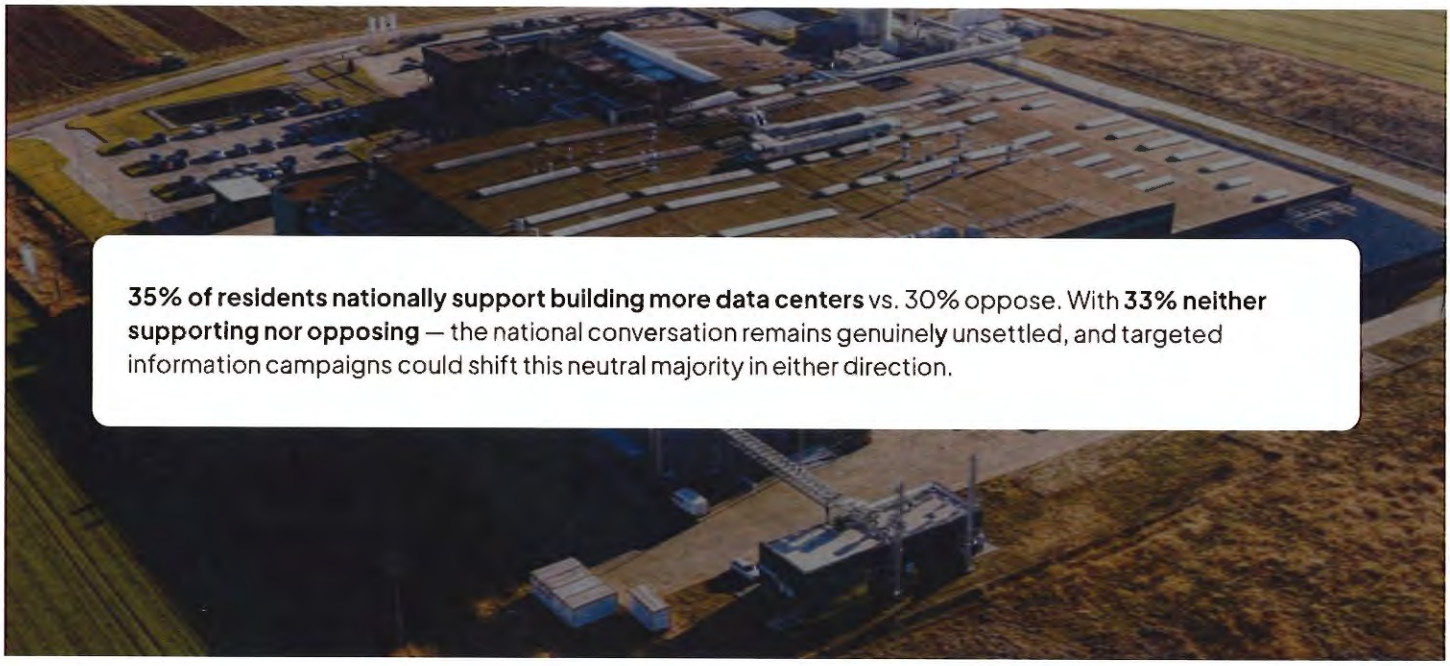
02

Awareness & Support

Understanding Resident Sentiment on Technology Infrastructure

Q2: To what extent do you support or oppose building more data centers across the country? *[Strongly support -> Strongly oppose]* *[Single select, N=1909]*





35% of residents nationally support building more data centers vs. 30% oppose. With **33% neither supporting nor opposing** — the national conversation remains genuinely unsettled, and targeted information campaigns could shift this neutral majority in either direction.

Overall Breakdowns: (N=1909)

National Insight:

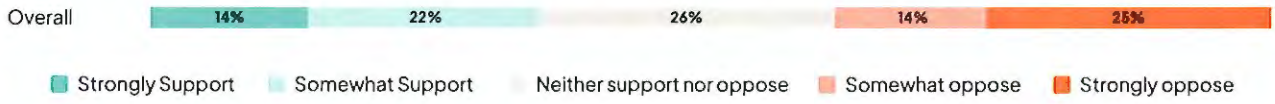
Support for data centers is highest among younger cohorts aged 18-34 (42%) and Hispanic residents (52%). Opposition is heavily concentrated in the 55+ demographic (46%), highlighting a generational divide.

02

Awareness & Support

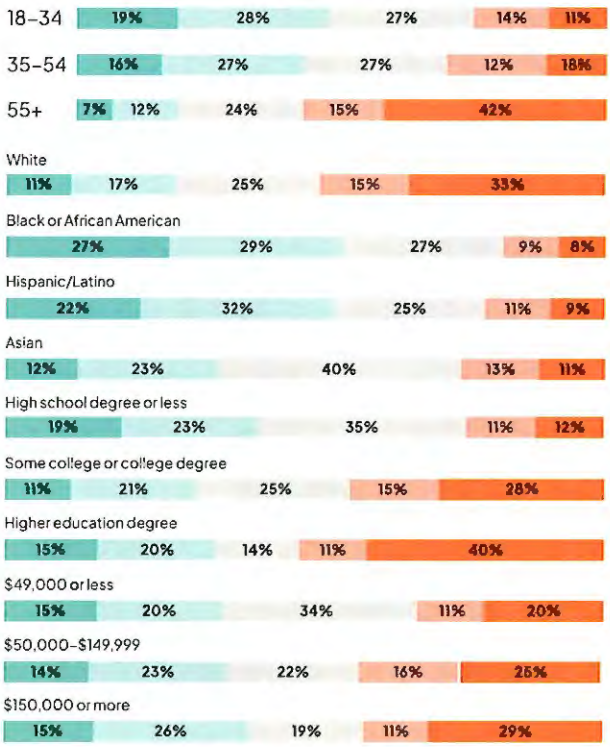
Understanding Resident Sentiment on Technology Infrastructure

Q3: Overall, do you support or oppose the development of a new data center in your local community? *[Strongly support -> Strongly oppose]* *[Single select, N=1909]*



Opposition rises when data centers move close to home: 35% support a data center in their own community, while 39% oppose — a reversal of the 35-32 favorable split on national construction. With 26% neutral, residents grow more cautious as proximity to home increases. The "NIMBY" effect shows that people support the digital economy in general, but worry about its impact on their own neighborhoods.

Overall Breakdowns: (N=1909)



National Insight:

Local opposition is most acute among White residents (48%) and increases with age, peaking for those aged 55+ (57%).

National Insight:

Residents with higher education degrees show the highest local opposition at 51%. Additionally, support increases slightly with income, and both residents with no more than high school education and residents with lower incomes present significant neutral sectors.

02

Awareness & Support

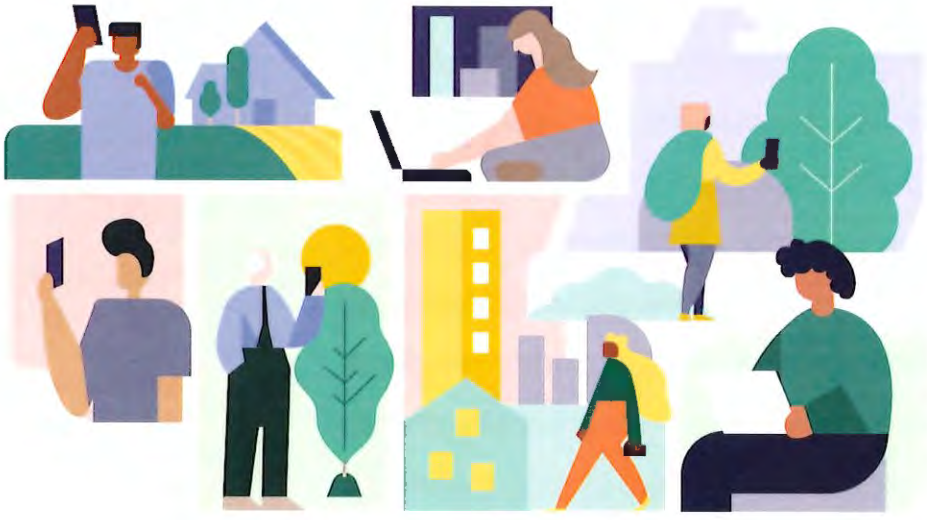
Understanding Resident Sentiment on Technology Infrastructure

Q18: Which of the following, if any, would make you more likely to support the development of a new data center in your local community?
[Only for respondents who oppose a data center being built in their community, Multi select]

Overall Breakdowns: (N=694)

National Insight:

For residents currently opposed, renewable energy mandates (38%) and water cooling guarantees (34%) emerge as the most effective levers to shift sentiment—suggesting environmental concessions outweigh direct financial incentives. That said, 46% report that nothing would change their mind, highlighting a large, firmly entrenched opposition segment.



03

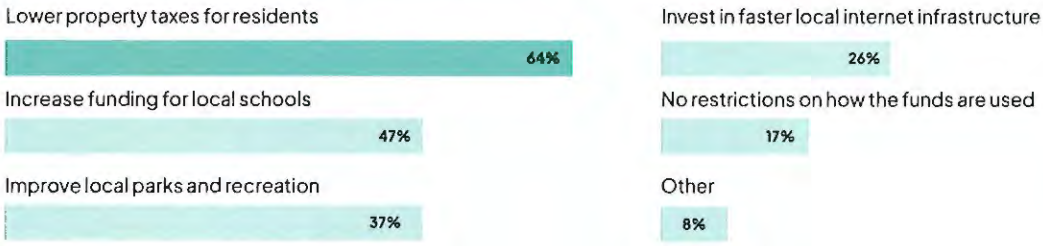
Costs and Benefits of Data Centers

Balancing Economic Growth with Resource Sustainability

This section analyzes how residents assess the trade-offs associated with data center development, including both economic gains and resource impacts.

Q17: If a data center was built, which of the following policies should the City prioritize for the new tax revenue generated by the data center? [Multi select]

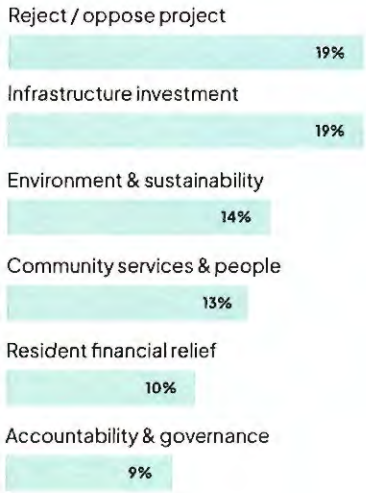
Overall Breakdowns: (N=1909)



National Insight: 64% of residents prioritize lower property taxes as the preferred use of data center revenue, followed by increasing funding for local schools by a wide margin

Respondents who chose 'other' (N=134)

Open text responses in "Other" – Leading Topics:



Reject / oppose project
"They should not ever build the data center. We already have unstable grids and water supplies"

Infrastructure investment
"Improve public infrastructure, i.e. roads, wastewater systems, etc."

Environment & sustainability
"Preserve wetlands and wildlife corridors."

Infrastructure investment emerged as a leading theme in resident write-ins (19% of all 'Other' responses), with residents specifically naming roads, public transit, and wastewater systems.

Rejection of the project also emerged as a leading response, with environmental and sustainability concerns ranking third—reinforcing consistent findings across the survey.

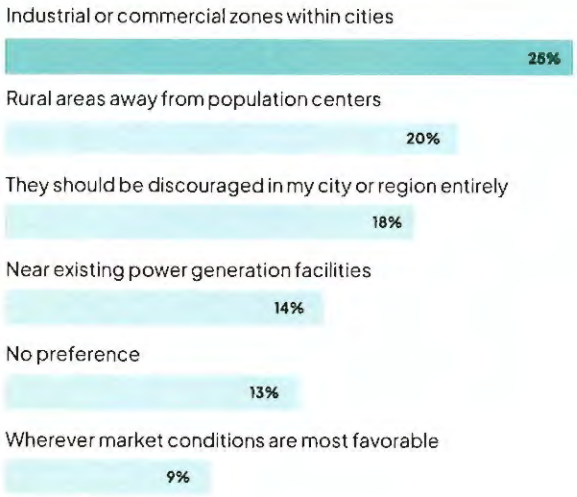
03

Costs and Benefits of Data Centers

Balancing Economic Growth with Resource Sustainability

Q19: Where do you believe data centers should primarily be located? *[Single select]*

Overall: (N=1909)

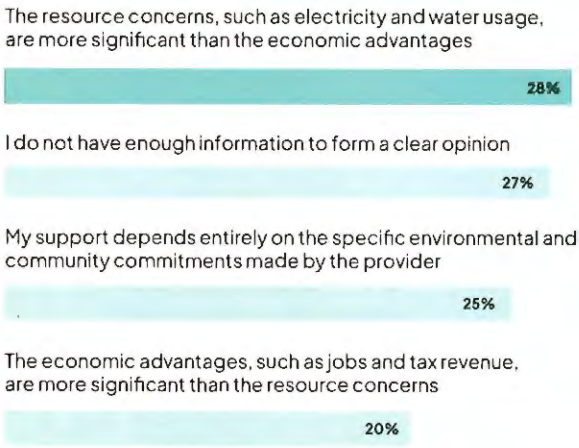


National Insight:

25% of residents prefer industrial or commercial zones, 20% favor rural areas away from population centers, and 18% believe development should be discouraged altogether.

Q16: Balancing the potential impacts of data centers, which of the following perspectives most closely aligns with your own? *[Only for respondents who are supportive or neutral about a data center being built in their community, Single select]*

Overall: (N=1215)



National Insight:

28% of supportive or neutral residents believe resource concerns outweigh economic advantages, while 27% admit they lack enough information to form an opinion. This neutral bloc represents the primary audience for city-led communications focused on resource protection.

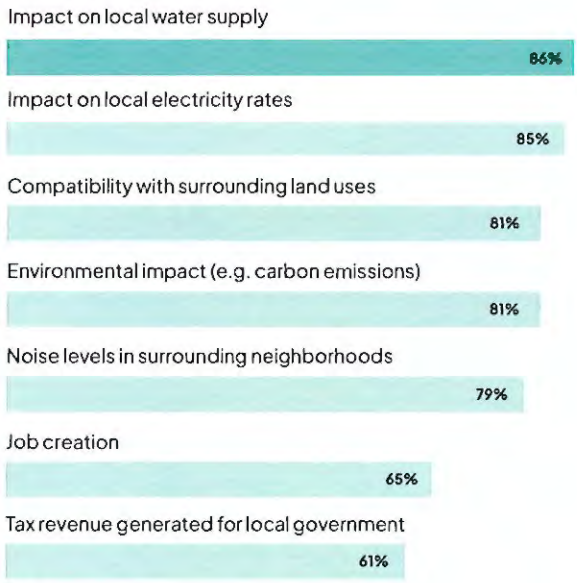
03

Costs and Benefits of Data Centers

Balancing Economic Growth with Resource Sustainability

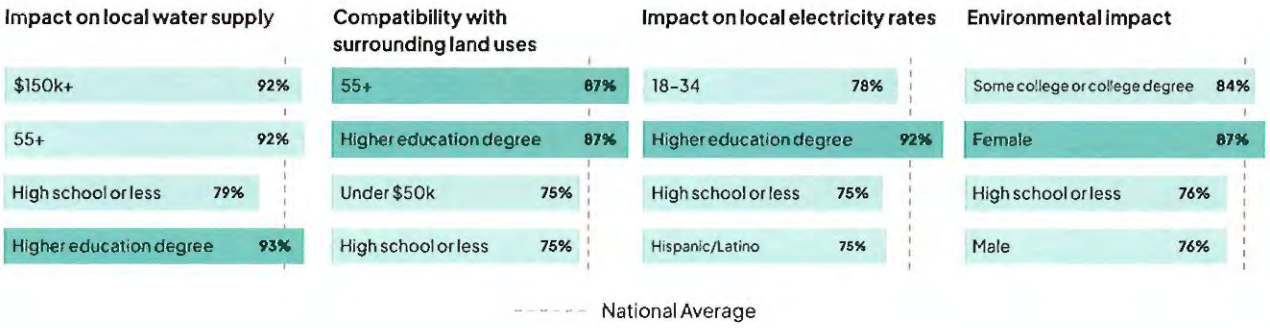
Q4-Q10: When considering the development of data centers in your local community, how important or unimportant are each of the following factors to you?
[Very important->Very unimportant] [Single select. Overall N=1909]

Overall: (N=1909)



National Insight:

Impact on local water supply (86%) and electricity rates (85%) are the most voted concerns. These factors significantly outrank job creation (65%), indicating that residents view data centers primarily as resource consumers rather than economic engines.



Emphasis on water and electricity intensifies with age, income, and education: 92% of residents 55+, 92% of those earning $150k+, and 93% of higher-education degree-holders rate water-supply impact as important — well above the 79% among residents with high school or less.

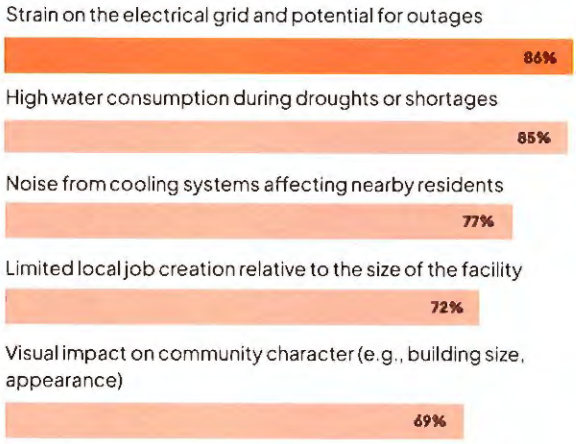
03

Costs and Benefits of Data Centers

Balancing Economic Growth with Resource Sustainability

Q11-Q15: When considering the development of data centers in your local community, how concerning or unconcerning do you find each of the following potential issues? *[Very unconcerning->Very concerning]* [Single select, N=1909]

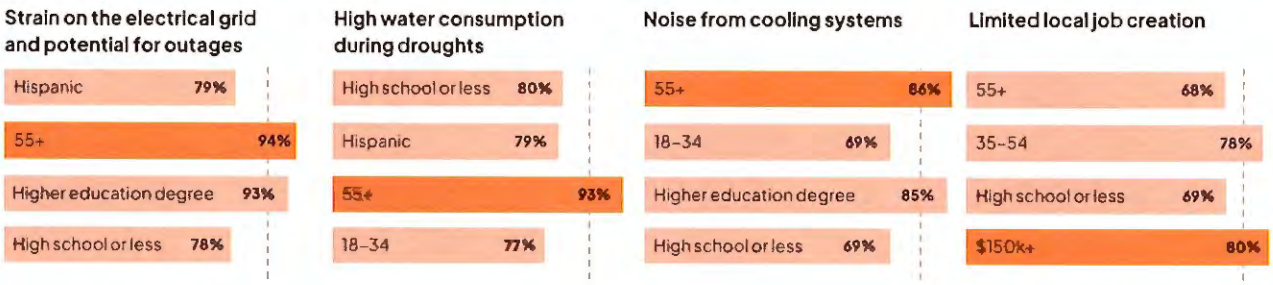
%Concerned Overall: (N=1909)



National Insight:

Grid strain and potential outages are the leading concerns (86%). Residents are less concerned about visual impacts (69%), placing greater emphasis on the functional stability of their utilities.

[Single select, Overall N=1909]



Concern is highest among older and higher-education residents: 94% of residents 55+ worry about grid strain and 93% about water consumption during droughts — both well above the National average. Notably, 80% of residents earning $150k+ are also concerned about limited local job creation, indicating that even higher-income residents question the economic case for data centers.

04

Local Decision Making

Resident Input and Institutional Trust

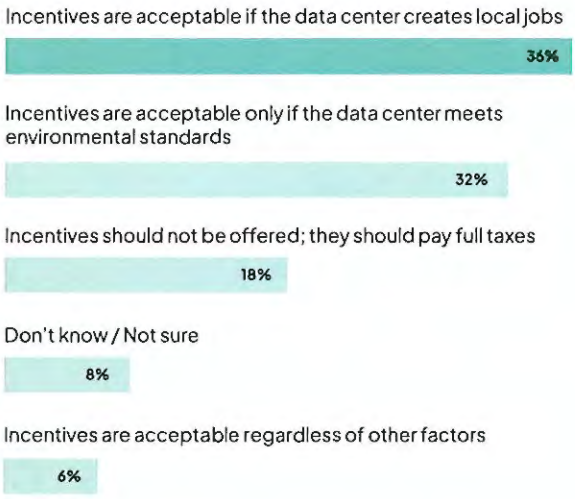
Large-scale infrastructure projects represent significant changes to a community's physical and economic landscape, and securing approval depends on transparent decision-making and meaningful resident input.

This section analyzes how residents believe they should be involved in the approval process (e.g., public vote vs. staff decision) and which sources they trust most to provide accurate information on environmental and community impacts.

Q21: Which statement best reflects your view on tax incentives (tax breaks) to attract data centers?

[Only for respondents who are supportive about a data center being built in their community, Single select]

Overall: (N=697)



National Insight:

Incentives are only broadly acceptable if they are conditional: 36% link them to job creation and 32% to environmental standards. Only 6% support unconditional tax breaks.

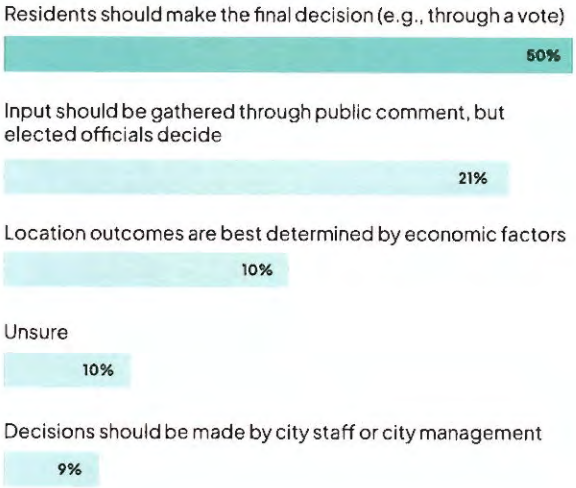
04

Local Decision Making

Resident Input and Institutional Trust

Q20: How much input should local residents have in decisions about whether to approve a new data center? *[Single select]*

Overall: (N=1909)



National Insight:

50% of residents believe the final decision should be made via a public vote, while only 9% trust city staff to decide independently, suggesting low levels of trust in public officials on this issue.

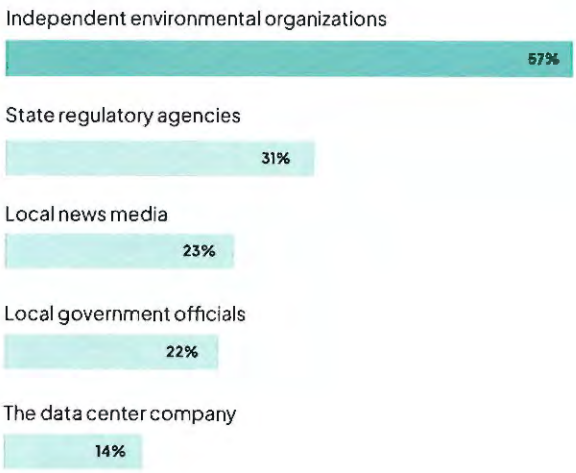
04

Local Decision Making

Resident Input and Institutional Trust

Q22: Which of the following sources do you trust the most to provide accurate information about the impacts of a proposed data center? *[Multi select]*

Overall: (N=1909)



National Insight:

Just 1 in 5 residents (22%) include local government officials among their most-trusted sources on data centers — nearly 3x behind independent environmental organizations (57%). Successful engagement requires third-party validation rather than reliance on developer-led marketing materials.

05

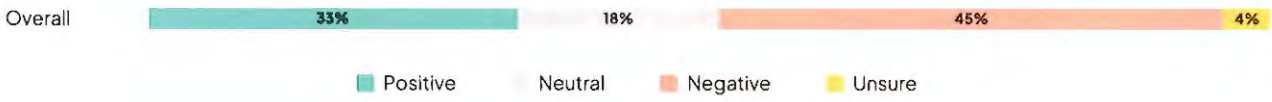
AI Usage and Trust

Digital Adoption and the Perceived Impact of AI

This section explores how "AI-literate" the community is and whether they view the shift toward Artificial Intelligence as positive.

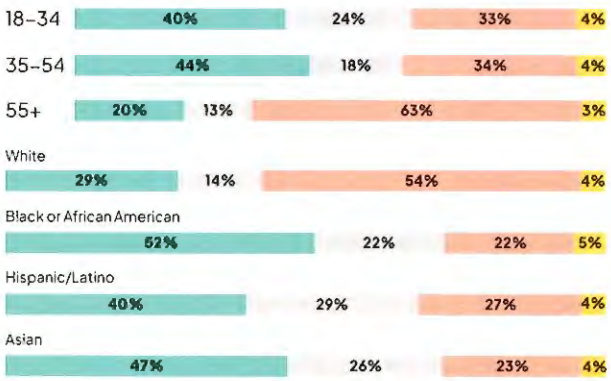
By measuring adoption rates we can identify how much of the population already relies on the services these data centers provide. This creates a link between the tools residents value and the physical infrastructure required to sustain them.

Q23: Overall, do you believe AI will have a positive or negative impact on society over the next 10 years? *[Very positive-> Very negative, unsure]* [Single select. N=1909]



About half of respondents (51%) believe AI will have positive or neutral impact on society, vs. 45% who expect a negative outcome. With 18% neutral and 4% unsure, public sentiment on AI — the technology data centers enable — leans skeptical. [Single select, N=1909]

Overall Breakdowns: (N=1909)



National Insight:

A significant generational gap is evident, with 63% of residents aged 55+ viewing AI negatively, while younger cohorts are roughly twice as likely to view it positively. Differences also emerge across ethnic groups, with White respondents more likely to be pessimistic about AI than other groups, particularly African American respondents.

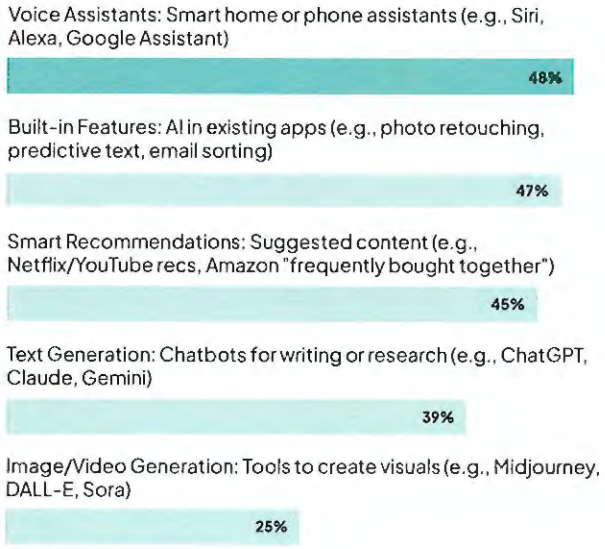
05

AI Usage and Trust

Digital Adoption and the Perceived Impact of AI

Q24–Q28: How often do you use the following types of Artificial Intelligence (AI) tools or services? *[Daily->Never]* *[Single select]*

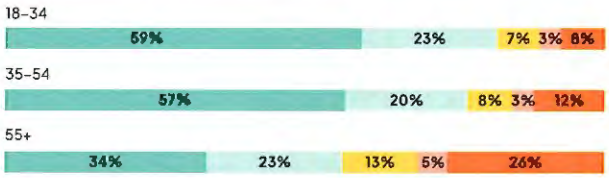
%Daily+Weekly Overall: (N=1909)



National Insight: Voice assistants (48%) and built-in AI features (47%) are the main points of interaction with AI. Image and video generation tools are used at roughly half that rate (25%).

Overall breakdown of *any** AI tool usage:

Overall Breakdowns: (N=1909)



National Insight: 49% of surveyed residents report daily AI tool usage, with 71% engaging at least weekly — signaling broad familiarity with AI services. A notable generational gap persists: residents aged 55+ report daily usage at 34%, 25 ppt below the 18–34 cohort (59%). Black/African American residents register the highest daily usage rate across all racial cohorts at 63%.

*For each respondent, "*any* AI tool usage" reflects their highest-frequency response across the five AI tool types in Q24–Q28. Categories are mutually exclusive, a "Weekly" respondent uses at least one tool weekly but no tool daily.

05

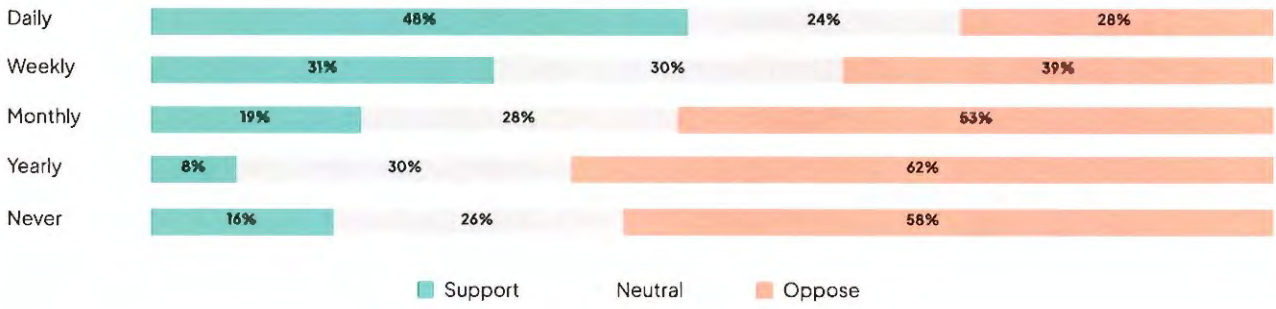
AI Usage and Trust

Digital Adoption and the Perceived Impact of AI

Cross-question analysis: how does usage of AI tools influence support for data centers?

Q3: Overall, do you support or oppose the development of a new data center in your local community? VS Q24-28: How often do you use the following types of Artificial Intelligence (AI) tools or services?

Support for local data centers by AI usage of any* tool:



*For each respondent, 'AI usage of any tool' reflects their highest-frequency response across the five AI tool types in Q24-Q28. Categories are mutually exclusive, a 'Weekly' respondent uses at least one tool weekly but no tool daily.

**Support= Strongly support+somewhat support. Neutral= Neither support not oppose. Oppose= Strongly oppose+somewhat oppose

Daily AI users express support for a local data center at 3× the rate of non-users (48% vs. 16%), revealing a direct correlation between AI familiarity and infrastructure receptiveness. Opposition peaks among yearly users at 62%. With 24-30% of residents across all usage cohorts remaining neutral, this represents a **significant communication opportunity.**

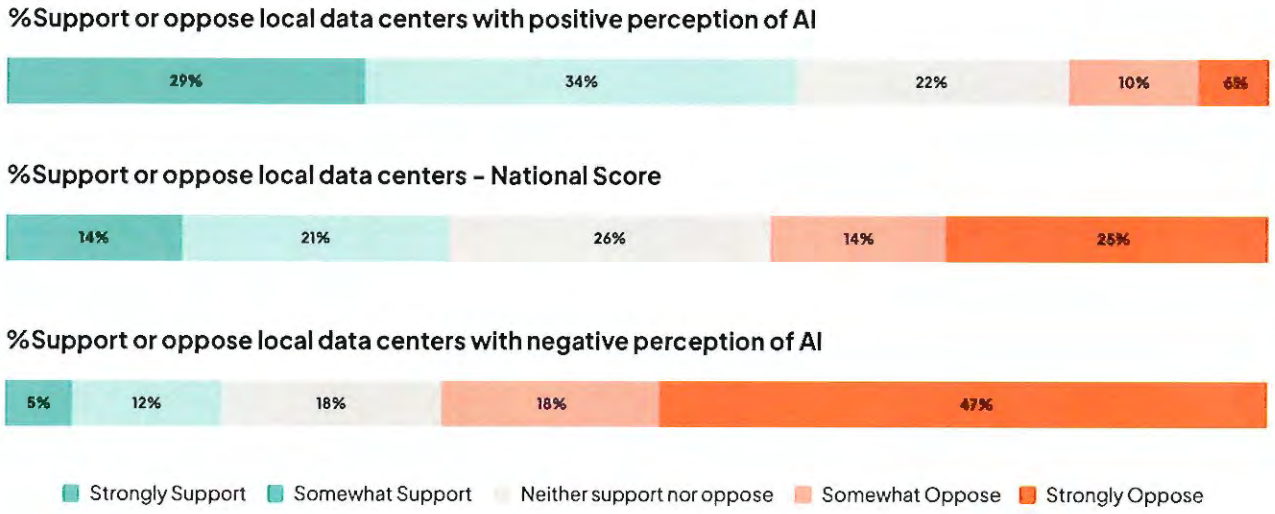
05

AI Usage and Trust

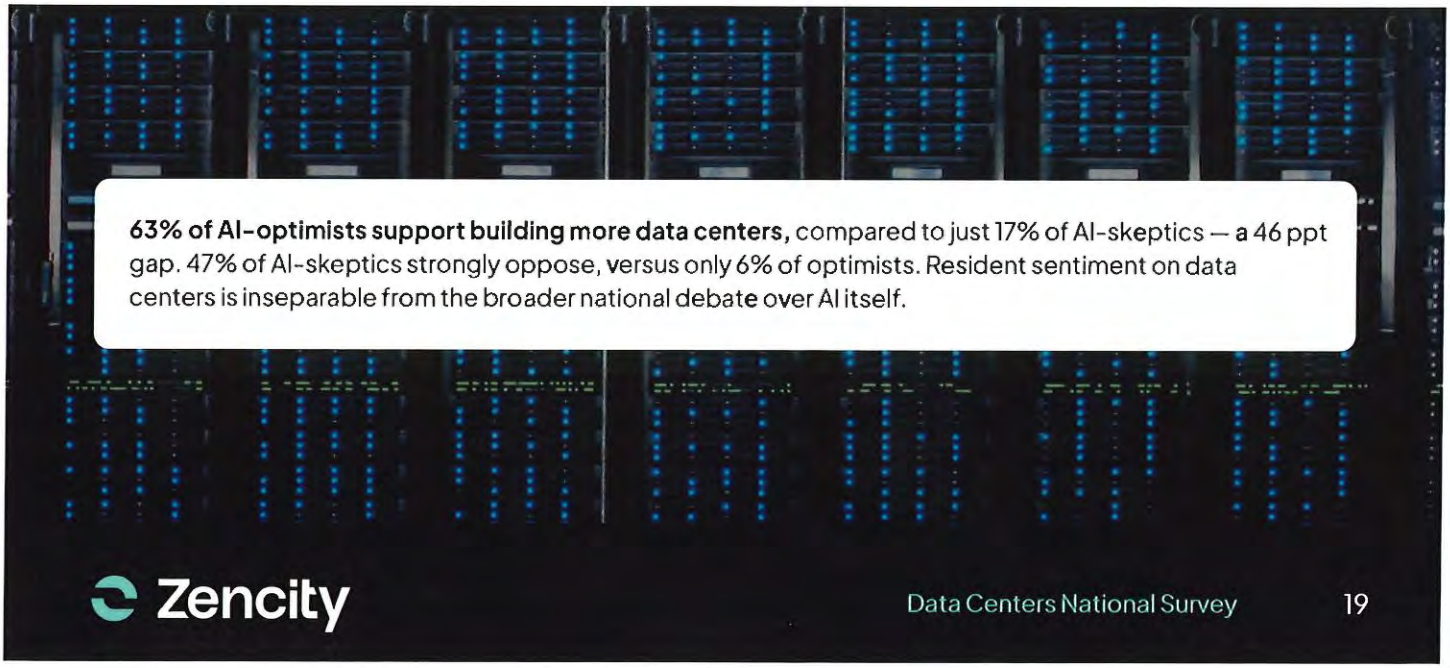
Digital Adoption and the Perceived Impact of AI

Cross-question analysis: how do perceptions of AI* influence support for data centers?

Q3: Overall, do you support or oppose the development of a new data center in your local community? VS Q23: Overall, do you believe AI will have a positive or negative impact on society over the next 10 years?



*Positive perception = Very positive+somewhat positive. Negative perception = Very negative+somewhat negative



63% of AI-optimists support building more data centers, compared to just 17% of AI-skeptics — a 46 ppt gap. 47% of AI-skeptics strongly oppose, versus only 6% of optimists. Resident sentiment on data centers is inseparable from the broader national debate over AI itself.

06

In Summary

1

Water and electricity are the dominant concerns.

Residents **prioritize impacts on water (86%) and electricity (85%)** far above jobs (65%) and tax revenue (61%). Local governments that establish resource stewardship as a standing priority — before any data center proposal — enter the conversation with credibility that project-level promises can't match.

2

Opposition is concentrated among older, more educated, and White residents.

Residents aged 55+, college-educated, and White report the highest opposition rates and the highest levels of concern around water and electricity, indicating a **strong alignment between demographic profile and resource-related priorities.**

3

AI familiarity is a strong predictor of resident support.

63% of AI-optimists and 48% of daily AI users support local data center development, compared to just 17% of AI-skeptics and 16% of non-users, a gap that identifies **digital outreach as the highest engagement lever available.**

4

One in three Americans are unsure.

One in three Americans neither support nor oppose building more data centers. This highlights the need to understand community-specific sentiment beyond the loudest voices, with structured surveys serving as a critical input for local decision-making.

5

Local government is not the trusted voice on data center impacts.

Only 1 in 5 residents trust local government officials for accurate information on the impacts of a proposed data center (22%), nearly 3x less than independent environmental organizations (57%). Successful engagement requires third-party validation rather than reliance on developer-led marketing materials.

6

Jobs and property tax relief are the most persuasive economic framing.

64% of residents nationally prioritize lower property taxes as the preferred use of data center revenue, followed by school funding (47%). Messaging anchored to direct, tangible community returns consistently outperforms abstract economic growth arguments.

7

Developer transparency is a key driver of support.

Residents are more likely to oppose projects when developer involvement feels unclear or revealed late. **Early disclosure** signals transparency and reduces speculation, helping local governments build credibility from the outset rather than trying to recover it later.

07

Survey Methodology

Purpose and Scope

Data in this report were collected by Zencity as part of representative research of United States residents:

- **Population:** Residents aged 18+ living in the United States.
- **Sample size:** 1,909.
- **Fielding dates:** April 6 – April 27, 2026.
- **Mode:** Online self-administered questionnaire.
- **Languages**: English, Spanish.

Weighted survey results have demographics that are representative of the demographic profile of 18+ residents of the United States. This survey was commissioned and funded by Zencity.

Survey Design

Sample design: Zencity uses a non-probability sampling approach with demographic quotas. Zencity recruits respondents through targeted digital advertising on social media platforms, mobile apps, and online survey panels. Quotas (minimum targets for the number of responses from each demographic group) are set before data collection begins. Zencity establishes targets for race and ethnicity rates using 2020 U.S. Census data, and age and gender targets using the most recent vintage of the American Community Survey 5-year estimates at the time of fielding:

- **Age:** 18-34, 35-54, 55+.
- **Gender:** Female, Male.
- **Race/Ethnicity:** Asian, White, Black or African American, and Hispanic.

As the survey runs, Zencity monitors the mix of respondents and adjusts recruiting efforts in real time to bring in a representative group of respondents. Additional respondents beyond our quotas are included in the sample to facilitate subgroup analysis. Survey weights control for extra respondents, retaining representativeness.

Eligibility

Sample eligibility was determined by self-attestation of residency in the population as well as geolocation from the ZIP code to the eligible area. Geographically ineligible respondents are excluded. Only respondents aged 18 and above are included in the resulting data.

Data Processing and Analysis

Data Quality Checks: Before final analysis, Zencity applies a series of checks to ensure the data are accurate and high quality, including deduplication through device fingerprinting, bot prevention using typing detection, and low-quality response screening. Quality screening analyzes metadata for responses that show signs of being inattentive or invalid through speeding, straightlining, and non-informative open-text. Responses that do not pass quality checks are excluded from the final dataset prior to weighting and analysis.

Limitations

All survey research has limitations. Like all surveys, these data may be affected by errors that cannot be fully measured, including self-selection bias (people choosing whether to participate) and question wording effects. These are inherent to all forms of public opinion research. Users of Zencity survey data should keep the following in mind:

- **Non-coverage error exists** for digitally disconnected residents. Although approximately 96% of Americans reported regular access to the internet, residents without digital access are not included in the sampling frame.
- **Because this survey uses non-probability sampling**, a traditional margin of error — as calculated for probability samples — does not apply and therefore is not reported. This reporting follows the American Association of Public Opinion Research's standards for disclosure of statistical properties of the sample.

Methodology Notes:

- Figures in this report may not add up to 100% due to rounding.
- 'N' represents the number of respondents per question.

Zencity

Let's Chat

At Zencity, we support this work across 400+ public sector organizations, helping local governments reach more voices, understand community priorities, and take confident, data-backed action.

We help local government leaders power their work with community voices.

Zencity is the AI-native governance platform that transforms resident voices into finished government work products.