

Larimer County Data Center Survey – Voice of Business

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Timeline

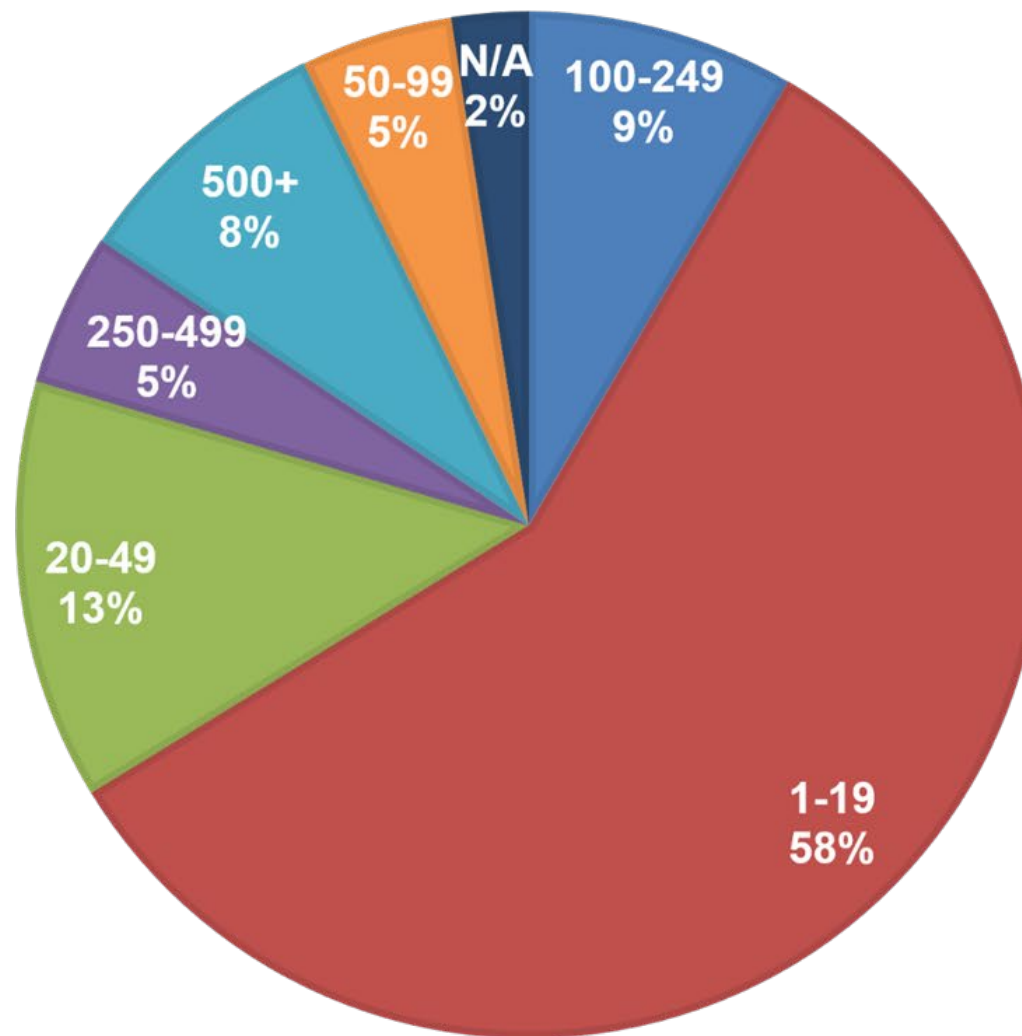
**Survey Conducted July
2026**

Participation

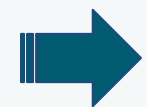
**83 Business Responses
Across Larimer County**

Voice of Business Data Center Survey- Respondent Profile

Business Respondents - Business Size by Number of Employees



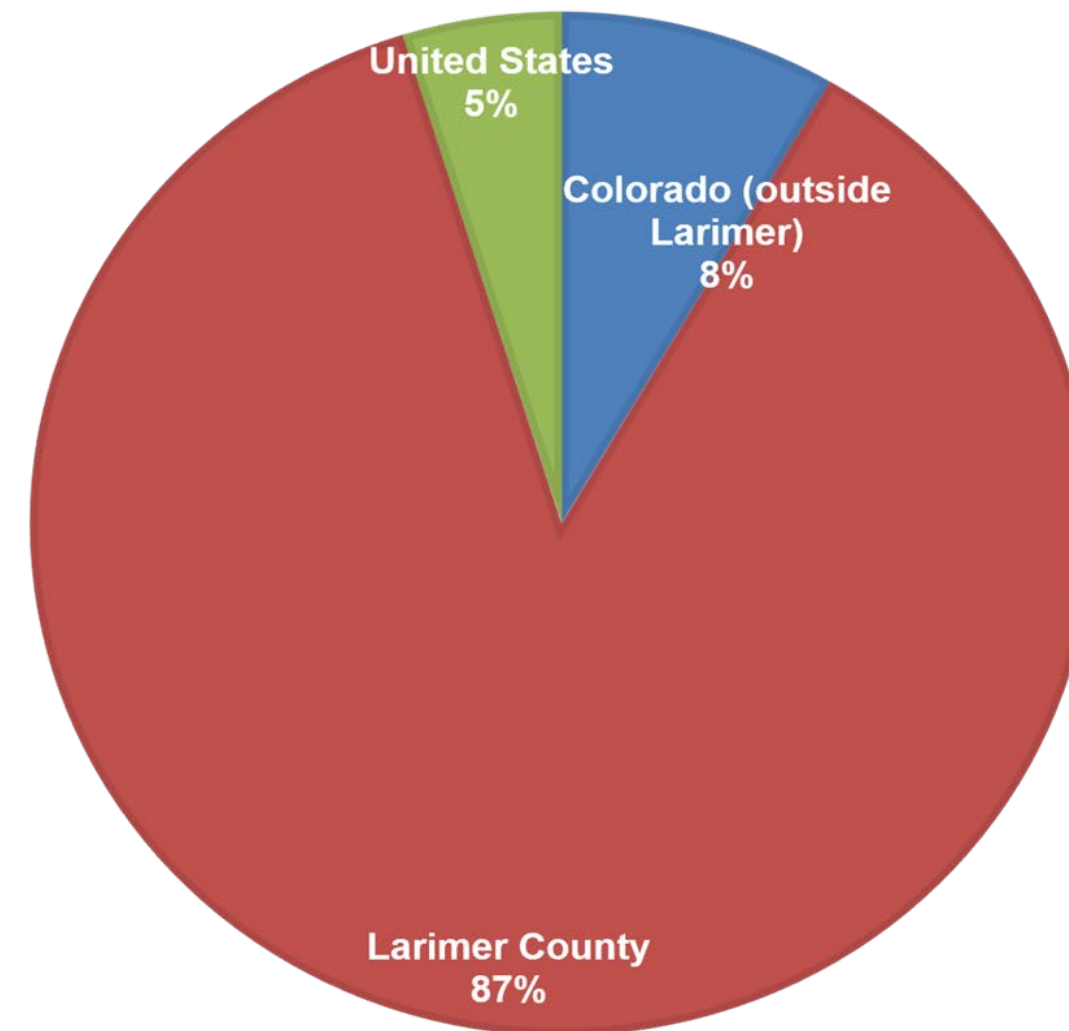
Respondents = 83



Respondents represent businesses of all sizes, however small businesses are the dominant voice in the survey.

Voice of Business Data Center Survey- Respondent Profile

Business Respondents - Reported Headquarter Location

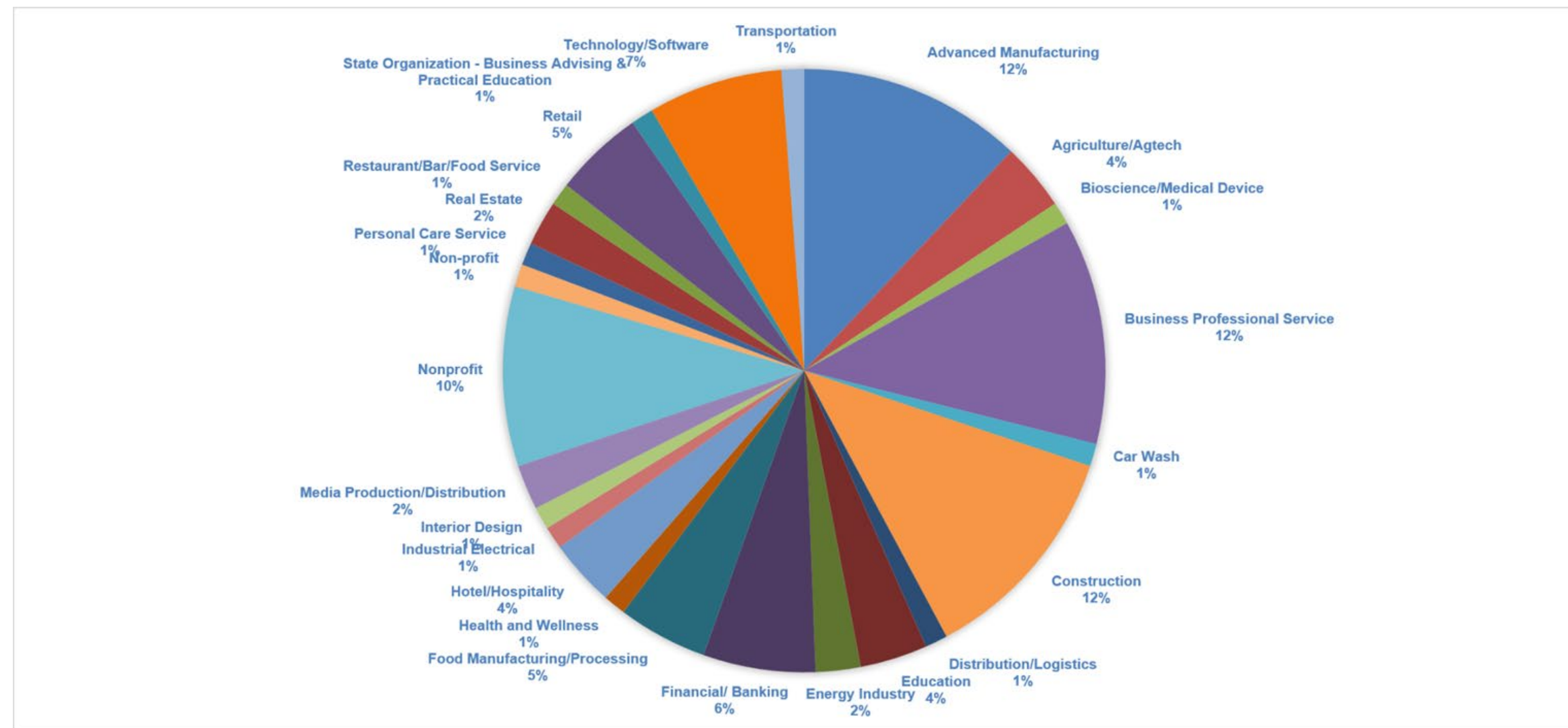


Respondents = 83

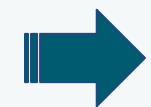
➡ The survey strongly reflects the voice of locally-based businesses: 84% of respondents are headquartered in Larimer County and 94% in Colorado, while still capturing perspectives from companies headquartered elsewhere in the U.S.

Voice of Business Data Center Survey- Respondent Profile

Business Respondents - Industry Representation



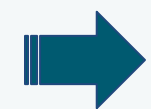
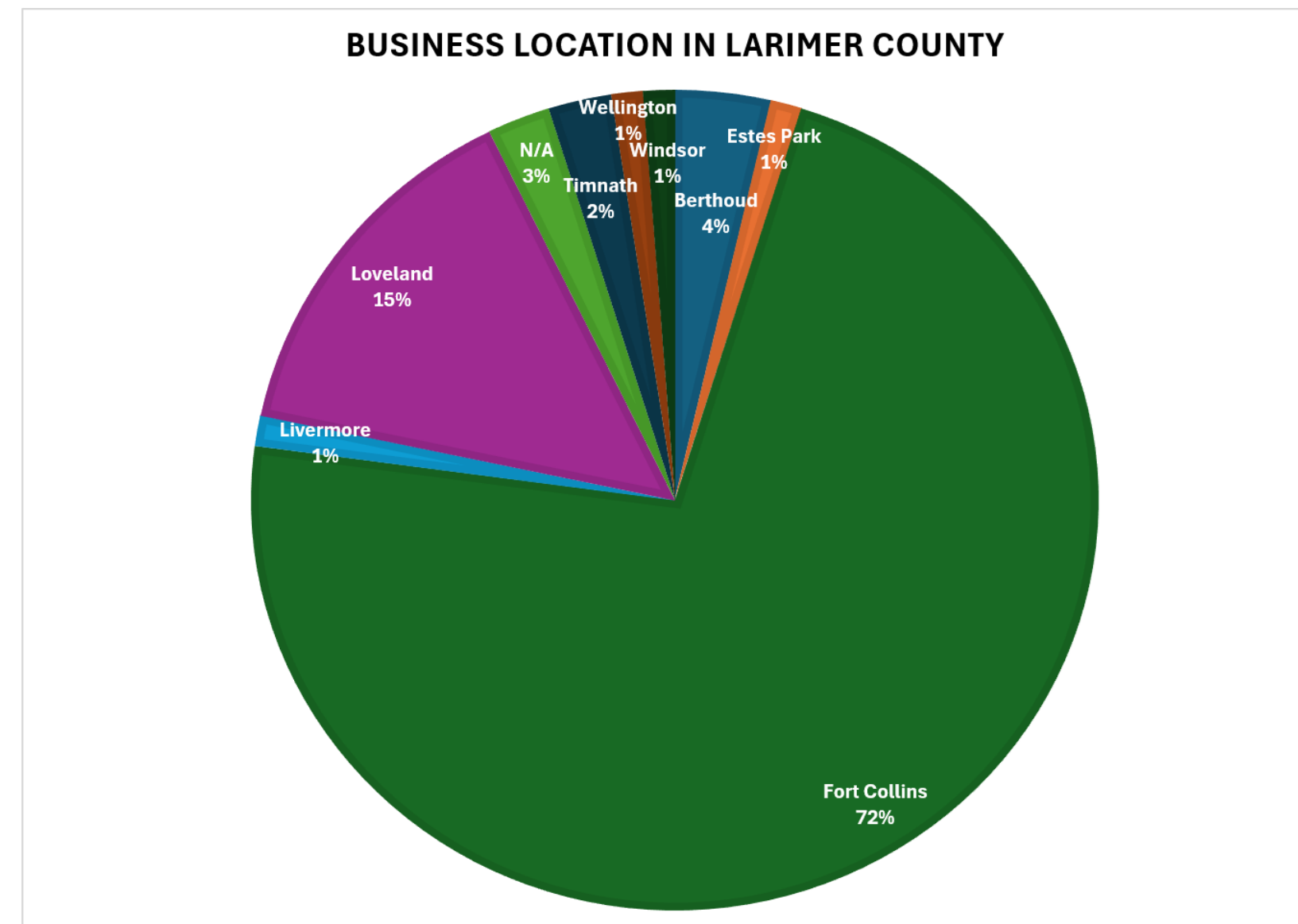
Respondents = 83



Respondents represent a broad cross-section of the Larimer County's economy, with no single industry accounting for more than 14% of responses. The survey includes more participation from professional services, advanced manufacturing, construction, technology and other industries central to the region's economy.

Voice of Business Data Center Survey- Respondent Profile

Respondents = 83

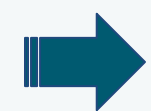
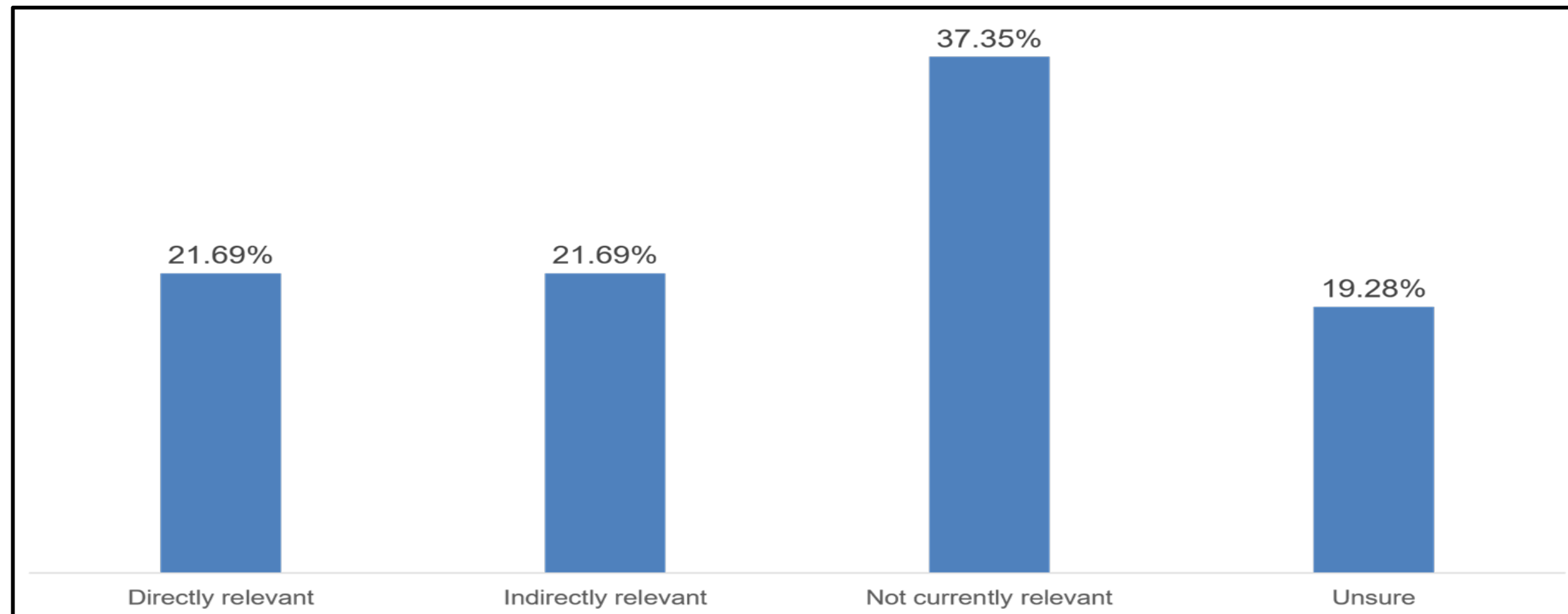


The survey responses are heavily concentrated in Fort Collins. Nearly three-quarters of respondents (72%) identify Fort Collins as their business location, with Loveland a distant second at 15%. Representation from the county's smaller and rural communities is very limited, with no individual community other than Berthoud representing more than 2%

Voice of Business Data Center Survey- New Data Center Development Relevancy to Business

Business Respondents - Relevancy of New Data Center Development to Your Planning and Operations

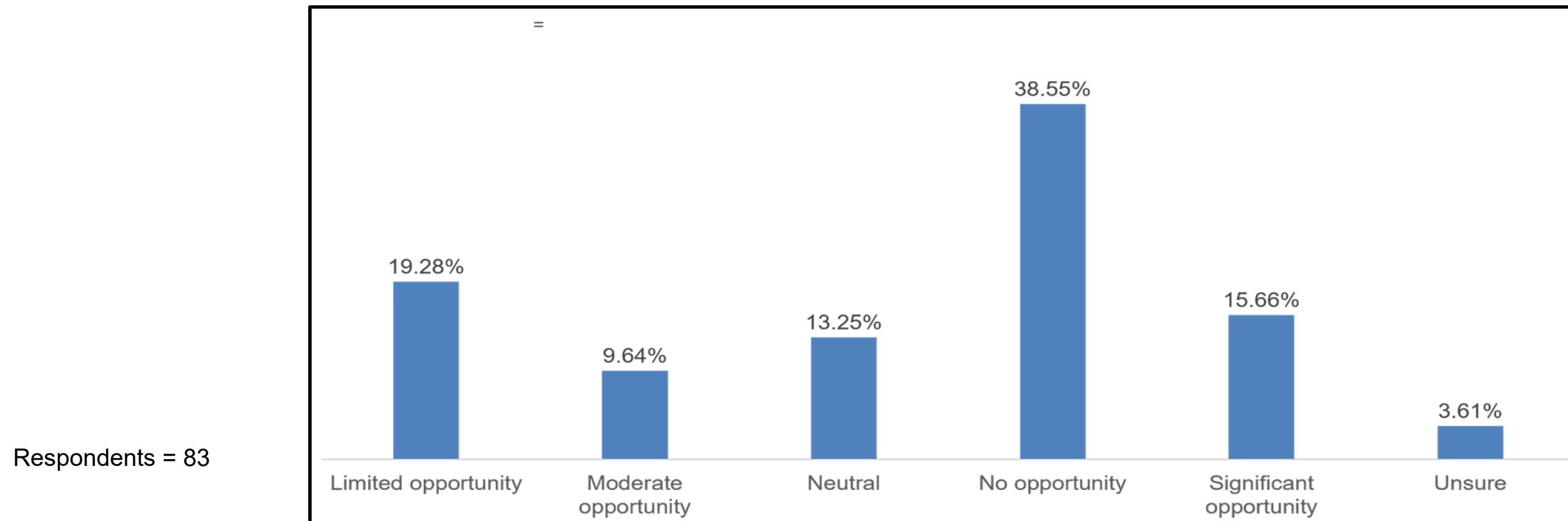
Respondents = 83



Most respondents do not currently see data center development as directly relevant to their own business operations. About 42% see some business relevancy.

Voice of Business Data Center Survey- Views On the Economic Opportunity for Larimer County

Business Respondents -New Data Centers as an Economic Opportunity for Larimer County



➡ Business respondents appear to lean more skeptical about the economic opportunity associated with new data centers. However, perspectives are divided, with one in four respondents viewing data centers as a moderate or significant economic opportunity for Larimer County.

Voice of Business Data Center Survey –How is New Data Center Development Relevant to Planning and Ops

“Our economic future depends on it”. *Higher Ed Institution*

1. Faster industrial data connections
2. Local backup and disaster recovery
3. Hosting customer-facing industrial systems
4. Better remote support infrastructure
5. Stronger compliance story - For aerospace, defense, ITAR, or CMMC-related work, a properly selected U.S.-based data center could provide:
6. Colocation instead of building your own server room

Small Advanced Manufacturer

“We provide *civil engineering, surveying, planning, and infrastructure design services* that directly support data center development. New data center projects in unincorporated Larimer County create opportunities to assist with site planning, utility coordination, transportation, drainage, grading, permitting, and construction support. Understanding the County's long-term vision for data center development helps us align resources, plan for future infrastructure needs, and support sustainable economic growth in the region. It also drives other potential new businesses and growth to our region that we might be currently missing out on - outside of the state of Colorado or locally in Colorado.” *Large Construction Firm*

“We and similar contractors are forced to rely on out-of-region or out-of-state facilities, which increases latency, complicates physical security/chain-of-custody requirements for controlled unclassified information (CUI), and raises our operating costs. Proximity matters for compliance audits, equipment staging, and incident response.”

Technology/ Software Company

“I am in the *real estate brokerage business*. These are services that just about everyone in each community use, and need. Many neighboring states have welcomed data center development with open arms. If you look at how those states are performing vs. Colorado, it's pretty clear that they have the recipe much more perfected. We are at a significant competitive disadvantage against neighboring states when it comes to economic development and this would serve to perpetuate, or exacerbate, this situation.”

Small Real Estate Company

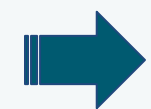
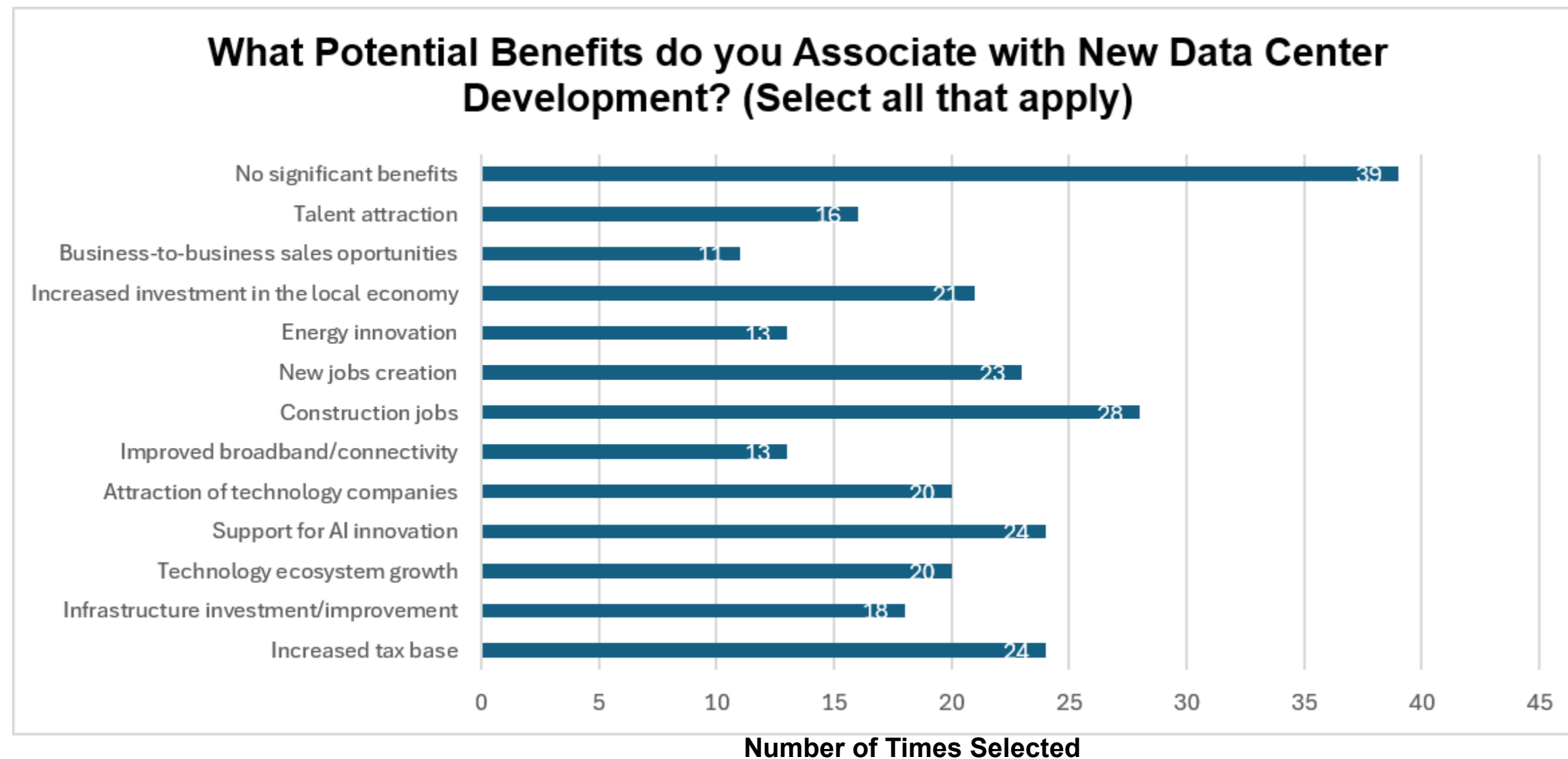
Both my business operations (growing and maintaining \$3 million+ in plants yearly) and my customers' demand for plants are hugely impacted by water. Building projects that consume a large amount of water in an area where water is a scarce and highly valuable resource further threatens an already tenuous supply.

Ag Business

I am not currently making plans regarding data centers but if a data center were to be put in near me I would seriously consider leaving Larimer County.

Small Food Manufacturer

Voice of Business Data Center Survey- Benefits Associated with New Data Centers



While respondents recognize potential economic and technology benefits, nearly forty percent of respondents see no significant benefits. Among those respondents identifying benefits, construction jobs, AI Innovation, increasing the tax base and new jobs are cited as the biggest benefits

Voice of Business Data Center Survey – Summary Benefits Associated with New Data Centers

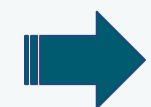
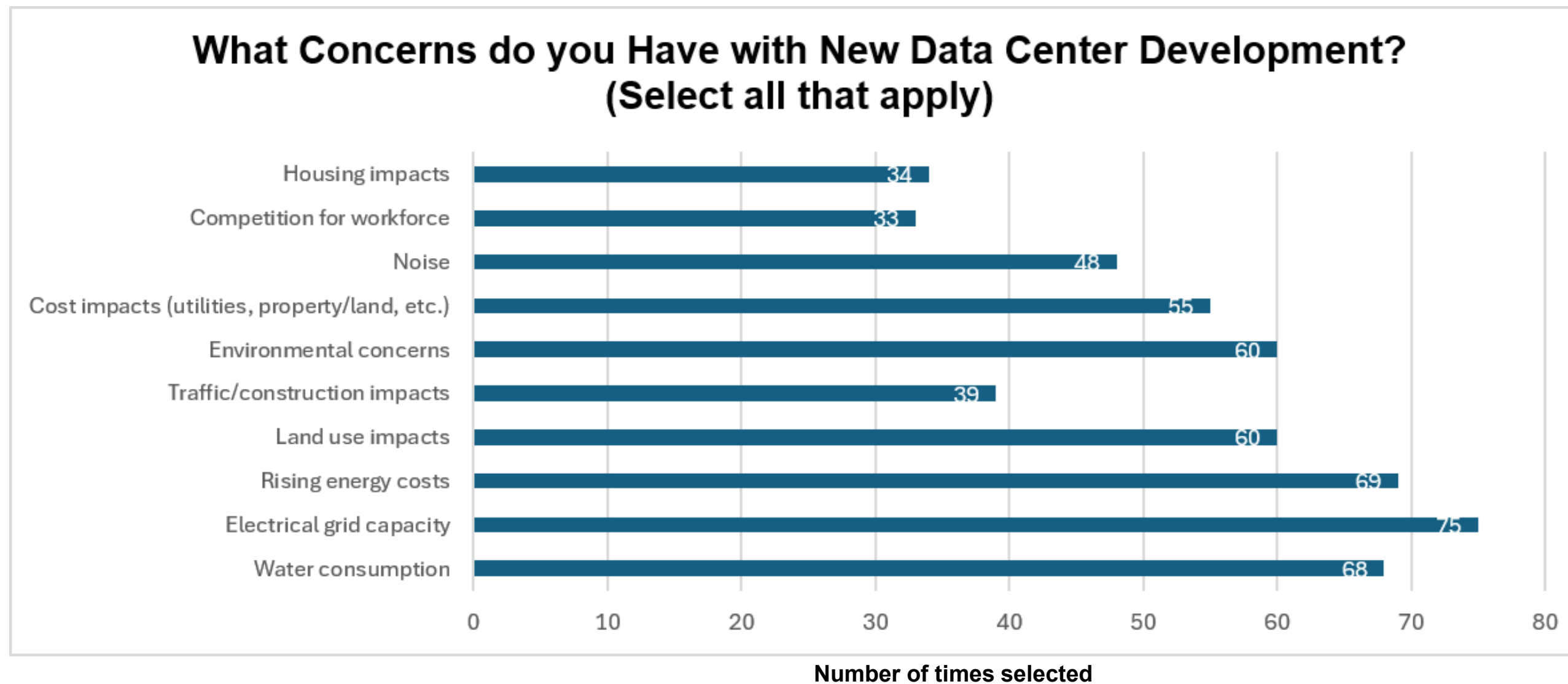
Major Takeaways - Summary of Benefits Of Data Center Development:

- ❖ **A decisive 39 responses were cast “No significant benefits”** However there were respondents that selected no significant benefits and also selected other benefits

Of those that selected benefits:

- ❖ **Construction Jobs** were recognized as the biggest benefit with 28 “votes”
- ❖ **Further AI innovation, increased tax base, and job growth benefits are benefits** — 24 “votes” were cast for increased AI innovation and an increased tax. New job creation received 23 “votes”.
- ❖ **Increase investment in the economy, new business attraction, tech ecosystem growth and new infrastructure investment** were checked as benefits with ~20 “votes”
- ❖ **Interestingly, infrastructure improvements were not strongly perceived to be benefits of new data center development.** They received ~12 “votes”
- ❖ **Direct benefits to companies** in the form of B2B sales and new talent were the least selected

Voice of Business Data Center Survey- Reported Concerns with New Data Centers



Concerns are overwhelmingly centered on resource and infrastructure impacts, particularly water consumption, electrical grid capacity, rising energy costs, land use and potential cost impacts to existing businesses and residents.

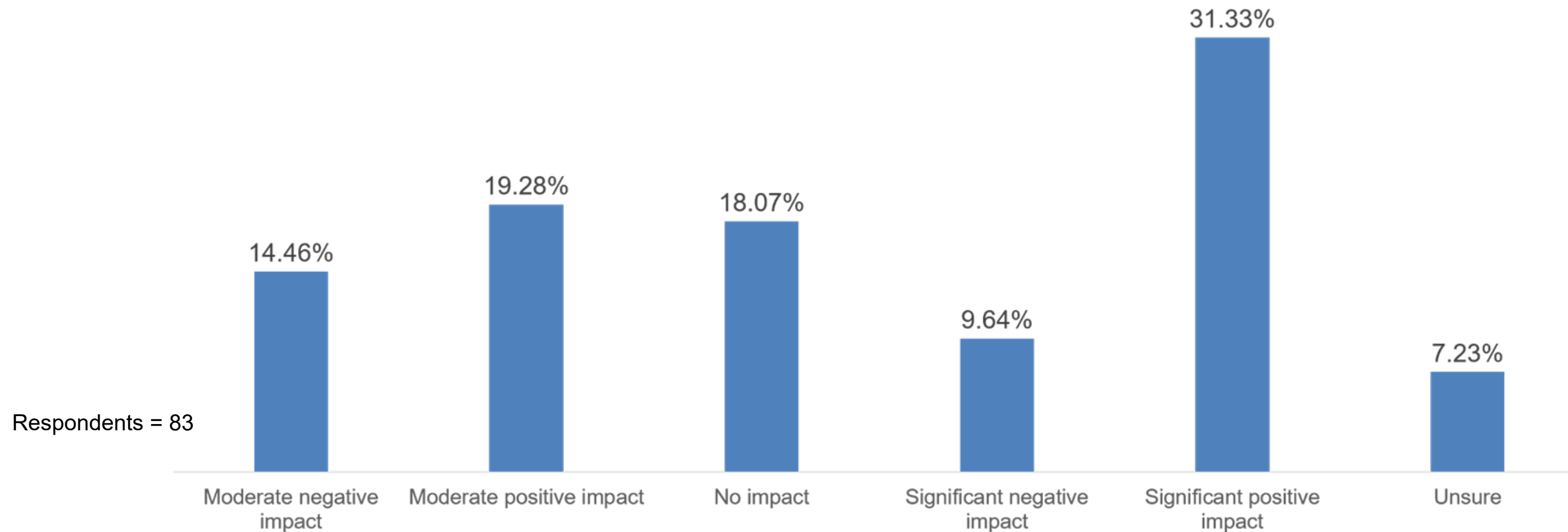
Voice of Business Data Center Survey– Summary Concerns About Data Centers

Major Takeaways -Summary of Concerns with Data Center Development:

- ❖ **Total selections were much greater around the concerns** - Double that of benefits selections made
- ❖ **Infrastructure capacity is the dominant issue.** Water, electrical grid capacity, land use and energy costs clearly rise above the other concerns. The responses also frequently bundle these concerns together, suggesting businesses are thinking about data centers in terms of their combined demand on regional infrastructure and resources, rather than as isolated impacts.
- ❖ **Cost is almost as important as capacity.** 69 “votes” were cast for concerned about rising energy costs and concerned about utility/property/land costs through 55 “votes” These respondents are concerned about whether the current infrastructure can accommodate data centers and whether accommodating them could affect the cost of doing business for existing users.
- ❖ **Environment impact** is a concern with 60 ‘votes” and respondents cite noise as a concern (selected 50 times) .
- ❖ **Less prominently cited but still significant** for the respondents are competition for workers and housing availability.

Voice of Business Data Center Survey- Reported Business Impact of a Long-term Moratorium

What impact, if any, would a long-term moratorium on new data centers in unincorporated Larimer County have on your business?



➡ **Half the representative business respondents (51%) believe a long-term data center moratorium would positively impact their business, compared with 24% who anticipate a negative impact. Another 18% expect no impact. This indicates a relatively limited perceived business downside from continuing the moratorium.**

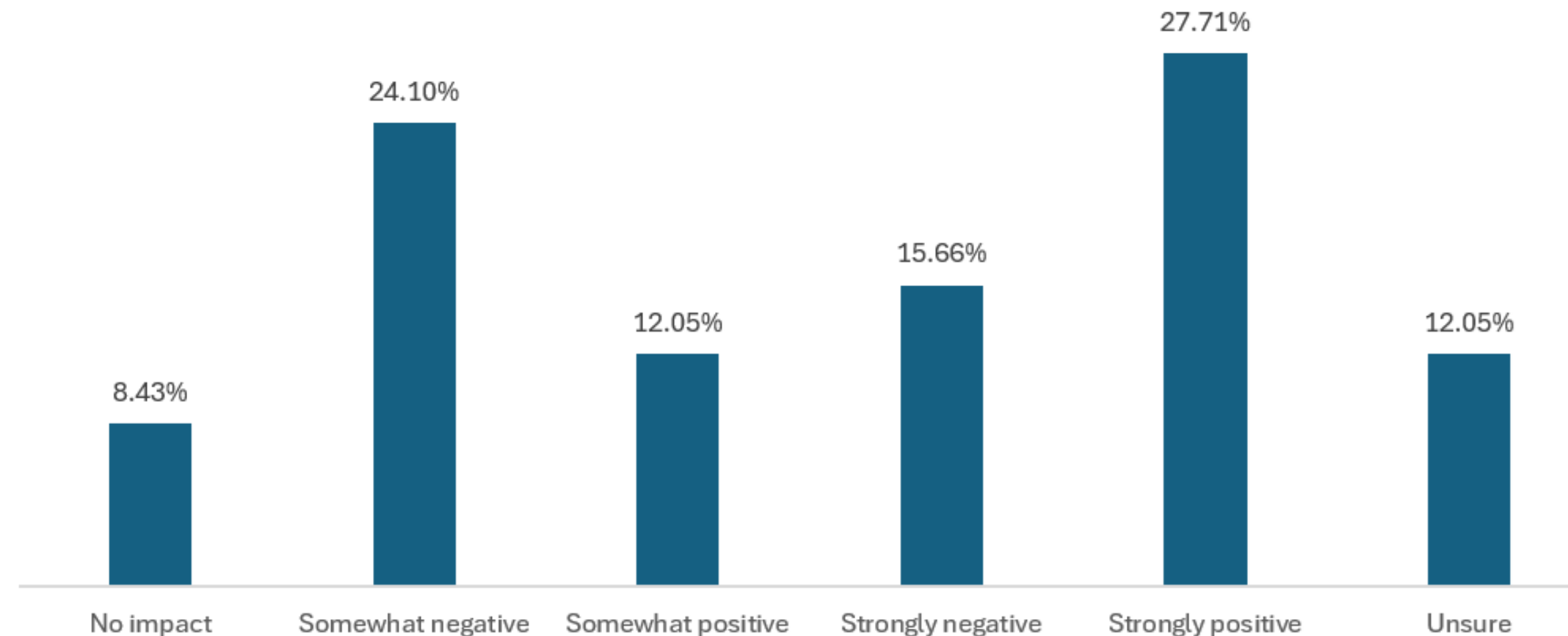
Voice of Business Data Center Survey– Summary Impacts of Large Data Centers

Major Takeaways -Summary of Perceived Impact of Data Center Development:

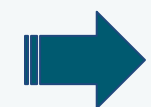
- ❖ **Utility capacity and cost are the most immediate business concerns associated with large-scale data centers.** Water is the strongest concern (74% expect negative effects. and energy follows closely behind (70% expect negative impacts), both with 49% anticipating a significant negative impact.
- ❖ **Land and facility impacts are also a concern, but the response is less pronounced.** Just over half (51%) anticipate negative impacts to facility or land cost and availability. In contrast 37% anticipate no impact.
- ❖ **Businesses are considerably less certain about impacts on their own ability to expand.** One-third (34%) expect a negative impact, while 42% are unsure or expect no impact. Respondents seem to distinguish between concerns about broader land/resource pressures and whether those pressures would directly constrain their own expansion.
- ❖ **Talent attraction and retention produces the most mixed response.** Thirty-five percent (35%) anticipate a negative impact, while 46% are unsure or anticipate no impact . At 18%, positive expectations are higher for new talent attraction than for any of the other four measures.

Voice of Business Data Center Survey- Reported Impact of a Long-term Moratorium

Reported Impact of a Long-term Moratorium on New Data Centers on Larimer County's Economic Competitiveness

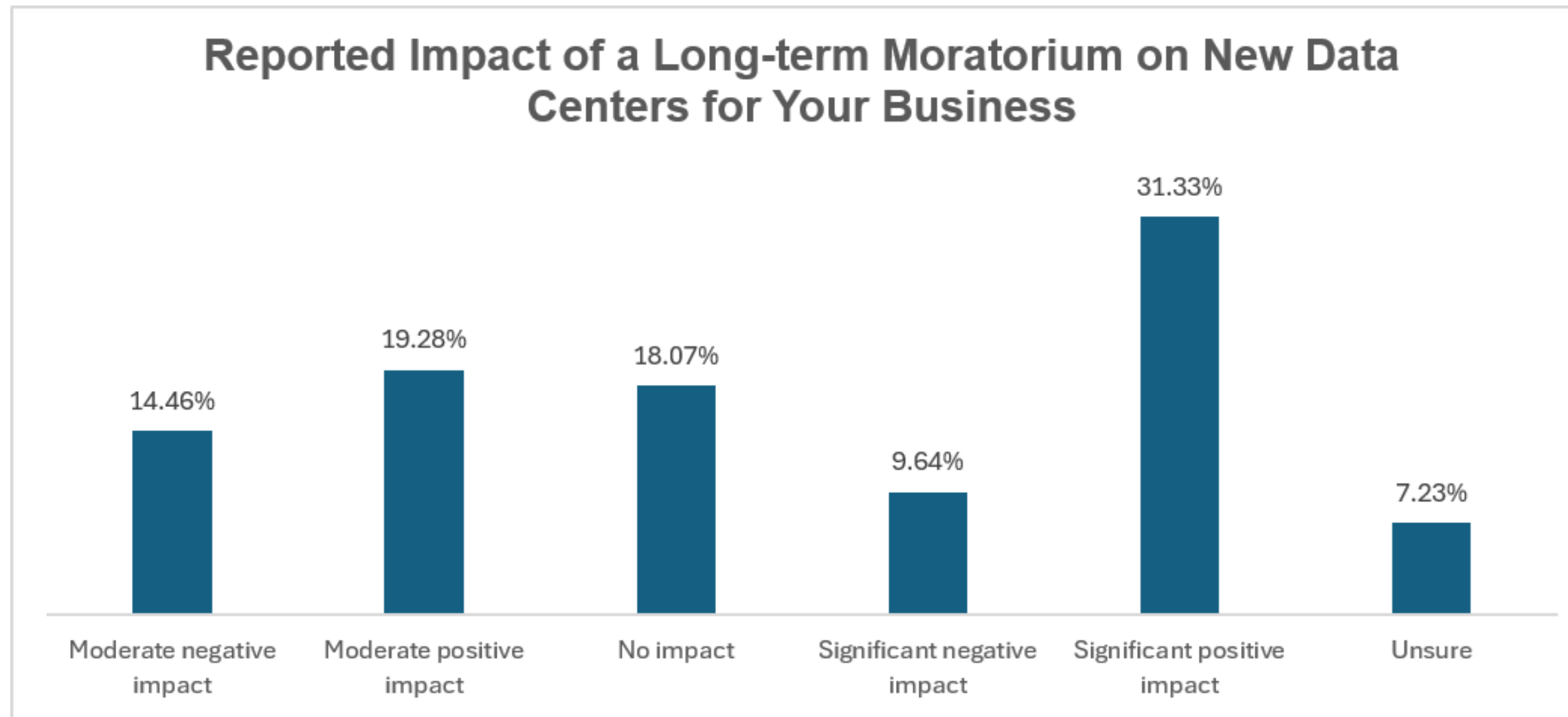


Respondents = 83

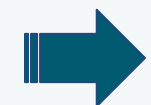


The results show a divided business perspective on how a long-term data center moratorium would affect Larimer County's overall economic competitiveness. Unlike the previous question about impacts on respondents' own businesses, there is no majority view on the broader competitive implications.

Voice of Business Data Center Survey- Reported Impact of a Long-term Moratorium



Respondents = 83

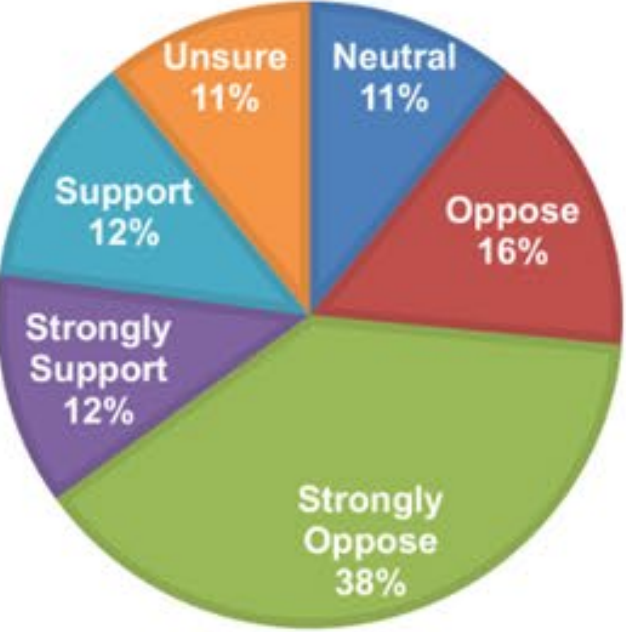


The results show half (50%) of businesses believe a long-term data center moratorium would benefit their business. One fourth (24%) of the respondents state that a long term moratorium would negatively impact their business and one fourth (25%) are unsure or feel it will have no impact on their business.

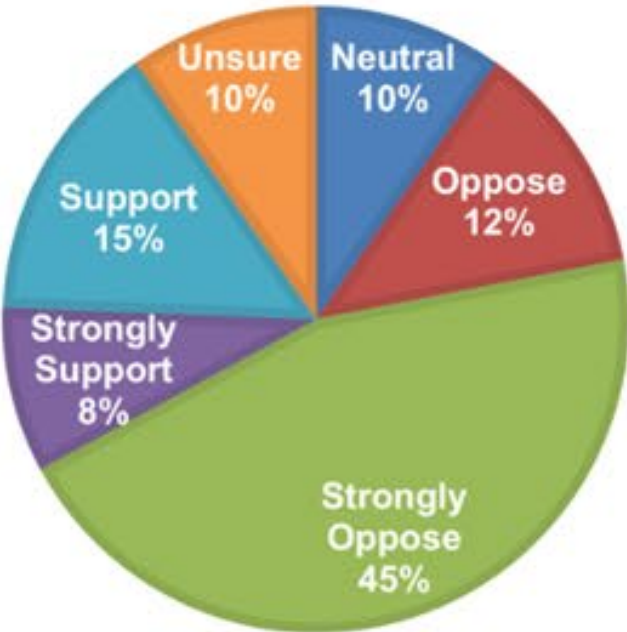
Voice of Business Data Center Survey- Level of Support for Each Type of Data Center

Indicate your Level of Support for Each Type of Data Center.

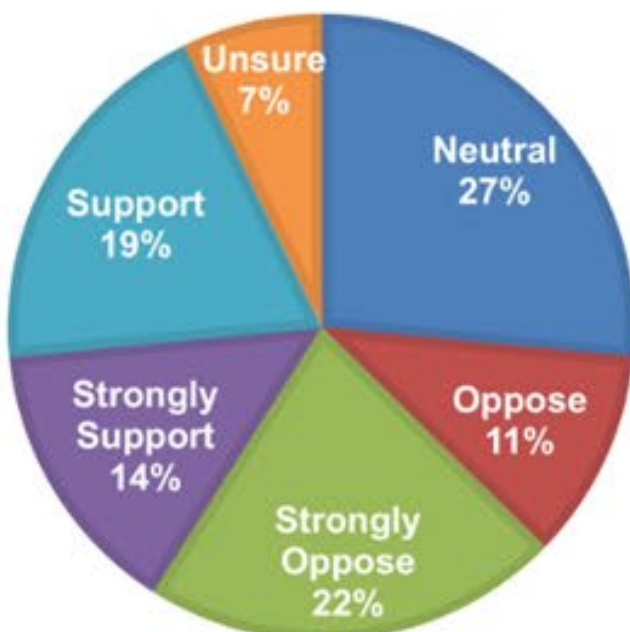
EDGE OR MICRO DATA CENTERS



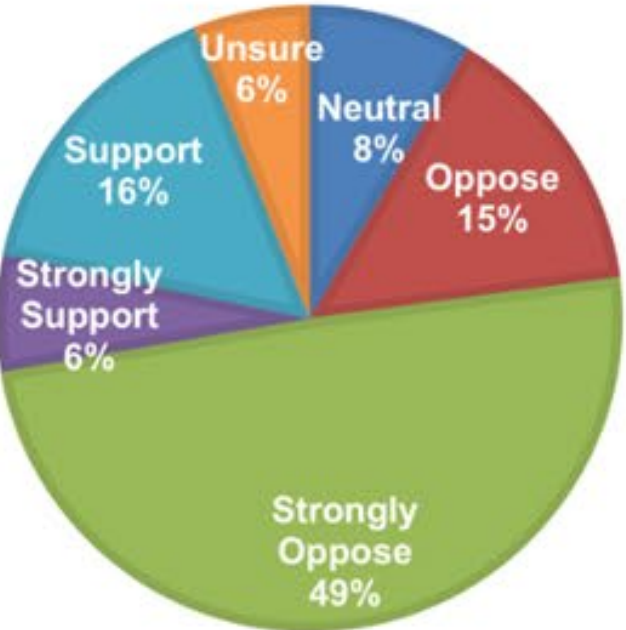
COLOCATION DATA CENTERS



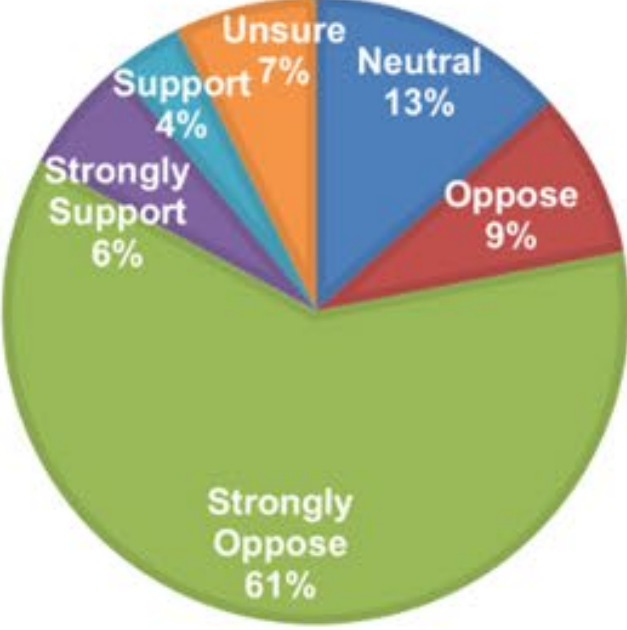
UNIVERSITY OR RESEARCH COMPUTING FACILITIES



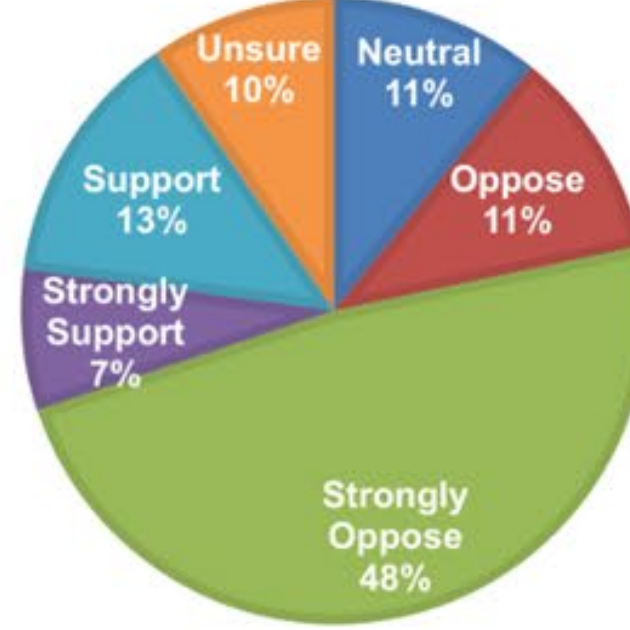
ENTERPRISE DATA CENTERS



HYPERSCALE DATA CENTERS



MODULAR OR CONTAINER DATA CENTERS



Voice of Business Data Center Survey – Summary Support Levels for Data Center Types

Major Takeaways - Summary Support for Varying Levels of Data Centers

- ❖ **Hyper Scale data centers face the greatest resistance.** 70% of the respondents oppose them.
- ❖ **Enterprise Data Centers** follow with 64% in opposition
- ❖ **Modular or Container, Colocation facilities and smaller microedge facilities do not overcome respondents' concerns** with over half of the respondents opposing them.
- ❖ **University/research computing is the clear exception.** Respondents are almost perfectly divided: 34% support, 33% oppose and 34% are neutral or unsure. This is a materially different response from the other three facility types.

The respondents differentiate among types of data centers. Opposition is not uniform across all types of facilities. University or research computing facilities receive substantially greater acceptance, while enterprise and colocation data centers face the strongest opposition.

Voice of Business Data Center Survey – Impact of a Long Term Moratorium Impact your Company/Industry/Sector

Water Energy and Infrastructure

The most persistent theme. Respondents worry data centers would compete with existing businesses and residents for water and electricity, strain infrastructure, and increase utility costs. A moratorium is therefore viewed by many as protecting resource availability and cost stability.

Cost of Doing Business

Businesses connect resource demand to higher energy, water/sewer, land, rent and production costs. Several small businesses specifically describe these increases as potentially affecting expansion or forcing costs onto customers.

Limited Permanent Economic/Job Benefit

several respondents acknowledge construction jobs but question the long-term employment return, arguing that large facilities require relatively few permanent workers compared with their resource and land requirements.

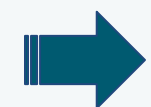
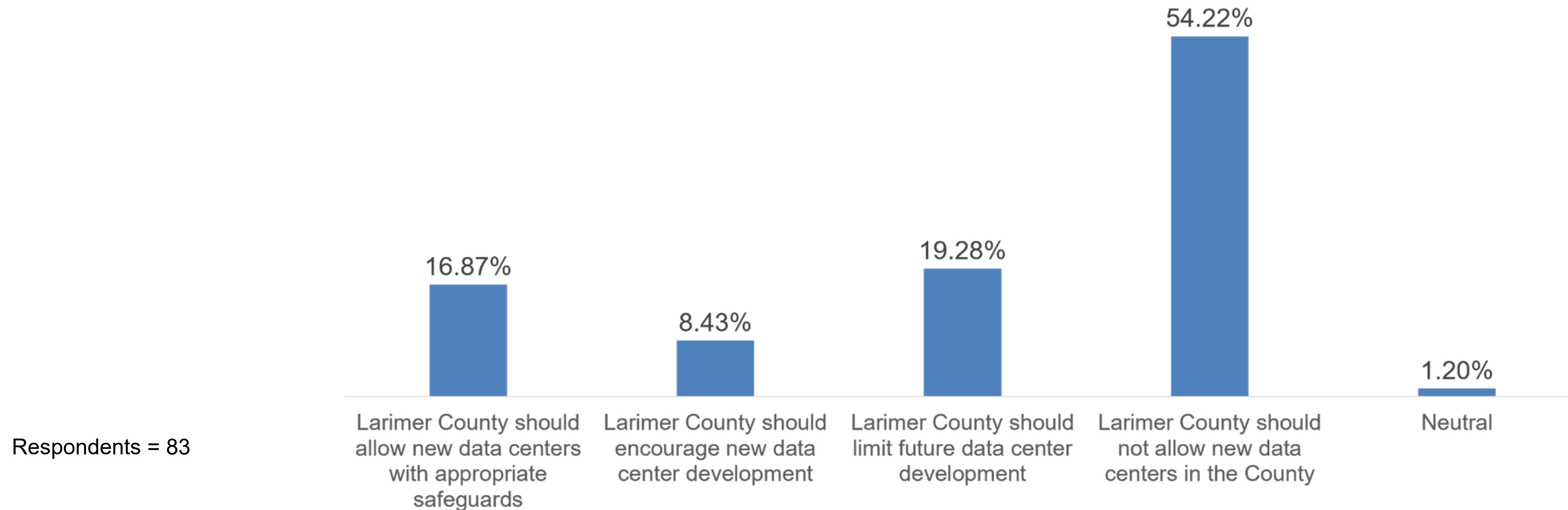
Economic Loss Cost

A smaller but clearly articulated group takes the opposite position: a long-term moratorium could discourage technology investment, reduce infrastructure and business opportunities, and signal that Larimer County is unfriendly to development or innovation. Some respondents identify specific losses from a moratorium, including construction work, IT/MSP activity, colocation services, cybersecurity, networking, automation, cooling and infrastructure partnerships.

47 Open-Ended Responses

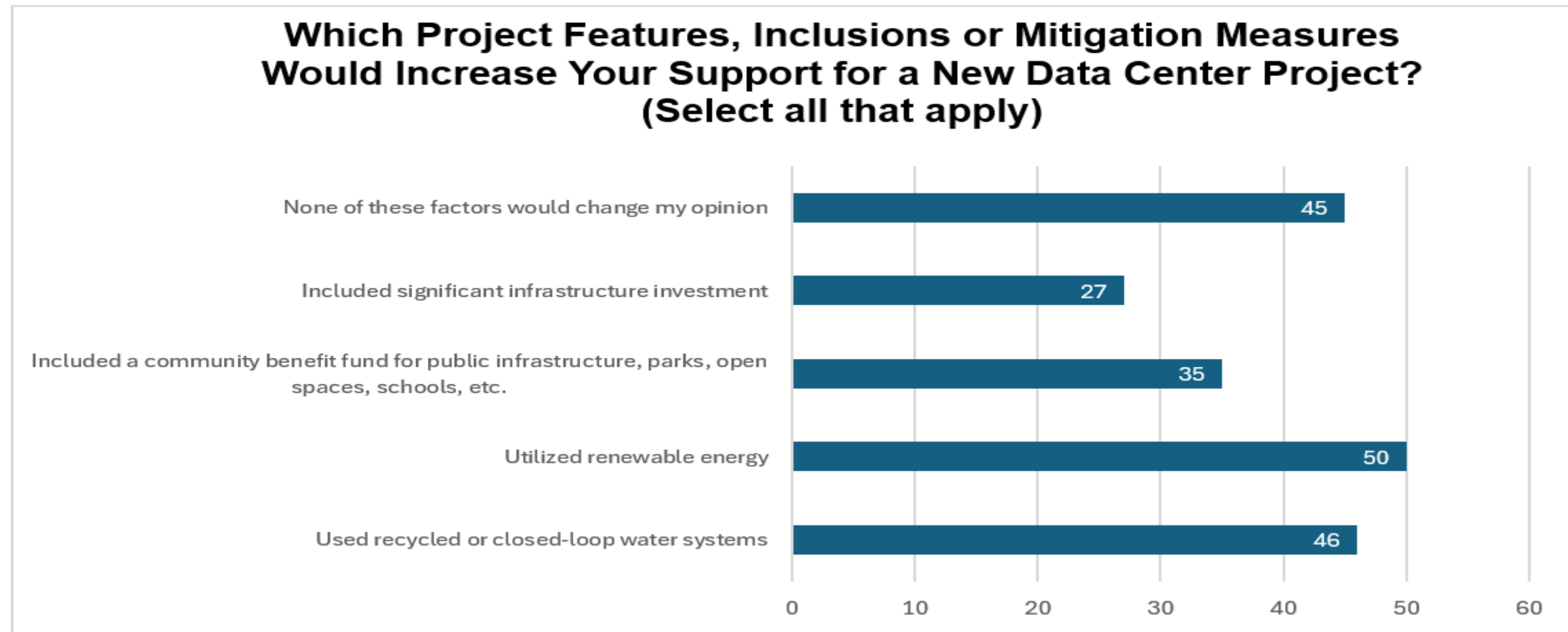
Voice of Business Data Center Survey- Business Overall View on Data Center Development

Which of the following best reflects your view?



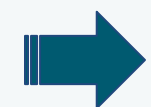
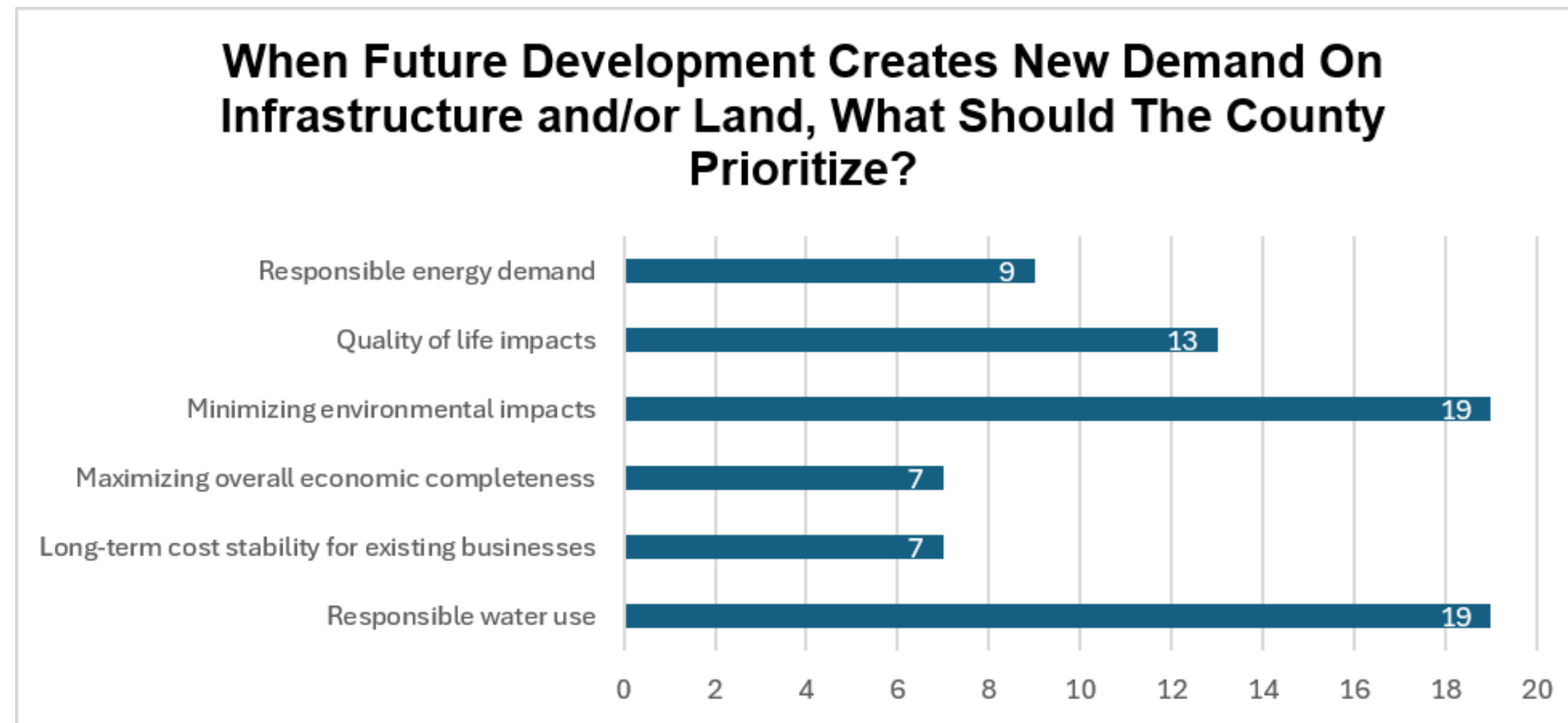
The results show a clear preference for restricting future data center development in Larimer County. Of the 83 respondents, more than half believe the County should not allow new data centers at all. 36% believe that the County should limit and place safeguards around future data center development.

Voice of Business Data Center Survey- What Would Increase Support for New Data Centers



➔ **Support is most responsive to reducing resource impacts—not adding economic benefits. More than half (54%) say closed-loop/recycled water could increase their support and 46% cite renewable energy. Yet 42% say no proposed mitigation would change their opinion. A substantial group firmly opposed regardless of project conditions.**

Voice of Business Data Center Survey- In Future Development the County Should Prioritize:



Respondents top priorities for developments that creates new new demands on infrastructure or land their are water use, environmental impacts and life quality impact. Traditional economic benefits ranks lower suggesting respondents favor managing the impacts of growth over maximizing its economic return.

Voice of Business Data Center Survey – What Else Would You Like Larimer County to Consider?

Respondents ask a fundamental cost-benefit question: Are the jobs, tax revenue and investment sufficient to offset the resource, infrastructure and community impacts?

“Is it worth the ROI”

Who pays matters. Several comments argue that existing businesses and residents should not bear infrastructure or utility costs created by new development.

“Existing county businesses and residents [should] not be asked to assume either short or long term infrastructure costs associated with that development.”

Scale and type matter. Some respondents who are not opposed to data centers generally distinguish between smaller/specialized facilities and resource-intensive hyperscale projects.

“Limited, structured, intentional data center development could have some positive impacts on the overall business environment in the county.”

Quality of life is viewed as an economic asset, not simply an environmental consideration; respondents connect it to talent attraction, business location and Northern Colorado's competitiveness.

“Companies have headquartered and invested in this specific area to provide a quality of life advantage for their employees. As a community we need to protect that.”

Thank You!

Questions?