

hot paper lantern

# DATA CENTERS

WHO'S OWNING THE CONVERSATION STUDY

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TABLE OF CONTENTS

<b>OVERVIEW</b>	<b>PG 03</b>
<b>KEY INSIGHTS</b>	<b>PG 05</b>
<b>SUMMARY OF RECOMMENDATIONS</b>	<b>PG 23</b>
<b>CONTACT US</b>	<b>PG 24</b>

## OVERVIEW

# RESEARCH OVERVIEW

## WHO'S OWNING THE CONVERSATION?

Data centers might be the fastest growing and most important technology and energy sector in the world right now.

AI has created an enormous need for added data capacity that simply doesn't exist in the United States and in many other countries. Because of this, data center operators and a host of vendor organizations have both emerged and expanded in this market and are trying to build both their share of market and share of voice.

Yet, with so many opportunities for growth and challenges being voiced by the public and businesses, the noise has become deafening. It is increasingly difficult for these companies to create and own narratives in the market and carve out their unique identities.



## OVERVIEW

# OUR STUDY FOCUS

In the following study, Hot Paper Lantern, a brand, communications, and marketing firm that specializes in the data center market, conducted thorough research on over 35 companies, comprising three key verticals within this category:

- Data Center Operators
- Data Center Cooling Technology Vendors
- Data Center Managed Service Providers

Our intent was to uncover which companies are owning the conversation around key topics and their own unique selling proposition. We researched both traditional and social media coverage, and then analyzed share of voice, sentiment and overall focus on proactive/reactive intent in communications.

The following study provides key data insights, narratives, and recommendations on both opportunities and challenges in the market.





**KEY**

**INSIGHTS**

# INSIGHT #1: A CAUTIONARY TALE:

## WHAT HAPPENS WHEN THE PUBLIC TELLS YOUR STORY FOR YOU

### HIGH VOLUME DOESN'T GUARANTEE A POSITIVE NARRATIVE:

A high volume of coverage does not necessarily equate to a positive public perception. Some data centers with extensive media presence show lower positive sentiment rates, underscoring that passive storytelling leaves room for narratives to be shaped by critics and sensationalist angles. This misalignment can have long-term repercussions on reputation, customer acquisition, and stakeholder trust.



**33.4% of all coverage** came from social media.



Two companies account for **57.4% of all social media coverage**.



The same two companies account for **83.6% of the overall negative sentiment**.



**9.7% of social media coverage** carries negative sentiment.

KEY INSIGHTS

# INSIGHT #1 OVERVIEW OF DATA:

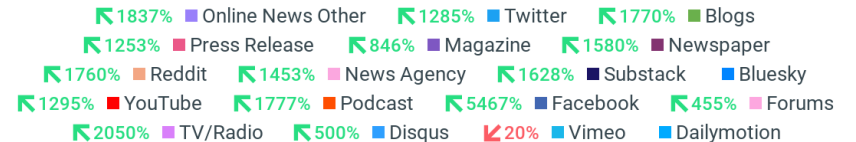
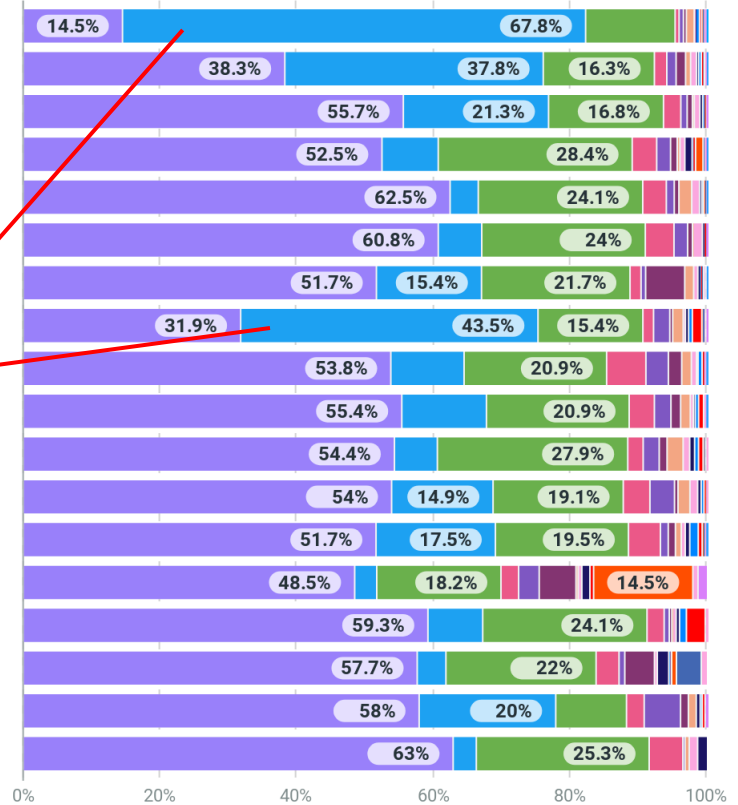
33.4% of all coverage came from social media

Two companies account for 57.4% of all social media coverage

The same two companies account for 83.6% of the overall negative sentiment

9.7% of social media coverage carries negative sentiment

81.6K Results



# INSIGHT #1 - A CAUTIONARY TALE: WHAT HAPPENS WHEN THE PUBLIC TELLS YOUR STORY FOR YOU

## OVERVIEW OF CHALLENGES:

### Uncontrolled Narratives:

With nearly 10% of social media interactions carrying negative sentiment, organizations risk their intended message being overshadowed by criticism and negative narratives if left unmonitored.

### Concentration of Negative Impact:

A small group of players are driving a disproportionate share of the negative sentiment. When a few voices dominate the conversation, it becomes difficult for others to steer the narrative in their favor.

### Long-Term Reputational Risks:

When external voices shape your story, negative sentiment can accumulate over time, potentially leading to sustained reputational challenges and undermining internal efforts to communicate value.

### Need for Proactive Communication:

The challenge is to reclaim control of the narrative through targeted messaging and strategic engagement, ensuring that high exposure is matched with a positive, consistent brand story.

## RECOMMENDATIONS:

### Diversify Your Media Channels:

Balance heavy social media exposure with integrated communications across owned and earned channels.

### Continuously Monitor and Optimize:

Regularly track sentiment and engagement metrics to adjust your approach in real time. Ongoing analysis will ensure that high media volume translates into a more positive narrative in the long term.

### Develop a Crisis Communications Playbook:

Prepare targeted protocols for rapid response when negative sentiment spikes or crisis occurs. A well-rehearsed plan can help steer the narrative before critics gain further traction.



# INSIGHT #2: DAVID VS. GOLIATH

## SMALL COMPANIES ARE PUNCHING ABOVE THEIR WEIGHT CLASS

### SMALLER DATA CENTERS ARE OUTPACING GIANTS IN MEDIA REACH AND ENGAGEMENT:

Despite having fewer overall pieces of coverage and operating on tighter budgets, some mid-tier data centers turn limited exposure into outsized influence. Their agile strategies, healthy media mix, and strategic messaging enable them to punch well above their revenue weight, challenging industry giants and owning their conversation.



Based on revenue, the bottom half of companies **average 5,740 pieces of coverage per \$100M revenue** — nearly 7× more than large firms.



The same companies achieve about **17,500 engagements per \$100M revenue** — over 15× that of top-tier peers.



These companies generate about **3.05 engagements per piece of coverage** — over double that of their larger competitors.

*\*Excluding outliers*

KEY INSIGHTS

# INSIGHT #2 OVERVIEW OF DATA:

Based on revenue, the bottom half of companies average 5,740 pieces of coverage per \$100M revenue – nearly 7x more than large firms.

The same companies achieve about 17,500 engagements per \$100M revenue – over 15x that of top-tier peers.

These companies generate about 3.05 engagements per piece of coverage – over double that of their larger competitors.

Results	Authors	Engagement	Net Sentiment	Potential Reach
15.1K 📈 994.7%	8.3K 📈 962.4%	27K 📈 2.5K%	98.16% 📈 2.3%	8.7B 📈 410.6%
6.7K 📈 2K%	3.1K 📈 1.2K%	7.6K 📈 533.8%	96.26% 📈 2.3%	5.9B 📈 344.6%
19.4K 📈 1.2K%	8.4K 📈 1.2K%	105.8K 📈 2.3K%	60.21% 📈 21.3%	3.8B 📈 1.1K%
4.9K 📈 10.3K%	2.1K 📈 5.2K%	7.4K 📈 13.6K%	98.54% 📈 1.5%	3.3B 📈 4.9K%
4K 📈 3.1K%	2.8K 📈 2.4K%	9K 📈 926%	86.62% 📈 31.5%	2.3B 📈 1.6K%
2.1K 📈 1.1K%	1K 📈 520.2%	4.5K 📈 10.5K%	95.58% 📈 3%	2.2B 📈 964.7%
2.6K 📈 986.8%	1.4K 📈 658.2%	1.9K 📈 1K%	97.66% 📈 3.7%	2.1B 📈 454.4%
695 📈 1.2K%	361 📈 993.9%	1.2K 📈 2.8K%	85.89% 📈 14.1%	2B 📈 2.8K%
6K 📈 4.5K%	1.8K 📈 1.4K%	3.8K 📈 3.2K%	97.89% 📈 12.4%	1.8B 📈 1.5K%
6.8K 📈 1.5K%	2.8K 📈 597.3%	10.9K 📈 744.9%	97.82% 📈 1.7%	1.8B 📈 1.9K%
5.2K 📈 3.6K%	1.5K 📈 1.2K%	4.9K 📈 6K%	99.47% 📈 2.9%	1.7B 📈 313.4%
714 📈 6.4K%	493 📈 4.4K%	591 📈 1.3K%	98.35% 📈 1.6%	1.5B 📈 1.9K%
2.5K 📈 2.1K%	1.2K 📈 1.2K%	2.4K 📈 1.3K%	96.42% 📈 1.7%	1.3B 📈 1.4K%
1.9K 📈 4.4K%	923 📈 3K%	1.6K 📈 20.1K%	96.91% 📈 3.1%	1B 📈 17.2K%
929 📈 3.3K%	671 📈 3.4K%	3.7K 📈 6.7K%	87.50% 📈 5%	883.1M 📈 3.1K%
1K 📈 1.3K%	734 📈 1.1K%	3.1K 📈 2K%	98.98% 📈 1%	870.7M 📈 4.1K%
798 📈 2.8K%	479 📈 1.8K%	919 📈 143.8%	96.77% 📈 3.2%	625.6M 📈 1.5K%
324 📈 980%	236 📈 742.9%	50 📈 4.9K%	100.00% 📈 0%	244.2M 📈 2K%

## KEY MESSAGING THEMES

- Digital Transformation
- Electrical Infrastructure
- Renewable Energy
- Industry Trends
- Annual Growth

# INSIGHT #2 - DAVID VS. GOLIATH

## SMALL COMPANIES ARE PUNCHING ABOVE THEIR WEIGHT CLASS

### OVERVIEW OF CHALLENGES:

#### Large Firms | Diluted Messaging:

A high volume of coverage can lead to mixed narratives, making it challenging to maintain a consistent, positive message.

#### Large Firms | Engagement Shortfall:

Overall engagement rates remain significantly lower compared to smaller firms, suggesting challenges in effectively communicating with audiences relative to their size.

#### Small Firms | Limited Absolute Exposure:

Although they generate nearly 7x more coverage and 15x more engagements per \$100M revenue, small firms' overall media footprint remains low, which may restrict broader market awareness and future growth.

#### Small Firms | Reputational Vulnerability:

With limited media presence, even isolated negative interactions can disproportionately impact their narrative and stakeholder trust.

## RECOMMENDATIONS

#### Centralize Your Messaging:

Develop unified content guidelines and coordinated campaigns to streamline communication across channels, reducing mixed narratives and reinforcing a consistent, positive brand story.

#### Leveraging Real Data Points Will Provide Real Credibility:

Incorporate real data points and personal industry insights into all communications to bolster credibility and position your company as an industry leader.

#### Strategic Relationships Can Drive Positive Results:

Identify the influential individuals driving the industry conversation and position your narrative to meet the needs, style, and content type of their audience.

# INSIGHT #3: WHY JUST 20% OF MID-TIER DATA CENTERS WIN THE MEDIA POSITIVITY GAME

## A SELECT FEW LEVERAGE DIGITAL CHANNELS TO DRIVE POSITIVE MOMENTUM

While most mid-tier data centers grapple with an average narrative, only a select few have cracked the code to win the media positivity game. These frontrunners harness digital channels to amplify their message, transforming what is typically a mixed media landscape into a compelling, positive narrative that drives growth and demonstrates positive company momentum.



Across mid-tier data centers, the **average positive sentiment is approximately 49%.**



The top four performing companies **average 62% positive sentiment, outpacing their peers by nearly 15%.**



For the top-performing company, **nearly 86% of its positive coverage comes from digital channels—outpacing its peers by nearly 25%.**

KEY INSIGHT

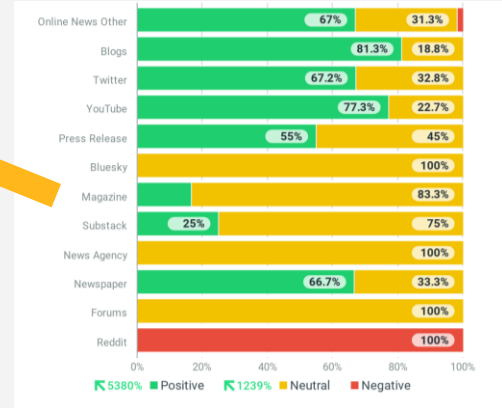
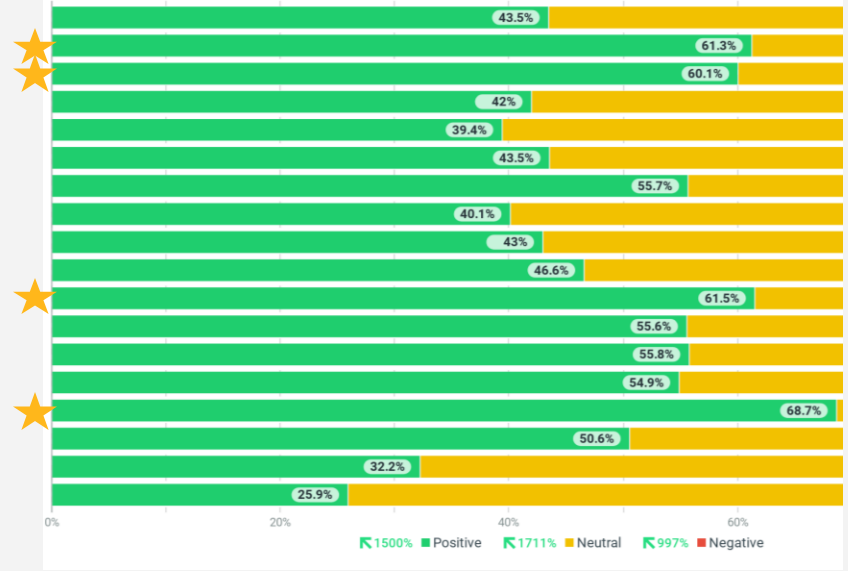
# INSIGHT #3 OVERVIEW OF DATA

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The top four performing companies average 62% positive sentiment, outpacing their peers by nearly 15%.

For the top-performing company, nearly 86% of its positive coverage comes from digital channels, specifically Online News and Blogs.

## Positive Sentiment Rates (%)



# INSIGHT #3 - WHY JUST 20% OF MID-TIER DATA CENTERS WIN THE MEDIA POSITIVITY GAME

## OVERVIEW OF CHALLENGES:

### **Competitive Narrative Overload:**

In a crowded media landscape, even well-crafted positive messages risk being diluted by the sheer volume of competing narratives.

### **Innovation Deficit:**

Fast-evolving digital trends demand continuous adaptation, but resource and agility constraints often hinder mid-tier data centers from deploying the advanced engagement tactics needed to drive positive sentiment.

### **Digital Engagement Gap:**

While digital channels are proven drivers of positive sentiment, many mid-tier data centers struggle to fully harness these platforms due to strategic and operational constraints, limiting their narrative impact.

## RECOMMENDATIONS

### **Tailor Your Digital Content to Meet Your Audience:**

Craft narratives specifically designed for each digital platform. There is no one-size-fits-all approach when navigating multi-channel conversations.

### **Interactive Engagement With Friendly Voices:**

Develop digital experiences that invite audience participation, turning passive viewers into active advocates for your brand.

### **Strategic Relationships Can Drive Positive Results:**

Identify the influential individuals driving the industry conversation and position your narrative to meet the needs, style, and content type of their audience.

### **Don't Be Afraid to Update Your Strategy:**

Experiment with emerging digital formats and creative storytelling techniques to keep your narrative fresh and consistently positive.

# INSIGHT #4: THE MOST OVERLOOKED DATA CENTER STORY NO ONE IS TELLING

## HOW SILENCE ON COOLING LEAVES YOUR BRAND OUT IN THE COLD

In an increasingly competitive market, cooling is a surprisingly untapped storytelling goldmine. Those who tackle it head-on before their competitors will own the conversation, generate more leads, and distinguish themselves from the rest.



Nearly **90% of brands generate less than 500 combined pieces of coverage** across key platforms, leaving the digital space to a select few.



Excluding the outlier, the active **40% of cooling providers capture 85% of total digital coverage**, leaving the remaining 60% virtually silent in the conversation.



Just **two of the cooling providers analyzed earned more than 50% positive sentiment**, largely due to lack of volume.

KEY INSIGHTS

# INSIGHT #4 OVERVIEW OF DATA

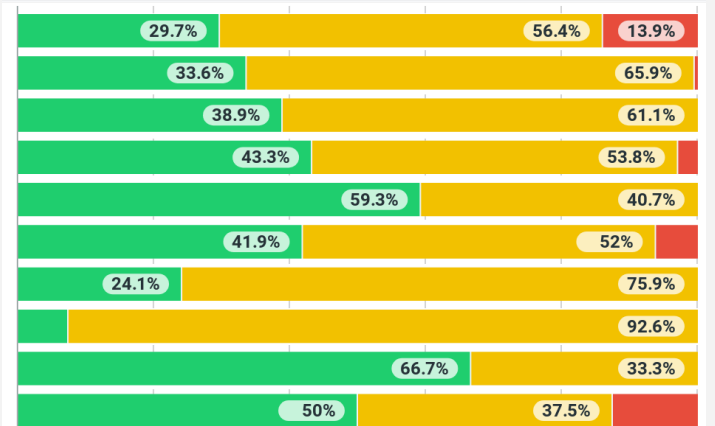
Nearly 90% of brands generate less than 500 pieces of coverage across key platforms, leaving the digital space to a select few.

Excluding the outlier, the active 40% of cooling providers capture 85% of total digital coverage, leaving the remaining 60% virtually silent in the conversation.

Just two of the cooling providers analyzed earned more than 50% positive sentiment, largely due to lack of volume.

## COMPANY COVERAGE

	Results	Authors	Engagement
	24.3K ↑ 1.1K%	11.7K ↑ 822.8%	80.6K ↑ 620%
★	406 ↑ 666%	274 ↑ 568.3%	164 ↑ 1.1K%
★	446 ↑ 829.2%	173 ↑ 565.4%	17.5K ↑ 7K%
★	312 ↑ 1.1K%	162 ↑ 1.1K%	47 ↔
★	248 ↑ 427.7%	148 ↑ 289.5%	9 ↑ 800%
	8 ↓	6 ↓	9 ↓
	179 ↑ 17.8K%	127 ↑ 12.6K%	10 ↔
	27 ↑ 575%	8 ↑ 100%	67 ↑ 1.6K%
	29 ↓	11 ↓	0 ↓
	15 ↓	14 ↓	0 ↓





# INSIGHT #4 - HOW SILENCE ON COOLING INNOVATIONS LEAVES YOUR BRAND OUT IN THE COLD

## OVERVIEW OF CHALLENGES:

### **Digital Void:**

Many mid-tier cooling providers are barely present on key digital channels, leaving their innovative stories untold and their market potential unfulfilled.

### **Underleveraged Narrative:**

Despite the powerful storytelling opportunity that the cooling industry offers, many providers fail to articulate their technological advancements, growth milestones, and key differentiators, missing a chance to lead in the market.

### **Narrative Control Risk:**

If these under-performing organizations remain on the sidelines, even a small uptick in negative publicity could dramatically skew public perception.

## RECOMMENDATIONS

### **Expand Your Digital Footprint:**

Invest in targeted campaigns across social media, online news, and blogs to ensure your cooling innovations aren't lost in the digital void.

### **Leverage Executives as Industry Experts:**

The thought leaders at your company are equipped with years of experience, have their finger on the pulse of the industry, and are full of potential content opportunities. Positioning your leadership team as trusted experts could unlock new avenues for shareable content that differentiates your brand in a competitive market.

### **Don't Overlook Industry Trades & Local Media:**

Industry trade publications and local media outlets often get overlooked when building out an earned media strategy. However, these platforms are typically friendlier and more accessible than tier-one channels, enabling you to build trust, own your narrative, and amplify your message effectively.

# INSIGHT #5 - NETWORK PROVIDERS AREN'T SPEAKING TO THE DATA CENTER MARKET

## NETWORK PROVIDERS ARE FAILING TO CONNECT THEIR BRAND TO DATA CENTER OPERATORS

Although network providers are central to every data center's strategic operations, mid-tier players have yet to effectively engage the data center audience. Rather than tailoring their messaging to the unique challenges and opportunities within data centers, many focus on product-specific announcements, generic technology innovations, and broad solutions that span multiple industries.



**The top 40%** of network providers generate **95%** of overall category digital results.



Positive discussions are scarce for network providers, with the **average net sentiment hovering at just 32.5%**.



Content published in traditional media outlets highlighting mid-tier network providers primarily discussed two topics: **large-scale network issues or event participation**.

# INSIGHT #5 OVERVIEW OF DATA

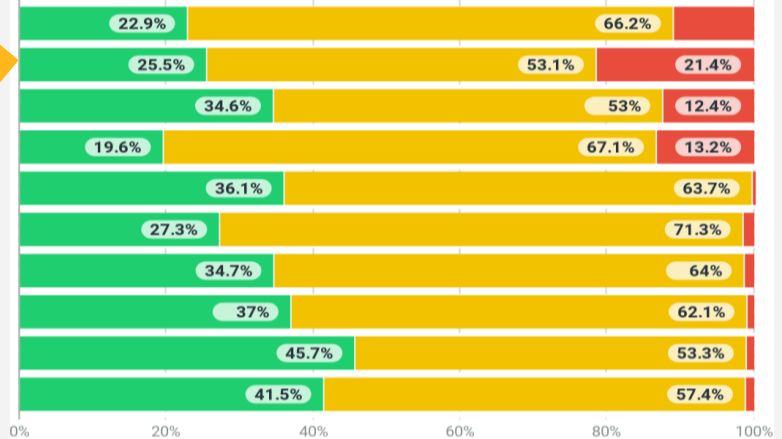
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Content published in traditional media outlets highlighting mid-tier network providers primarily discussed two topics: large-scale network issues or event participation.

## Industry Overview

Results	Authors	Engagement	Net Sentiment
202.8K ↑ 1.3K%	77.8K ↑ 1.1K%	1.4M ↑ 679%	35.46% ↓ 26.7%
41.2K ↑ 1.1K%	19.3K ↑ 843.8%	263.5K ↑ 1.4K%	47.35% ↑ 28.4%
40.4K ↑ 968.2%	16.3K ↑ 645.9%	140.4K ↑ 1.3K%	19.45% ↓ 44.3%
101.9K ↑ 758.4%	31.2K ↑ 545.3%	1.7M ↑ 2.1K%	8.76% ↑ 117.6%
7.5K ↑ 847.9%	2.5K ↑ 488.5%	778 ↑ 784.1%	98.97% ↑ 6.7%
3.2K ↑ 1.2K%	1K ↑ 607.7%	830 ↑ 2K%	90.06% ↓
2.9K ↑ 1.3K%	1.3K ↑ 879.1%	2K ↑ 1.9K%	92.93% ↑ 1.5%
2.5K ↑ 1.2K%	1.1K ↑ 824.1%	678 ↑ 697.6%	95.24% ↑ 1.2%
1.9K ↑ 2.1K%	955 ↑ 1.2K%	186 ↑ 2K%	95.74% ↓ 4.3%
721 ↑ 1.8K%	371 ↑ 1.4K%	70 ↑ 268.4%	94.79% ↓ 5.2%



# INSIGHT #5 - NETWORK PROVIDERS AREN'T SPEAKING TO THE DATA CENTER MARKET

## OVERVIEW OF CHALLENGES:

### **Messaging Disconnect:**

Mid-tier network providers are stuck in generic tech narratives, failing to speak directly to data center challenges. This disconnect prevents them from addressing the unique opportunities and operational needs that data centers require.

### **Narrow Media Focus:**

Traditional coverage fixates on broad network issues and events, sidelining the strategic role providers play in data center operations. Consequently, their contributions to enhancing data center efficiency remain underreported and undervalued.

### **Reputational Vulnerability:**

Scarce positive sentiment undermines credibility and leaves brands exposed to negative perceptions. Without a consistent, positive narrative, even minor setbacks can disproportionately erode trust among key stakeholders and potential clients.

## RECOMMENDATIONS

### **Pivot Your Narrative to Data Center Growth:**

Align your messaging with the vast growth opportunities in the data center market. Rather than focusing solely on traditional network applications, highlight how your solutions drive data center efficiency and scalability.

### **Showcase Impact Through Success Stories:**

Develop case studies and customer testimonials that illustrate the tangible benefits your technology brings to data centers. This real-world evidence can resonate with decision-makers looking for solutions to power their operations.

### **Tailor Content for Strategic Platforms:**

Refine your digital strategy to target platforms frequented by data center operators. Industry-specific media outlets can ensure your narrative reaches the right audience with the right context.

# NEXT

# STEPS

# SUMMARY OF RECOMMENDATIONS

## DATA CENTERS

- **Centralize Your Messaging:** Develop unified content, messaging, and brand guidelines to streamline communication across channels, reducing mixed narratives and reinforcing a consistent, positive brand story.
- **Leveraging Real Data Points Will Provide Real Credibility:** Incorporate real data points and personal industry insights into all communications to bolster credibility and position your company as an industry leader.
- **Strategic Relationships Can Drive Positive Results:** Identify the influential individuals driving the industry conversation and position your narrative to meet the needs, style, and content type of their audience.

## COOLING SYSTEMS

- **Expand Your Digital Footprint:** Invest in targeted campaigns across social media, online news, and blogs to ensure your cooling innovations aren't lost in the digital void.
- **Leverage Executives as Industry Experts:** The thought leaders at your company are equipped with years of experience, have their finger on the pulse of the industry, and are full of potential content opportunities. Positioning your leadership team as trusted experts could unlock new avenues for growth.
- **Don't Overlook Industry Trades & Local Media:** Industry trade publications and local media outlets often get overlooked when building out an earned media strategy. However, these platforms are typically friendlier and more accessible than tier-one channels, enabling you to build trust, own your narrative, and amplify your message effectively.

## NETWORK PROVIDERS

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