

Data Centers

Powering the Internet and Our Modern Economy

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Centering Development: Industry Perspectives on Data Centers

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The Data Center Coalition:

- **The Voice** of the data center industry
- **Advocates** for a business climate, policies, and investments that support the growth and competitiveness of the industry
- **Information Resource** for elected officials, candidates, community leaders, and other stakeholders

Data Center Owner/Operator Members



DCC Membership

Executive



Board



Partner



General



DCC Membership

Large End Users

ANTHROPIC

 **CoreWeave**

OpenAI

Associate (Pre-Operational)

 **BEACON**
DATA CENTERS

Beale
Infrastructure



CleanArc[™]
DATA CENTERS

 **FLEET**
DATA CENTERS

MONTERA
INFRASTRUCTURE

 **NSCALE**

 **RELATED**
DIGITAL

IAC Members



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CLAYCO
THE ART & SCIENCE OF BUILDING

 **CLUNE**

 **DAIKIN**



EAT•N
Powering Business Worldwide

ECOLAB[®]

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 **HYPER**

Johnson
Controls 

MCCARTHY[®]

 **PCI** | mission
critical

Life Is On

Schneider
Electric

 **RYAN**

 **Solutions**

 **VERTIV**[™]

Main Types of Data Centers

Enterprise

A privately-owned data center used by a single organization for internal data processes

Multitenant

Shared facilities where multiple organizations house their servers and data

Number of People/Devices Drives Data Center Demand

"The data center industry has experienced explosive growth over the past decade, driven by ever-increasing demand for cloud services and the expanding use of web-enabled devices globally. [...] **In the next five years, consumers and businesses will generate twice as much data as all the data created over the past 10 years.**"

-JLL, *Data Centers 2024 Global Outlook*

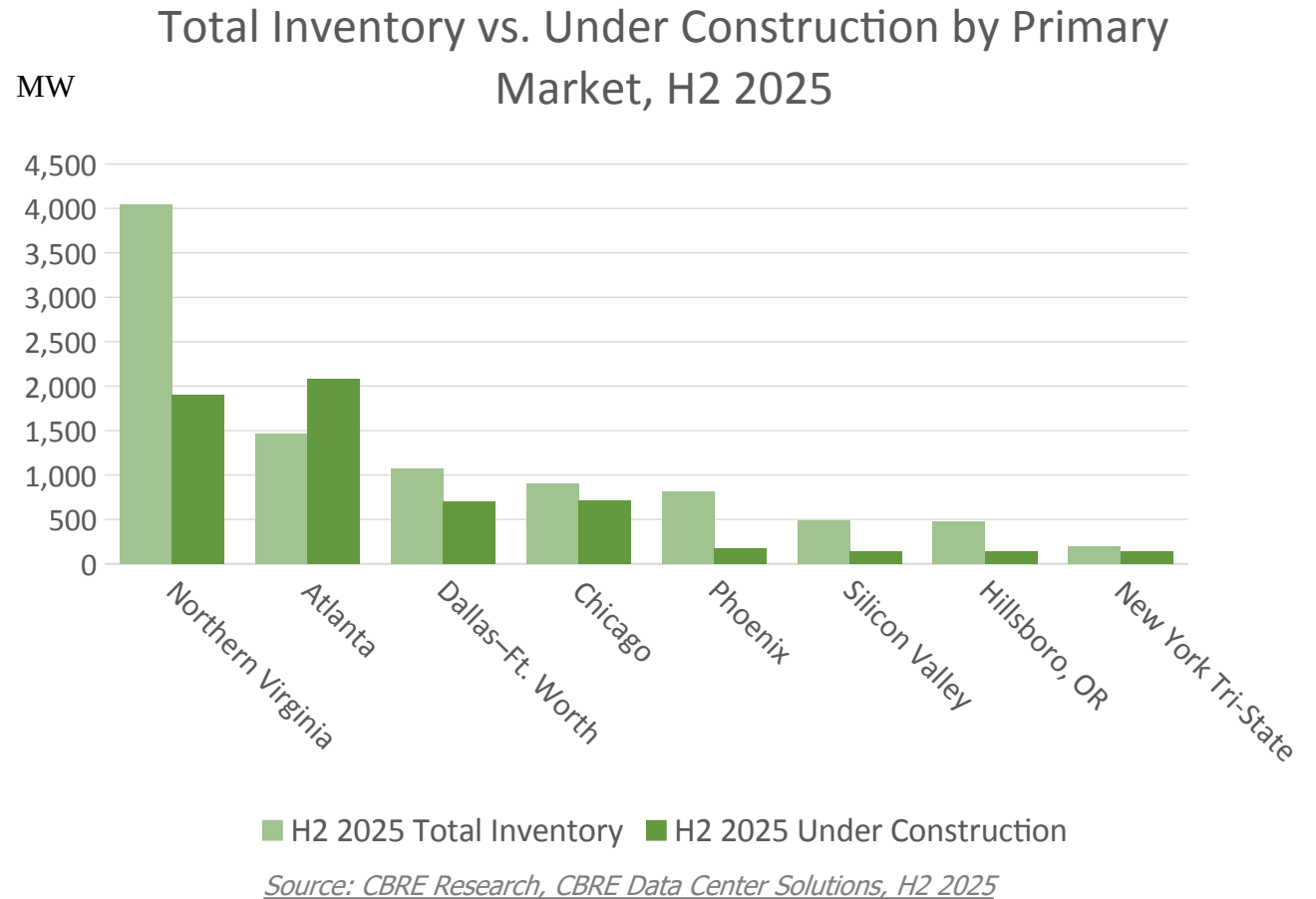
More People Are Getting Online

- Approximately 5.4 billion people - or 67% of the global population - are online today. This represents an **increase of 45% since 2018**. 2.6 billion people are not yet connected to the internet.
- On average, U.S. households have a total of **21 connected devices**.

Data Center Trends

Total Inventory vs. Under Construction by Primary Market, H2 2025

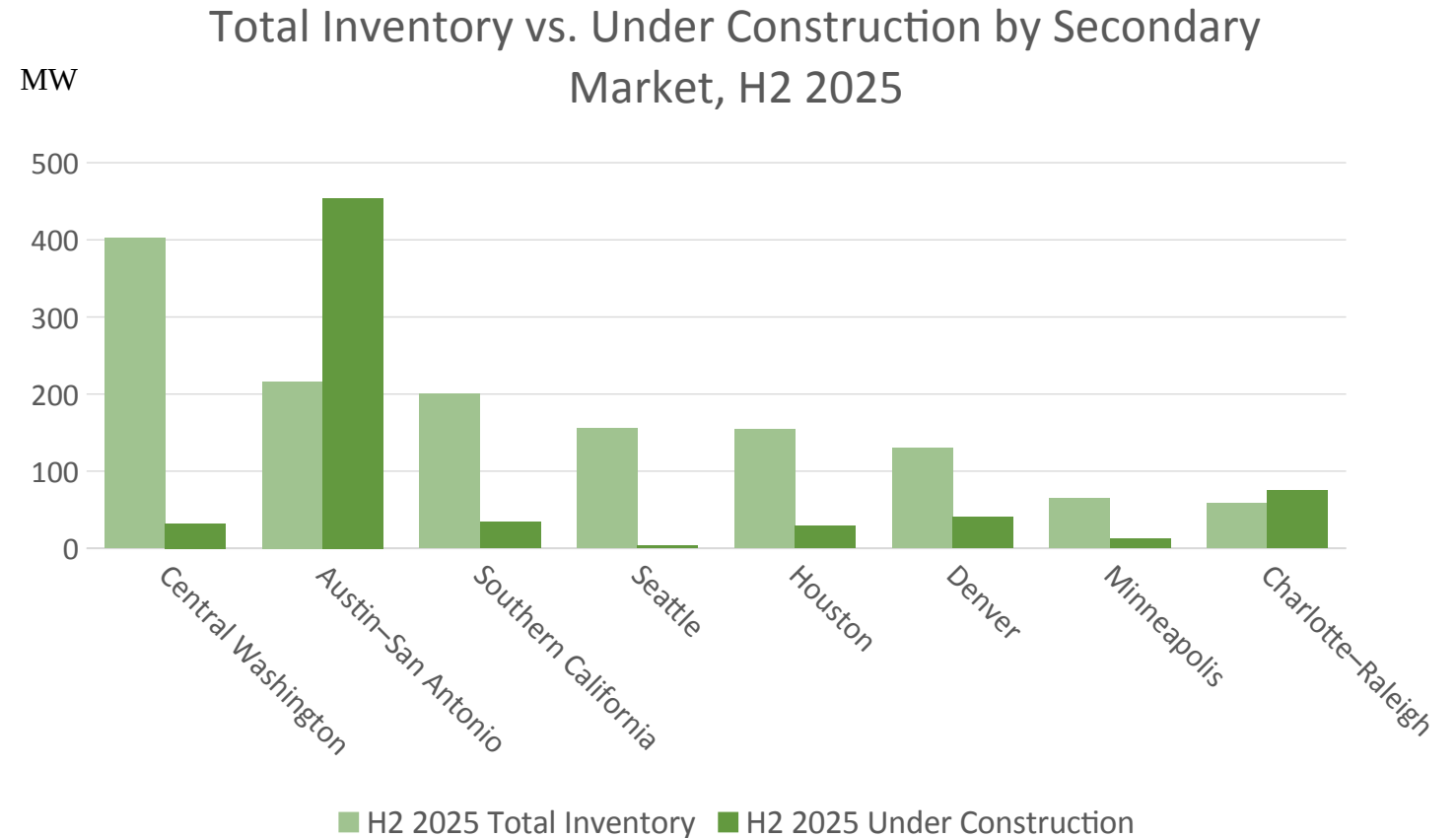
- Virginia remains the largest global data center market.
- There are a variety of factors that data centers take into consideration when deciding where to locate:
 - Workforce (construction + technical)
 - Low risk of natural disaster
 - Fiber connectivity
 - Favorable tax and regulatory environment
 - Power, speed to power
- Seeing shifts in data center market growth, primarily due to long interconnection times



Data Center Trends

Total Inventory vs. Under Construction by Secondary Market, H2 2025

- Data center development is expanding across the U.S. among growing demand and shifts in legacy markets' ability to address various siting considerations.



Source: CBRE Research, CBRE Data Center Solutions, H2 2025

Why Data Centers?

- Tremendous Capital Investment
- Big Driver of Tax Revenue
- High Wage Jobs, Low Demand on Services
- Substantial Construction Jobs and Activity
- Building and Strengthening Tech Ecosystem
- Catalyst for Renewable Energy

U.S. Data Center Industry

Jobs

- **Direct** employment: **1 million jobs** in 2024
- **Total** employment: **5.5 million jobs** in 2024(direct, indirect, and induced)

Labor Income

- **Total** labor income: **\$525 billion** in 2024 (direct, indirect, and induced)

GDP and Taxes Impact

- Data centers contributed **\$302 billion** to national GDP in 2024
- **\$204 billion** in state and local tax revenues in 2024

Data Center Investment in Historical Perspective

BOOM	PEAK YEARS	TOTAL INVESTMENT ('26 DOLLARS)	AS PERCENT OF U.S GDP
Railroads	1880–1890	\$81 Billion	2.43%
Electrification	1922–1929	\$92 Billion	0.83%
Internet/ Telecom	1996–2003	\$1.6 Trillion	1.10%
AI Data Centers	2025–2030	\$2.8 Trillion	2.80%

Source: Forbes, Inside The Trillions Being Spent On The AI Data Center Buildout, 2026