

I. Introduction

The rapid advancement of digital technologies and the growth of data-driven industries have coincided with increased deployment of data center infrastructure across the U.S. economy. Serving as infrastructure for cloud computing, AI, and digital communications, data centers support the storage, processing, and transmission of large data volumes. During 2023 and 2024, increased AI workloads, continued expansion of hyperscale facilities, and deployment of edge computing were associated with changes in industry investment and operational patterns. At the same time, rising energy costs and geopolitical considerations were observed to influence operational efficiency, resilience, and sustainability considerations.

DCC engaged PwC to examine the economic contribution of the U.S. data center industry at the national and state levels for 2023 and 2024, building on prior PwC analysis covering the period from 2017 through 2023.² Reflecting the evolving structure of the industry, this study adopts an expanded, function-based definition of the data center sector that captures data center services wherever they are produced, rather than limiting measurement to a single industry classification.

The growth and development of data centers during this period supported a wide range of employment opportunities, from facility operations and infrastructure management to specialized roles in information technology and data services. Beyond direct employment, the industry stimulated economic activity across related sectors, including construction, telecommunications, power infrastructure, and manufacturing.

This report is organized as follows: **Section II** defines the data center industry for this study. **Section III** presents PwC's estimates of the industry's total economic contributions at the national and state level for 2023 and 2024. More detailed state-level results are presented in **Appendix A**, while **Appendix B** describes the data sources and methodology used in the analysis.

² PwC, Economic Contributions of Data Centers in the United States, January 2025. Available at: <https://www.datacentercoalition.org/reports-and-publications>.