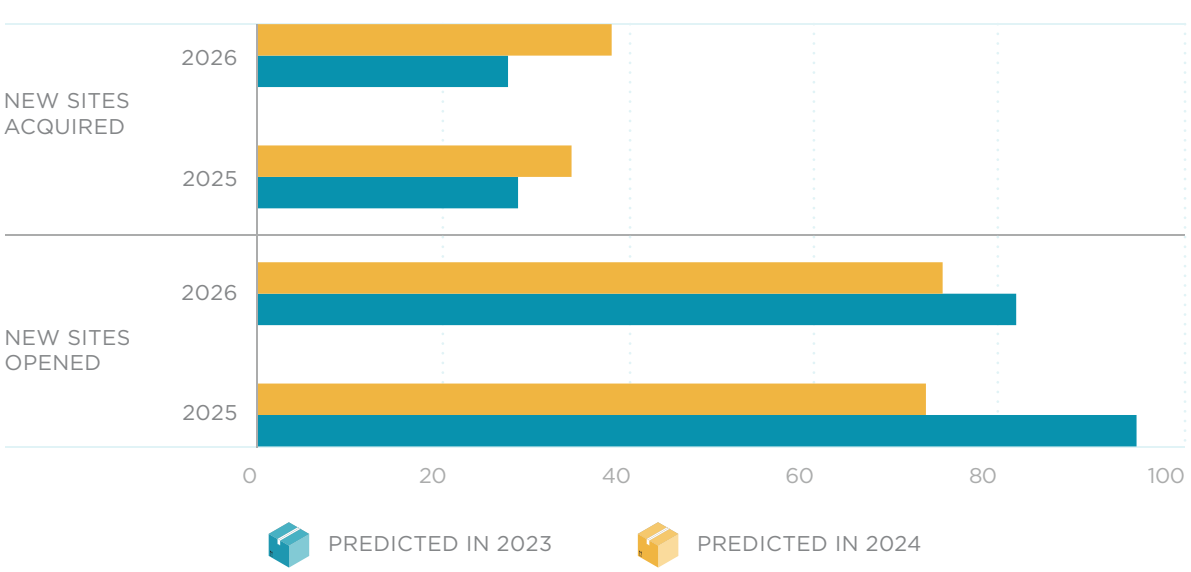


PREDICTED GROWTH

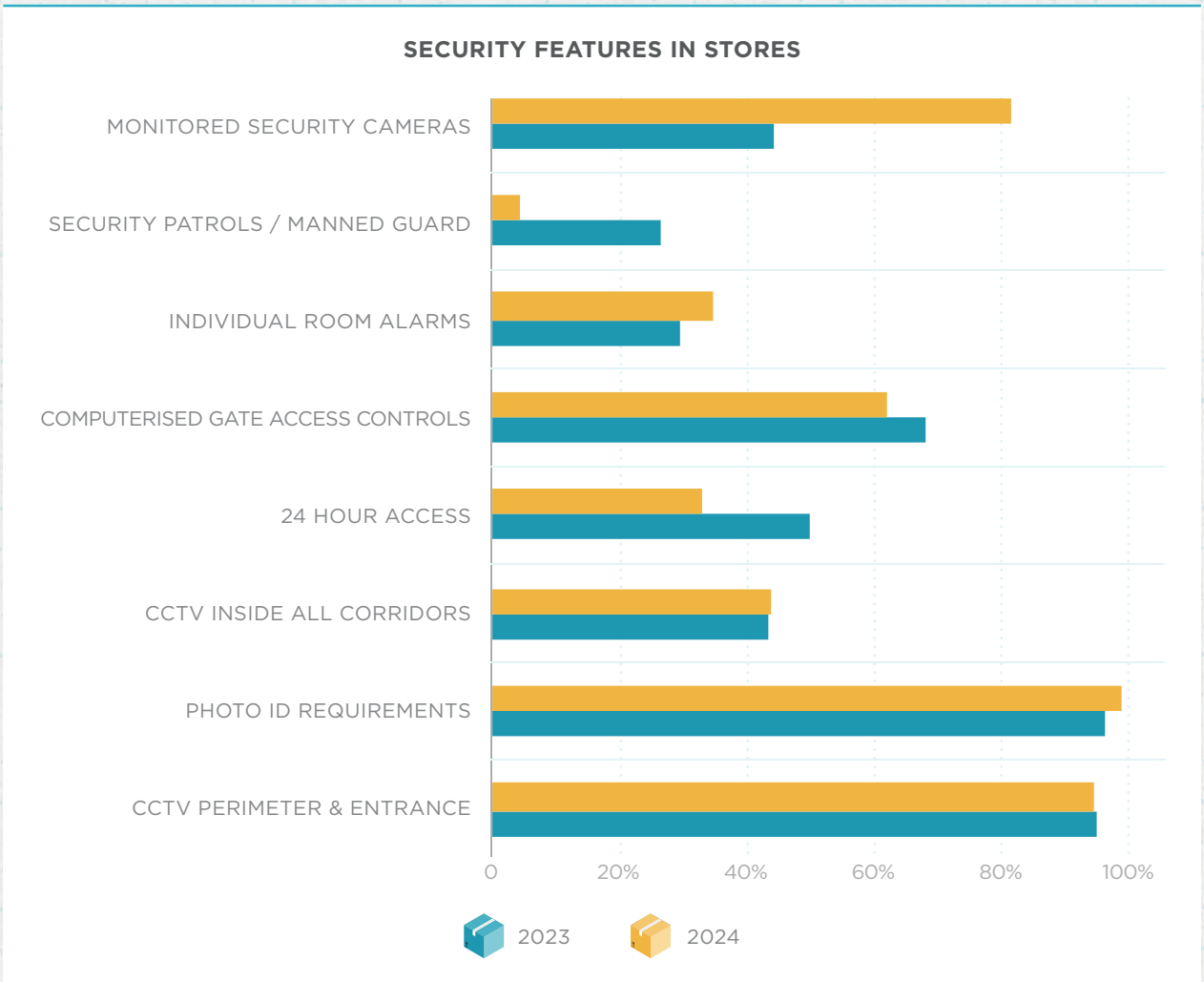


Store Features

SECURITY FEATURES

There has been an increase in criminal activity within the industry and operators are turning to technology to improve their security with the aim of having more proactive security measures to identify suspicious people and criminal activity before it occurs.

Hence the move towards monitored security cameras rather than security patrols. Many of the security monitoring services are using AI and other algorithms to identify suspicious activity in stores.

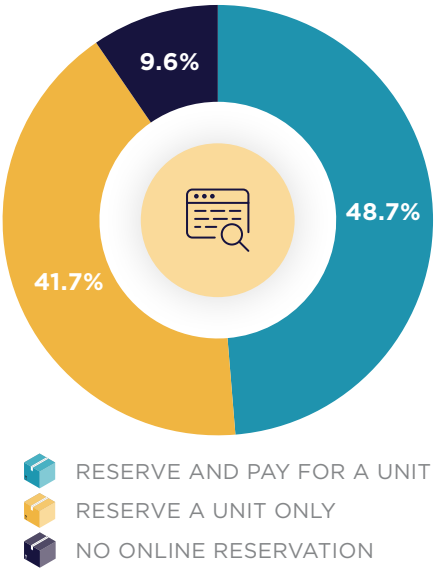


ONLINE BOOKINGS

The number of businesses providing online bookings continues to grow, with 90% offering the service, up from 82% last year. There has been a reluctance from some operators to provide pricing online or provide online bookings. This is primarily due to concerns that it commoditises the product and encourages customers to shop purely on price.

However, customer expectations are that pricing will be online and a growing number of customers wish to complete the entire booking process online. The challenge for operators is to create an exceptional online journey for customers that replicates the level of service that the industry has traditionally provided new customers through phone or in person contact.

CAN CUSTOMERS RESERVE A UNIT THROUGH YOUR WEBSITE?

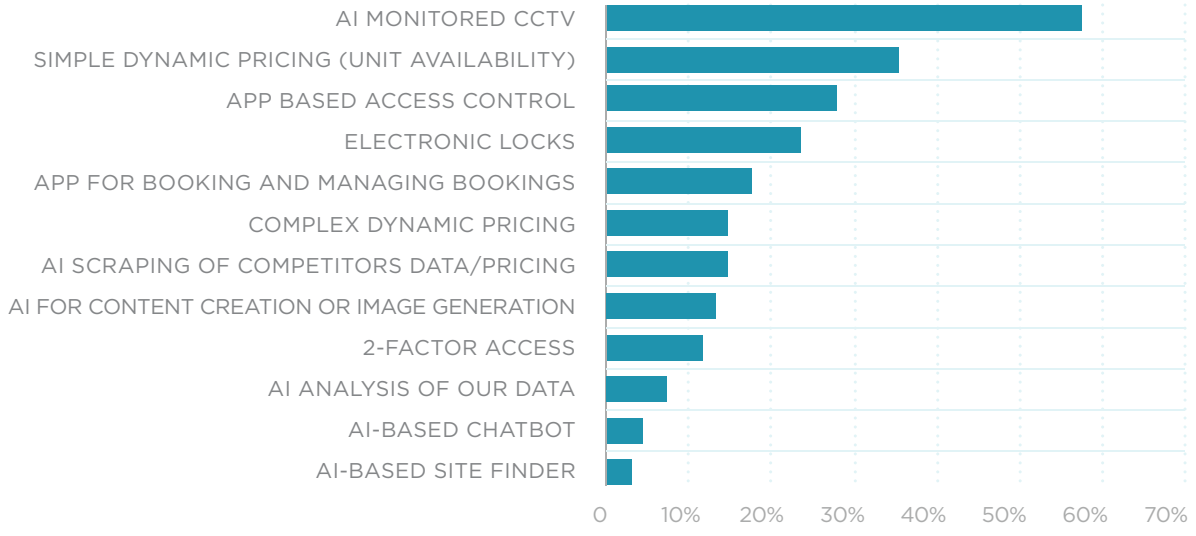


TECHNOLOGY ADOPTION

Operators are investing in technology and exploring adoption of AI. As mentioned earlier, many of the third party, security monitoring companies are using AI to identify suspicious activity.

Dynamic pricing models are also becoming more common as operators look at maximising revenue from existing customers. This was a new question for this year's survey and it will be interesting to track technology adoption over time.

TECHNOLOGY USED IN AT LEAST ONE OF YOUR STORES

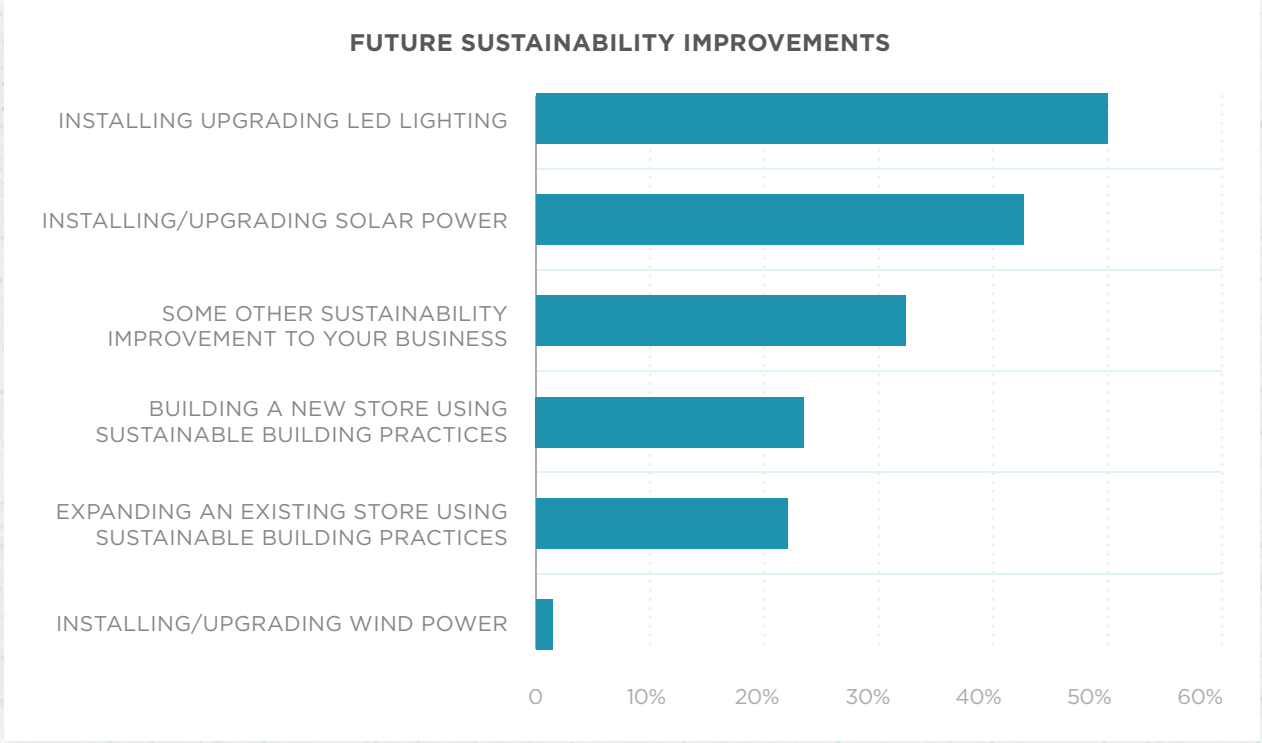




SUSTAINABILITY ADOPTION

When asked which sustainability improvements they plan on implementing in the next 2 years, half of operators are planning on installing LED lighting. The number of all operators considering solar has risen significantly in the past 3 years. This could be due to rising energy costs making such installations more economical, or also pressures from investors and purchasers for more environmentally sustainable assets.

With large roof space and minimal energy, most self storage stores lend themselves well to solar power generation. Some operators are now entering into power share agreements with nearby businesses where they sell solar power directly to neighbouring sites that have higher power demands.



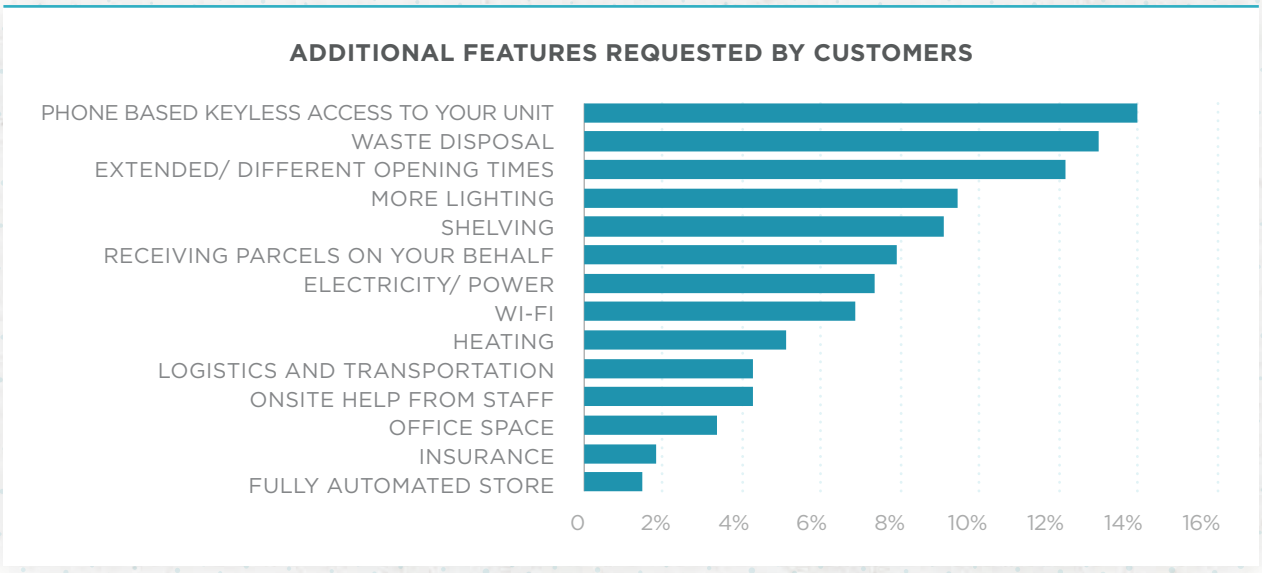
ADDITIONAL FEATURES REQUESTED BY CUSTOMERS

When customers were asked what additional features they would like to see in a self storage store, the most requested feature was phone based keyless access to the unit, up from 10% in 2023. Keyless access to units is becoming more prevalent in the industry, particularly in new independent stores.

The technology is also becoming more common in hotels and other holiday accommodation which exposes more people to the idea of opening a door with your phone.

What the survey does not show is if customers are willing to pay more for this service, as there is a significant cost to operators to install such technology, especially when retrofitting existing stores.

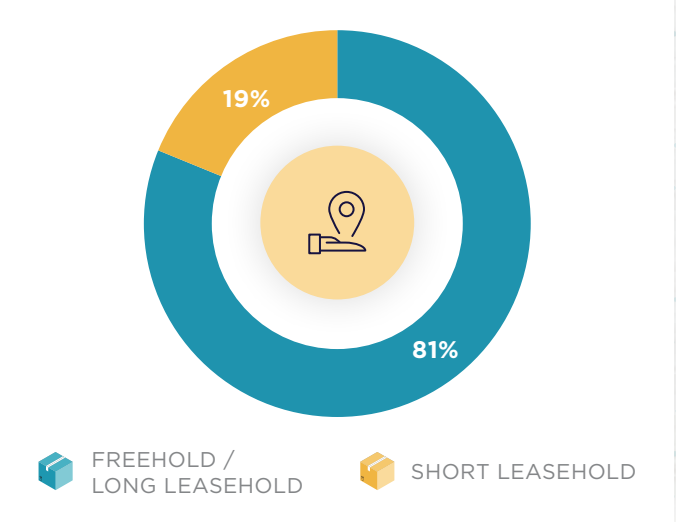
Waste disposal and extended operating hours are often challenging for operators to balance at the request of some customers with the overall needs of others. Late night access can provide more opportunities for criminal activity in stores, hence many operators are reducing after hours access or charging for it.



PROPERTY OWNERSHIP

There has always been a preference for freehold properties where operators can combine property asset values and growth with the operational revenue from the self storage business.

Despite more new entrants using leasehold options as a lower capital means to enter the market, especially with smaller external storage sites, the mix of freehold and leasehold has stayed at around 80%/20% for the last 10 years.



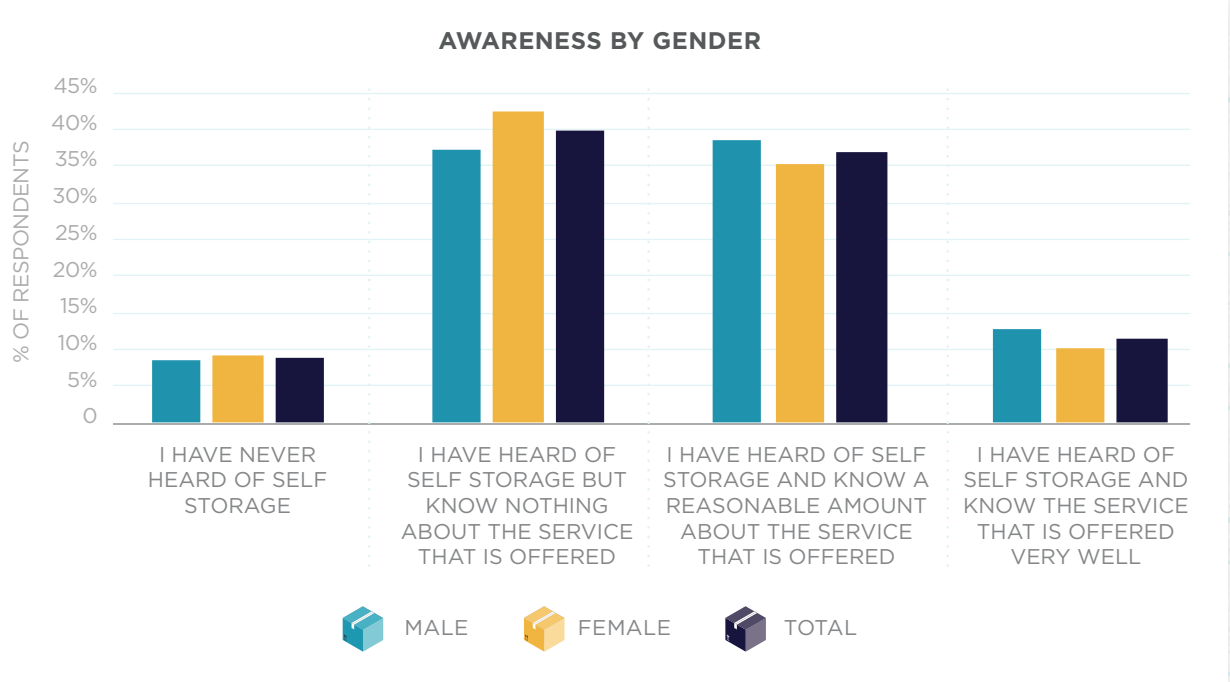
Awareness & Intention To Use

There has been a marginal drop in overall awareness, and while some individuals clearly have a solid grasp of what self storage entails, a sizeable portion still lacks understanding.

Ongoing efforts to educate the public would help drive growth, potentially targeting the 40% who have heard of self storage but don't know what it offers.

Overall, there is a relatively balanced awareness between genders, with some variations in knowledge levels. A slightly higher proportion of women (42%) than men (37%) have heard of self storage but know nothing about the services offered.

Conversely, more men (38%) than women (35%) report having reasonable knowledge and an even higher proportion of men claim to know the services very well compared to women. This may suggest men are slightly more familiar with self storage potentially due to differences in exposure, usage, or interest in storage related services.





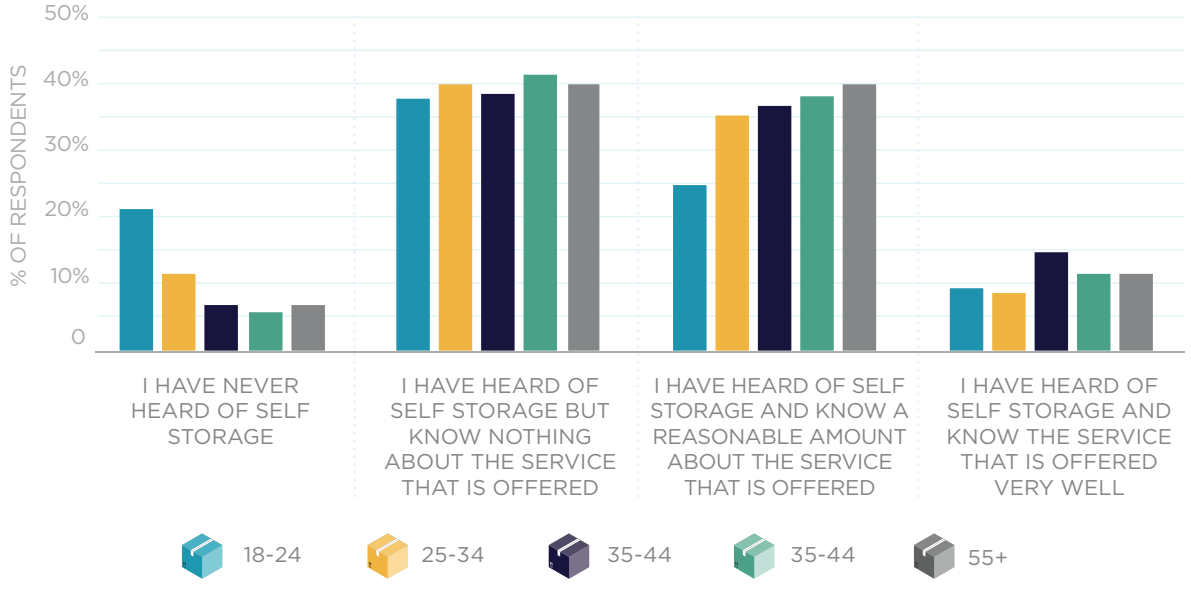
Younger individuals aged 18-24 (21%) have the least awareness of self storage. Many will be students, young professionals, or are living at home and simply don't own a lot of belongings. They may live in temporary accommodation (university housing, shared flats), prefer to travel light rather than accumulate belongings, and are likely to have limited disposable income.

Without a need for self storage, they are less likely to be familiar with the concept. Awareness improves significantly in older age groups, with only 6-7% of those aged 35+ being unaware. For those who have heard of self storage but know nothing about it, awareness is relatively even across all age groups.

However, older individuals (aged 35+) tend to have a better understanding with the 55+ age group (40%) having the highest knowledge due to their life experiences of situations that require storage, including home ownership, accumulated belongings, downsizing, moving or relocating (possibly to retirement homes), managing inheritances or family possessions which have made it a relevant, familiar, and often necessary solution.

Only a small percentage (9-15%) of all age groups claim to know self storage very well and this is likely to be largely made up of people who have used it at some point.

AWARENESS BY AGE

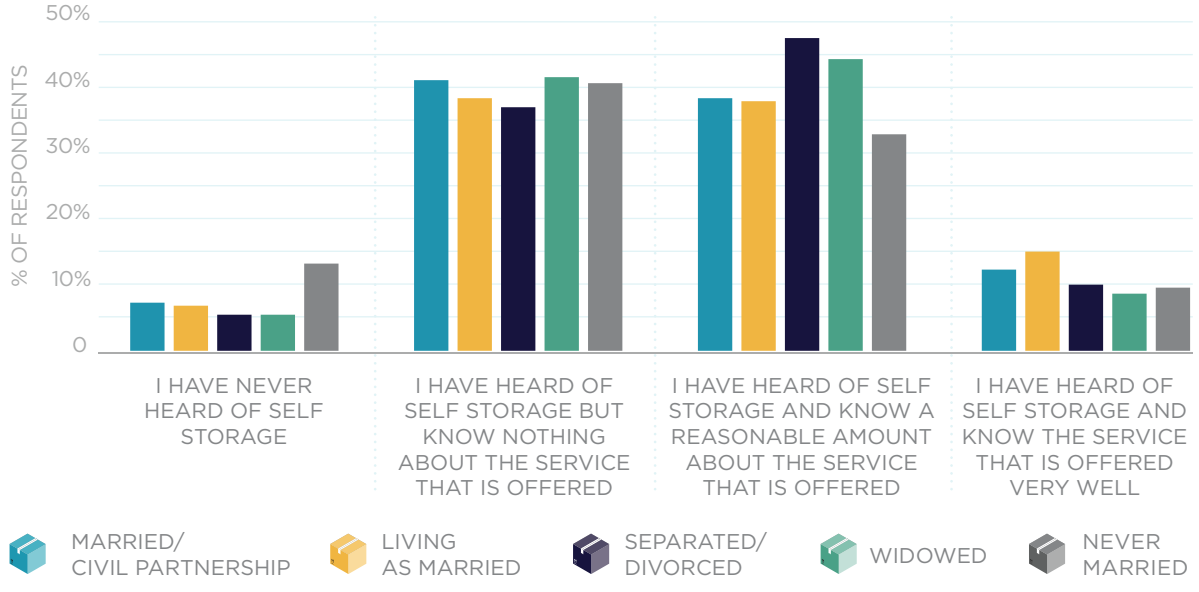




People who have never married have the lowest awareness compared to separated/ divorced and widowed individuals who have the highest knowledge level as these life transitions disrupt living situations often resulting in moving home (downsizing or relocating), splitting possessions during a divorce /separation or clearing out a deceased partner's belongings after widowhood.

These scenarios create an immediate, personal need for temporary or long-term storage solutions. There is a relatively consistent picture (around 40% for most groups) who have heard of self storage but know nothing about the service. Separated/ divorced individuals (47%) and widowed individuals (44%) claim to know a reasonable amount but those knowing the service well are generally low across all groups.

AWARENESS BY MARITAL STATUS

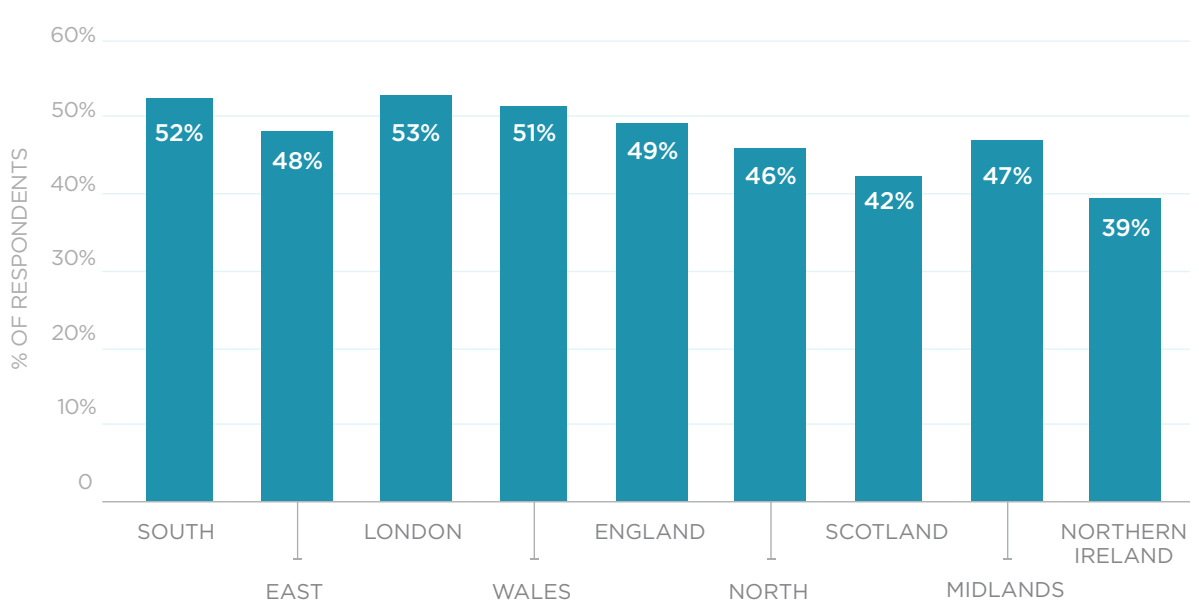




Awareness of self storage varies significantly across regions. The East and Midlands have high basic awareness but a lower deeper understanding. London leads with the highest awareness levels of 53% but also has the largest concentration of stores – the higher population density and space constraints result in a greater need for storage solutions.

Self storage is often a temporary or occasional need. Those who know the service well are more likely to use it again and consider it for longer-term use. Unsurprisingly, moving home and renovations create the highest consideration for storage. Life events are key triggers for storage use; however, data also suggests that broader lifestyle needs such as general decluttering and seasonal storage (e.g., sports equipment, holiday decorations) are factors in people's use of self storage.

GOOD LEVEL OF AWARENESS BY REGION



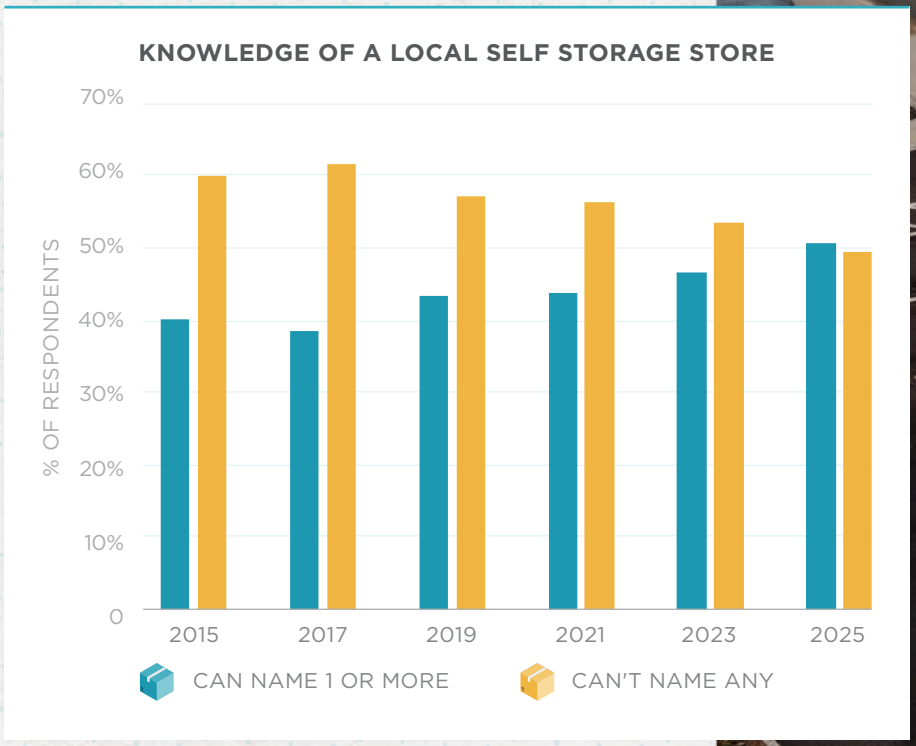
KNOWLEDGE OF A LOCAL STORE

Product awareness is on the rise but considering almost everyone surveyed would have at least one self storage business in their local area, there is still a long way to go to get solid awareness. More people can name multiple brands, suggesting competition is increasing, and differentiation becomes more critical.

Awareness of 2 or more businesses rose to 16% in 2025 and those aware of 3 or more has steadily grown, now at 7% for 3 and 1-2% for 4+ indicating a more competitive and visible market. It should be considered that people with no perceived need for self storage are less likely to be aware of stores in their area as they would not be looking for them, similarly, people without pets are unlikely to be aware of their local vets.

Many self storage stores are in high-exposure locations with bright colours and signage to try and increase awareness in their local communities.






sure
store
Storage
Home & Business
sure
store

UNDERSTANDING

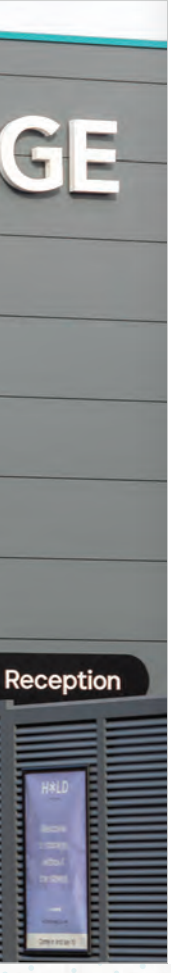
While people may be aware of self storage, asking them to describe the key elements of the services shows a lack of understanding of what self storage really is. People who use self storage obviously tend to have a better understanding of the service, but there is still a need for education even among actual users. 44% of users perceive self storage buildings as secure and understand that access is private and restricted to them only and they are also more familiar with the flexibility of contracts.

In contrast, those who have only considered using self storage are less aware of these benefits. While most people recognise that self storage offers a range of unit sizes, this understanding is noticeably lower among the "considering" group.

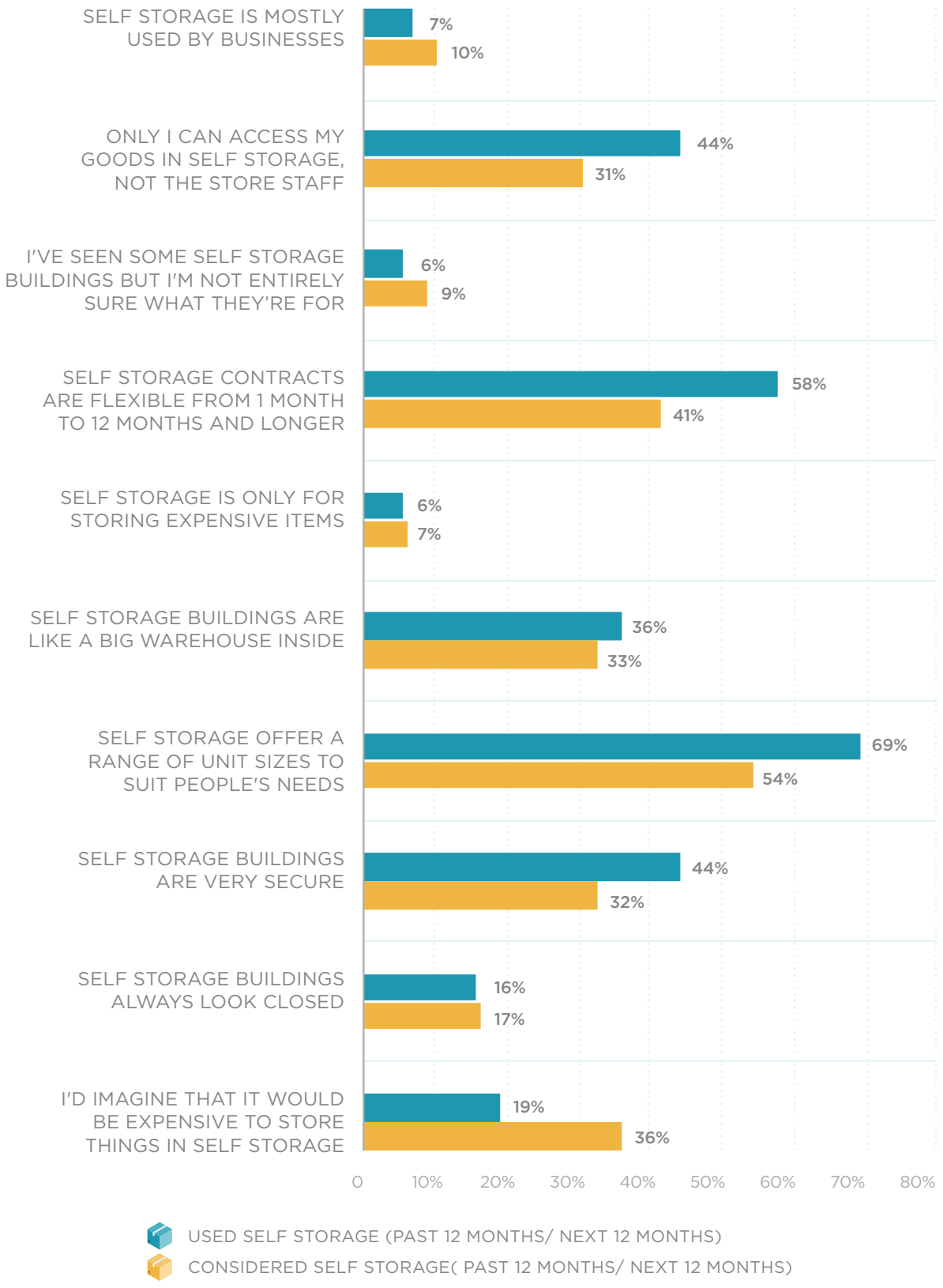
Some people who have seen self storage buildings remain unclear about what they are for, suggesting a need for clearer signage or marketing to explain the service. There is also low awareness of the actual cost for those who haven't used the service. Interestingly, the misconception that self storage is only for expensive items persists across both groups, with minimal difference between users and those merely considering it.

Furthermore, more non-users associate self storage with businesses, reinforcing that the industry still has work to do to broaden its appeal to the residential market and correct misconceptions.





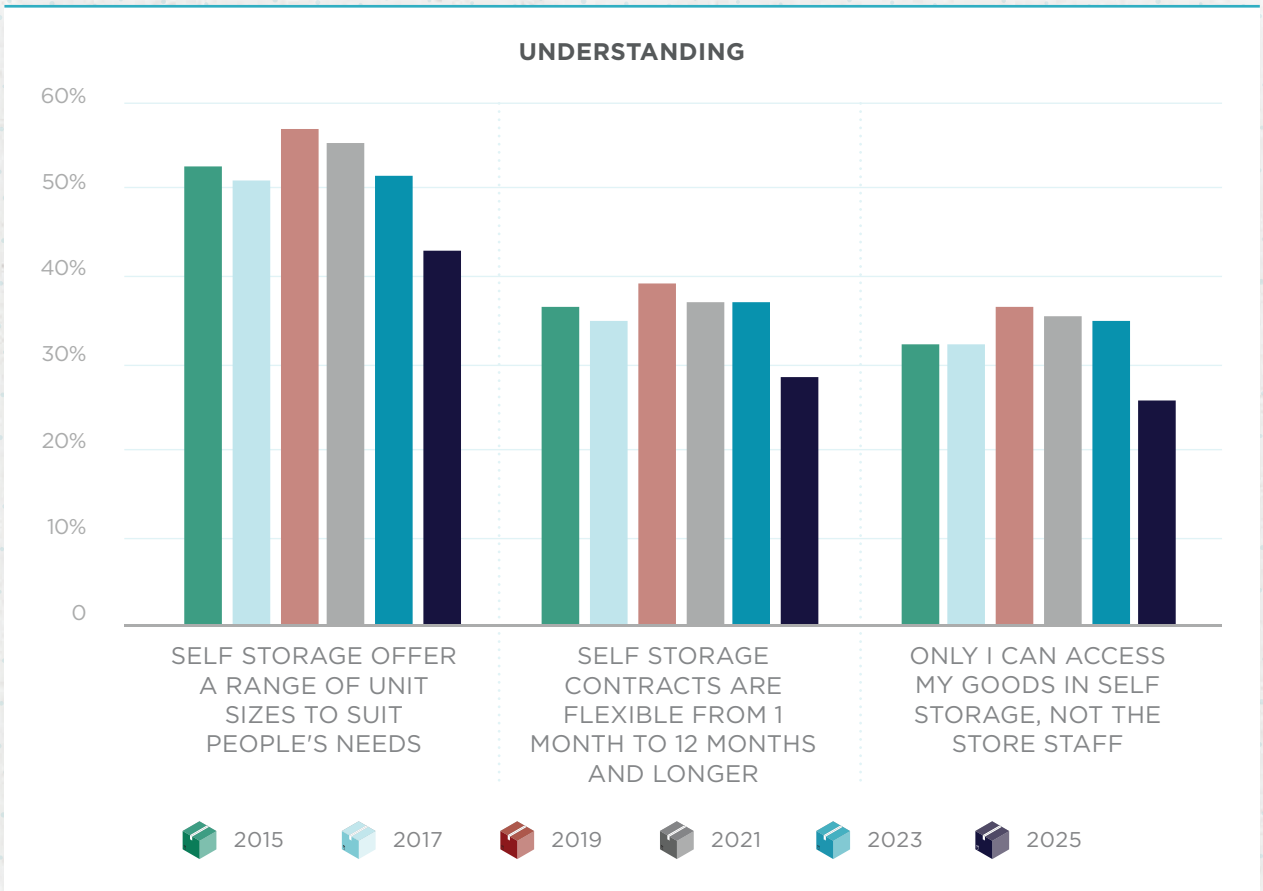
UNDERSTANDING OF THE PRODUCT





Many people *think* they understand self storage but hold misconceptions, whether about cost, contract flexibility, unit sizes, security or who it's for.

As the graph shows, this understanding isn't improving, highlighting an ongoing need for better education and awareness, a situation that is not helped when the bulk of the industry's marketing budget is spent on PPC and other digital avenues primarily targeting people already looking for self storage, rather than increasing understanding more broadly.



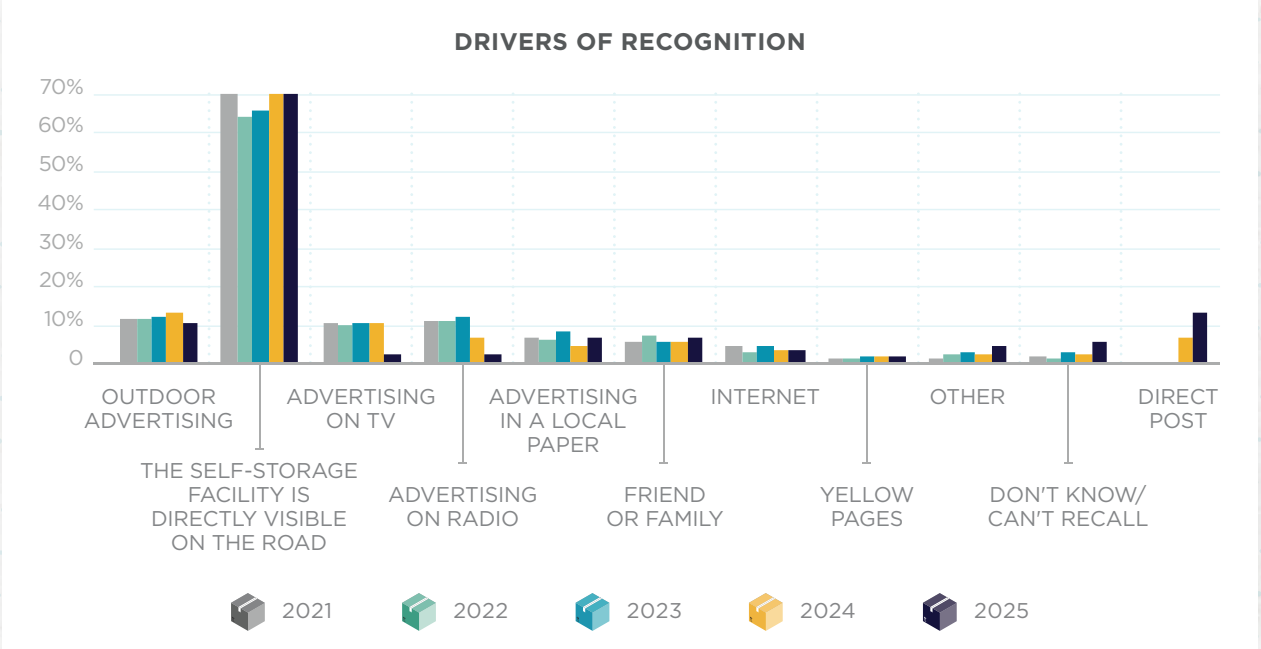


DRIVERS OF RECOGNITION

Visibility on the road remains king. A consistent 70% of respondents cited roadside visibility as the top source of awareness. Direct post is making a comeback from 0% in 2021-2023 to a sharp rise of 7% in 2024 and 13% in 2025 suggesting a resurgence in traditional mail campaigns, which could include local community newsletters. Online awareness remains low at around 5%.

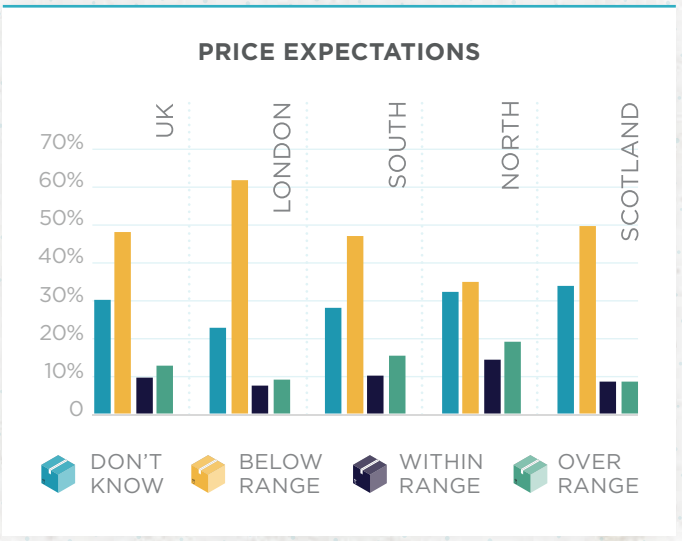
This shows that while people may use the internet to research or book a self storage business, they are often looking for stores that they have seen elsewhere.

They are not exposed to advertising online that promotes the industry generally and makes them aware of self storage. Businesses that are successful in generating customers through social media tend to post consistently across multiple platforms, increasing their visibility and enhancing algorithm performance to attract customers actively searching for self storage.



PRICE EXPECTATIONS OF CUSTOMERS

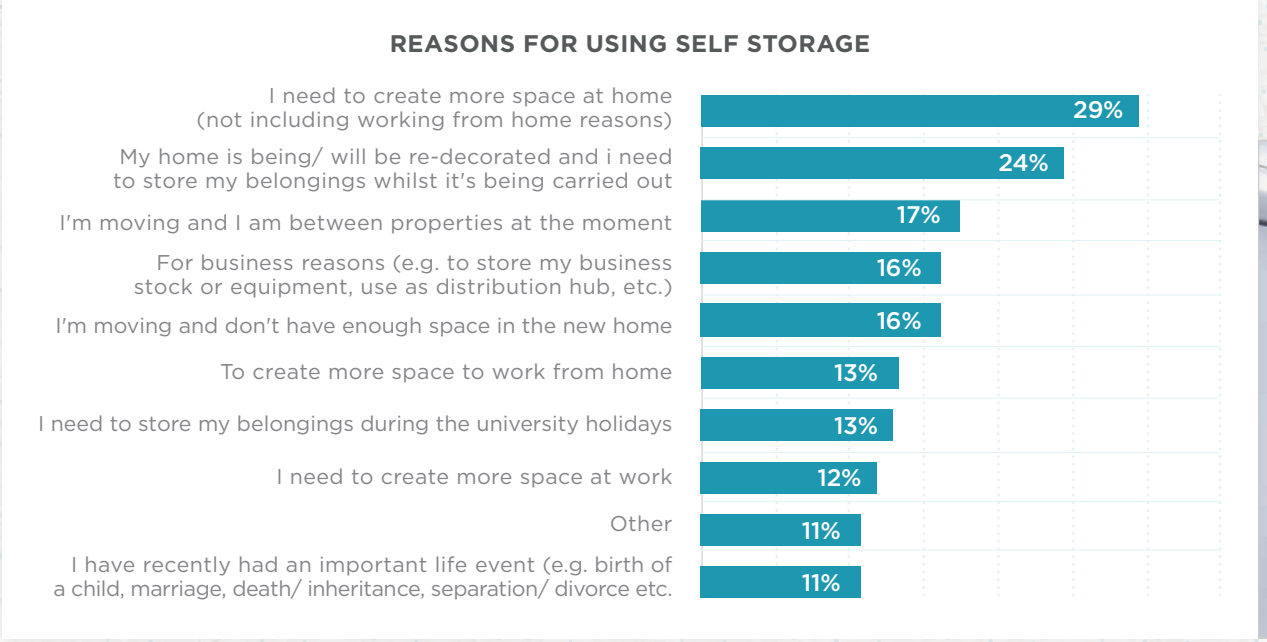
The public have a poor perception of the cost of self storage. The "Don't know" category has been decreasing which suggests more people have some knowledge of self storage pricing, though there has been limited improvement in the number of people that are within the actual price range of the product. When comparing all regions, 19-21% believe the cost to be under £100 with only around 10% knowing the true cost of self storage.



REASONS FOR USING SELF STORAGE

Storing belongings during home redecoration has increased from 13% in 2014 to 24.4% in 2025 and indicates a trend in home improvements, potentially tied to lifestyle upgrades or a flattening of the property market with people investing in their existing homes rather than selling and rebuying. The ongoing trend of working from home is also likely to be contributing to this.

Business-related storage is growing and has more than doubled from 8.7% in 2014 to 16.2% in 2025 suggesting small businesses or eCommerce growth views self storage as a cost-effective solution. Creating more space at work has grown again, landing at 11.7% in 2025, after lower levels in the previous years, which could tie into hybrid working setups needing flexible spaces.





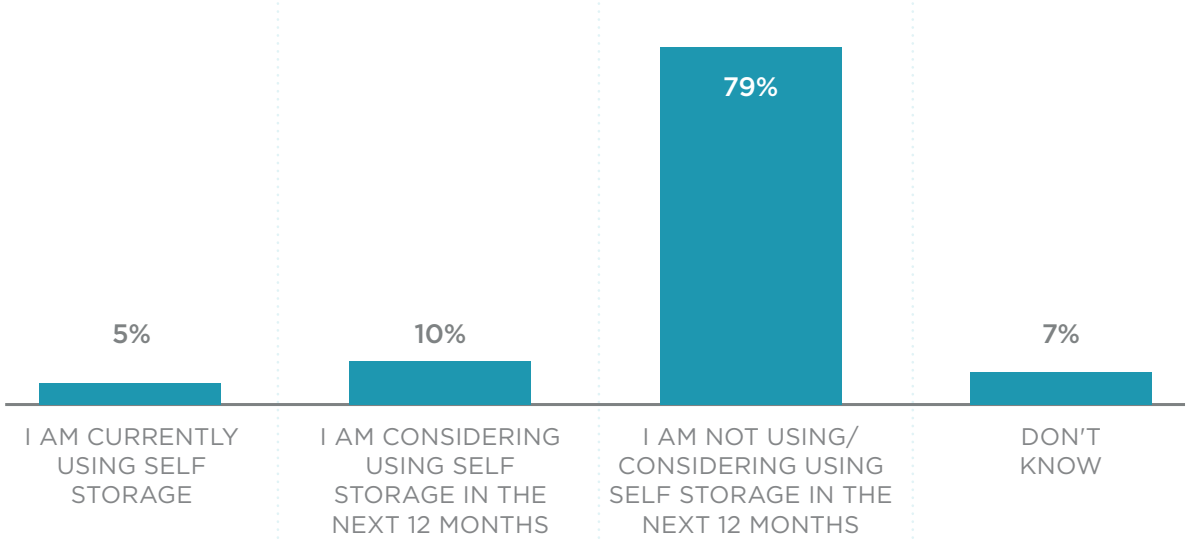
POTENTIAL USAGE

The percentage currently using self storage has increased considerably in the current data. This is likely to be a combination of increased usage but could also be an anomaly in this year's sample. With such a small percentage of the population using self storage they make up a small portion of this sample so increases can be easily magnified.

This is why a separate customer survey is completed to gather data from this segment.

People considering self storage in the next 12 months have also increased which suggests growing awareness, potential demand, and interest. This year 10% of people stated they are considering using it over the next 12 months. This has consistently been around twice the number of people actually using it. The industry needs to understand why around half the people considering self storage never take out a unit.

USAGE OVER THE NEXT 12 MONTHS

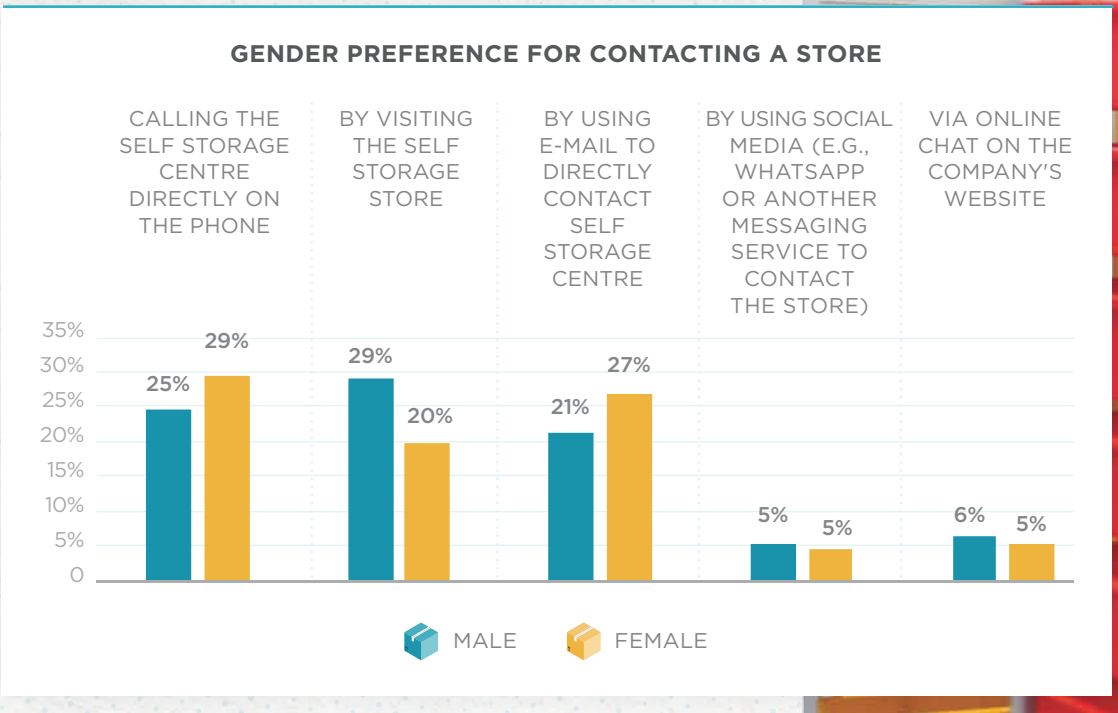




Research & Contact Methods

PREFERENCE FOR CONTACTING A STORE

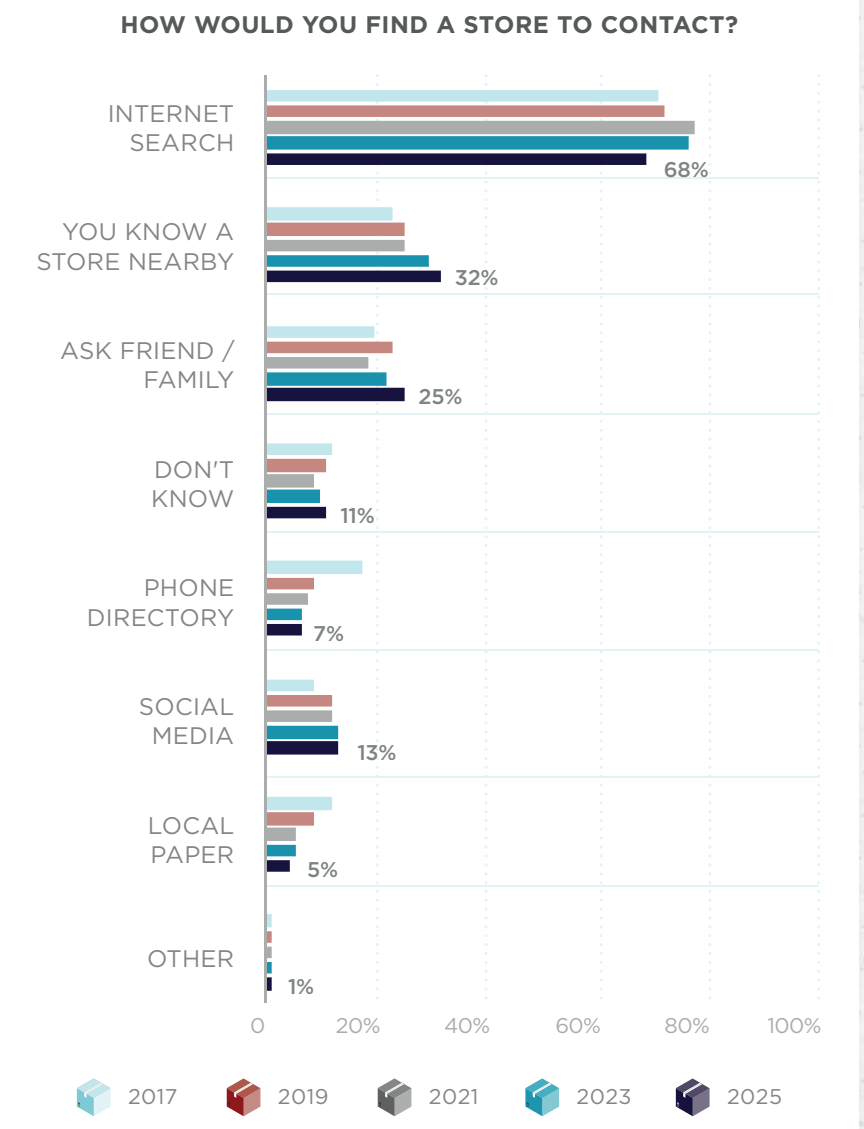




Females (29%) prefer calls and emails, which indicates they prefer real-time conversations for clarity and reassurance or documented contact. Males are more likely to visit the store suggesting a preference for a physical inspection before making a decision. Social media isn't yet a strong channel with both genders equally low at 5%.

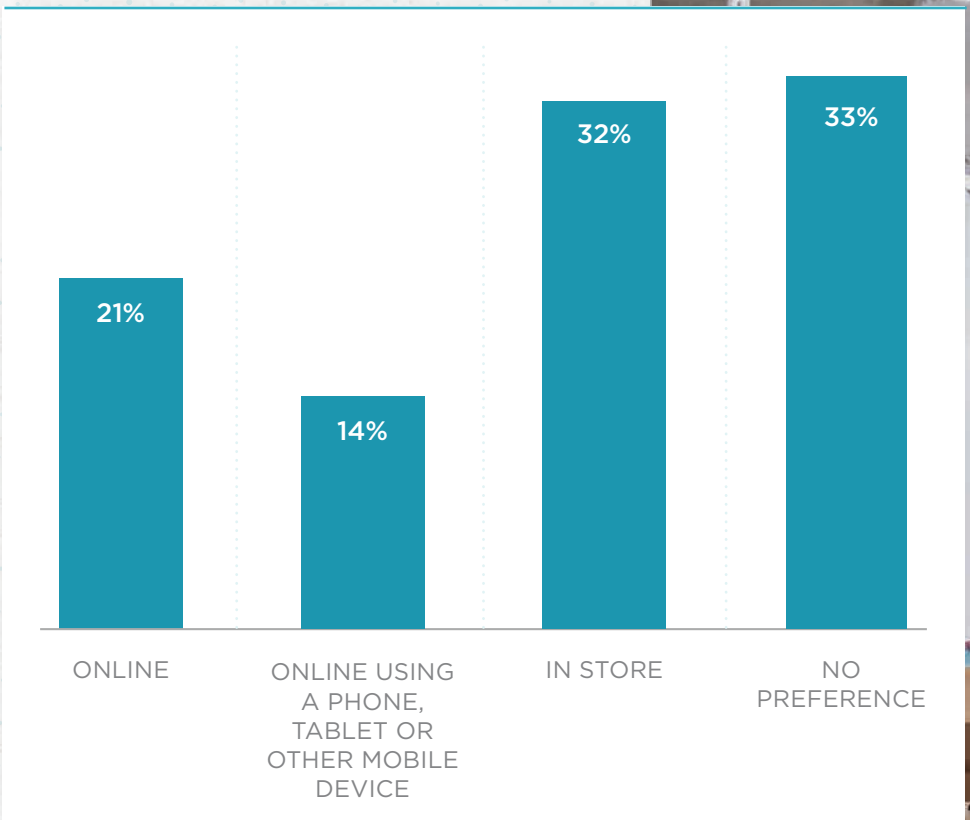


FINDING A SELF STORAGE FACILITY



Internet searches remain the most consistently popular way for people to find storage facility contact details, although its use is in decline as people become more aware of local stores and potentially contact them directly. Word of mouth is also rising, highlighting the continued power of personal recommendations and the importance of referral marketing. As expected, traditional methods such as phone directories and local newspaper ads are in decline.

PREFERRED METHOD FOR BOOKING A UNIT





In-store bookings have stayed relatively stable, but the 'no preference' group has grown significantly, rising to 33% in 2025 from less than 20% the previous year. This suggests that customers are becoming more flexible, or perhaps indifferent, as long as the booking process is straightforward and convenient.

This is the first year that this question has split online to using a mobile device and traditional device and it will be interesting to see how this changes over time.

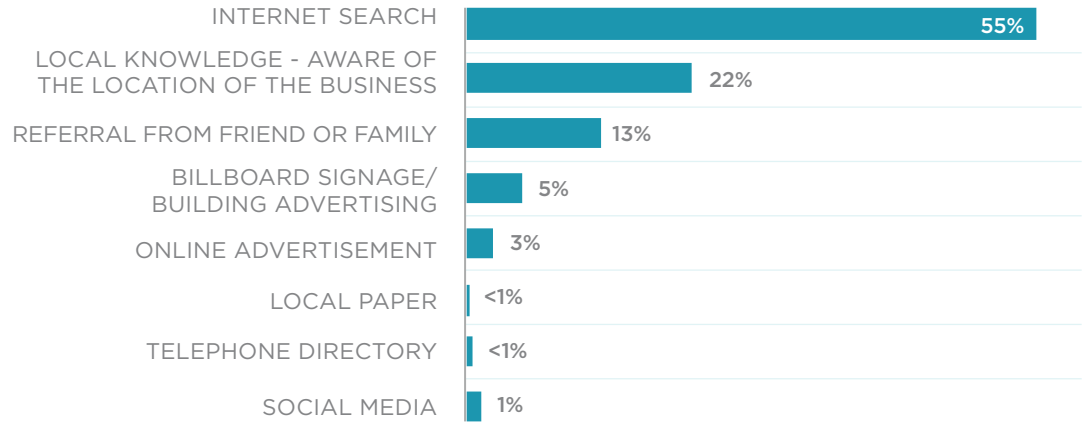


SOURCE OF ENQUIRIES

Contrasting data from the public survey found the bulk of customers stated they first learned of their chosen self storage store online, and this has increased since the last survey. Furthermore, those that did not select the internet here, were asked if they then researched online of which 61% said yes.

This means that 82% of customers are using online methods to find out more about their chosen self storage store. Referrals have also increased from 9.7% to 13%, further showing the power that an active referrals programme and delivering exceptional service can have on gaining new customers.

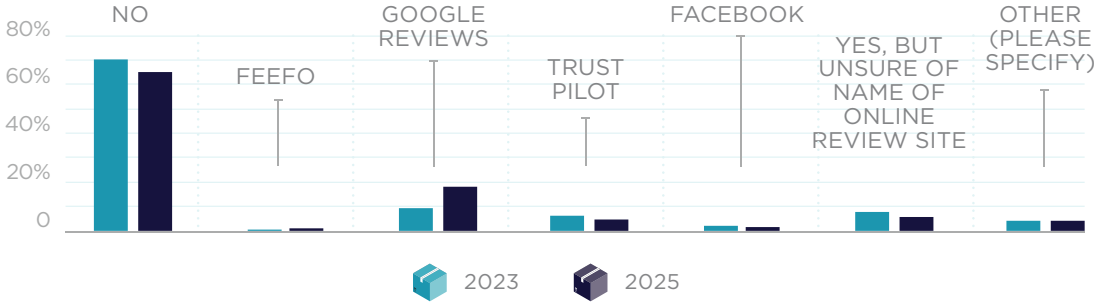
HOW DID YOU FIRST LEARN OF YOUR SELF STORAGE STORE?



An increasing number of customers are considering reviews before selecting their self storage store, with Google reviews the clear platform of choice. The industry does not generally promote or encourage reviews as well as other industries.
It has lower volumes of reviews than other industries and less responses from owners.

This could be due to the fact that many operators do not like to contact their customers while they are in storage, so miss the best time to get reviews. Customers are often busy and stressed during move in, but contacting them some weeks later can increase the likelihood of a positive review.

WHERE DID YOU LOOK FOR SELF STORAGE REVIEWS?



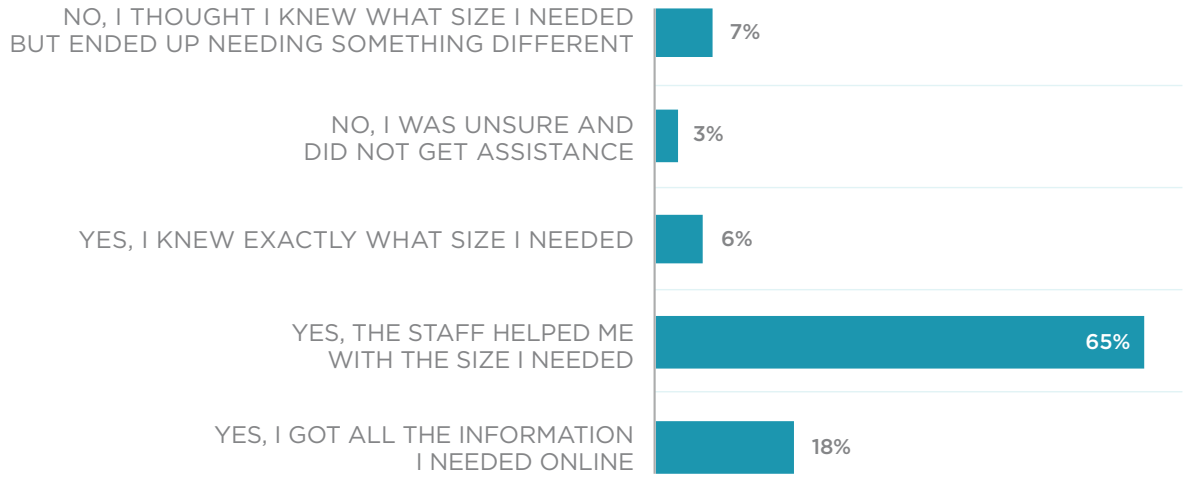


UNIT SELECTION

Choosing the correct unit size remains one of the main challenges for customers even if they have used the service before. Only 6% of customers stated they did not need any assistance in selecting a unit size. Businesses appear to be getting better at providing online tools for selecting unit size.

The number of people getting assistance in this area online has been steadily growing, it is now 18%, an increase from 11% 5 years ago. AI and wearable technology could assist customers in selecting the correct unit size in the future but so far there has been very little adoption of this area of self storage.

DID YOU NEED ASSISTANCE CHOOSING THE CORRECT UNIT SIZE?

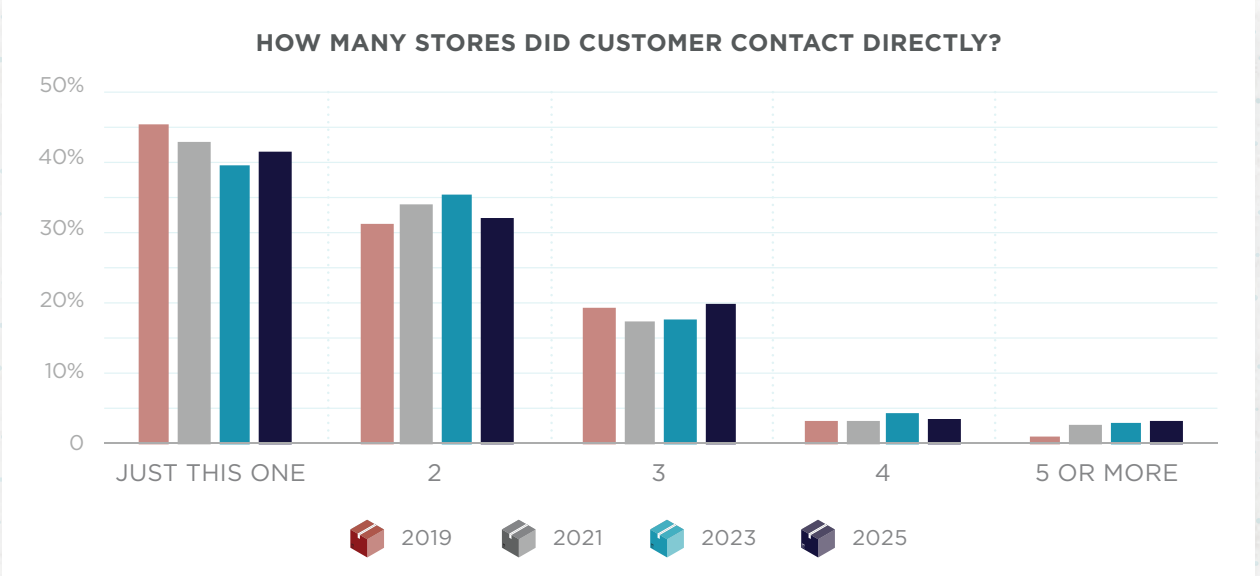




STORES CONTACTED

A surprising number of customers only contact one self storage store and this trend has not changed significantly in the past 6 years. Very few customers contact more than 3 stores, despite there often being more than 3 stores in relatively close proximity, especially in city locations.

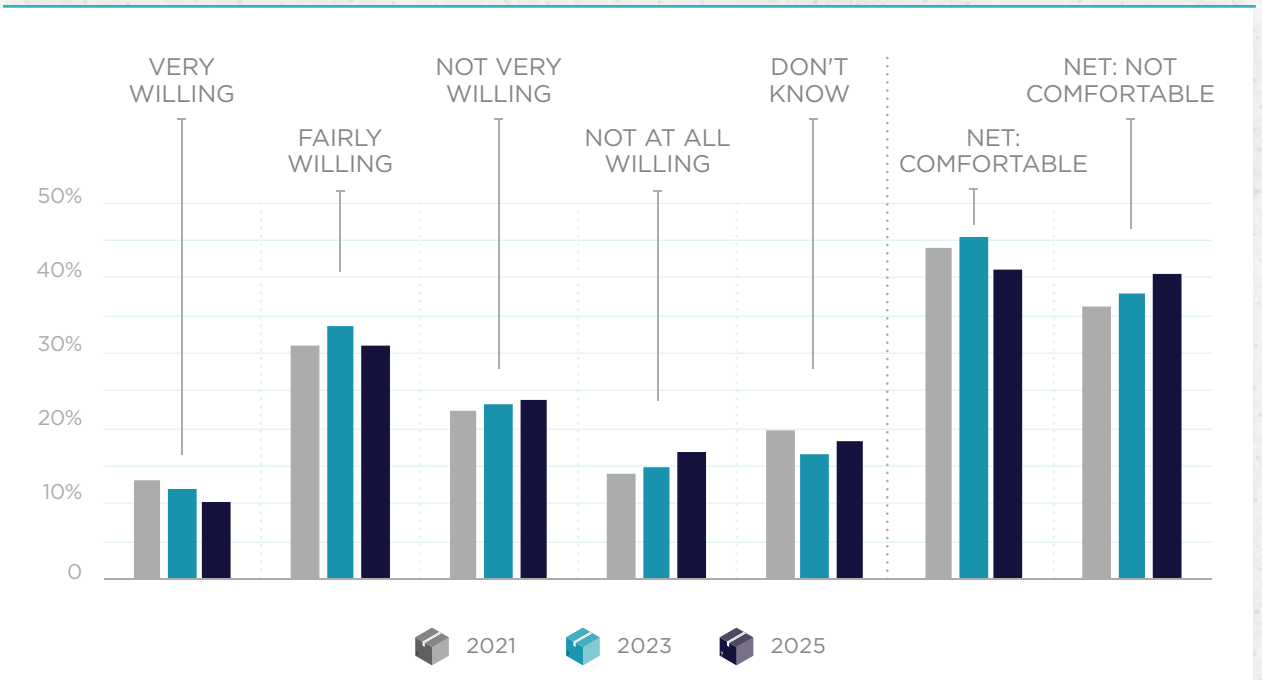
It should be noted that the question refers to contacting a store. With more prices and information available online it is possible that the customer has considered more stores but did not feel the need to contact them directly.



WILLINGNESS TO USE AN UNMANNED/ FULLY AUTOMATED SELF STORAGE FACILITY

Interest in automation has grown and unmanned facilities will appeal to customers who want 24/7 access without dealing with staff and the tech-savvy might prefer convenience over an in-person service. People who are very willing have remained fairly stable but low, suggesting only a small core of people are really enthusiastic about fully automated storage.

Fairly willing has been stronger, peaking at 35% in 2024, but has slipped a little in 2025. There is certainly not a big growth in enthusiasm for unmanned stores. Some people will still prefer human reassurance, especially when leaving valuable or sentimental items in storage and trust/security concerns can be barriers. Around 20% are unsure so they likely need more information or reassurance about how unmanned storage works.





PACKAGING SALES

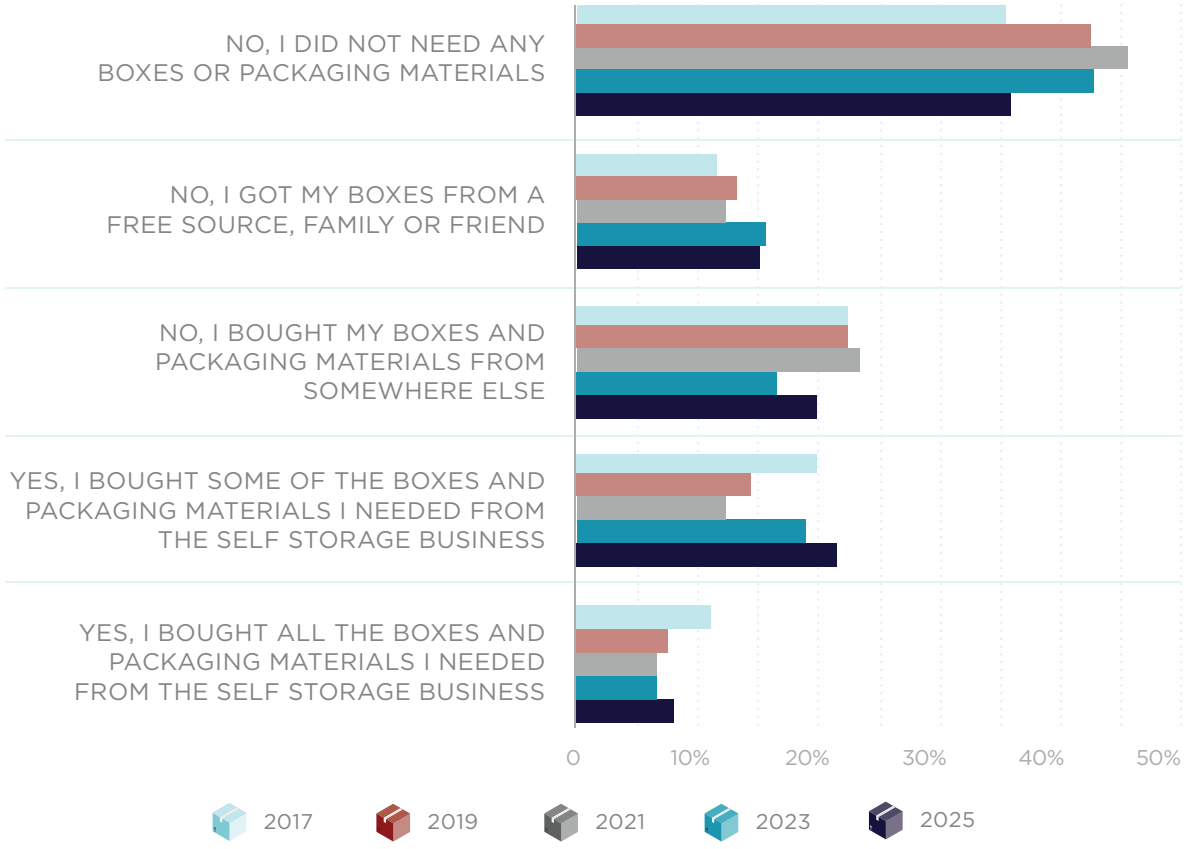
While the sale of packaging materials remains a huge opportunity for self storage businesses to increase their income, there has been a marked improvement in recent years. More stores are actively selling packaging materials to customers, rather than just waiting for them to ask for them.

Operators are also beginning to offer packaging materials online, some even organising them to be delivered to customers homes. That's a little over half of all customers that needed packaging material.





DID YOU BUY PACKAGING MATERIALS ON SITE?



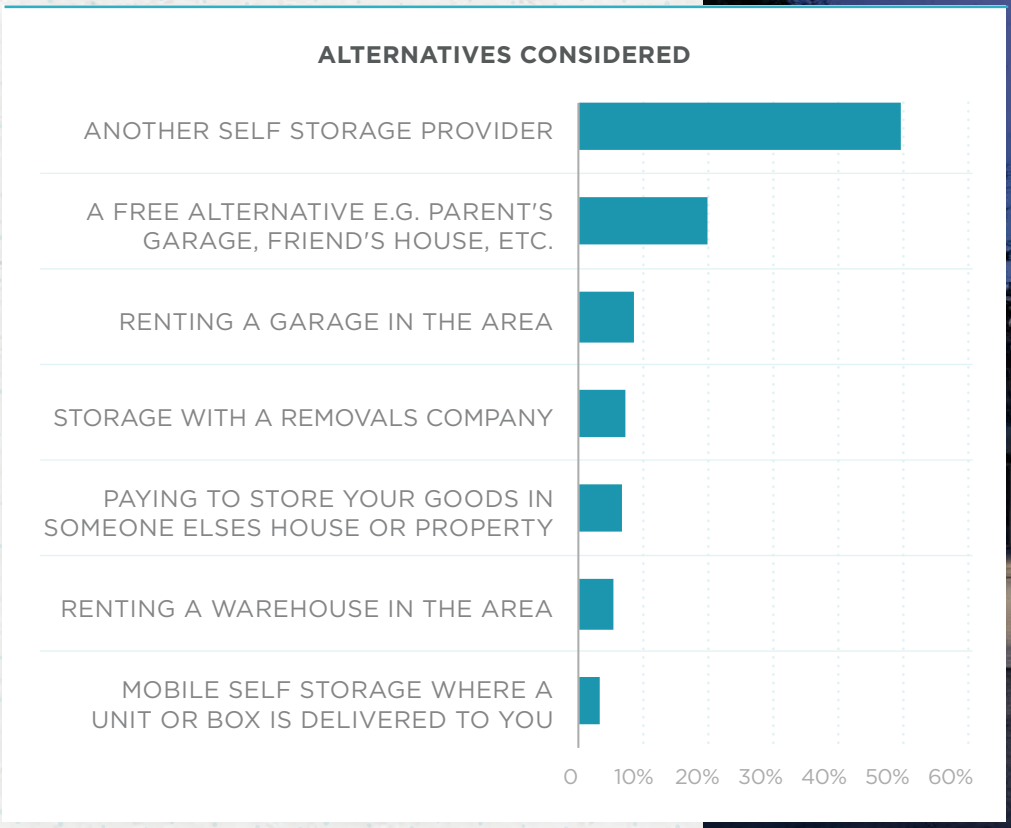
OTHER CONSIDERATIONS

Free alternatives remain the most popular option for customers other than self storage providers. Interestingly, more people are considering free alternatives and looking slightly less towards other providers. Mobile providers have also increased slightly but still account for only 3% of customers.

This and the Airbnb style of storage; paying to store in someone else's stores, are the supposed disruptors to the industry but this data suggests they only impact a small portion of self storage customers. Mobile storage has limitations in terms of having space in your front yard or street to place the unit when filling it up as well as more size restrictions than self storage.

Peer to peer storage has issues with insurance, security and access. This and the fact many people are not comfortable leaving their goods unsupervised in a strangers house.






VANGUARD
SELF STORAGE

10 Reasons For Use

COMMERCIAL AND DOMESTIC USE

The mix of commercial and domestic use has remained stable for the past 5 years, although there is some indication that this year, more large unit commercial customers departed as the percentage of space occupied by commercial customers dropped slightly.



