

GSG FOR AMERICA IS ALL IN, APRIL 2026

Data Center Survey Analysis

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Methodology

Voters

Global Strategy Group conducted a survey of **2070 registered voters nationwide** between April 9 and April 19, 2026, including a base sample of 1003 voters and oversamples to reach the following sample sizes:

- 380 Black, 286 Hispanic, and 145 AAPI voters
- 338 self-identified independent voters
- 447 urban voters in states with Democratic governors
- 327 urban voters in states with Republican governors
- 272 rural voters in counties with contested data center activity
 - *Contested data center activity: canceled data centers, observed opposition, stopped by local government, or restrictive ordinances, defined by Heatmap county list.*
- 472 suburban/urban voters in counties with contested data centers
- 949 voters in counties with upcoming data centers
- 1,351 voters in counties with existing data centers

Margin of error

The margin of error at the 95% confidence level is +/- 3.1% for the base sample.

The margin of error on sub-samples is greater.

- Black voters: MoE +/- 5.0%
- Hispanic voters: MoE +/- 5.8%
- AAPI voters: MoE +/- 8.1%
- Independent voters: MoE +/- 5.3%
- Urban Dem governor state voters: MoE +/- 4.6%
- Urban GOP governor state voters: MoE +/- 5.4%
- Rural contested DC county voters: MoE +/- 5.9%
- Suburban/urban contested DC county voters: MoE +/- 4.5%
- Upcoming data center county voters: MoE +/- 3.2%
- Existing data center county voters: MoE +/- 2.7%

This survey used data from Heatmap to examine segments of Americans who live near current or upcoming data center sites, as well as contested data center sites, differentiating between urban/suburban and rural voters to give a more nuanced picture of opinions on the issue.

Key Findings

1

Views on AI and data centers are still dynamic and undefined.

One in five Americans haven't heard anything about data centers and don't know where the nearest one is to their community. Americans are unsure whether solutions should come from federal, state, or local leaders.

2

Varying experiences with local data centers play a major role in shaping how Americans interact with the topic.

Those in rural counties where there have been contentious public debates around data centers are far more staunchly opposed to having one in their community than Americans overall. Those in suburban and urban communities with contentious public debates around data centers; those in counties with upcoming data centers; and those in counties with existing data centers more closely resemble the general population.

3

What Americans DO know is that their costs are rising, and they want action.

They trust state and local leaders more than the federal government on data centers and utilities than on other issues.

4

With much uncertainty in the landscape, Americans are data center NIMBYs, but powering data centers with clean energy overcomes these concerns.

Powering data centers with clean energy creates an odd bedfellows effect, where typical progressive strongholds – liberals, college-educated women, and people of color – are pulled in by the prospect of clean energy, in partnership with those who always support data centers no matter the power source: men, especially younger men.

- Americans in rural counties with contentious data centers remain less supportive of local data centers than Americans overall, even when powered by clean energy (though a majority of them do support clean energy-powered data centers). Suburban/urban Americans with contentious data centers, those with upcoming data centers, and those with existing data centers look more like the general population.

5

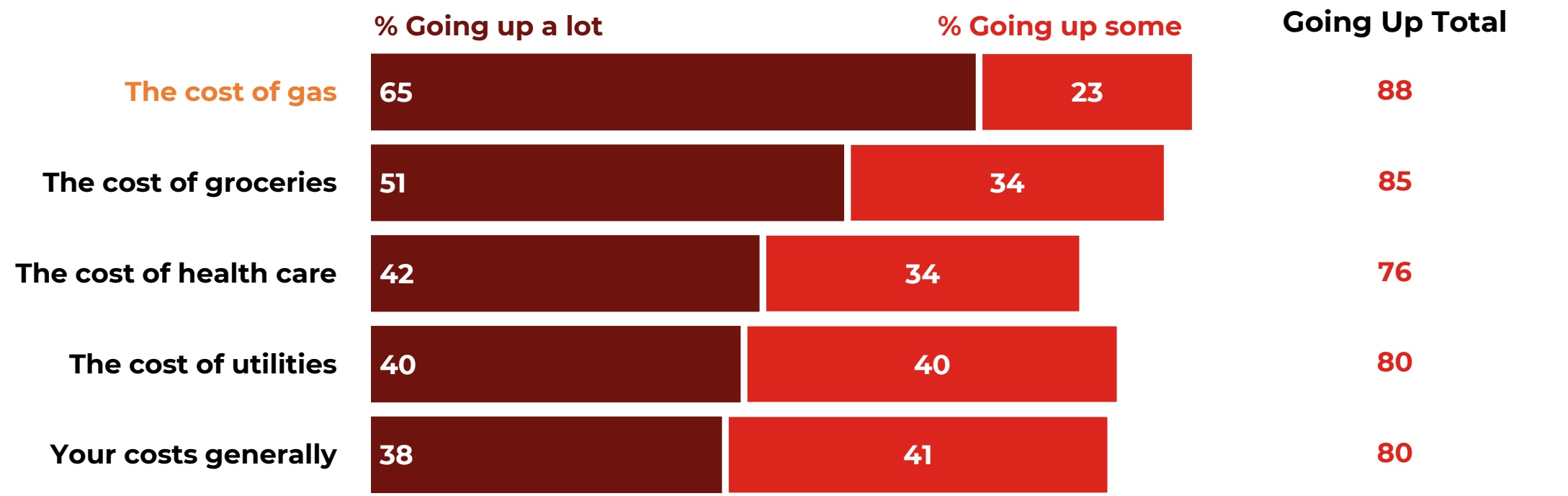
The strongest messaging in favor of clean energy-powered data centers focuses on bringing down costs, increasing electricity reliability, and building in a way that is responsible with wind and solar.

Americans are skeptical of the tech companies behind data centers and have real concerns that data centers will drive up local utility costs. Messaging that assuages these concerns is key to getting Americans to support clean energy-powered data centers in their communities.

Landscape

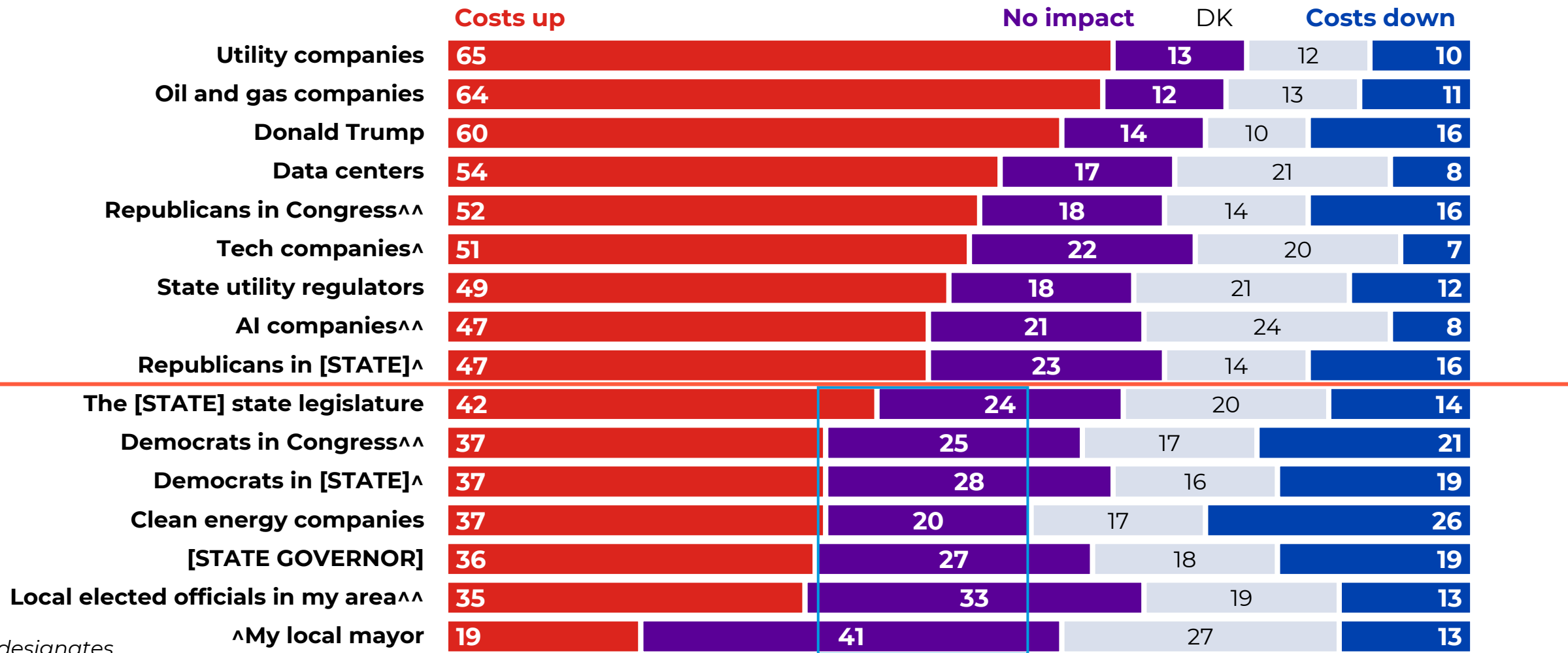
Amid the ongoing war with Iran, gas prices are seen as increasing most, but majorities also say gas, utilities, groceries on the rise

Please indicate, for each one, whether you feel like those costs are going up, going down, or staying the same.



Utilities, oil/gas, the Trump administration, DCs/AI/tech companies are all seen as causing costs to rise, while majorities do not believe local/state electeds are driving up costs

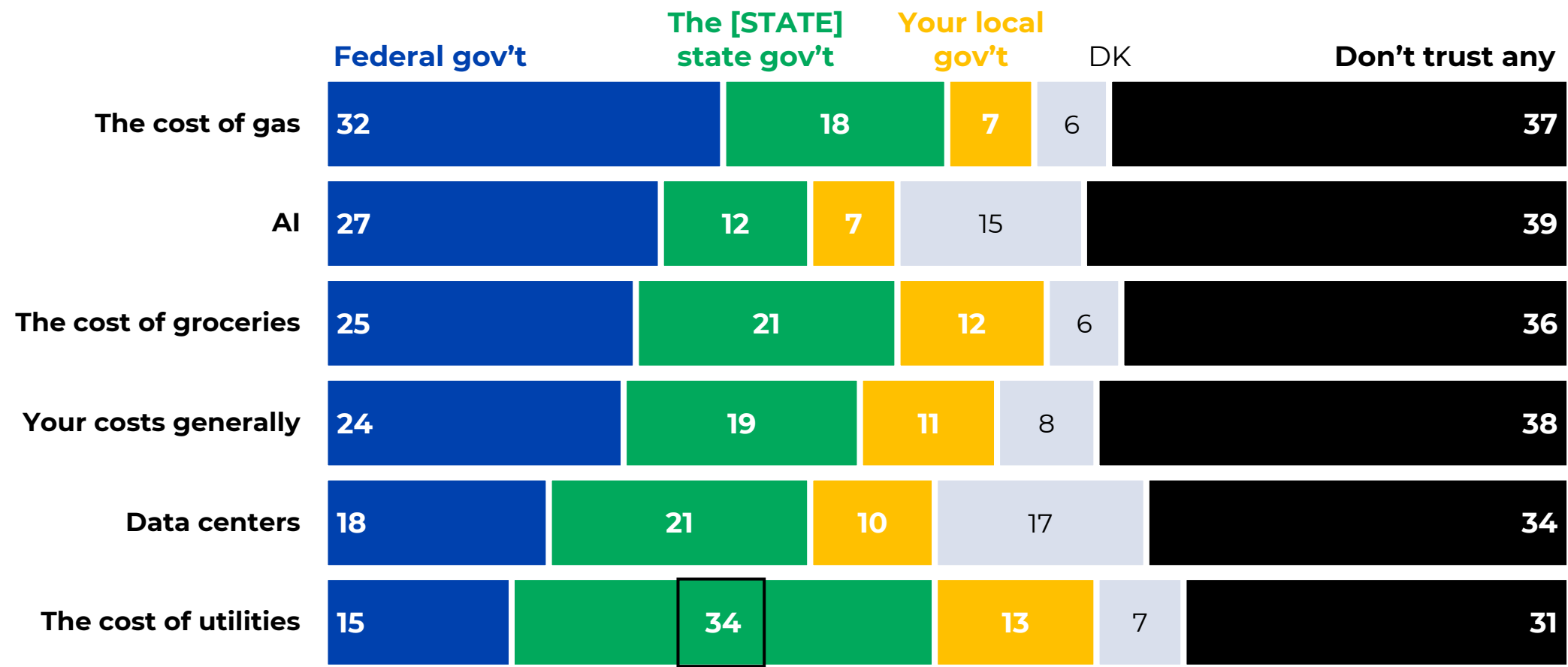
Indicate for each one whether you think they are helping to bring utility costs down, are causing utility costs to go up, or are not having any impact on utility costs.



^^ designates split item

While more look to the federal government on several cost issues, many have no idea where to look. More look to state and local government on data centers and utilities than on other issues

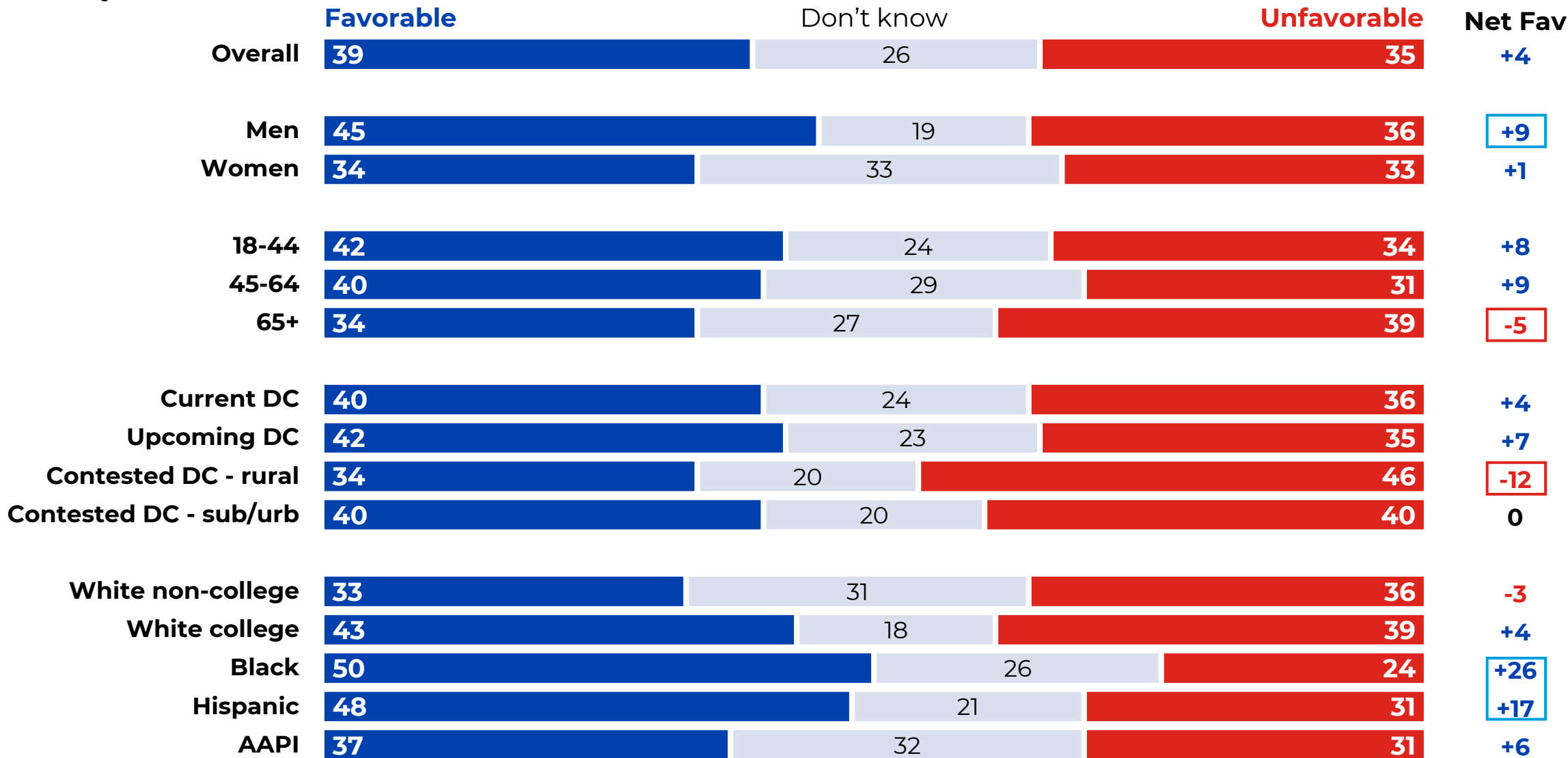
Please indicate who you personally trust more to handle each issue.



Data Center Landscape

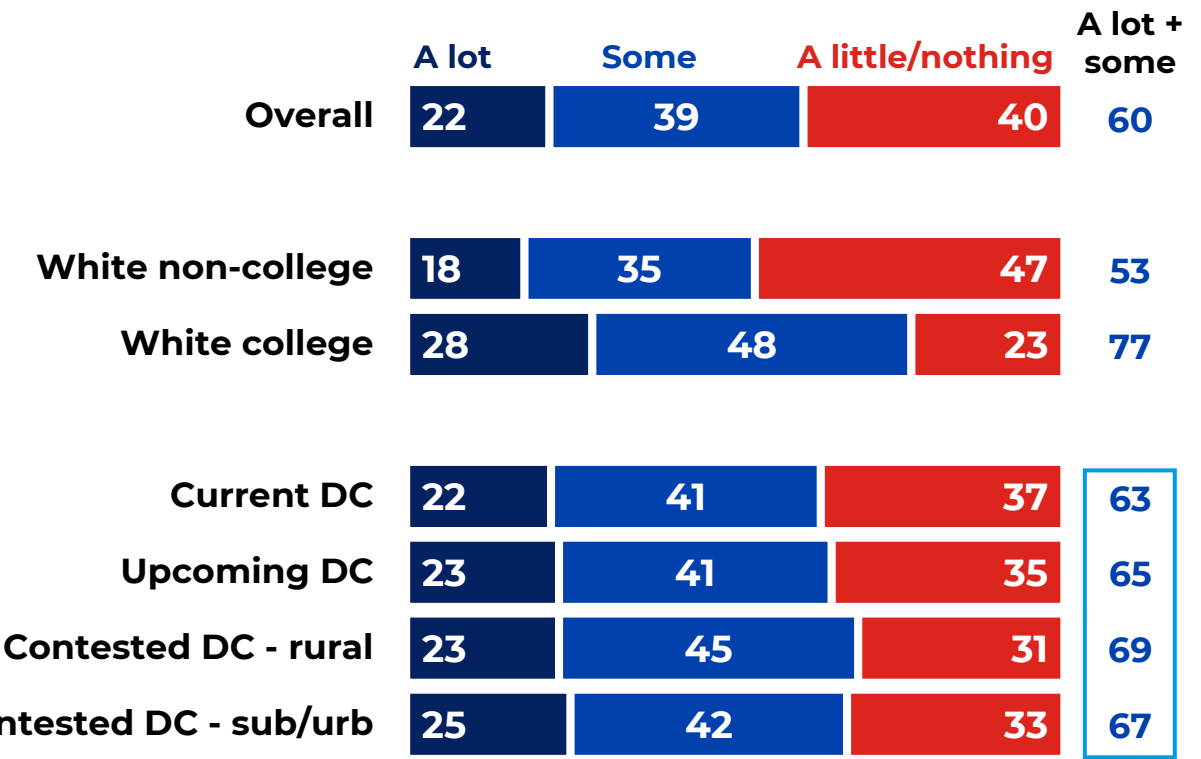
Men, younger Americans, Black Americans, and Hispanic Americans most amenable to data centers. Seniors, those in rural counties with contested data centers negative

Favorability of Data Centers

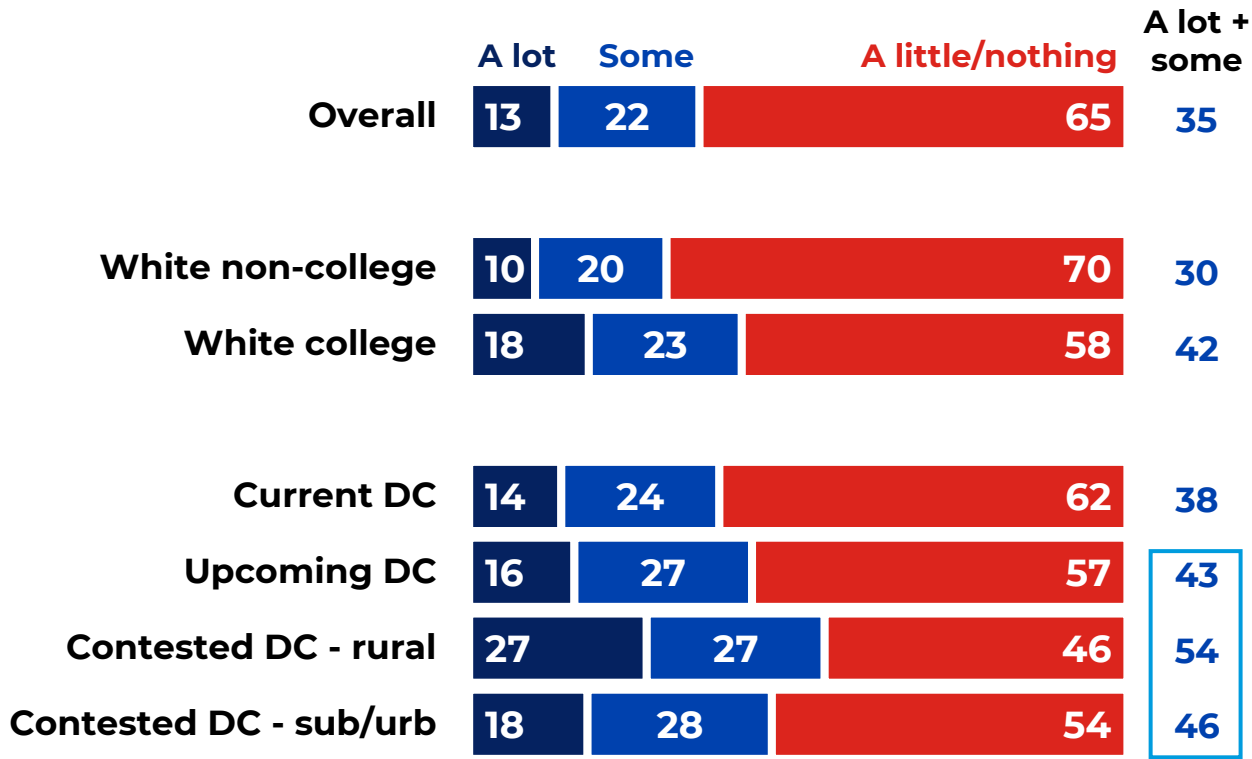


Most aren't hearing "a lot" on data centers. Those with new data centers emerging/being debated in their counties hearing somewhat more

How much have you seen, read, or heard about data centers being built or considered in the U.S.?

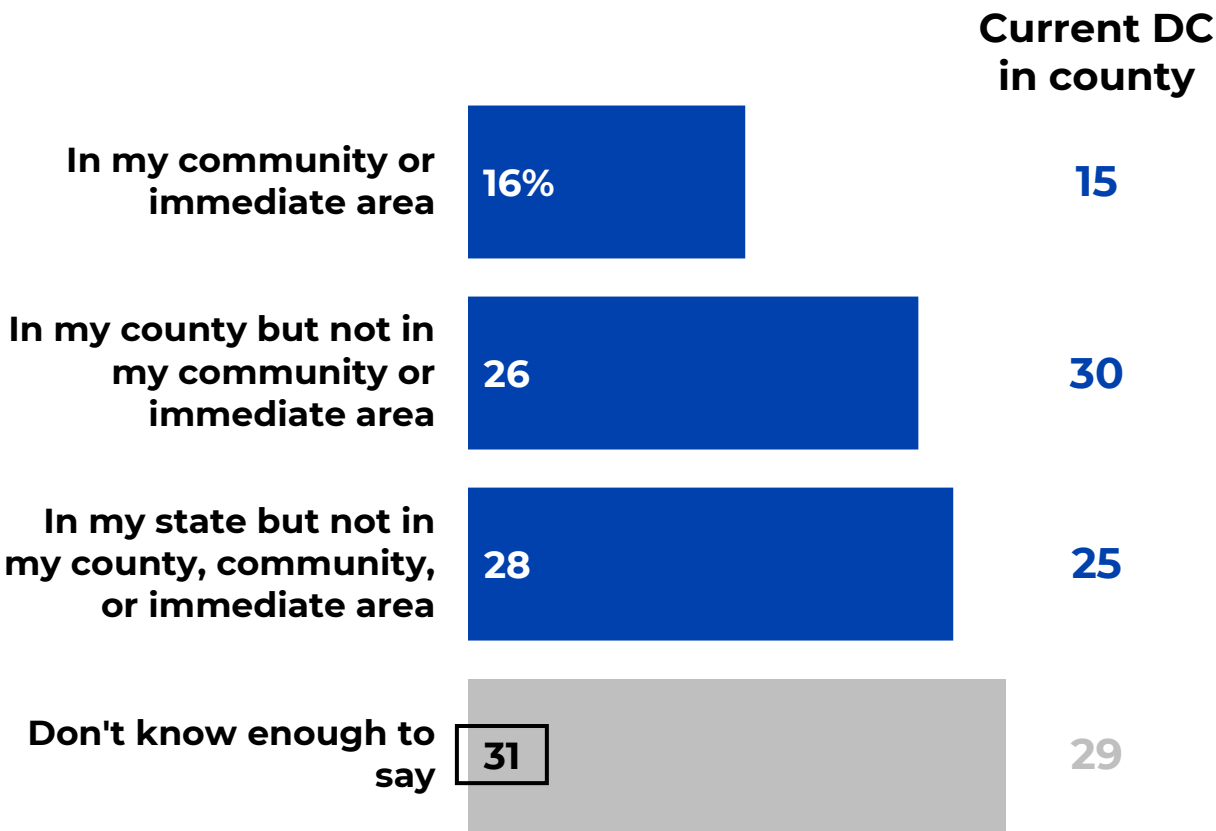


How much have you seen, read, or heard about data centers being built or considered in your community?

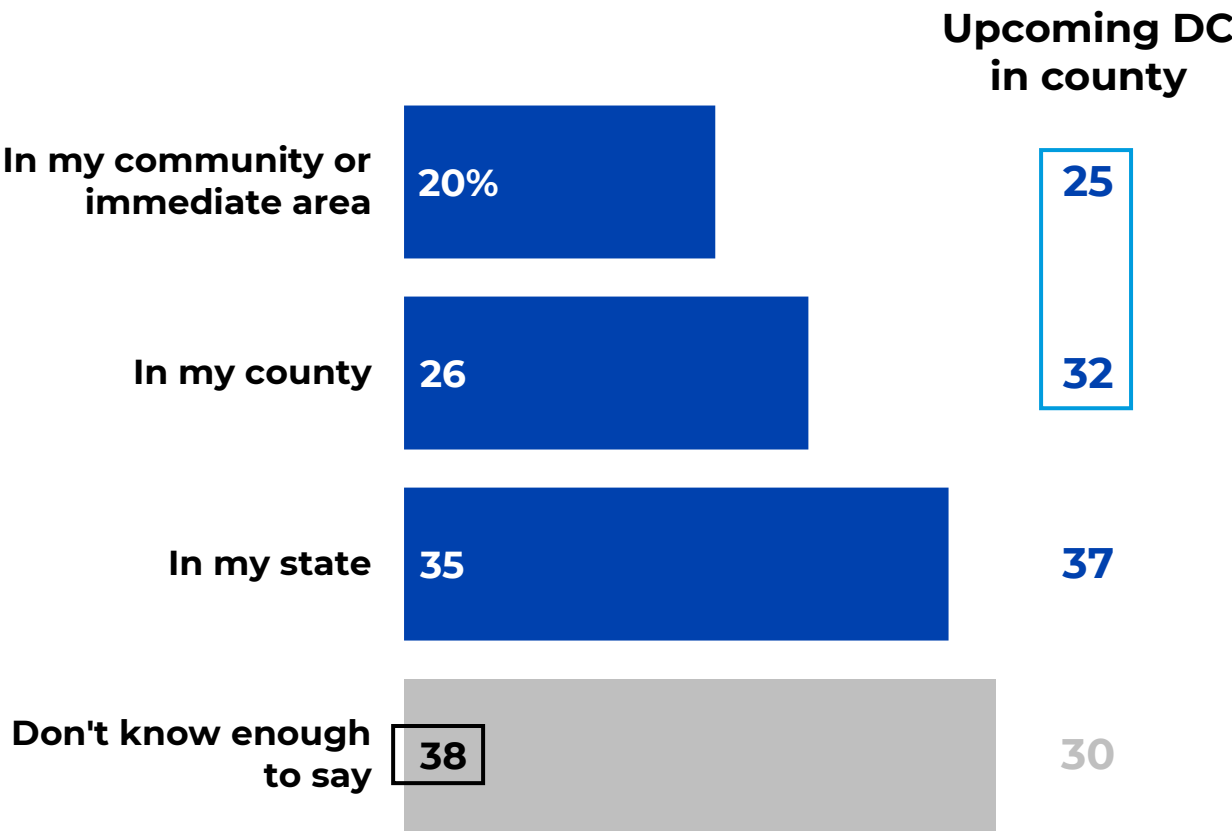


Pluralities don't know enough about data centers to say where they are/where they are coming. Those in counties with upcoming data centers somewhat more aware they are planned

Where do you think the **closest** data center is to you?



Where are data centers being planned or considered near you, if anywhere? [Select all that apply]



“Data center uninformed” Americans skew more female, moderate, non-college, passive news consumers disengaged from politics. But, they are just as sensitive to high utility costs

Americans who are data center uninformed – who have not heard about data centers locally or nationally, and do not know where the nearest data center is to them – make up 21% of Americans.

Overall electorate 100%	DC uninformed 21%	Total	Overall electorate 100%	DC uninformed 21%	Total	Overall electorate 100%	DC uninformed 21%	Total
47	32	Men	67	79	Non-college	31	15	Politics is v. impt to identity
53	68	Women	33	21	College	35	28	Somewhat important
						35	56	Not that impt/Not impt
41	35	18-44	28	18	Liberal			
31	36	45-64	38	49	Moderate	60	45	I seek out news
28	29	65+	34	33	Conservative	40	55	News comes to me

Still – they’re feeling the pinch on utilities, too: 82% say their utility costs are rising.

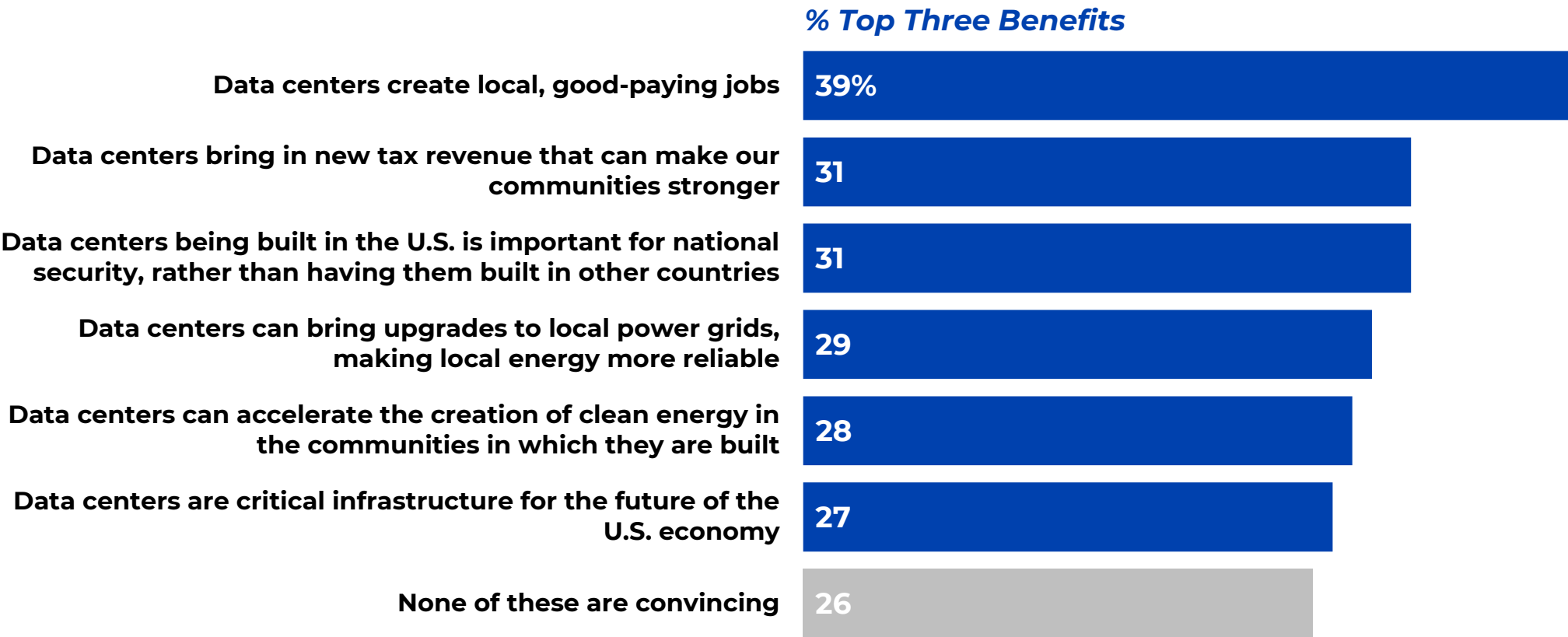
Data center NIMBYs: while Americans are divided on both measures, there is more support for data centers nationally than in Americans' backyards

Do you support or oppose data centers being built...

	In the U.S.				In your community				Diff in Net Support
	Support	Oppose	Not sure	Net Support	Support	Oppose	Not sure	Net Support	
Overall	43	34	23	+9	35	44	22	-9	-18
DC uninformed	24	18	58	+6	18	26	56	-8	-14
White non-college	36	37	27	-1	29	46	25	-17	-16
White college	54	31	14	+23	41	44	15	-3	-26
Black	51	26	23	+25	42	35	23	+7	-18
Hispanic	42	38	20	+4	41	44	15	-3	-7
AAPI	39	27	34	+12	30	38	32	-8	-20
Men	51	34	15	+17	43	43	14	0	-17
Women	36	34	30	+2	27	44	28	-17	-19
18-44	45	35	21	+10	42	40	19	+2	-8
45-64	40	32	27	+8	30	43	27	-13	-21
65+	44	35	22	+9	28	51	21	-23	-32
Current DC	44	35	20	+9	36	45	19	-9	-18
Upcoming DC	47	35	18	+12	37	46	17	-9	-21
Contested DC-rur	30	45	25	-15	26	55	19	-29	-14
Contested DC-sub/urb	44	36	20	+8	37	45	18	-8	-16

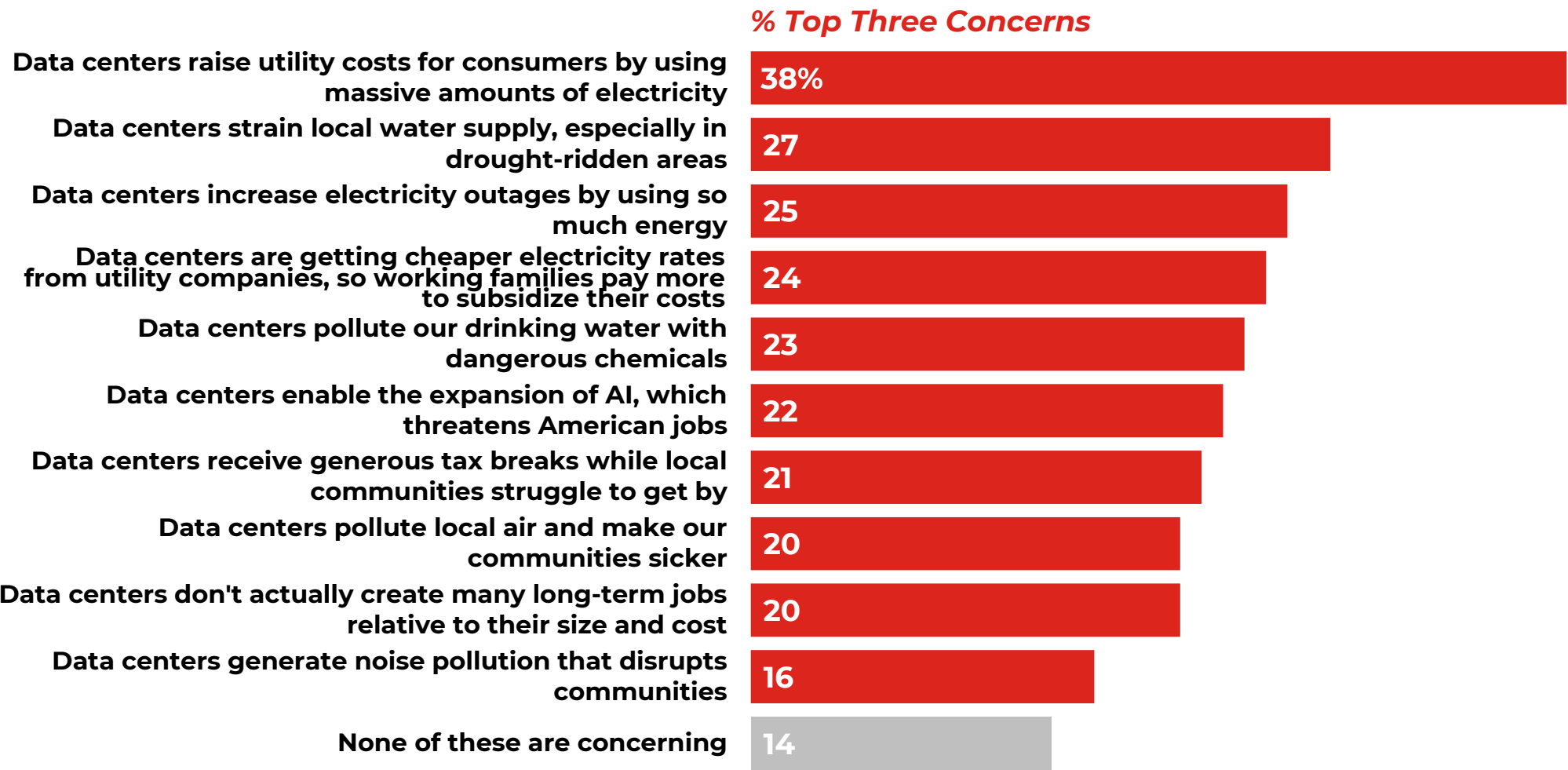
Job creation is the best reason for many to support local data centers. Secondary benefits include local tax revenue, national security, and investing in local power grids

Most convincing reasons to support data center in community



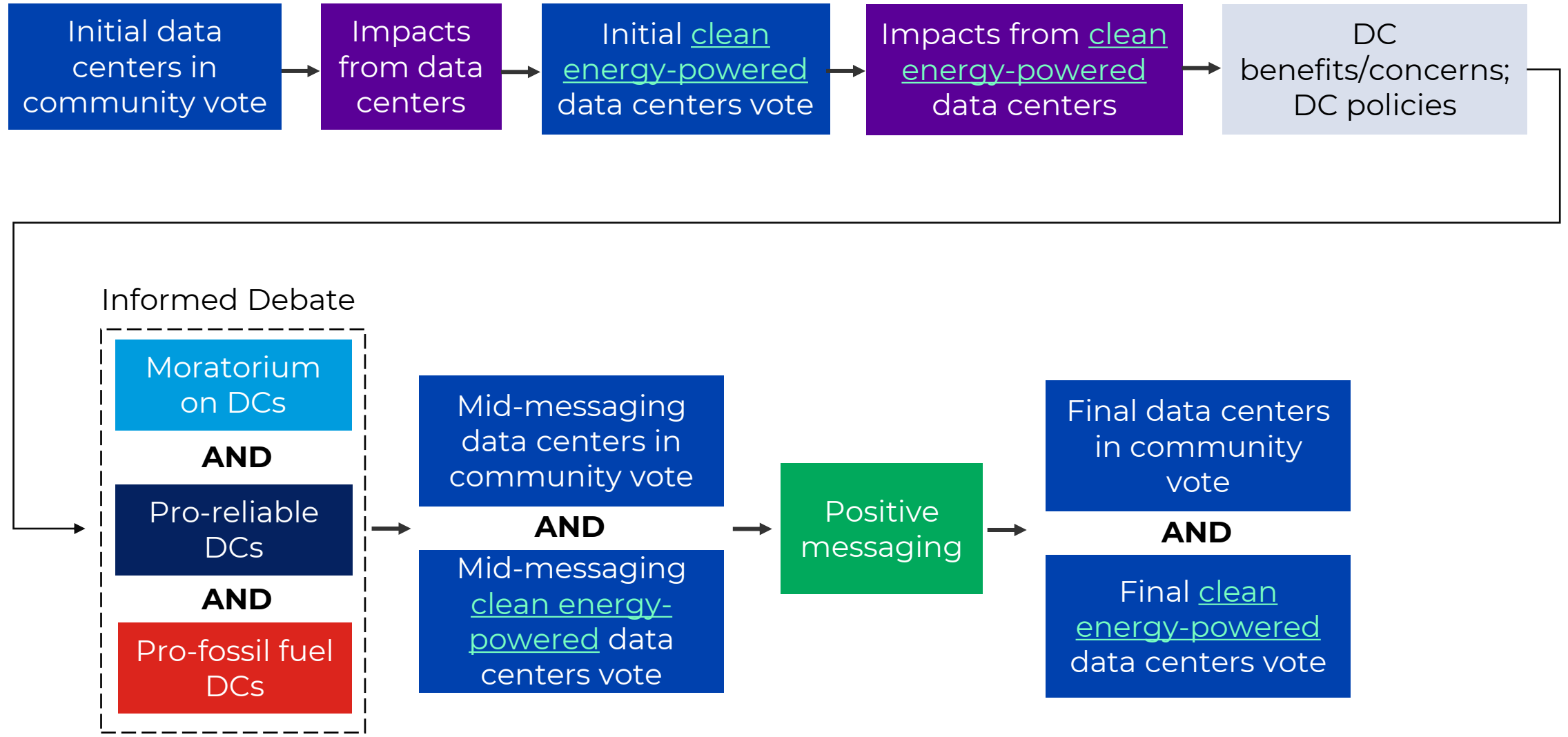
The greatest concern on data centers is the impact on utility costs, followed by water and electricity strains and favored rates/subsidies for DCs

Most concerning aspects of having a data center in community



Clean Energy in the Data Center Debate

Survey structure



Powering data centers with clean energy creates odd bedfellows: hyper-pro DC base is much younger, more male. Clean energy base – who don't love data centers, but are brought in by clean energy – skew more progressive

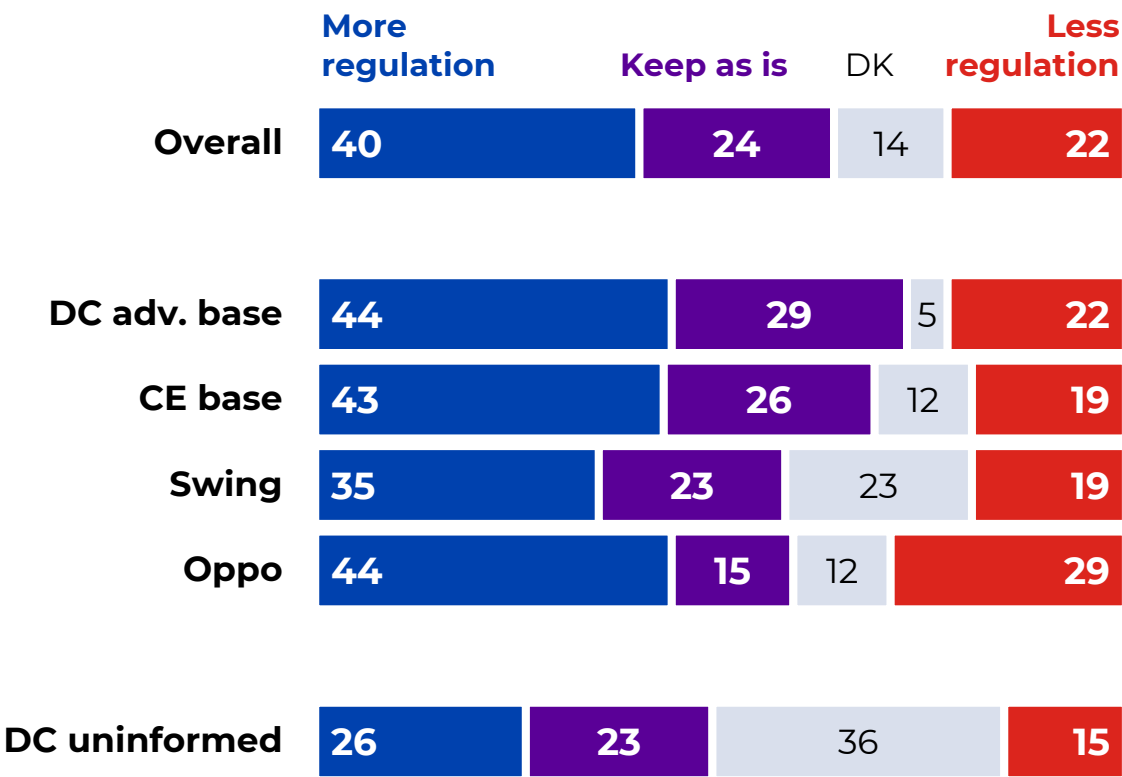
Vote Targets on Support for **Clean Energy-Powered** Data Center Built in Community



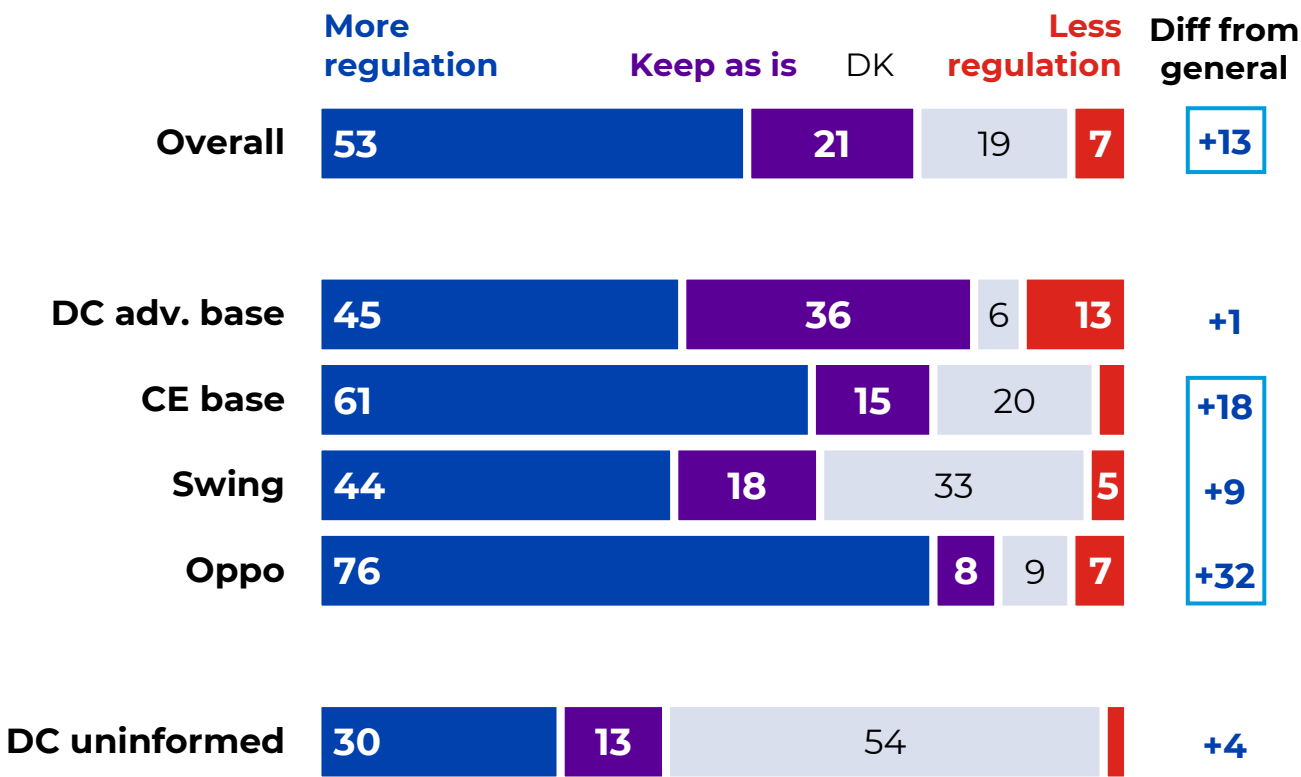
Men under 55 (38% are DC advocate base) Men (32%) ○ College men (39%) ○ Hispanic men (35%)	White liberals (24% are clean energy base) ○ White women (23%) College-educated POC (24%) College-educated women (24%)	Moderates (45% are swing) Black non-college (51%) Black women (46%) AAPI (47%)	Seniors (27% are oppo) White over 55 (26%) Conservatives (25%) ○ White conservatives (28%) <u>Contested DC – rural (21%)</u>
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Whether pro- or anti-data centers, Americans want to see more regulation of them, more than are pro-regulation generally

Which approach do you prefer on most issues?



Which approach would you prefer on data centers?



Clean energy companies, local electeds, governors, and mayors most trusted to look out for Americans when it comes to data centers

Indicate how much you trust each one to look out for people like you when it comes to issues related to building new data centers.

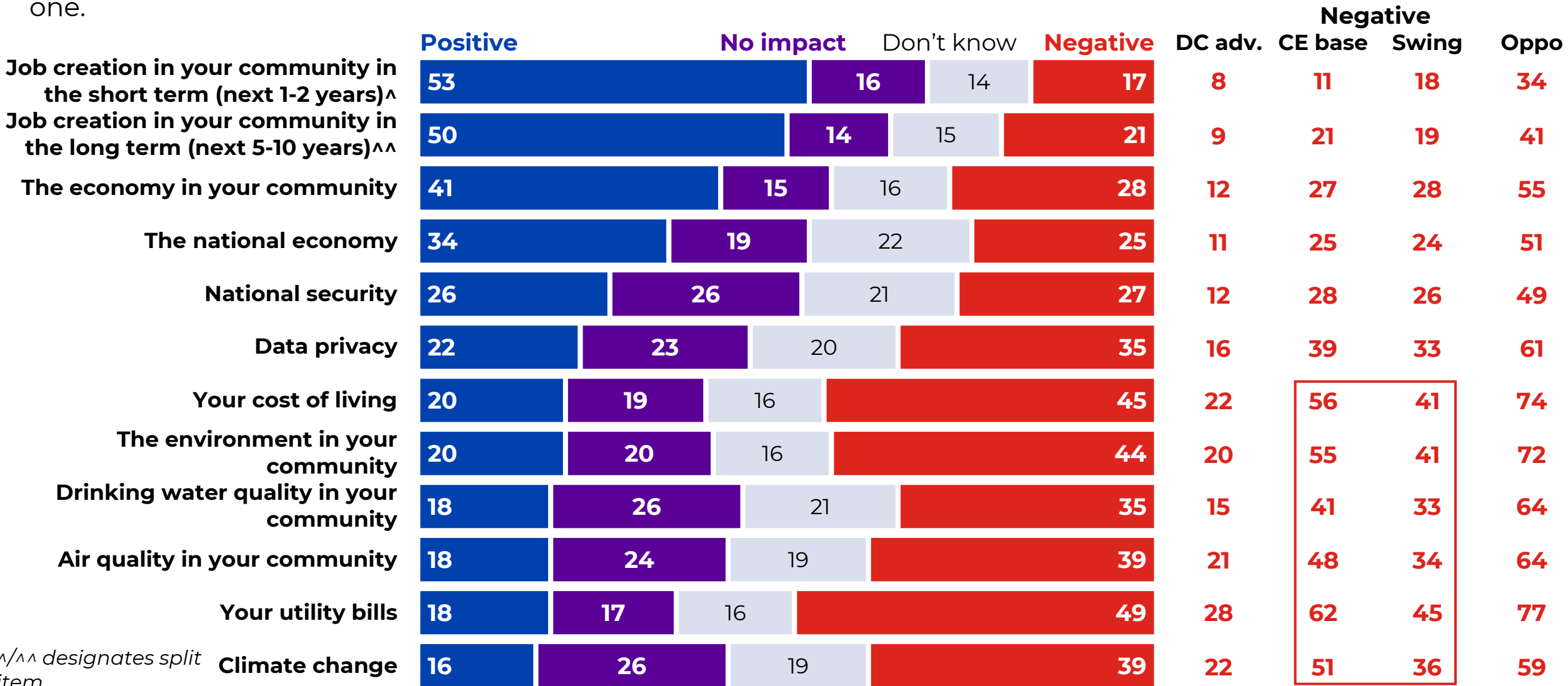
	Trust			Don't know	Don't trust	Ovr.	DC adv.	CE base	Swing	Oppo	Urban, gov party:	
											Dem	Rep
Clean energy companies	53	12	35	+18	+58	+39	+3	-31	+34	+34		
Local elected officials in my area^^	49	13	38	+11	+38	+26	-2	-16	+24	+22		
My local mayor^	45	19	36	+9	+41	+11	-4	-16	+12	+20		
[STATE GOVERNOR]	46	11	43	+3	+31	+6	-4	-23	+19	-12		
The [STATE] state legislature	43	12	45	-2	+38	-3	-13	-41	+5	-3		
Democrats in [STATE]^	43	9	48	-5	+27	-2	-11	-40	+20	+3		
Electric companies^^	41	11	48	-7	+29	-17	-15	-34	-6	+1		
Democrats in Congress^^	41	9	50	-9	+22	+12	-18	-60	+7	+28		
State utility regulators	38	13	49	-11	+27	-12	-18	-50	0	-9		
Utility companies^	39	9	52	-13	+34	-29	-18	-51	-9	-12		
Tech companies^	36	10	54	-18	+45	-35	-28	-68	-17	-24		
Republicans in Congress^^	36	10	54	-18	+4	-42	-20	-22	-29	-8		
Republicans in [STATE]^	36	9	55	-19	+12	-36	-28	-20	-32	-26		
Donald Trump	36	7	57	-21	0	-44	-27	-13	-39	-19		
AI companies^^	29	15	56	-27	+31	-41	-39	-78	-24	-11		
Oil and gas companies	29	11	60	-31	+9	-52	-33	-61	-28	-17		

^/^^

designates split item

Americans see economic benefits to data centers, but negative impact on the environment and personal costs

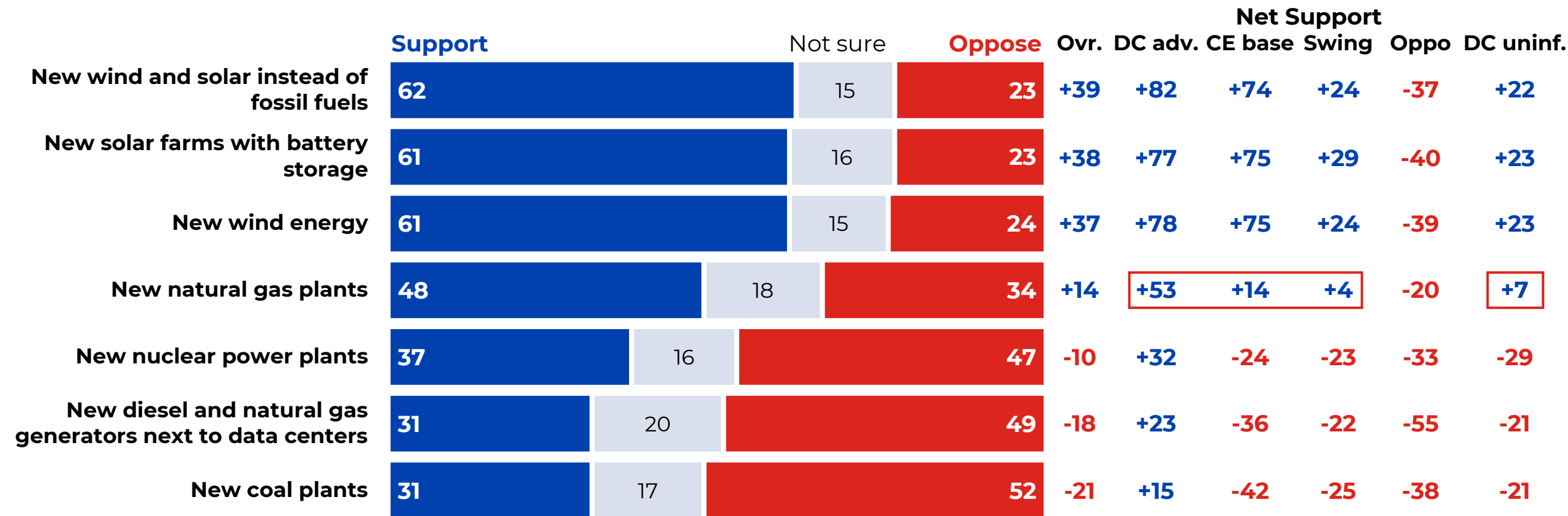
Indicate whether you think a local data center would positively impact, negatively impact, or not impact each one.



[^]/^{^^} designates split item

Coal and diesel/gas generators are no-gos for powering local DCs, including for swing. Wind and solar instead of fossil fuels has broad support; natural gas has traction

To what extent would you support or oppose a data center being built in your community if it was powered by each of the following energy sources?



Introducing clean energy boosts support for local data centers across the board

Support for community data centers

Do you support or oppose a data center being built in your community?

Would you support or oppose a data center being built in your community **if it was powered by clean energy like wind and solar instead of fossil fuels?**

	Support	Oppose	Not sure	Net Support	Support	Oppose	Not sure	Net Support	Diff in Net Support
Overall	35	44	22	-9	58	27	14	+31	+40
DC uninformed	18	26	56	-8	43	21	36	+22	+30
White non-college	29	46	25	-17	54	30	16	+24	+41
White college	41	44	15	-3	63	27	10	+36	+39
Black	42	35	23	+7	62	22	15	+40	+33
Hispanic	41	44	15	-3	64	26	11	+38	+41
AAPI	30	38	32	-8	57	23	20	+34	+42
Men	43	43	14	0	62	27	11	+35	+35
Women	27	44	28	-17	55	27	17	+28	+45
18-44	42	40	19	+2	64	24	11	+40	+38
45-64	30	43	27	-13	58	24	18	+34	+47
65+	28	51	21	-23	49	35	15	+14	+37
Current DC	36	45	19	-9	59	29	13	+30	+39
Upcoming DC	37	46	17	-9	62	27	11	+35	+44
Contested DC-rur	26	55	19	-29	53	32	16	+21	+50
Contested DC-sub/urb	37	45	18	-8	61	28	11	+33	+41

Clean data centers completely shift perceptions of environmental and cost impacts from local DCs, for clean energy base and swing

Indicate whether you think a local data center that would be powered by clean energy would positively impact, negatively impact, or not impact each one.

% <i>Positive + No Impact</i>	Overall Clean Energy			Clean energy base			Swing Clean Energy		
	General	Clean Energy	Shift	General	Clean Energy	Shift	General	Clean Energy	Shift
Job creation in your community in the long-term (next 5-10 years) ^{^^}	64	74	+10	64	84	+20	53	66	+13
Job creation in your community in the short-term (next 1-2 years) [^]	69	73	+4	76	89	+13	57	62	+5
The economy in your community	56	66	+10	55	78	+23	44	56	+12
The national economy	54	64	+10	50	71	+21	43	55	+12
The environment in your community	40	58	+18	26	70	+44	32	47	+15
Climate change	42	61	+19	27	72	+45	35	50	+15
Air quality in your community	43	61	+18	30	78	+48	35	50	+15
Your utility bills	35	53	+18	21	64	+43	28	42	+14
Your cost of living	39	52	+13	28	62	+34	31	42	+11
National security	53	59	+6	50	63	+13	41	51	+10
Drinking water quality in your community	45	57	+12	33	66	+33	36	48	+12
Data privacy	45	53	+8	40	58	+18	34	43	+9

[^]/^{^^} designates split item

After learning a bit more about data centers, policies that put DCs in check not only garner support from clean energy base and swing, but oppo too

Support for Data Center Policies (Top 7 of 15 Policies Tested)

	% Strongly support	% Somewhat support	% Strongly support			
			DC adv. base	CE base	Swing	Oppo
Requiring data centers to pay the full cost of the energy and grid infrastructure they say they need, preventing cost increases for ratepayers.	53	23	46	66	44	71
Freezing utility rates so that consumers do not see their costs go up.	49	23	49	58	39	61
Instituting stronger protections from air, water, and noise pollution from data centers.	46	27	43	59	36	58
Requiring data centers to fund transmission and grid upgrades needed to support their operations in the communities they are considering.	45	26	42	55	36	57
Mandating that new data centers "bring their own clean power" or get dedicated clean energy sources to avoid straining the existing grid. ^Λ	44	26	44	53	35	56
Requiring data centers to reduce their energy use during periods of high demand to help prevent blackouts and keep the electric grid reliable for homes and businesses.	44	29	44	52	33	58
Requiring data centers to demonstrate clear economic benefits, including high-quality, long-term job creation, before construction approval.	44	29	43	56	33	54

Policies that are less connected to energy bills and community impacts garner less intense support, though are still popular

Support for Data Center Policies (Lower 8 of 15 Policies Tested)

	% Strongly support		% Strongly support			
	% Somewhat support		DC adv. base	CE base	Swing	Oppo
Establishing new taxes on high-energy users like data centers to ensure they are charged appropriately.	42	26	39	51	34	58
Setting efficiency and sustainability standards for data centers, including limits on water usage and energy intensity.	42	29	40	53	32	56
Mandating that new data centers "bring their own power" or get dedicated energy sources to avoid straining the existing grid, including clean energy and fossil fuels.^	40	30	39	52	27	57
Requiring new data centers to use clean energy sources rather than fossil fuels.	40	27	42	61	29	37
Allowing or encouraging local governments to impose zoning restrictions or permitting requirements on data center development.	38	28	34	44	30	55
Ending tax credits for data centers.	36	25	32	33	28	60
Enacting moratoriums – or suspensions of construction – of new data centers until their impacts are better understood.	33	28	27	35	26	55
Giving tax breaks or other incentives only to data centers that meet high standards for clean energy use, water efficiency, and community benefits – rather than offering incentives to all data centers regardless of their impact.	23	30	32	28	16	20

^/^ designates split item

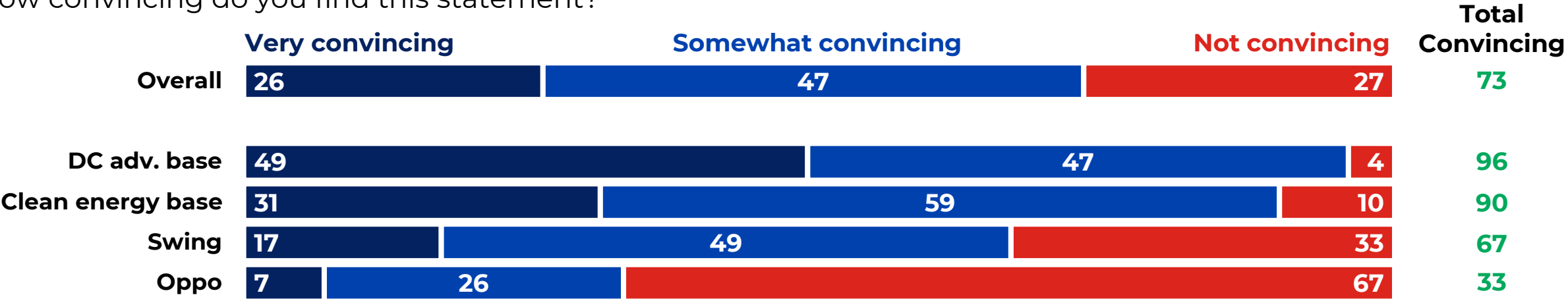
Movement and Messaging

In the argument for clean data centers, focusing on how clean energy is cheaper and will lower costs as well as provide reliable grid infrastructure is key

Highlighter Exercise – Pro-Clean Energy-Powered DCs

Data centers and AI are growing rapidly and will shape our future economy, presenting a major opportunity to drive local investments, strengthen national security, and accelerate the transition to **cheaper clean energy** like wind and solar. We can be pro-data center and pro-accountability. By having data center operators invest in new clean energy, grid upgrades and enhancements, and community energy like rooftop solar and battery storage in your neighborhood, these data centers can actually **help lower bills** for everyone in the community, while developing the energy abundance we need. By powering new data centers with clean energy, and making them part of the future of our community, we can ensure data centers support **long-term, reliable, resilient grid infrastructure** and bring broad, sustainable benefits for communities and the country - while helping **bring energy costs down.**

How convincing do you find this statement?

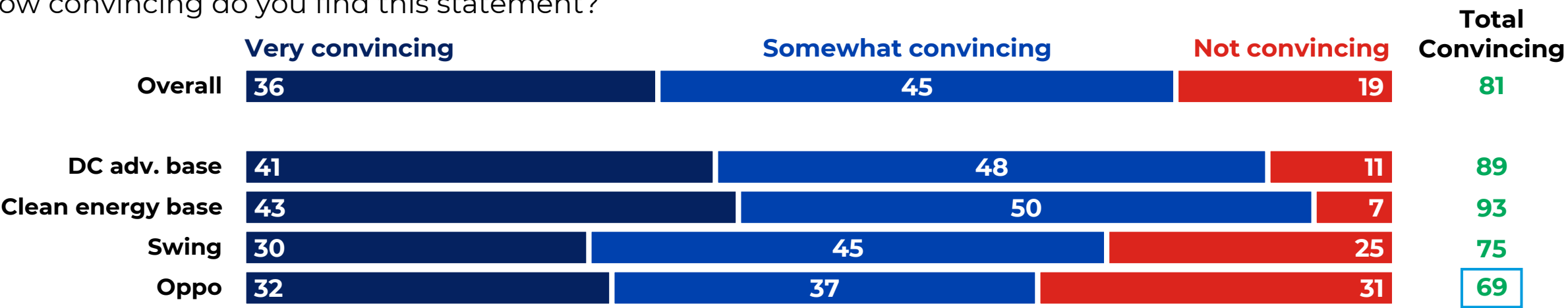


The strongest pieces of a moratorium argument highlight concerns about DCs: local resource strain, higher costs, pollution. Even data center base see resonance in this

Highlighter Exercise – Moratorium on DCs

Data center development is happening too quickly and at the expense of local communities: their unchecked, rapid growth is straining local power grids, driving up energy costs for consumers, and polluting our air and water. Without stronger safeguards in place, communities risk bearing the environmental and financial burdens without seeing local benefits. Putting a moratorium, or pause, on new development would give policymakers time to establish clear guidelines, protect public health, do the research, and ensure infrastructure can handle demand so that all data center development is done without raising consumers' utility bills or harming the environment.

How convincing do you find this statement?



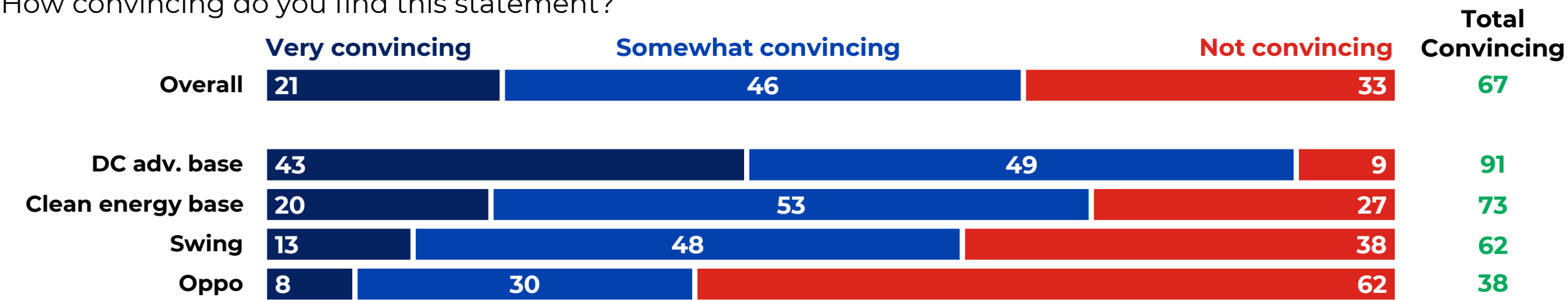
Data center advocate base are deeply drawn to a gas-powered DC argument; it doesn't work with CE base or clean DC swing

Highlighter Exercise – Pro-Fossil Fuel-Powered DCs

AI and data centers are **critical to America's economic future** and **national security**, driving innovation, productivity, and global competitiveness, and ensuring the U.S. does not fall behind China or India. Their rapid expansion should be embraced, not restricted. Imposing strict green energy mandates to use wind and solar risks slowing growth, raising costs, and limiting the ability to scale quickly to meet demand.

Natural gas remains the most affordable, reliable, and abundant energy source in the U.S., making it essential for powering this infrastructure efficiently. Rather than overregulating, policymakers should prioritize speed, flexibility, and energy abundance to ensure the U.S. leads in AI development while keeping costs low and maintaining energy reliability.

How convincing do you find this statement?



A range of arguments in favor of clean DCs are compelling. For CE base and swing, responsible DCs, increasing grid reliability, local benefits, and vehicles for clean energy are compelling; for swing also, nat'l security appeals

Reasons to Support Clean Energy Data Centers in Your Community

DC CE DC
Ovr. adv. base Swing Oppo uninf.
% convincing (4 or 5 out of 5)

48	73	62	38	21	35
48	72	66	36	17	33
46	74	64	31	16	31
46	72	64	33	13	32
45	73	59	31	17	29
45	69	58	36	13	31
42	72	53	31	10	30

[RESPONSIBLE] Data centers are essential to our economy and future, but **we need a balanced approach that is fair to local communities so they get a say in when and how they are built.** And companies should be held to their commitments – on jobs, infrastructure, and environmental impact – and responsible for any harm they cause. **We can support innovation and data centers, powered by clean energy, while ensuring local communities aren't left bearing the costs.**

[RELIABILITY] Building data centers with clean energy isn't just about keeping costs down or protecting the environment: it's about increasing the reliability of our grid. Right now, our power grid is incredibly outdated, with much of the technology being decades, if not centuries, old. Investing in clean energy to power data centers can make our systems more resilient, more cost-effective, more efficient, and less dependent on volatile fossil fuels, protecting consumers.

[LOCAL BENEFIT] Data centers can be powerful in generating local economic growth – if they are done in the right way. **That means creating good-paying local jobs, investing in local communities including their electricity grid, and bringing new clean energy online.** These investments can help bring down energy costs for all of us long-term, by bringing more clean power online and increasing cheaper, more abundant energy.

[CLEAN ENERGY BEST] Data centers are coming – fast – and the question isn't if, but how we power them. **Clean energy is already the fastest and cheapest way to meet rising energy demand at scale.** It delivers reliable power, lowers long-term costs, and avoids delays tied to fuel constraints, making it the smartest path to support data center growth while bringing down energy bills long-term by developing more of these clean energy sources.

[FUTURE] AI and data centers will shape the future economy, whether we like it or not. **By prioritizing clean energy, innovation, and smart planning today, we can make sure that this future is sustainable and inclusive of local communities.** That means an embrace of responsible development that generates local investment, creates jobs, and allows communities to lead in the industries of the future, without compromising the local environment or economy.

[NATIONAL SECURITY] AI and data centers are going to continue to expand, whether that is on U.S. soil or elsewhere. **By leaning in and developing clean energy-powered, local data centers, we can increase our national security at a volatile time, keeping our data protected here at home.** Not to mention, the continued development of clean energy reduces our reliance on other countries for fossil fuels.

[CLEAN ENERGY OPP] The rapid growth of data centers is a huge opportunity to accelerate America's transition to clean energy. Realistically, these data centers are going to get built in the U.S. either way – by powering these facilities with clean energy, we can take advantage of this new investment to benefit all Americans. Done right, data centers don't just consume energy: they can drive investment in a cleaner, more reliable power grid.

Conclusions and Recommendations

Conclusions and Recommendations

Americans do not trust data centers and the AI/tech companies behind them to look out for them. Policies that allow data centers to exist while putting appropriate checks in place that speak to their concerns – environmental harms and costs going up – are extremely popular, even among those for whom powering data centers with clean energy is still not quite enough to get their support.

As a result, a pro-accountability approach is much stronger than a pro-innovation framework. In an environment where there is little trust in corporations to look out for Americans, elected officials need to make it clear they don't put AI/tech companies first. In addition to centering cost of living, for tenuous clean energy base and swing, we should focus on how this approach prioritizes:

- Keeping utility bills down for working families
- Accountability for data centers and their backers
- Responsible development that keeps in mind community needs, particularly not over-straining electricity and water
- An increase in grid reliability with much-needed updates
- (For clean energy base) A vehicle through which to move the clean energy power transition forward
- (For swing) An increase in national security

Key Information for Governors and Mayors

Setting the stage: Right now, we all know one thing for certain: energy bills are rising, and families are struggling.

We're seeing more demand on our energy system than ever, including from data centers. And while these projects can bring jobs and local economic growth, we need to hold them accountable.

Clean energy DC argument: We need to make sure data centers don't drive up local utility bills, put too much strain on our local energy grids or water supply, or release harmful pollution into our communities. And the best way to do that is by powering them with clean energy like wind and solar – not fossil fuels, like coal or diesel generators next to data centers.

When they are powered with cheap, clean energy, they can actually help bring down community energy costs by bringing more wind and solar power online, which also helps ensure our grid is reliable over the long term.

Additional policy prescriptions: This means instituting strong local protections from air, water, and noise pollution from data centers, and requiring data centers to:

- Fund transmission and grid upgrades
- Reduce their energy use during periods of high demand to increase reliability
- Demonstrate clear economic benefits, including high-quality, long-term job creation

Implications for decisionmakers: If a company wants to build their data center here, they need to do so responsibly, using clean energy and developing the resources they need, protecting our grid, and delivering real, lasting benefits for our communities.

Because we're not going to accept higher utility bills, strains on our energy and water, or more pollution. We're going to have data centers that work for the communities they're lucky enough to build in.

GSG FOR AMERICA IS ALL IN, APRIL 2026

Thank You

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