Uptime Institute Global Data Center Survey 2024: supplier view

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SUMMARY

The Uptime Institute Global Data Center Survey, now in its 14th year, is the most comprehensive and longest-running study of its kind. This report highlights some of the results from vendor, consultant and product supplier respondents and provides an insight into the spending strategies, technology adoption and issues facing their customers.
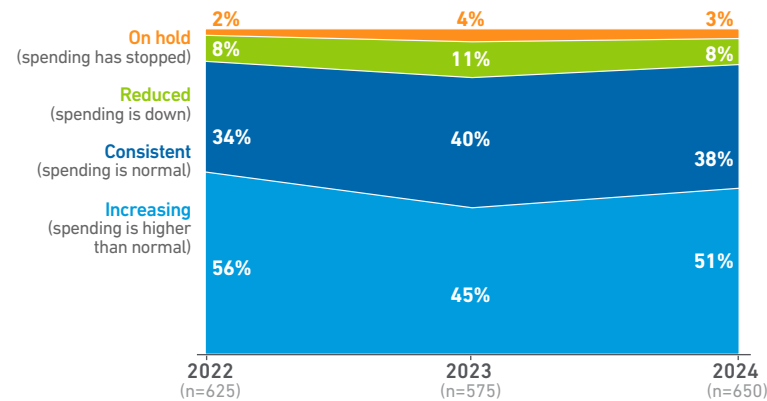
Suppliers rank forecasting future data center capacity as their customers' greatest challenge, and most say that staffing shortages will limit capacity growth within the next five years.

ABOUT THIS SURVEY
The Uptime Institute Global Data Center Survey 2024, conducted online in March and April 2024, had more than 750 supplier respondents. This report highlights some of the findings.

Customer spending continues to rise
How would you characterize the current willingness of your customers to spend money on data center products and/or services?
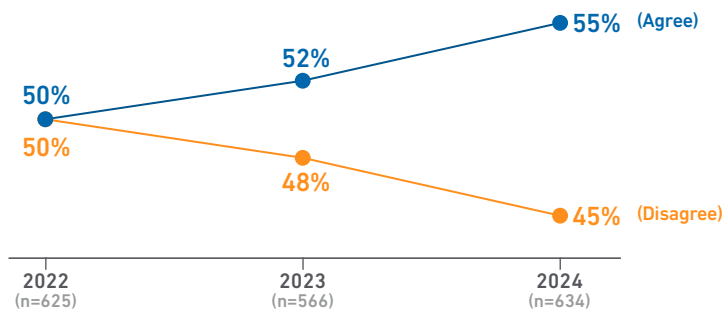
On hold (spending has stopped): 2% (2022), 4% (2023), 3% (2024)
Reduced (spending is down): 8% (2022), 11% (2023), 8% (2024)
Consistent (spending is normal): 34% (2022), 40% (2023), 38% (2024)
Increasing (spending is higher than normal): 56% (2022), 45% (2023), 51% (2024)

2022 (n=625) | 2023 (n=575) | 2024 (n=650)

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Over half of vendors say data center staff shortages will limit growth
A shortage of data center facilities staff will limit the data center industry's growth in the next five years. Agree or disagree?

(Agree): 50% (2022), 52% (2023), 55% (2024)
(Disagree): 50% (2022), 48% (2023), 45% (2024)

2022 (n=625) | 2023 (n=566) | 2024 (n=634)

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Capacity planning and staffing are top customer challenges
Which of the following do you believe is the single largest challenge for the majority of your data center customers? (n=652)

- Forecasting future capacity requirements — 23%
- Lack of qualified staff — 19%
- Improving energy performance for facilities equipment — 13%
- Maintaining competitive / cost-efficient operations — 10%
- Improving energy performance for IT — 10%
- Managing different data center environments (e.g. mix of public cloud, colocation, on premises) — 9%
- Maintaining availability with aging infrastructure — 7%
- Migrating from on-premises to third-party data centers (e.g. cloud / colocation) — 4%
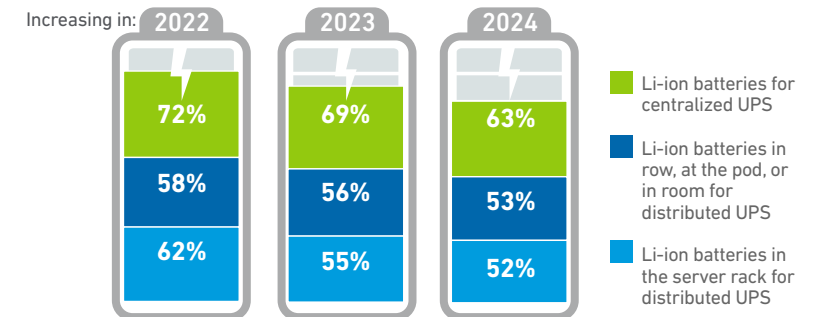- Other — 5%
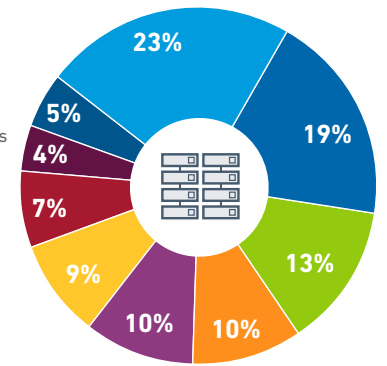
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Li-ion adoption remains strong, but shows signs of slowing down
For each of the following lithium-ion battery technologies, tell us whether your customer adoption rates are increasing. (n=561).

Increasing in:

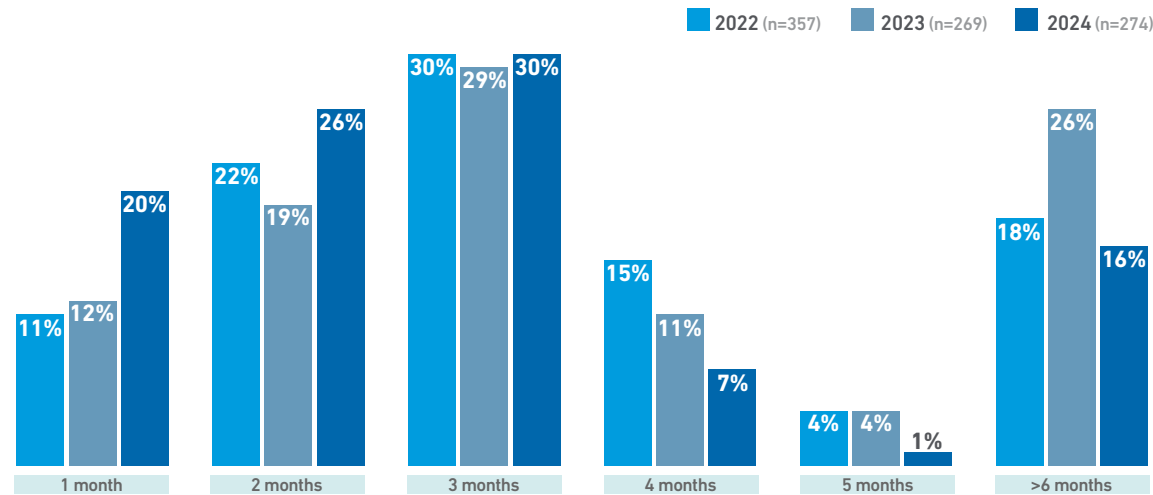|	2022	2023	2024
Li-ion batteries for centralized UPS	72%	69%	63%
Li-ion batteries in row, at the pod, or in room for distributed UPS	58%	56%	53%
Li-ion batteries in the server rack for distributed UPS	62%	55%	52%

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Vendors note that customer delays are getting shorter

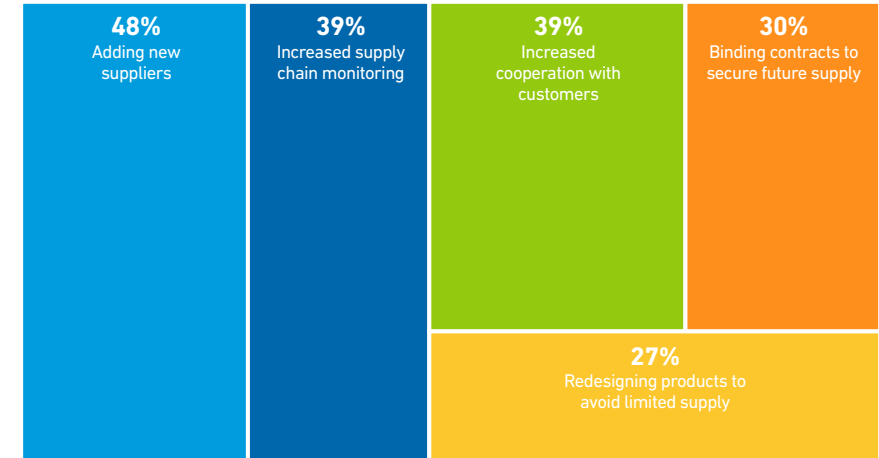How much of a delay are your customers experiencing due to supply chain issues?

Legend: **2022** (n=357) | **2023** (n=269) | **2024** (n=274)

Delay	2022	2023	2024
1 month	11%	12%	20%
2 months	22%	19%	26%
3 months	30%	29%	30%
4 months	15%	11%	7%
5 months	4%	4%	1%
>6 months	18%	26%	16%

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Vendors add more suppliers to reduce customer delays

What approaches is your organization using (if any) to avoid / reduce data center project delays due to supply chain issues? Choose all that apply. (n=586)
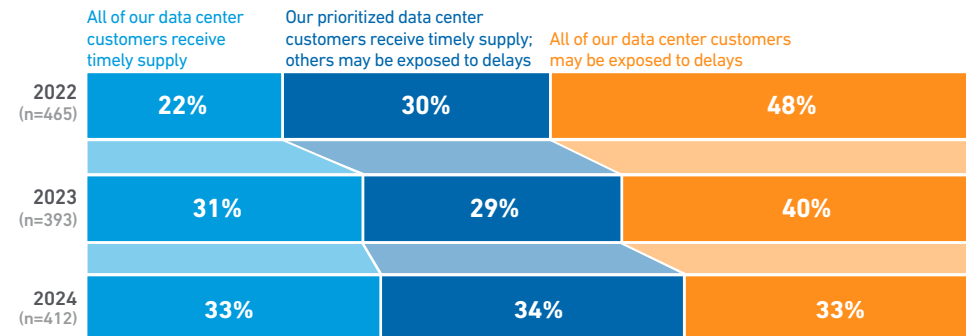
- **48%** Adding new suppliers
- **39%** Increased supply chain monitoring
- **39%** Increased cooperation with customers
- **30%** Binding contracts to secure future supply
- **27%** Redesigning products to avoid limited supply

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More vendors report products are delivered on time

Which of the following best describes the timeliness of your product supply to your data center customers?
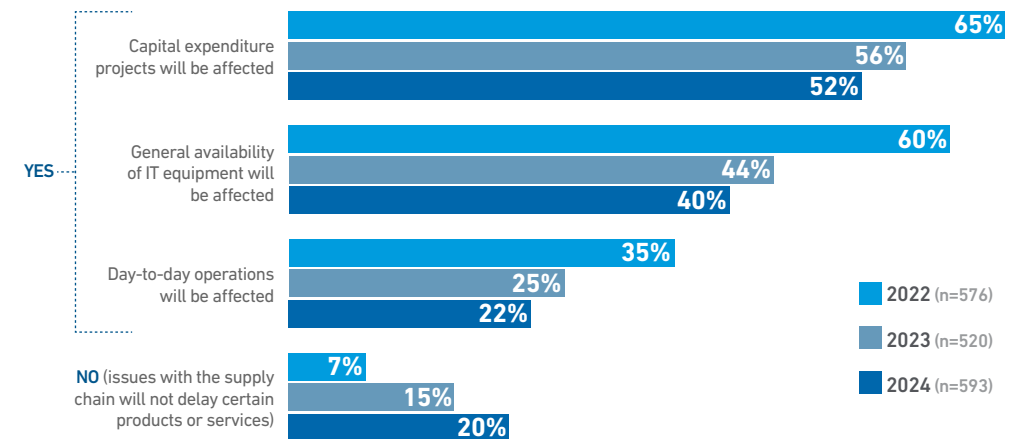
Legend: All of our data center customers receive timely supply | Our prioritized data center customers receive timely supply; others may be exposed to delays | All of our data center customers may be exposed to delays

Year	All receive timely supply	Prioritized timely; others exposed	All may be exposed to delays
2022 (n=465)	22%	30%	48%
2023 (n=393)	31%	29%	40%
2024 (n=412)	33%	34%	33%

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Supply chains affect fewer products but remain a challenge

During the next two years, will issues with the supply chain delay certain critical products or services needed by data centers? Choose all that apply.

Legend: **2022** (n=576) | **2023** (n=520) | **2024** (n=593)

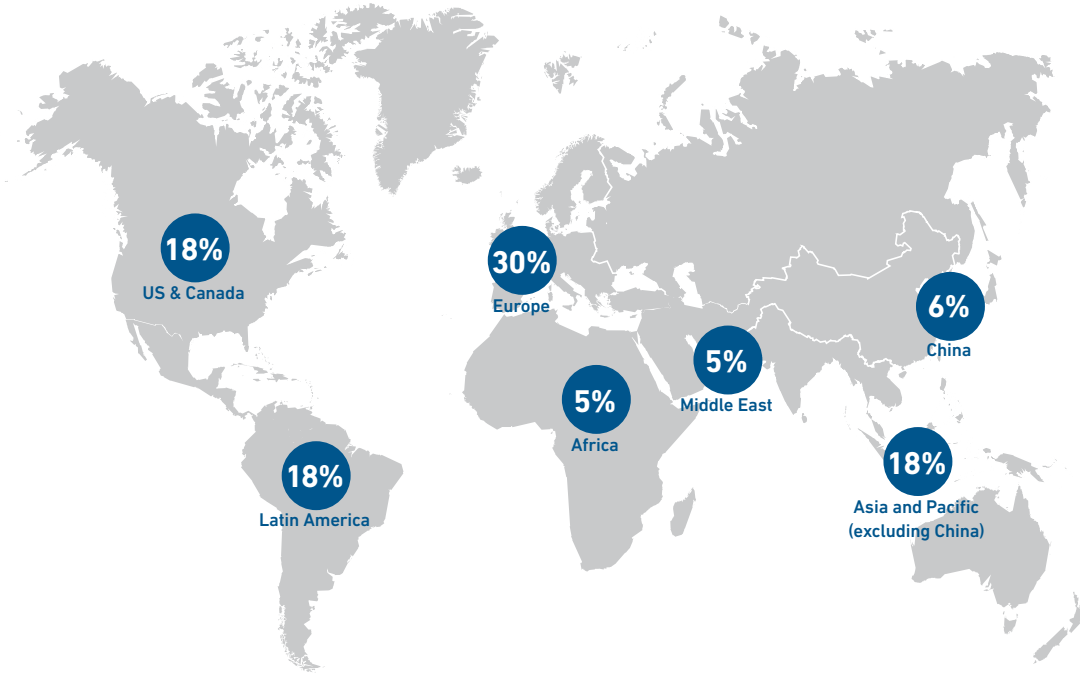|	2022	2023	2024
YES — Capital expenditure projects will be affected	65%	56%	52%
YES — General availability of IT equipment will be affected	60%	44%	40%
YES — Day-to-day operations will be affected	35%	25%	22%
NO (issues with the supply chain will not delay certain products or services)	7%	15%	20%

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Demographics: Uptime Institute Global Data Center Survey 2024

Company location (n=708)

- **18%** US & Canada
- **30%** Europe
- **6%** China
- **5%** Middle East
- **5%** Africa
- **18%** Latin America
- **18%** Asia and Pacific (excluding China)

Verticals (n=573)

- Design and engineering **41%**
- Data center equipment supplier **17%**
- IT **11%**
- Manufacturing **9%**
- Colocation / multi-tenant data centers **5%**
- Financial **4%**
- Telecommunications **3%**
- Utilities / energy **3%**
- Software and/or cloud services **2%**
- Other **5%**
  - **1%** Government
  - **1%** Healthcare / pharmaceutical
  - **1%** Education
  - **1%** Retail / wholesale / distribution
  - **1%** Media
  - **0%** Insurance
  - **0%** Transportation

Job description (n=575)

24% Senior executive (VP or C-level)	**18%** Design engineer	**3%** IT manager	**1%** IT operations staff
36% Consultant	**3%** Critical facilities manager	**1%** Critical facilities operations staff	**14%** Other

Author

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About Uptime Institute

Uptime Institute is the Global Digital Infrastructure Authority. Its Tier Standard is the IT industry's most trusted and adopted global standard for the proper design, construction, and operation of data centers – the backbone of the digital economy. For over 25 years, the company has served as the standard for data center reliability, sustainability, and efficiency, providing customers assurance that their digital infrastructure can perform at a level that is consistent with their business needs across a wide array of operating conditions.

With its data center Tier Standard & Certifications, Management & Operations reviews, broad range of related risk and performance assessments, and accredited educational curriculum completed by over 10,000 data center professionals, Uptime Institute has helped thousands of companies, in over 100 countries to optimize critical IT assets while managing costs, resources, and efficiency.

Uptime Institute is headquartered in New York, NY, with offices in Seattle, London, Sao Paulo, Dubai, Singapore, and Taipei. For more information, please visit **www.uptimeinstitute.com**

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