

**FEDESSA**  
Federation of European  
Self Storage Associations



# IRELAND SELF STORAGE INDUSTRY REPORT **2025**

# Brian Hefferon

Chair Irish Self Storage Association



I am very pleased to present the first ever report into the Irish self storage industry. This document pulls data from industry operators, customers and the general public to give a comprehensive insight into the industry. We compare this with other data from the FEDESSA European report and SSA UK report to establish how the Irish self storage industry is performing against its neighbours. This report could not have been produced without the assistance of the ISSA members who generously provided their data and allowed us to survey their customers. I also thank Rennie Schafer and his team at FEDESSA for coordinating the project, analysing the data and producing the final report. It is our intention to produce this report on a regular basis moving forward to track the progress of the industry

and its performance compared to other European countries.

The Irish self storage industry is maturing with a strong presence in Dublin and stores located throughout the country. We are also starting to see segmentation of the market with more external and container based storage sites opening across the country and businesses offering specialist storage services. There has been significant investment in the industry in recent years, most notably the acquisition of U Store It by Heitman in 2022 and their subsequent growth of this platform. As this report shows there is still work to be done in terms of raising awareness of the industry with the general public. Continual improvement in this area will contribute to further growth of the industry.

# Contents

## 4 Introduction and Methodology

## 5 Store Data

5 Occupancy

6 Rental Returns

7 Property Ownership

8 Security Measures

9 Staffing

10 Remotely Managed Stores

11 Sustainability

## 12 Customer Data

13 Customer Demographics

18 Usage Patterns

20 Value and Services

25 Customer Journey

## 30 Public Survey

31 Awareness and Understanding

36 Contact Methods





## Introduction and Methodology

This is the first time that the Irish Self Storage Association (ISSA) has completed a comprehensive report into the self storage industry in Ireland. This report covers all viewpoints of the industry, collecting data from operators, customers and the general public, making it the most detailed report ever completed on the industry. Data is analysed at a local level and also compared with data from the European industry report completed by the Federation of European Self Storage Associations (FEDESSA).

The operator survey was completed by 11 companies with 28 stores in total; each one a member of the ISSA. The survey was completed in the months of July and August 2024. Compared to the industry as a whole, the data set is slightly weighted to larger operators, as a lesser proportion of the small independent operators completed the survey. The sample represents over 65% of the total self storage space in the country.

The public survey, conducted online by YouGov on behalf of FEDESSA, was completed between May 21 and 25 2024. It was an online survey with data taken from a statistically selected and weighted group that represents a sample of the demographics of the adult Irish population. 1,002 people completed the survey.

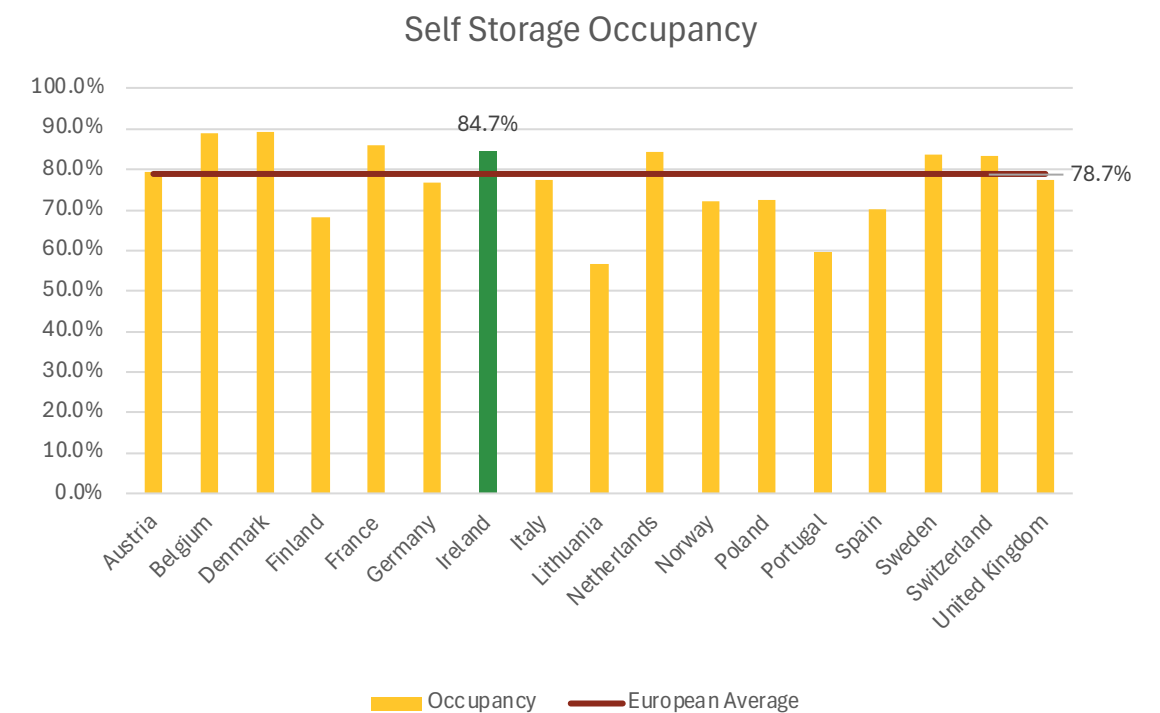
Also included in the report is data from the customer survey completed in August 2024 from 9 self storage companies who have 25 stores in total. 752 customers responded to the survey of which 76% were domestic customers and 24% business customers. This survey was sent to the main contact on the self storage contract. The survey was entirely voluntary and without reward.

I would like to thank all the ISSA members who provided data for this report. I'm sure you will gain valuable insight from the report. It is intended to be the first of a regular report on the industry that will also track changes over time.



## Store Data Occupancy

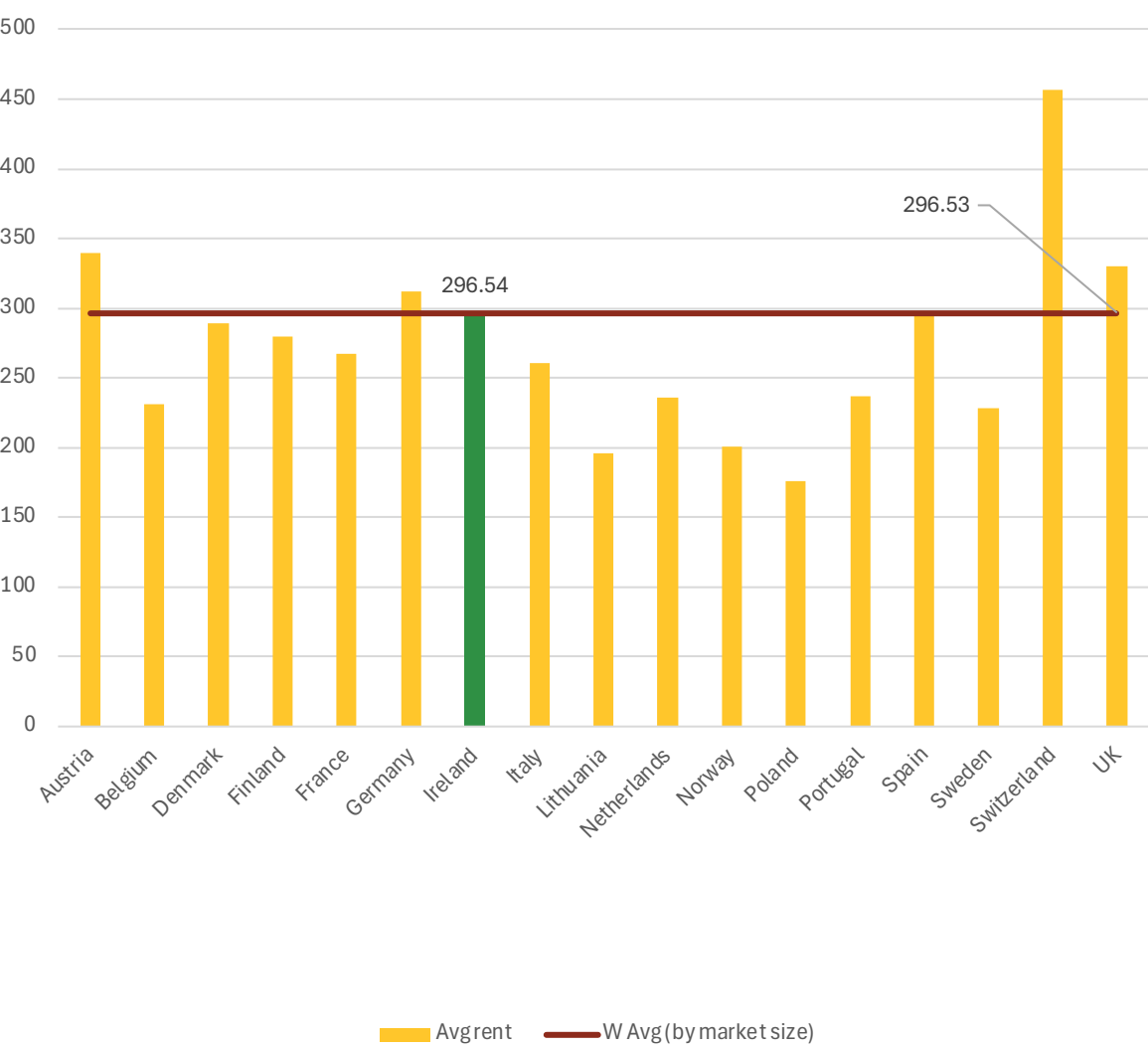
Ireland has considerably higher occupancy than the European average and grew its occupancy from 73% in 2023. There were a number of new store openings and additional space added in 2023 which would have impacted occupancy that year. As Ireland is a relatively small market, adding a new store in fill up stage, with occupancy below 50% can influence the average figures. The occupancy levels have returned quickly to optimal levels of around 85%. Stores generally do not want to be at 100% occupancy as this means they have no product to sell and are most likely not managing their pricing to maximise yields on the space. As storage is a fixed quantity product, operators should be managing their pricing once they hit occupancy of 85% - 90% to maximise rental returns on the remaining space.



# Rental Returns

The increase in occupancy has come at a cost as return per square meter has dropped by 5% down to €296.54. However, when considering occupancy rose by 16%, the overall profitability of the industry has improved considerably. Also noting that the return per square meter in Ireland is almost the same as the European average so operators have not been sacrificing yield excessively to gain occupancy. It will be interesting to note how rates change in 2025 if stores are closer to optimal occupancy now.

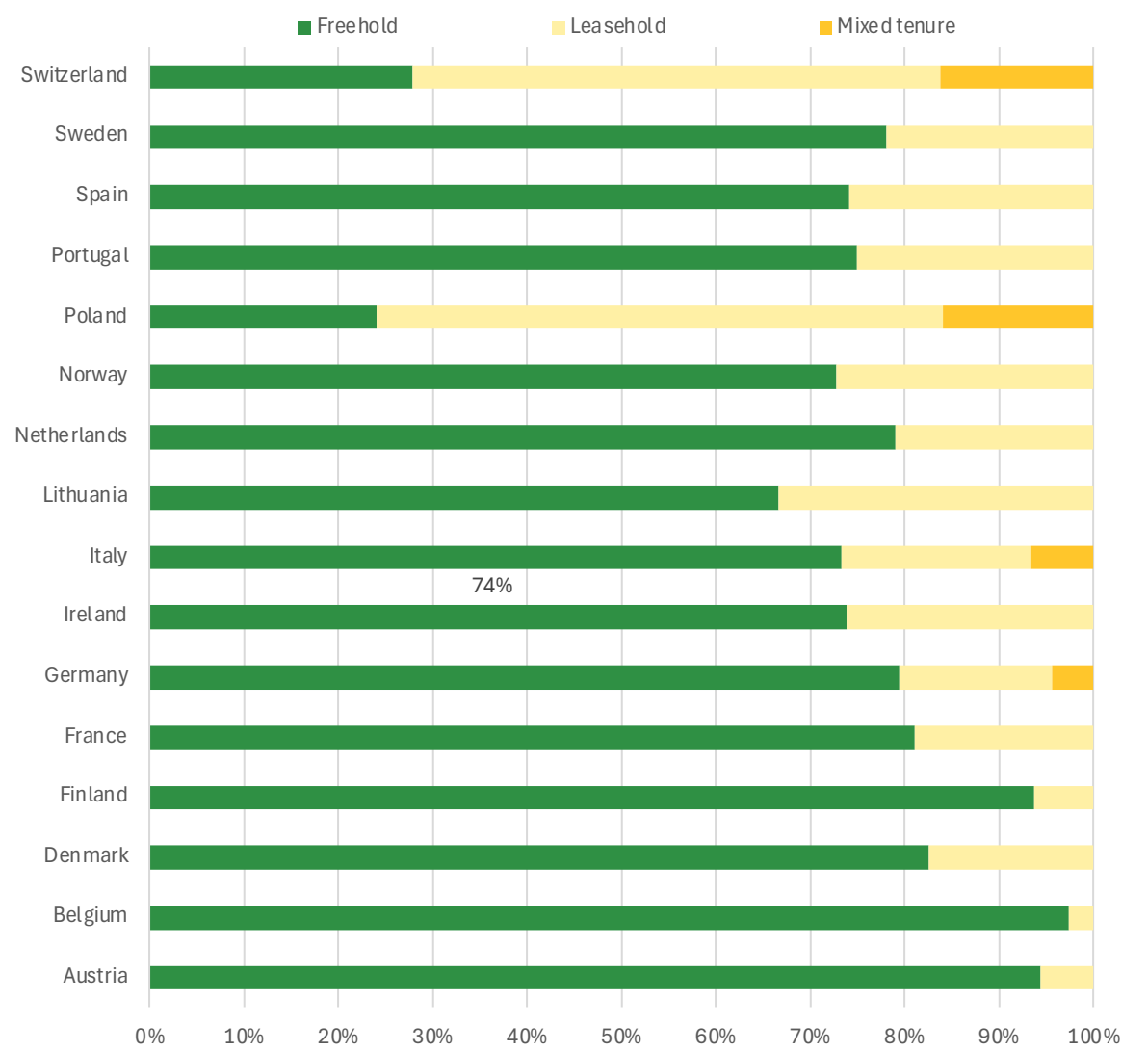
Average Rental Rate for Storage Space (€per sq m) ex VAT



# Property Ownership

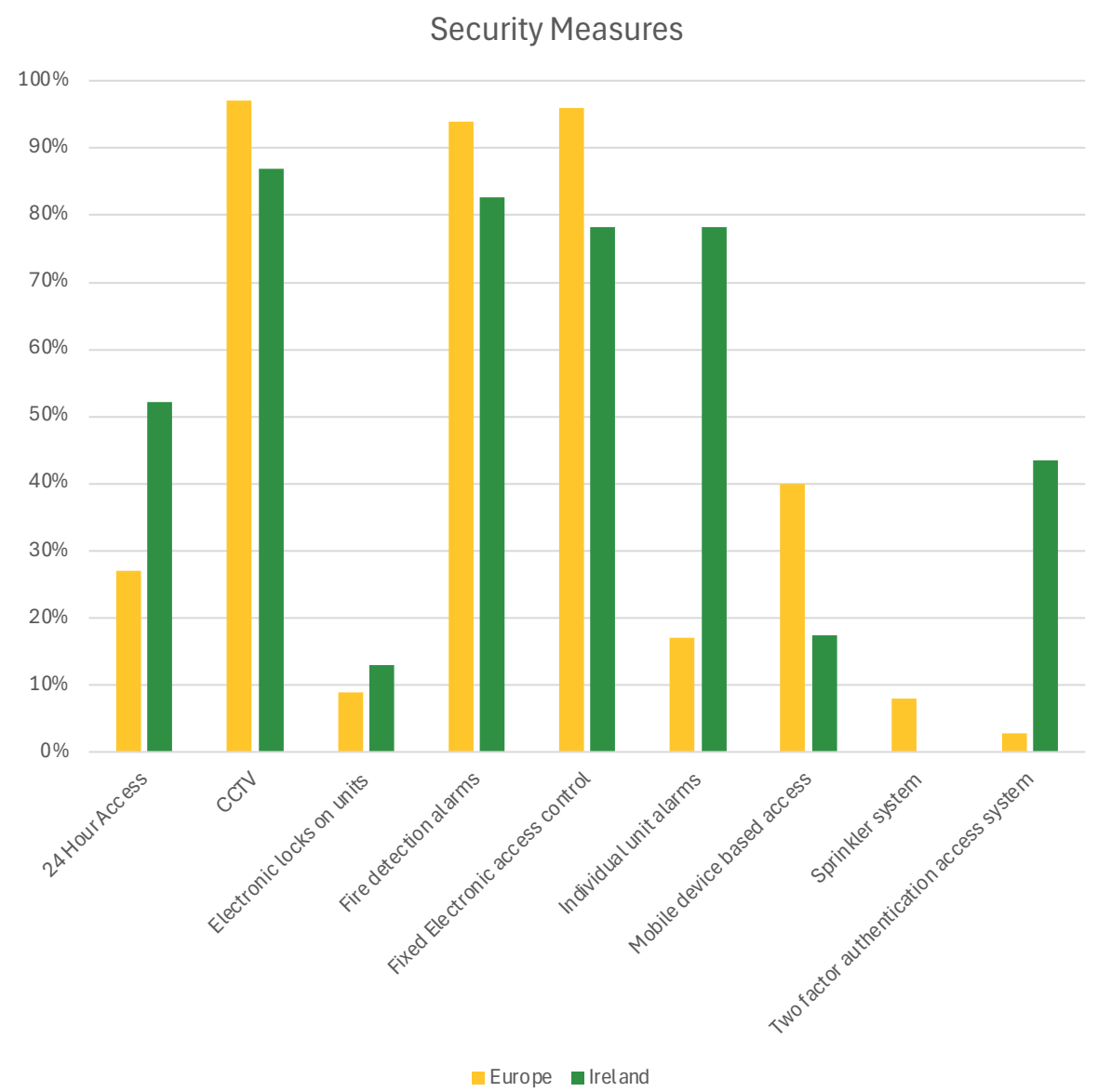
Irish self storage operators typically have a preference for freehold properties with around ¾ of sites being freehold or long leasehold. This allows capital growth from the asset as well as revenue from the operating cash flow of the business. However, we are seeing more rental properties coming to the Irish self storage market. They can be an easier way for operators to access the market with less capital, particularly for container storage sites who often start with leasehold sites before potentially acquiring freehold sites further down their business cycle.

Particularly post-COVID, freehold industrial properties suitable for self storage development have been harder to find and more expensive to acquire. Those that become available are often in areas where there are already other self storage developments.



# Security Measures

Generally self storage stores in Ireland have a higher than average level of security. As a newer market more stores have implemented current technologies, such as individual alarms and two factor authentication and they have fewer legacy stores with limited security. Some countries in Europe have seen a significant increase in criminal activity in the past couple of years, particularly while stores are unmanned. This has led many operators to reduce the hours of access to customers and eliminate 24 hour access except for selected clients. This trend has not yet come to Ireland with over 50% of stores surveyed offering 24 hour access to customers.



# Staffing

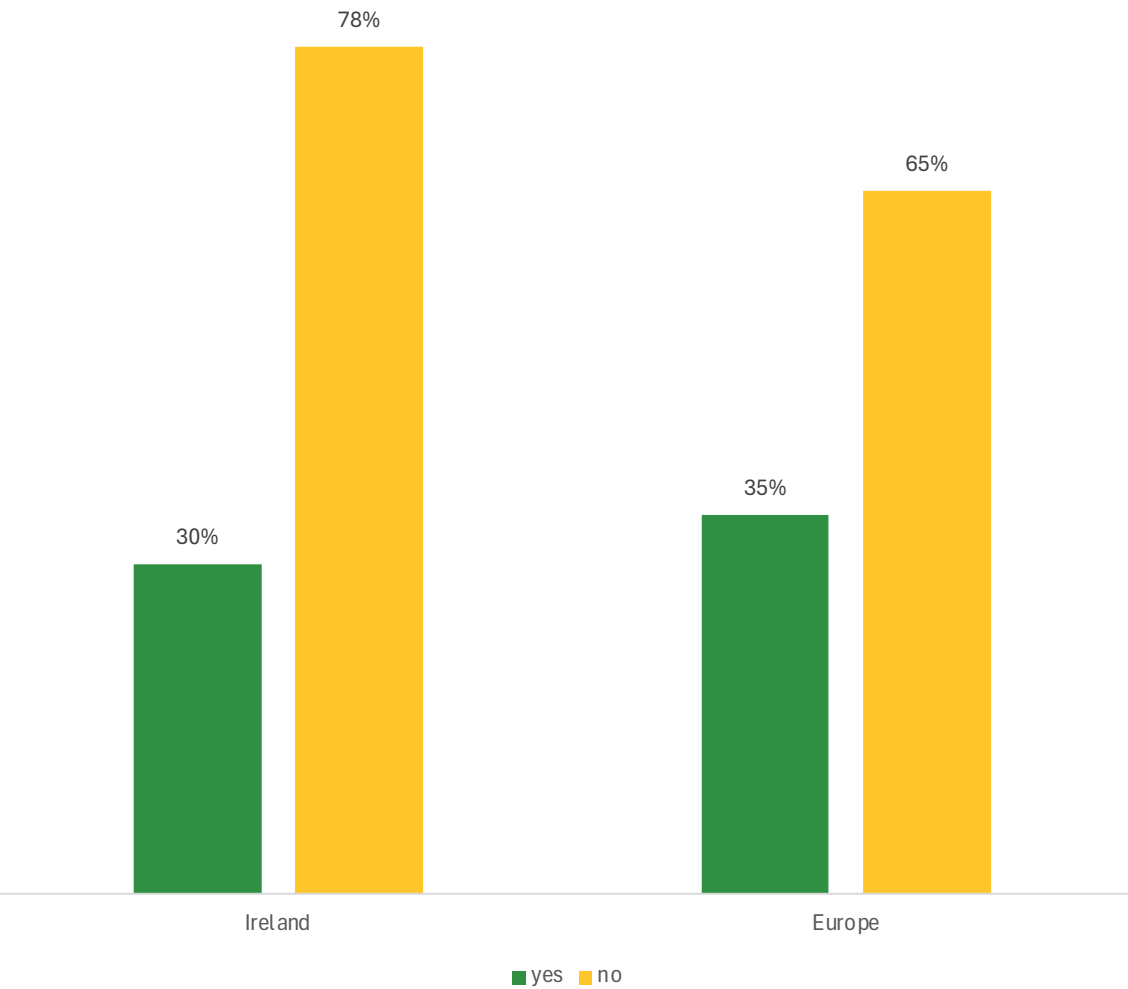
There is clearly a preference for part time staff in Ireland. This could be as the industry is growing and operators are looking for more flexibility to staff stores as they fill up and explore use of automation. Employing part-time staff is also somewhat easier in Ireland than some other European countries with the Protection of Employees (Part-Time Work) Act 2001 defining many of their benefits and making the employment relationship clearer.



# Remotely Managed Stores

Adoption of remotely managed stores is lower than the European average. Ireland tends to have more larger stores than other more developed markets, particularly around Dublin. Remotely managed stores are typically smaller and often not in prime locations. We are seeing existing operators use managed stores to expand into smaller sites that would not necessarily warrant a full time staff member. It will be interesting to see if the micro site model prevalent in Austria and Germany makes its way to Ireland, where operators invest in large numbers of very small remotely managed stores in a local area.

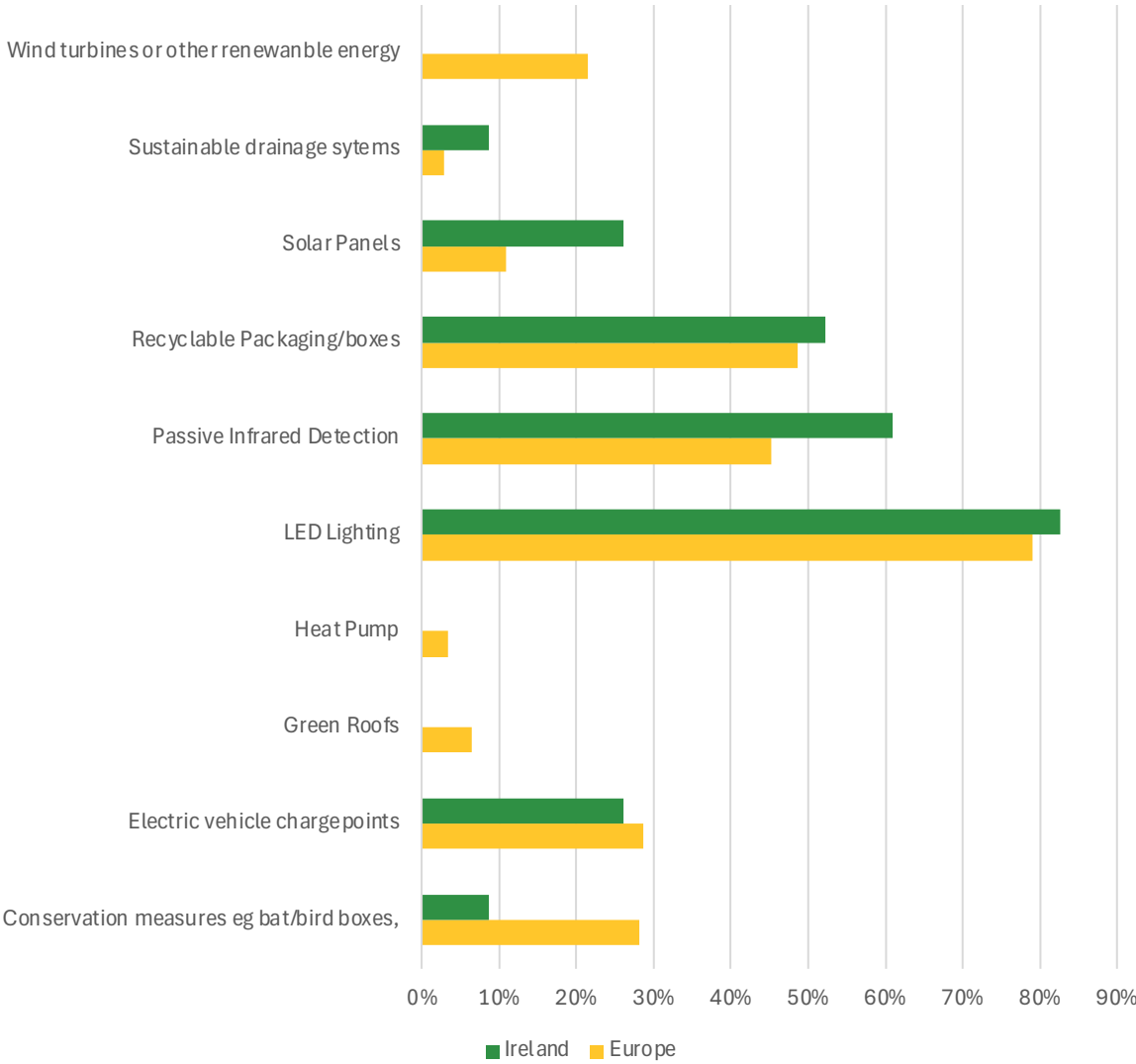
Remotely Manged Stores



# Sustainability

Irish operators are investing into sustainability initiatives, mostly around energy consumption. There is a preference for solar power over wind generation. When further analysing the data, the stores with solar panels tend to be newer, presumably having solar installed at construction, rather than retrofitting to older stores. Similarly the stores with sustainable drainage systems are newer stores. Electrical vehicle charging points are often installed to improve green credentials for schemes such as BREAAAM, however their use in self storage stores can be mixed. Other than for staff use, customers do not tend to stay for long periods of time at the self storage store and prefer to park their vehicle close to loading bays or their storage unit, rather than leaving them on charging stations.

Sustainability Initiatives

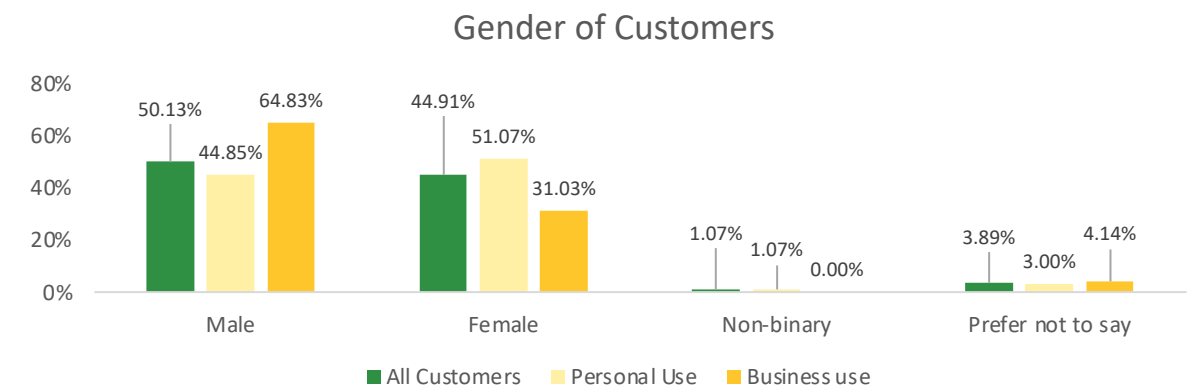




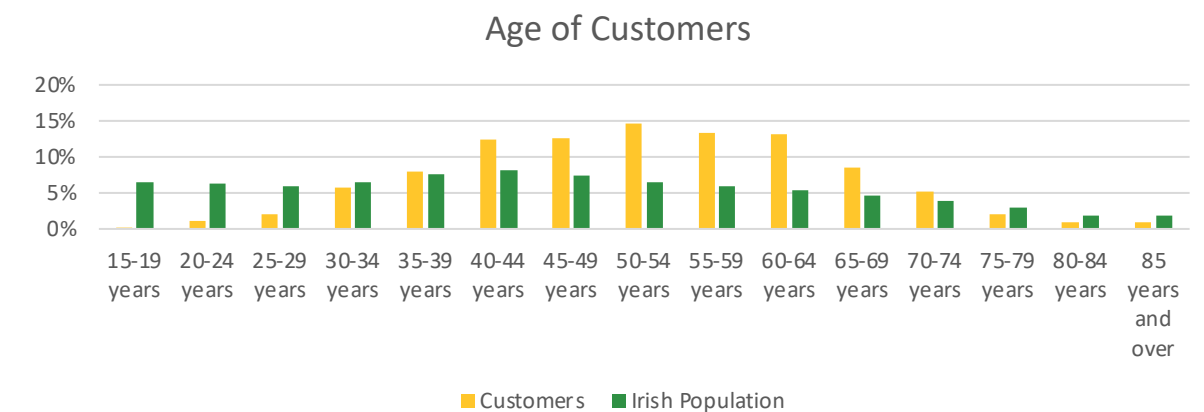


## Customer Demographics

There is a tendency for more males to use self storage, or at least be the main contacts on the contact, which is who the survey was sent to. This mix is similar to the UK and other countries in Europe that have completed similar surveys. When you break the data down between personal and business users, you see that more females are using the service for personal use than males. Females also tend to stay shorter periods than males and have other traits that self storage businesses should consider in their marketing and customer profiling.



Self storage customers are also in the older end of the demographic with 83% above 40 and 66% between 40 and 64. Personal users have slightly more representation in the younger age groups with 82% above 40 although they also have higher representation in the over 70's. As people age they are more likely to acquire more goods that could be put into self storage. They also go through more of the life changing moments that can lead people to self storage. Such as a death in the family, having children, separating from their partner, changing house and traveling.

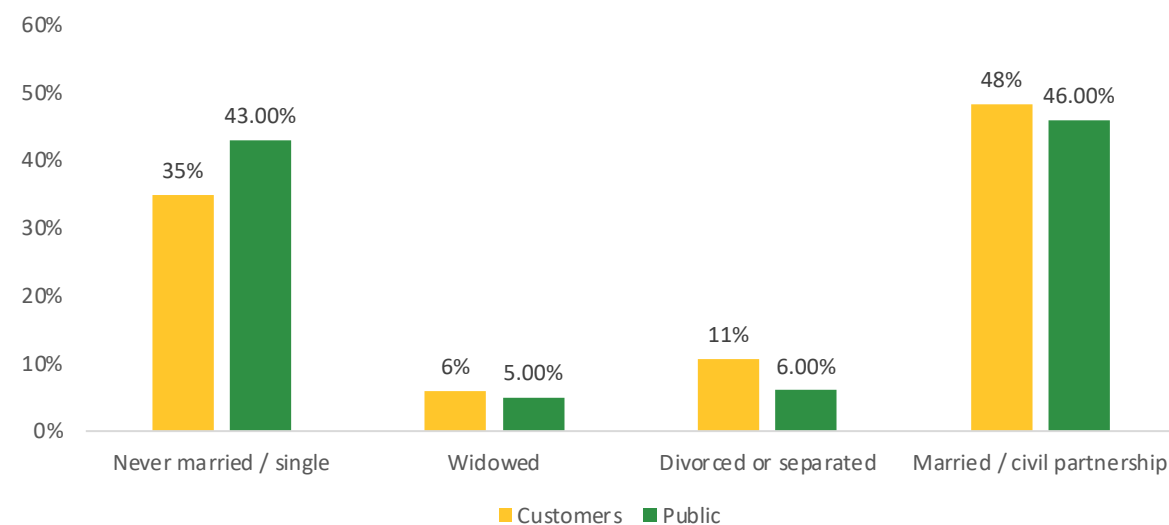


## Customer Data

FEDESSA and the ISSA sent surveys out to customers of ISSA members to gather data on the type of people that use self storage and also their perception of the industry. The survey sample was balanced between large and small operators and stores located around the country to get as broad a data set as possible. 736 people completed the survey although not all respondents answered all questions. Of the general questions the response rate ranged from 736 to 689 people.

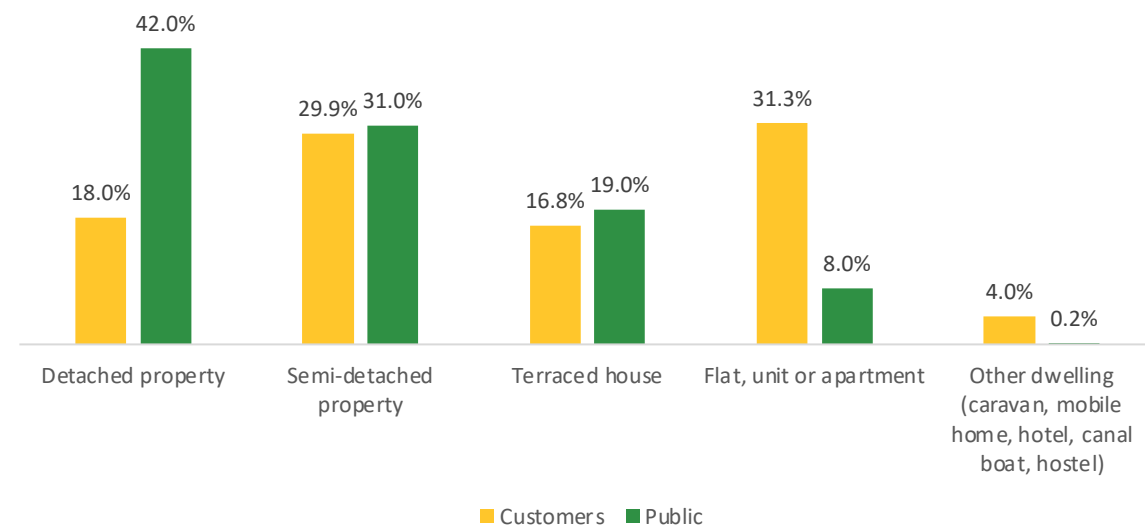
Not surprisingly, divorcees are more likely to use self storage than singles, given that storing goods after a divorce is one of the main drivers of self storage demand. When comparing this data to other European markets the representation of singles is lower in Ireland and more married people are also using self storage than the UK and other countries.

Marital Status of Personal Use Customers



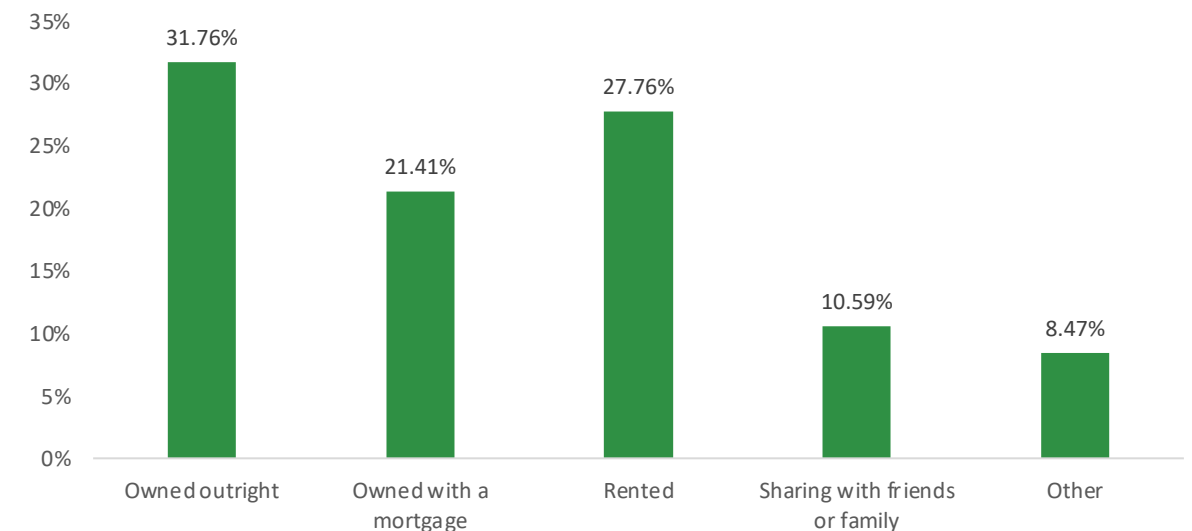
Self storage customers are also more likely to be living in smaller accommodation such as flats or apartments. People living in larger homes with more storage space are less likely to need self storage.

Housing Type



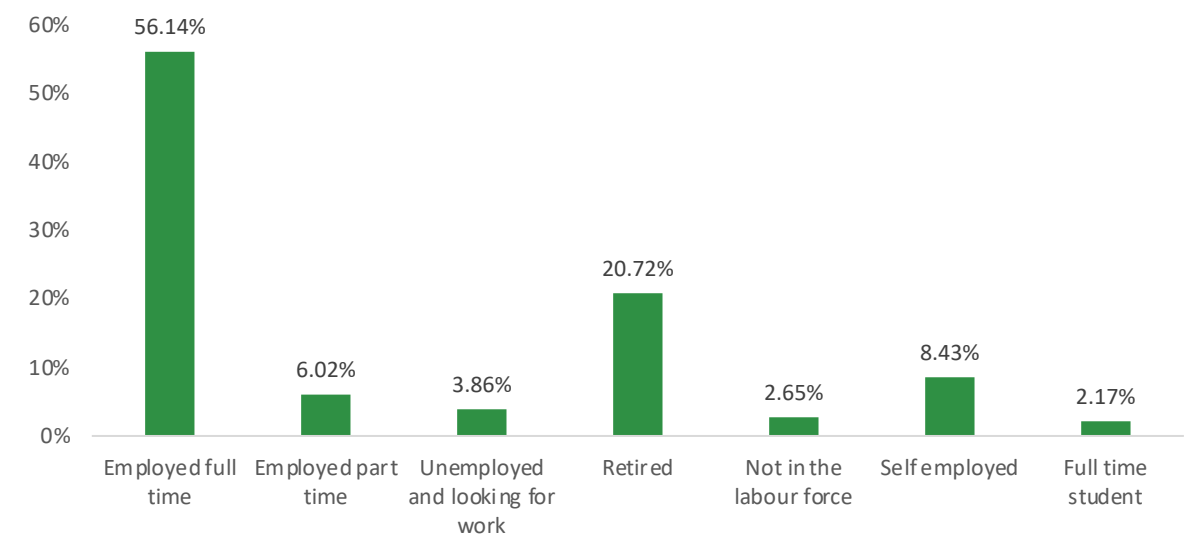
People sharing a house or renting are more likely to be using self storage than people who own their homes outright. Although it is difficult to compare this to census data as the CSO does not provide specific data on the percentage of households sharing with friends or family, the comparative results do indicate renters are more represented in the customer sample than the general public.

Do You Rent or Own Your Own Place of Residence?



Retired people are also more likely to be using self storage which matches with the earlier data that showed an increase in personal users over 70. Full-time employees are also more likely to be users. Self storage is largely a discretionary purchase and does come at a cost so people with higher wages and full-time jobs are more likely to be able to afford the service.

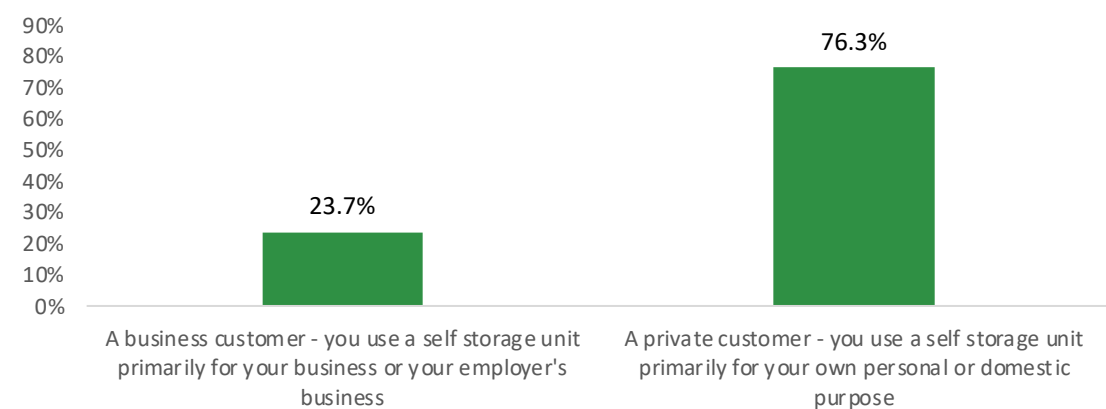
What is your employment status?





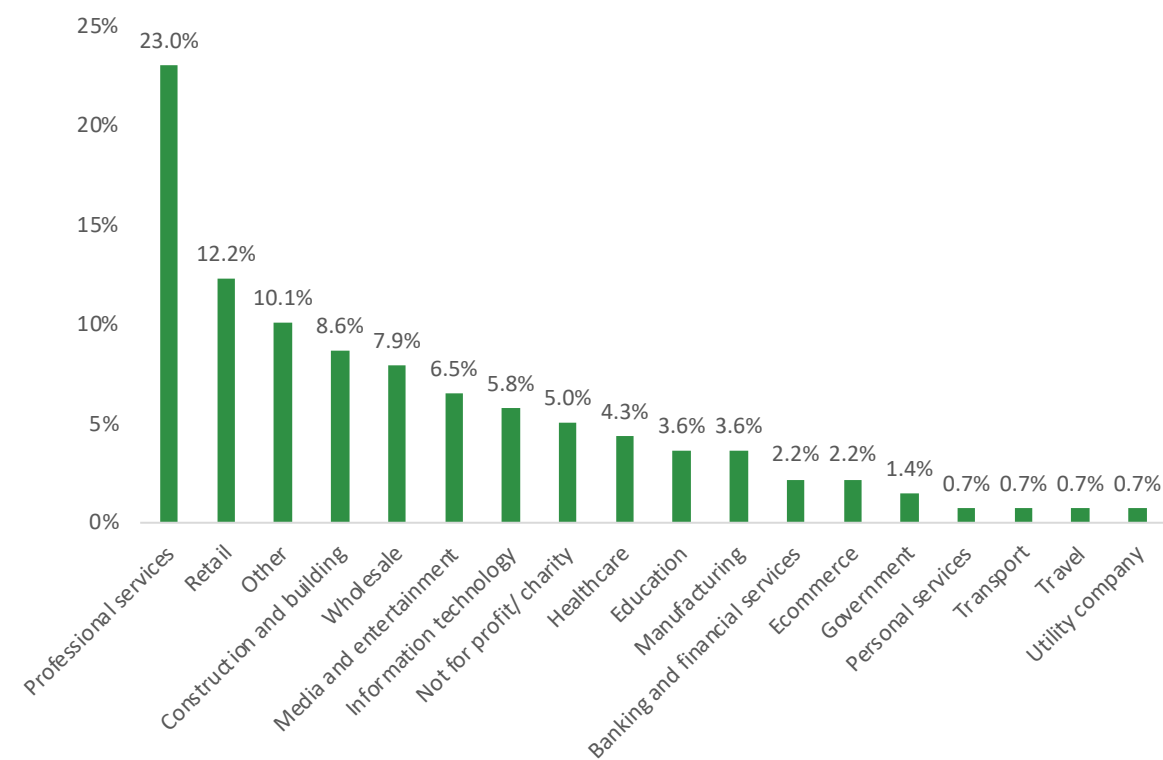
**B**usiness customers make up 24% of the customer base which is similar to the UK and Europe. However, they tend to take larger units so account for around 30% of the space.

### What Type of Customer Are You?



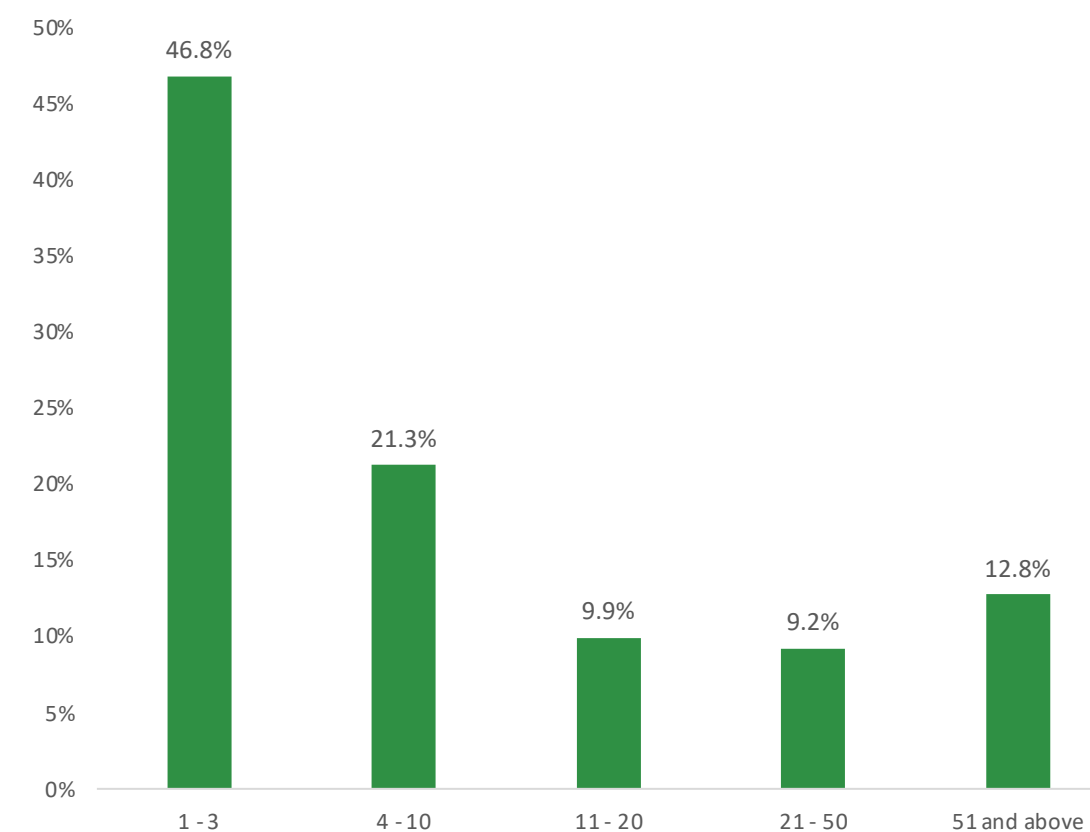
**P**rofessional services and retail are the 2 biggest single types of businesses that use self storage. While professional services are likely to be storing documents and records, retail often store stock and marketing materials. There is a relatively high number of not-for-profit businesses using self storage. It is quite common for the self storage companies to give free or discounted storage to local charities and clubs.

### Which Category Best Describes Your Business?



**W**hile the bulk of business users are small businesses, they are actually under represented when considering the make-up of the Irish business market. 68% of self storage business customers employ 10 or less people, but they make up 92% of all businesses in Ireland. So self storage is widely used by medium to large businesses. Sometimes this is for excess stock where businesses do not want to commit to long leases for short-term needs. It can also be used as a drop-off point for samples or products for sales people to pick up from regional locations rather than having to travel back to the head office or warehouse. It is even used by large retailers to store seasonal promotional materials so they can be quickly installed into stores. Small businesses often use self storage as a means to grow out of their home. When a home-based business needs more space for stock or records, self storage provides a flexible and affordable solution that can grow with their needs and does not require a long-term commitment. This is why self storage is often considered a local business incubator, helping small businesses grow during this difficult transitional period.

### How Many Employees in Your Business?



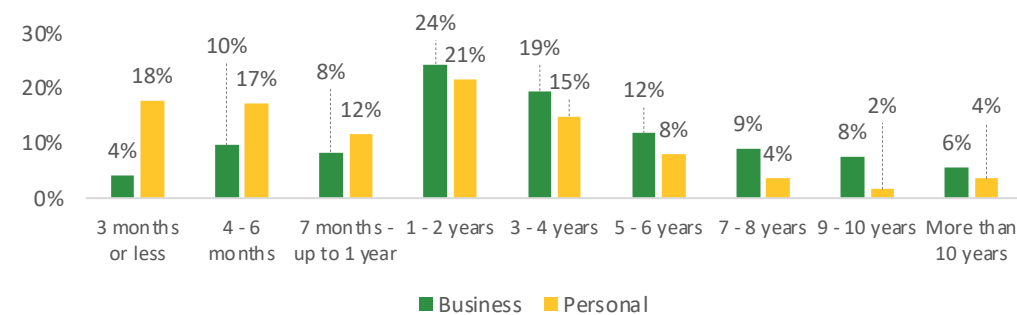
**M**ost businesses that use self storage also have another property that they operate from. 17% operate solely from their self storage unit, which is lower than the UK (20%). This still shows the importance of self storage to local business and employment. While the store may not employ large numbers of people directly, it fosters business growth, especially during the transition from a home based business to something more substantial.



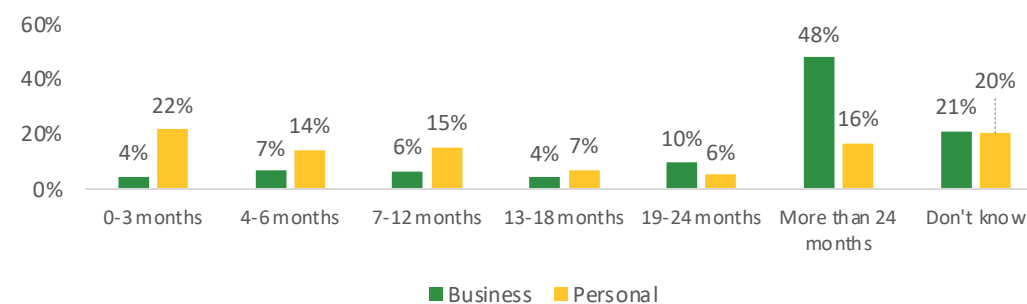
## Usage Patterns

Given that self storage units come in a range of different sizes to suit customers needs, it is no surprise that 89% of customers only use one unit. This increases to 91% for private customers alone. Business customers tend to take larger units with the most common size for private customers being 10 – 50 square feet, followed by 50 -100 square feet. Business customers also stay a lot longer in their units than personal use customers reducing the level of churn in the self storage business.

Length of Use to Date

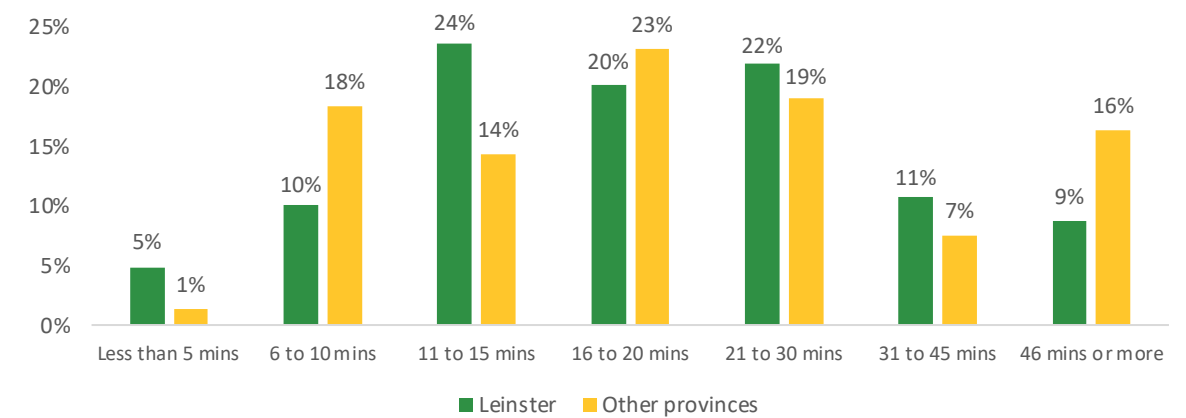


Intended Use



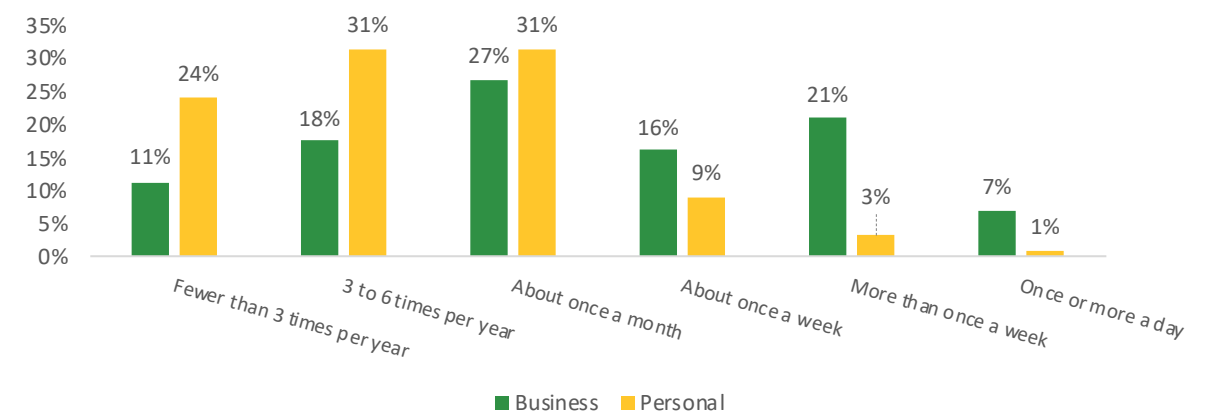
People travel further to their local self storage business in Ireland than they do in the UK with 58% within a 20 minute travel. This is likely due to the lack of self storage stores in the country with most located in the major cities. When you consider data from Leinster only, where the most self storage stores are located, you can see people travel far less to their local self storage store. For most customers self storage is a convenience; they want to be close to their goods so that they can access them easily when they need to. For people traveling or storing goods they are not planning on using as often then location may not be as important, but most customers would select a store as close as possible.

Distance to Travel to Store



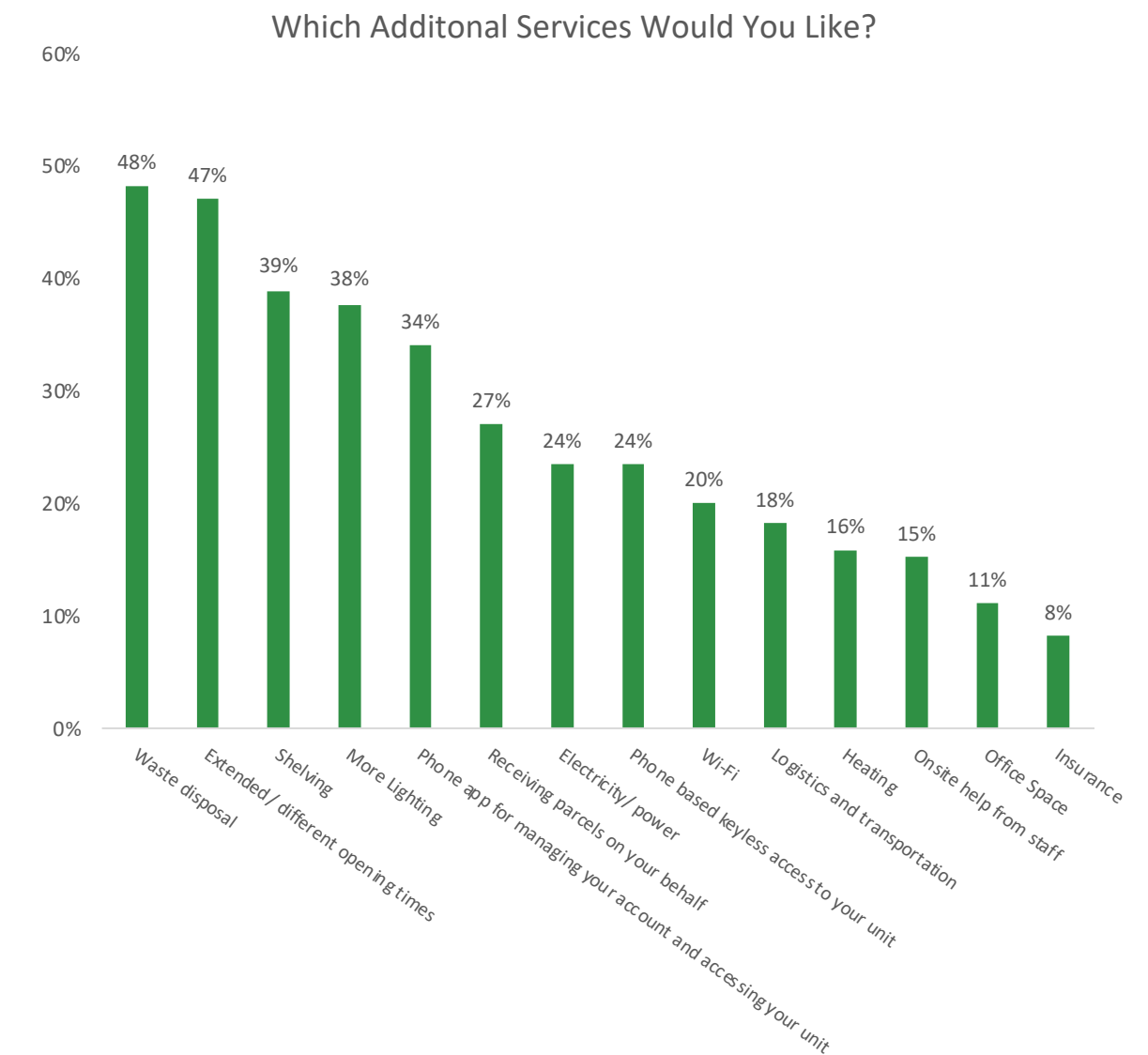
Despite the customers preference for a store close to them and the perception that they will need to access their goods frequently, 55% of personal use customers access their self storage unit less than once a month, with 24% accessing it less than 3 times a year. Understandably, commercial customers access their unit more frequently with 44% visiting their unit once a week or more.

Frequency of Visiting Storage Unit



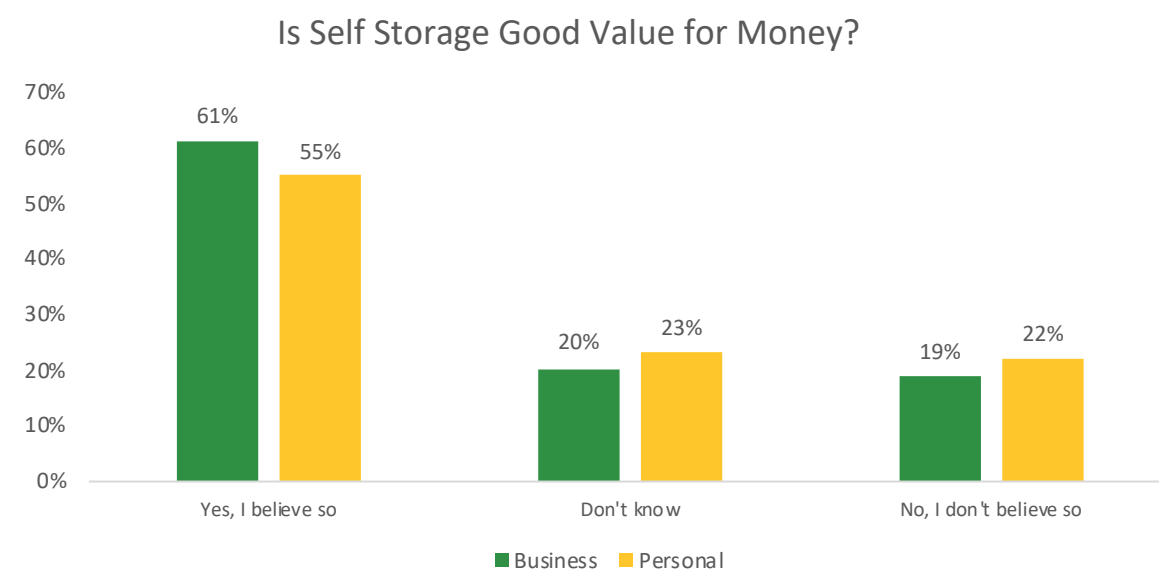


Waste disposal and extended access hours are the most requested services by customers. Many stores are reducing their access hours largely to reduce criminal activity which is more common when stores are unattended and late in the evenings. When we look at access data from stores with extended access there is often very few customers accessing the store out of hours, particularly after 9:00pm. It is possible that they like the idea of being able to access their goods out of hours, but in reality would rarely use the service at these times. It is interesting to note that 25% of customers would like keyless access to their units from their mobile device. This is relatively new technology for self storage businesses and there are limited stores with this functionality in Ireland. It is a considerable investment for the stores to implement such technology but clearly there is a demand for it from customers. Whether they would pay extra to use such technology remains to be seen.



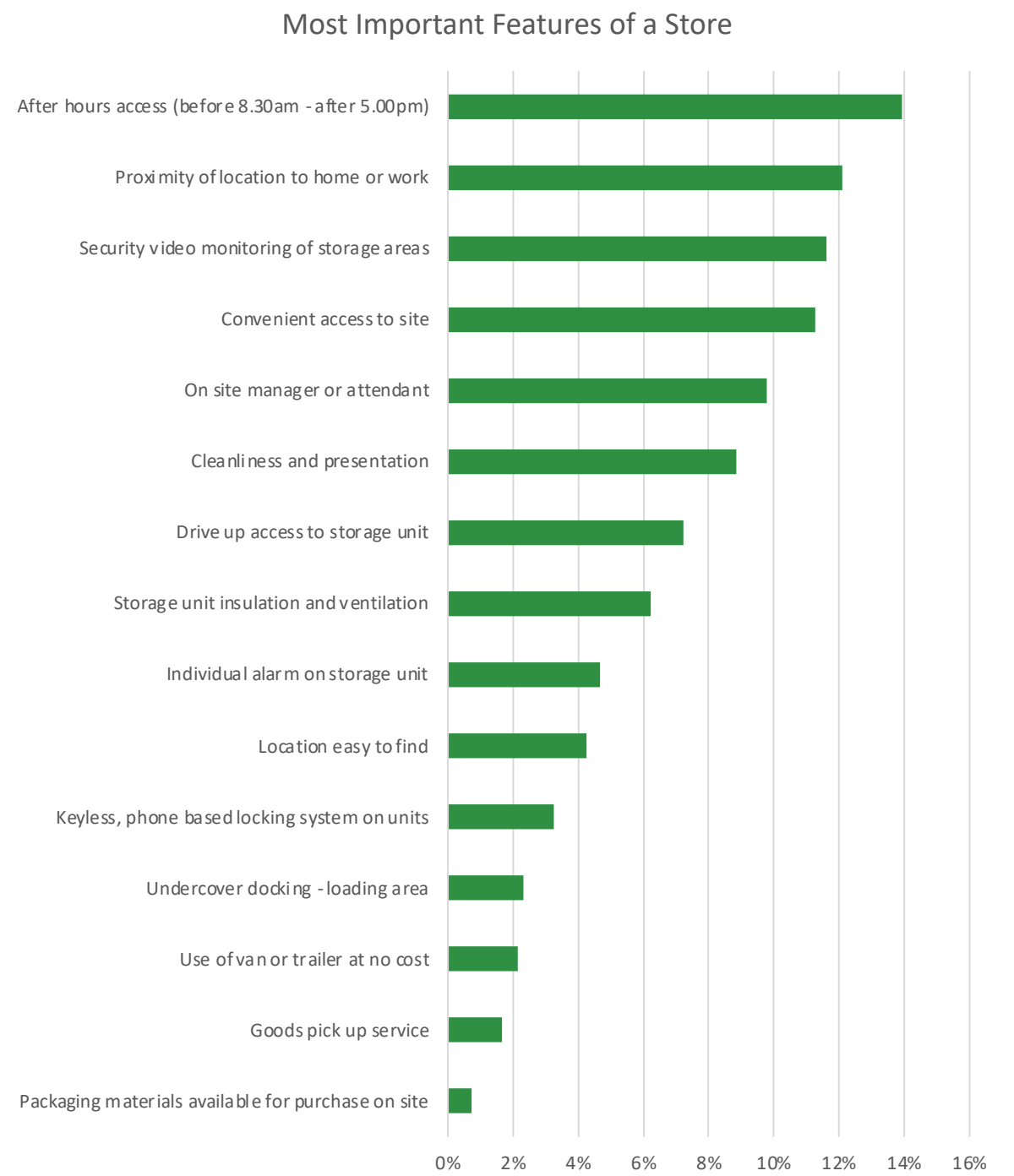
## Value and Services

Businesses see more value in self storage than personal customers and it is somewhat of a concern that 22.6% of customers perceive the service as poor value. However, only 16% of the people who believe it to be poor value are planning on moving out in the next 3 months, which is only a couple of percentage points more than those that consider it good value. So the data suggests that even if people do not see value in the service, they have limited alternatives and this does not mean they are significantly more likely to move their goods out of storage.

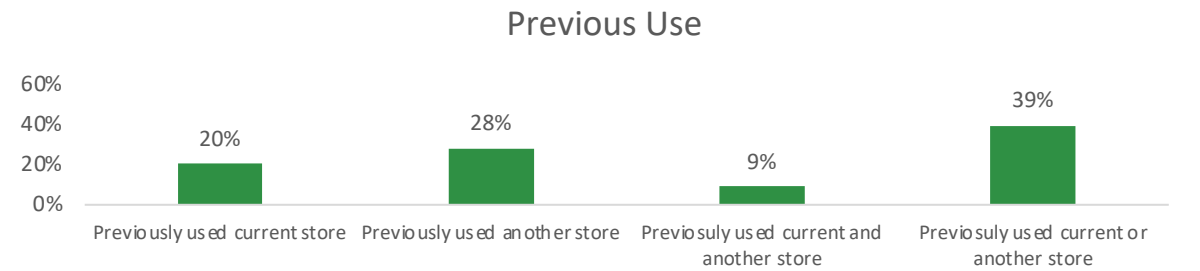




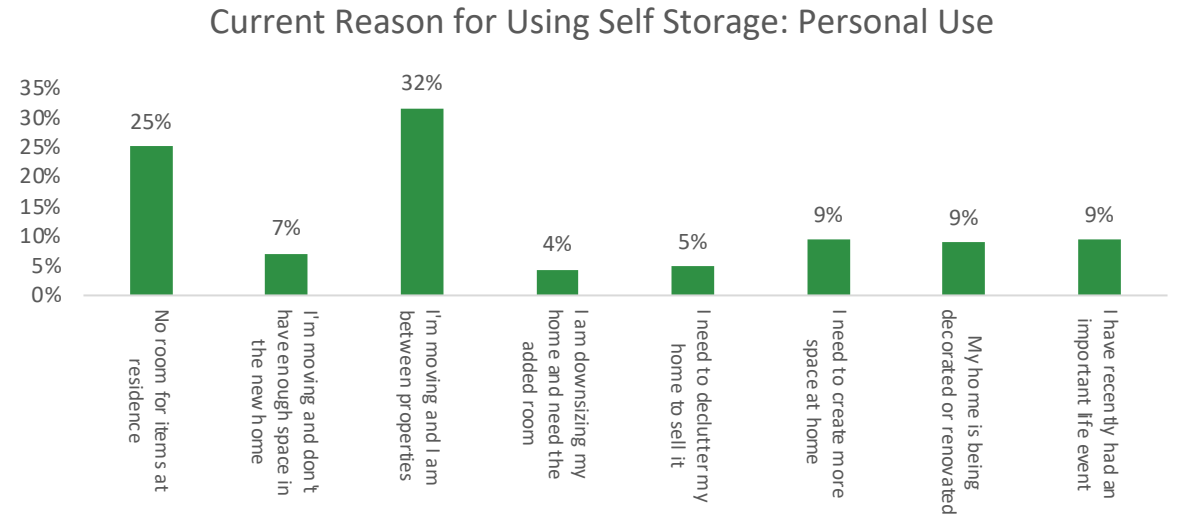
When customers were asked to rate their top 3 most important features of a self storage store access and security measures rated the highest. While customers may state after hours access is the most important feature, the reality is store data shows most customers never access their unit out of hours. Stores must also balance the increased likelihood of criminal activity out of hours against the number of customers that genuinely need the service. Hence some providers will charge extra for out of hours access, so customers that value it have access but there are less options for improper use out of hours.



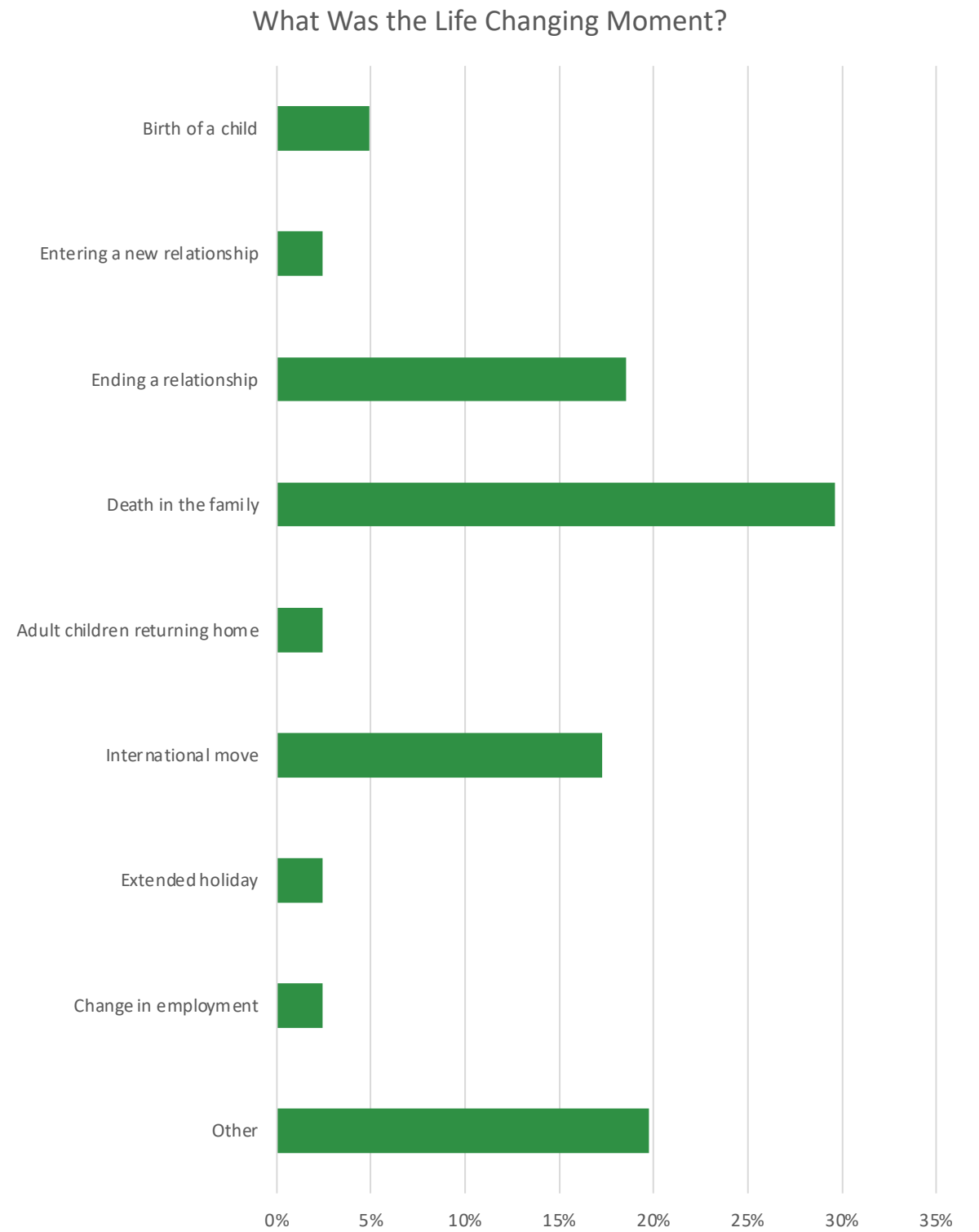
Repeat customers are a big part of the Irish self storage market with 39% of current customers being repeat users. This is higher than the UK (32%) and Europe (34%). There is an opportunity to market to past customers based on this data. It also raises the potential for active referral campaigns. If so many customers are repeat users, they are likely satisfied with the service provided and could be sharing their experiences within their network.



Storage relating to house moves remains the most common reason people use self storage, accounting for 47% of all personal use customers. This does mean the industry is influenced by changes in the domestic housing market. When considering the life changing moments that bring people to self storage death in the family is the most common. This is a sensitive issue but does provide an ideal marketing channel for operators who can create a suitable message for this target group. It should also be considered that the initial reason a person uses storage is not always the reason they remain. Often people come for a short-term need but then find the convenience of a room away from home useful for storing items for an extended period, often many years. For example, 51% of people who said they came to self storage due to a house move have had their unit for over 6 months, 38% have had it for over a year and 20% more than 2 years, which is a lot longer than you would expect a house move to take.

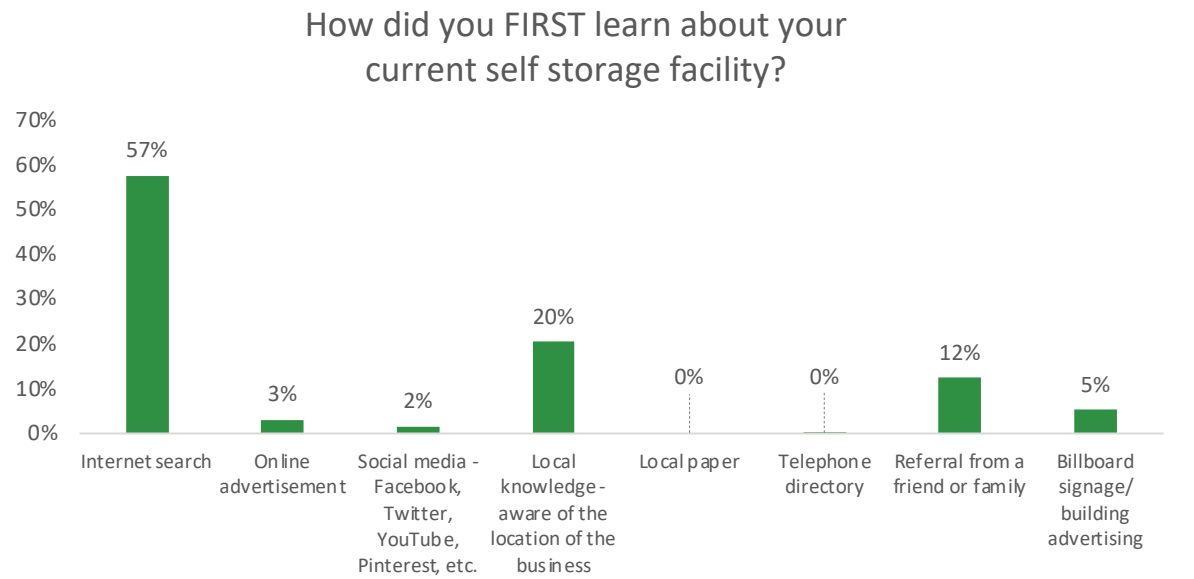


Of those customers that came to self storage during a life changing moment death in the family is the most common reason. Self storage can provide relief for families in this situation, giving them time to sort through a loved ones belongings after the initial stress and grief of their passing. Of the other moments, retirement, returning to education and downsizing were popular responses.



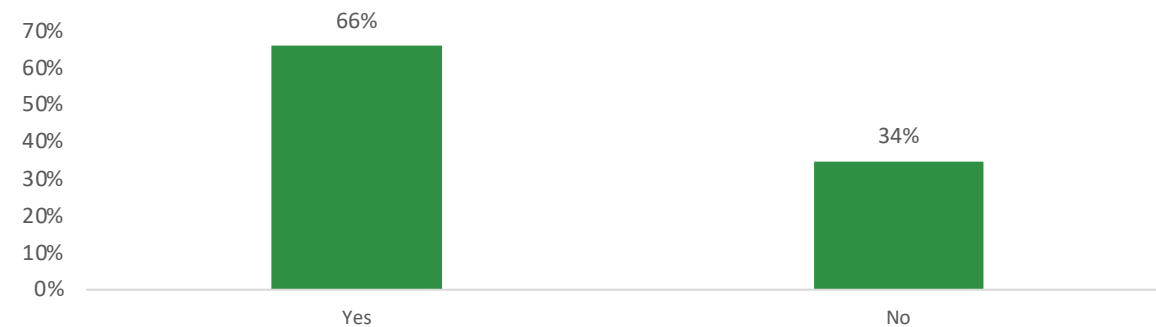
## Customer Journey

In today's digital world it is interesting that only 57% of people first heard of their self storage business online. It shows the power of a well located site with high visibility with 20% of customers choosing a site where they were aware of the location. There is no doubt that location is one of the most important factors when a customer chooses a self storage solution as they want a local solution that is close to their home or business.



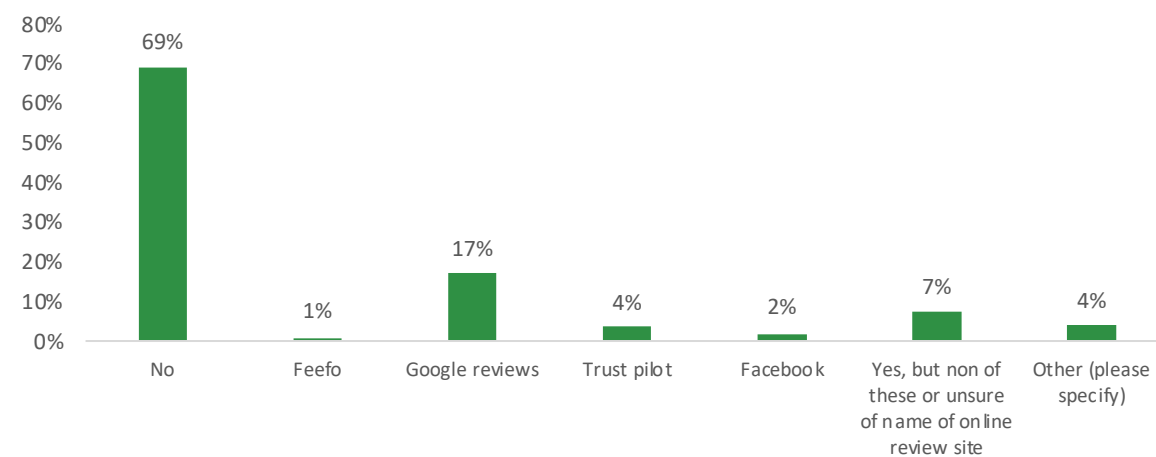
As general awareness and understanding of self storage by the public is quite low, many customers that found their self storage store offline still went online to conduct further research or possibly contact them. This means a total of 71% of customers went online to assist them in their purchase decision.

If you first heard of the business offline, did you then search online as well for more information?



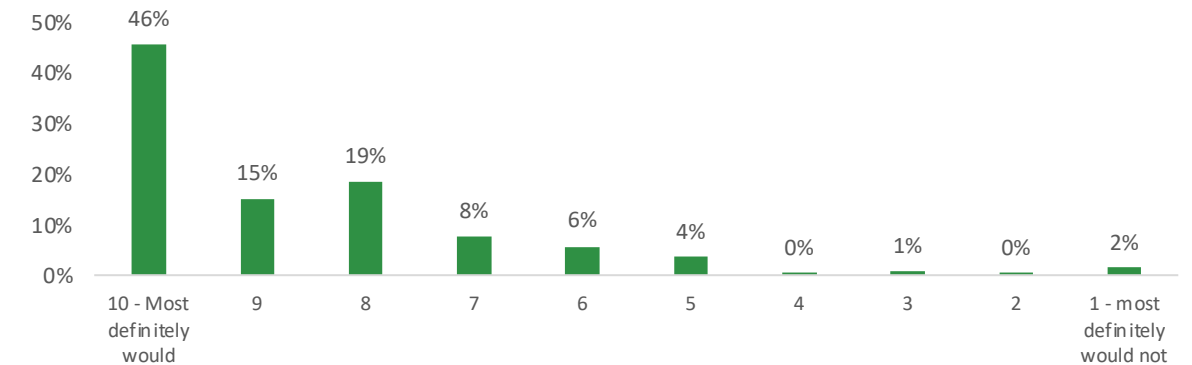
Online reviews also play an important role in customers choosing their self storage provider with 31% of customers looking at a review site, with Google being the most popular. Particularly with products or services that customers have never used before online reviews often provide validation for the customers choice. They are usually referred to towards the end of the research phase to check if there are any issues with the store and see if customers with similar needs found the store useful. These results are similar to the UK and other European countries.

Did you consider any online reviews before selecting the self storage facility you use?



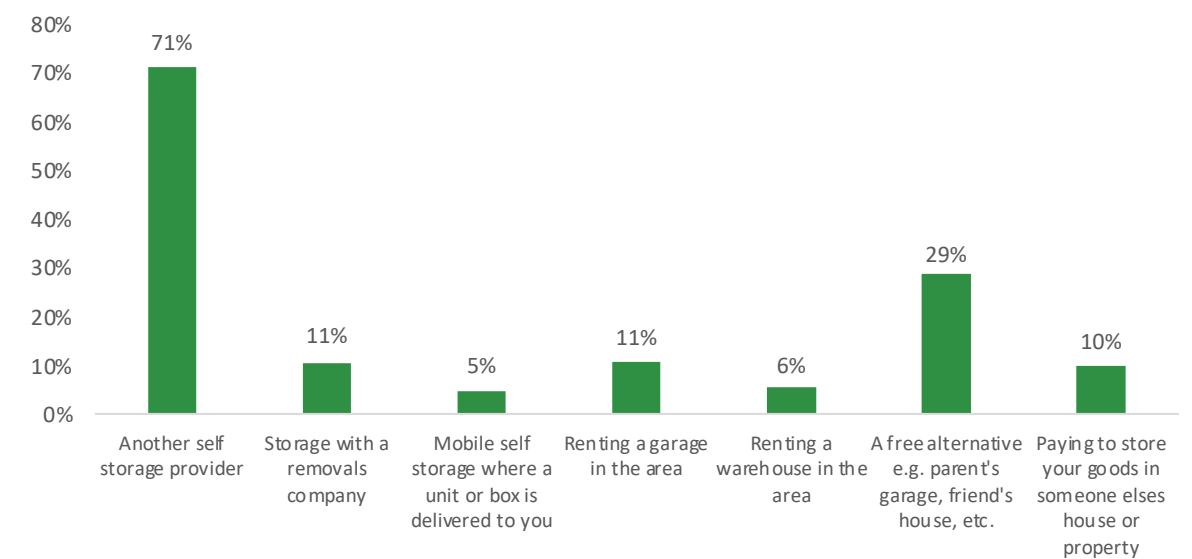
Customer satisfaction in self storage is high. When considering a net promoter score 61% of customers are considered promoters with 46% most definitely recommending the business. Considering people often come to self storage during stressful times and even moving goods into self storage can be difficult, this is a good result. Retail typically scores around 60% while logistics and transportation averages 40%.

How likely would you be to recommend this store to friends or family on a scale of 1 - 10



Rather than other self storage providers, the biggest competition for customers is a free alternative, like storing goods with friends or family. It is worth noting that only 13% of customers considered one or both of the so called “challenger” industries to self storage such as mobile storage and peer to peer storage. Note that customers could choose multiple responses to this question for all the different options the considered; hence, the total value of responses will exceed 100%.

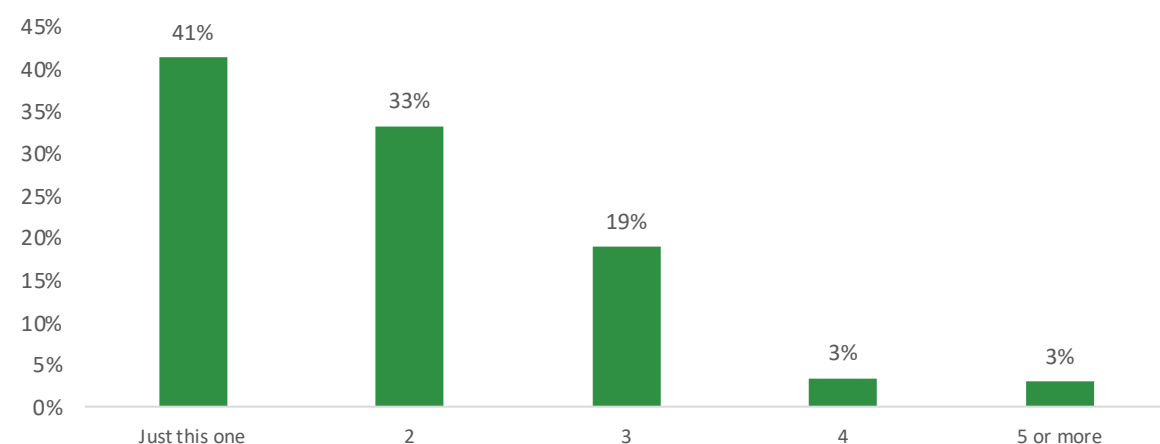
Before choosing this self storage facility, what else did you consider?





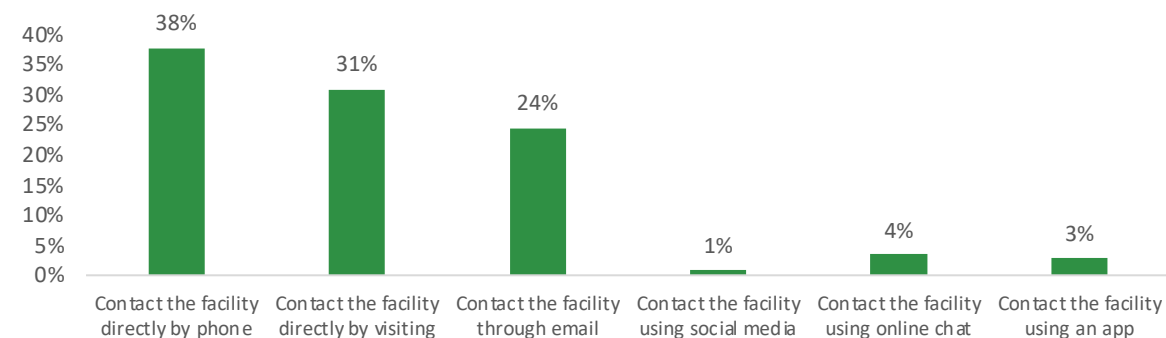
As much as 94% of customers contacted 3 or less stores before selecting their chosen solution. While this appears to indicate that customers are not extensively shopping around for different solutions, it should also be considered that many self storage businesses have their prices online. So customers may have been researching other stores without directly contacting them. Having prices visible online is one of the debated issues within the industry as the concern is that when customers do not understand the product they can be comparing on price alone when the quality of the store and features offered may differ.

How many self storage facilities did you contact before selecting this one?



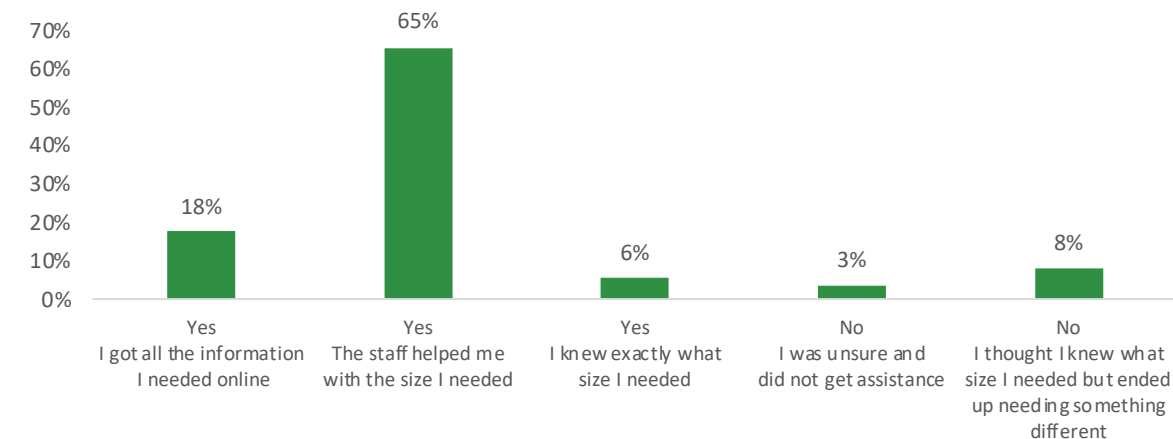
Irish customers still prefer in person contact when booking a self storage unit rather than online contact. So while operators need a clear website for customers research they also need a solid sales support structure for phone and in-person contact. In-store contact in Ireland was significantly higher than the UK(22%). Leinster customers are more likely to visit the store in person at 32% equal to those that chose to contact the store by phone.

When making an enquiry about renting a self storage unit, would you prefer to:



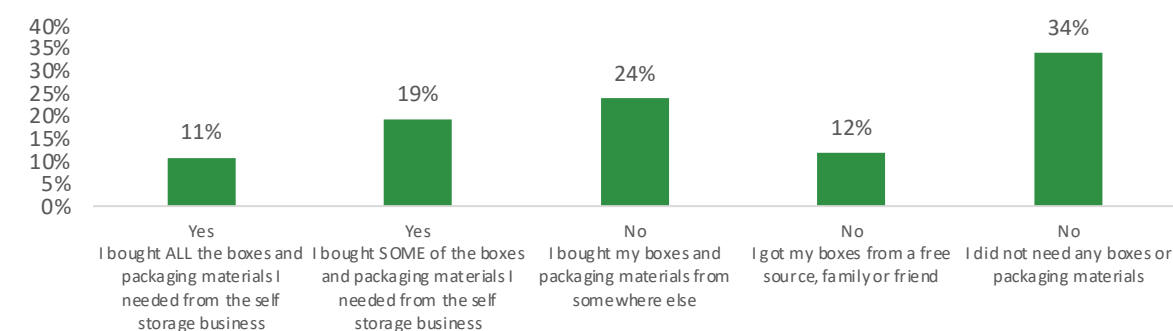
Choosing the correct size of storage unit can be challenging for customers. Many people struggle to visualise how large a space will be required to store their goods. The fact that so many customers contacted the store directly has contributed to the level of assistance that store staff can give customers when selecting the correct unit. When analysing the data further, almost all the respondents that said they were unsure and did not get assistance preferred online contact with the store and 75% of those that ended up with the wrong size also preferred online contact. Providing an easy means for customers to gauge the size of unit online remains a challenge for the industry.

Did you find choosing the right size unit was easy?



Selling of boxes and packaging can be a valuable source and ancillary income for self storage businesses. 66% of customers needed some sort of packing materials, but of these only 30% bought some from their self storage store and only 16% bought all their packing materials at the self storage store. There is a lot of potential for improvement here. Often self storage staff are not actively selling packing materials, only providing information when asked about it. Store displays of packaging are often not retail friendly, they may look appealing with stacked boxes and displays, but they do not show customers how each box can be used, differences between locks and the like. Providing packaging bundles based on the size of the unit or reason people are storing and taking a more active retail approach to selling packaging could have a significant impact on profit levels.

Did you buy boxes or packaging materials from this self storage business?





## Public Survey

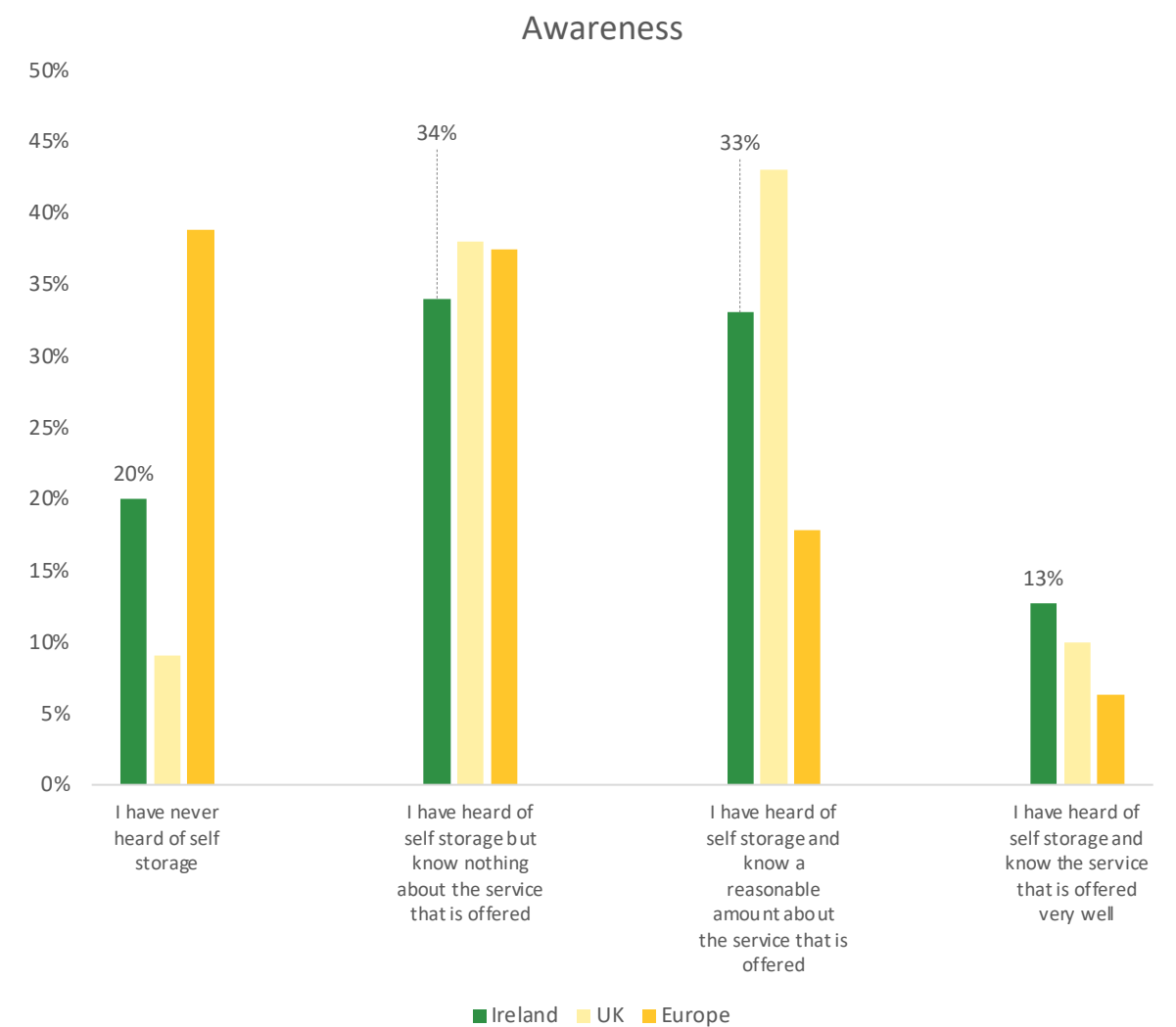
In May 2024 an online survey of the general population was conducted using the services of YouGov. The responding sample is weighted to the profile of the sample definition to provide a representative reporting sample. The profile is derived from census data or, if not available from the census, from industry accepted data. 1002 people completed the survey and the data was broken into gender, age and region.

This data was compared with a similar survey completed in the UK during January 2025 and surveys in Spain, Denmark, Germany, Netherlands, Sweden, Austria, France, Poland and Italy during 2023 and 2024. For the purposes of the report, these continental European countries' data have been averaged and is referred to as Europe.

## Awareness and Understanding

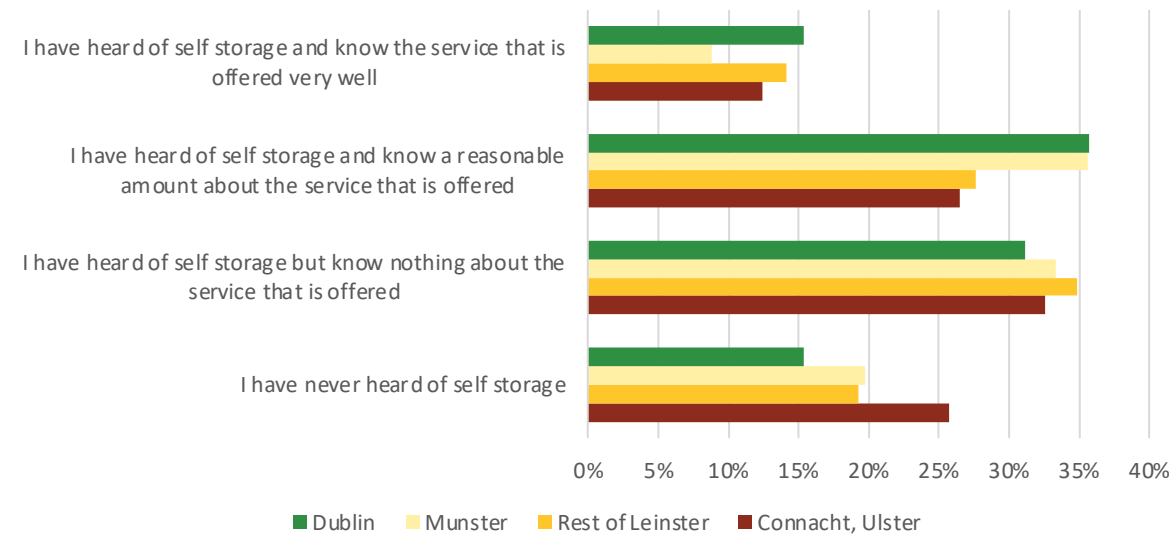
People in Ireland have a significantly higher awareness of self storage than those in the UK or Europe, despite the UK being a much more mature market than Ireland. This is likely due to the high profile sites of the larger operators and could also be assisted by the extensive public advertising campaigns run by NESTA in particular, using billboards, bus stations and other mediums with messages giving people reasons to use self storage. There is also generally more use of radio advertising in Ireland, possibly as the population is more clustered and there are less stations than other countries.

Despite the high results, still less than 50% of the population claim to know of or understand what self storage is and 20% of people have never heard of self storage. This shows the market has substantial potential for growth as awareness increases and these people go through the life changing moments that often bring people to self storage.



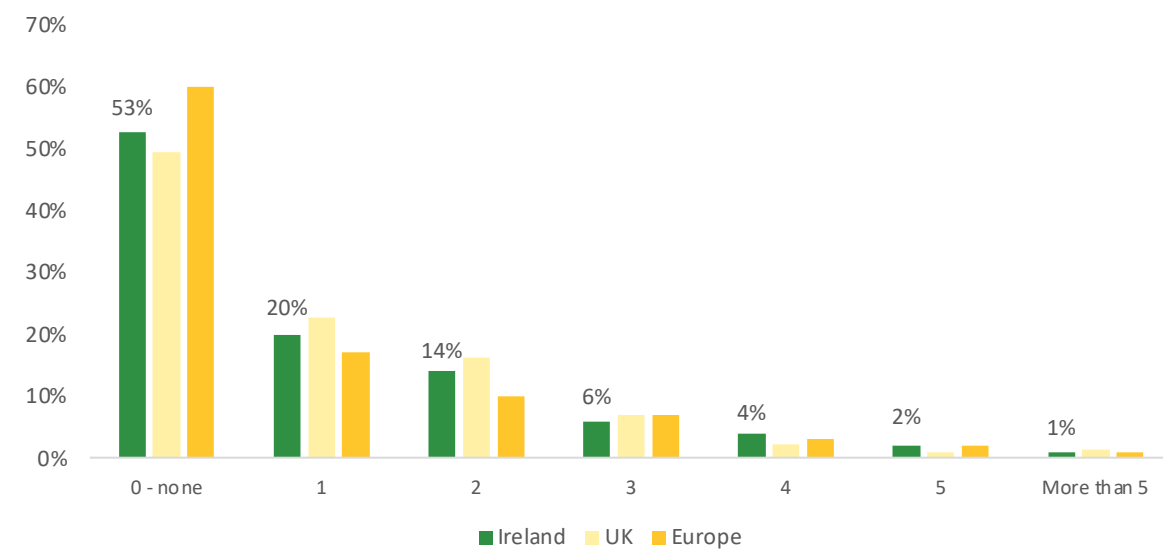
Understandably, awareness is higher in Dublin which also has the highest concentration of self storage space and more high profile stores on major roads like the M50.

Awareness by Region



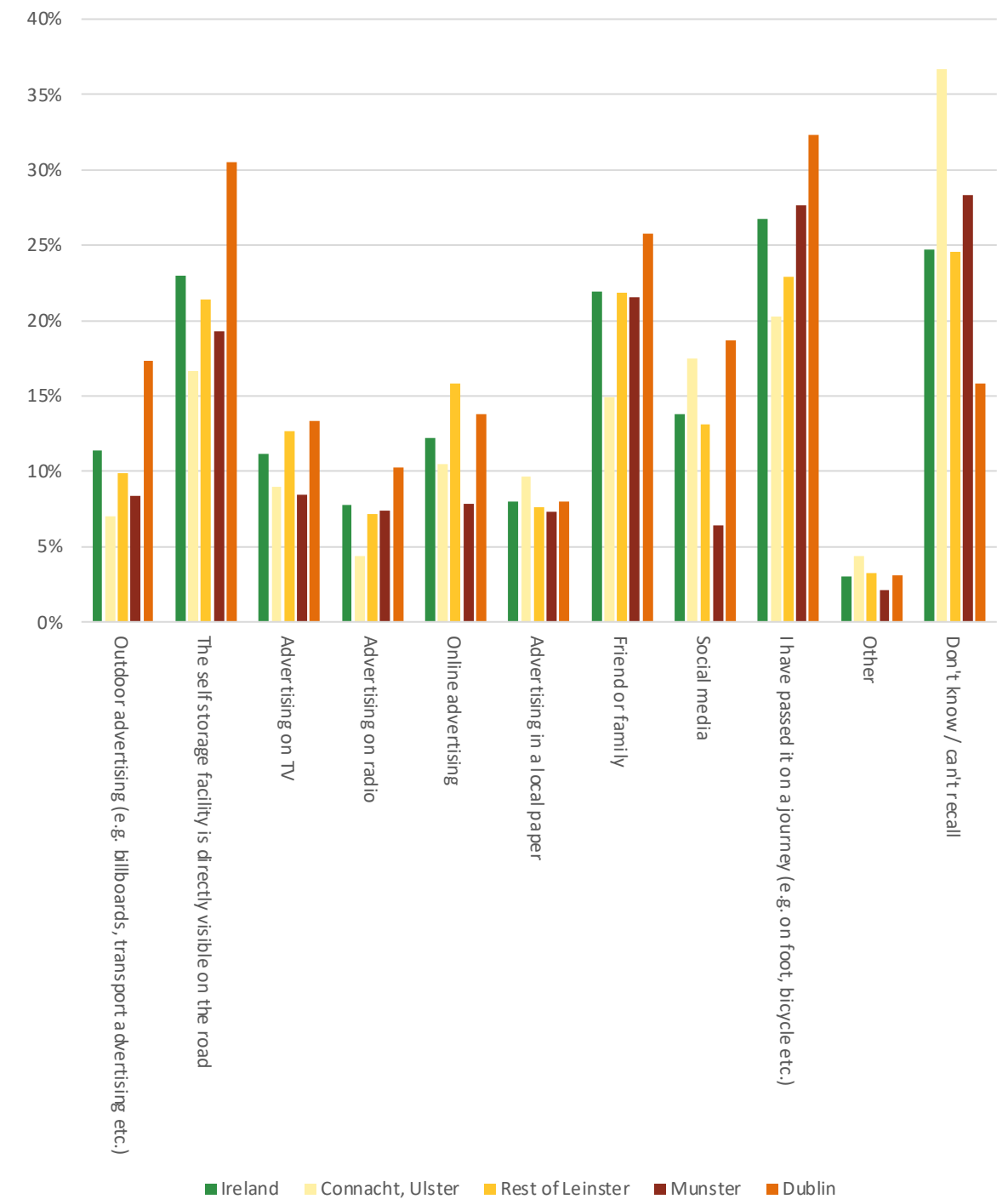
Further demonstrating that high profile stores are contributing to awareness of the product, with a little over half the population are aware of a self storage store in their local area which is better than the European average, and more people know of 4 or more stores than in the UK. When you further analyse the data, it shows the bulk of people that knew of 2 or more stores in their local area also claimed to have a good understanding of the product.

How many stores in your local area?



When asked how they were made aware of their local self storage stores, site awareness is the main reason, either they pass it on a journey or its directly visible on the road. Dublin has a higher percentage of people who were made aware of their self storage store via outdoor advertising, TV and radio, indicating that the mass media campaigns the operators are running in the city are increasing awareness of the industry.

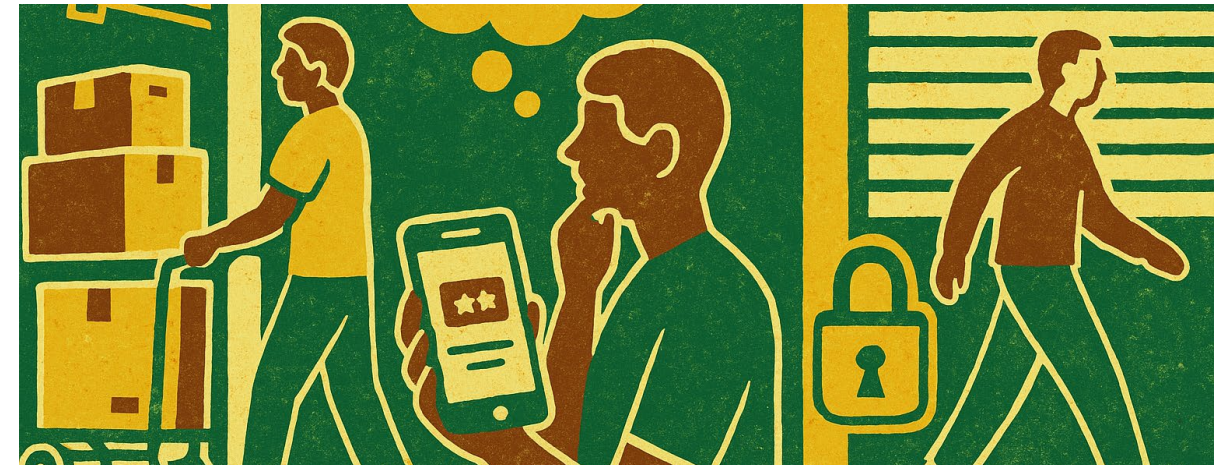
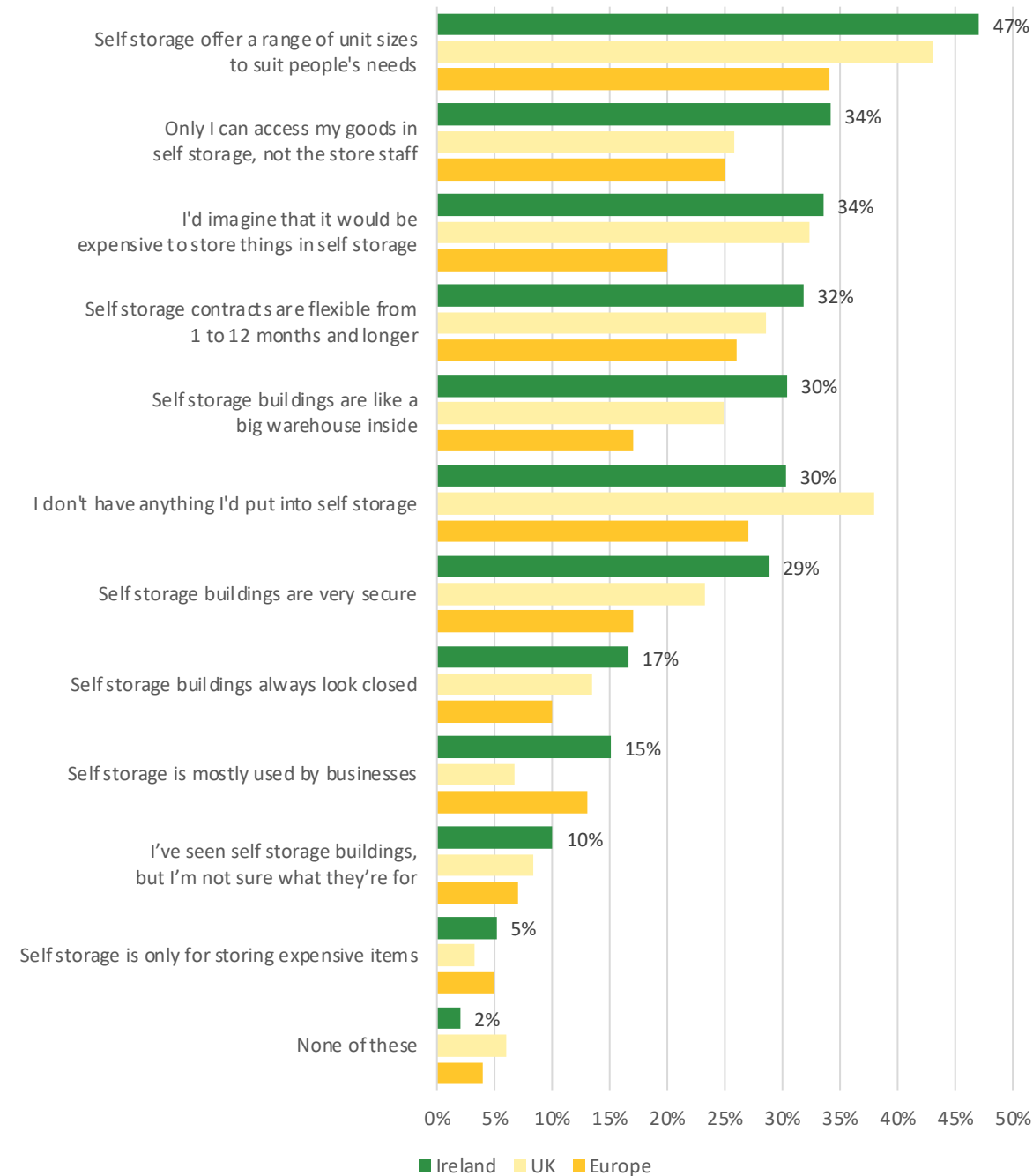
How were you made aware of your self storage store?





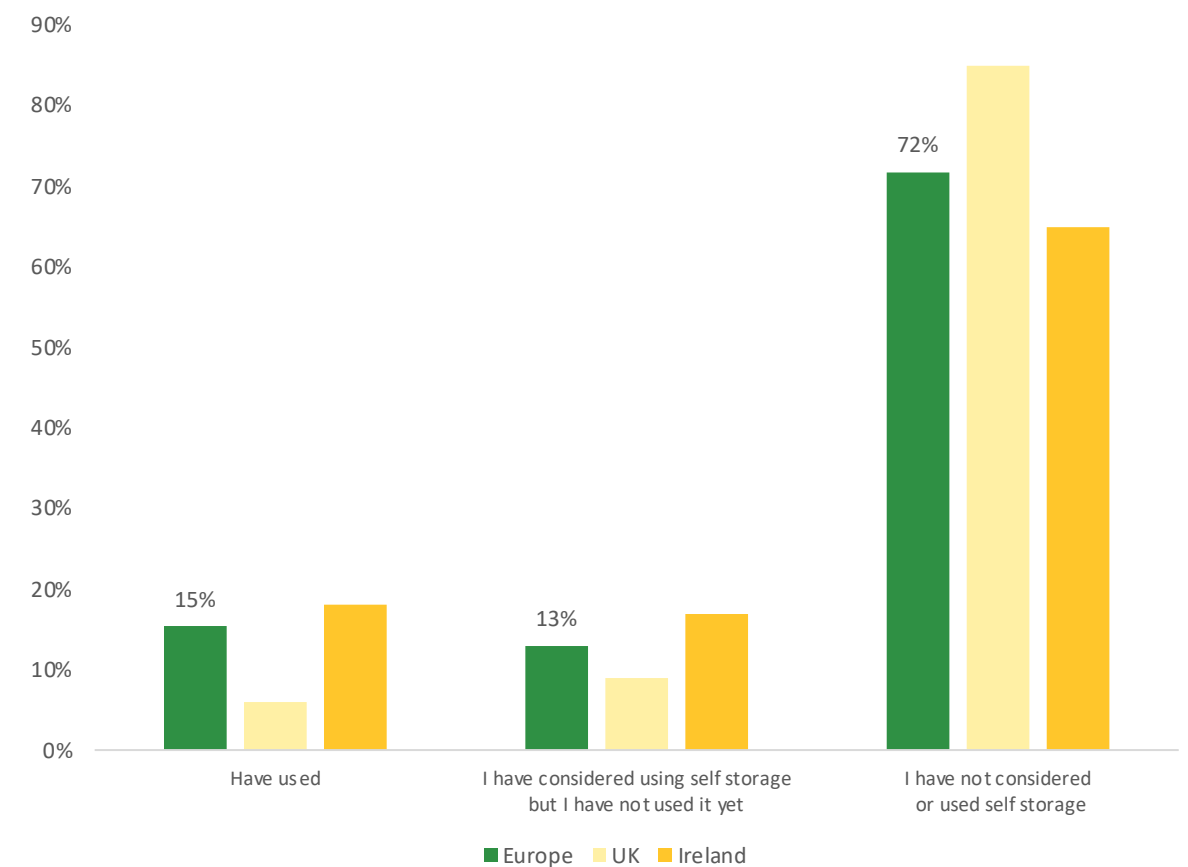
When further questioning people on their understanding of self storage it is apparent that Irish people generally have a better understanding of the key features of self storage than people in the UK or Europe, polling better in key areas such as, security, flexible contracts, having individual access to goods and offering flexible contracts. However more people thought self storage was used mostly for businesses, were like big warehouses and would be expensive. So there is a larger negative sentiment towards the product in Ireland than other countries despite the better understanding of what self storage delivers.

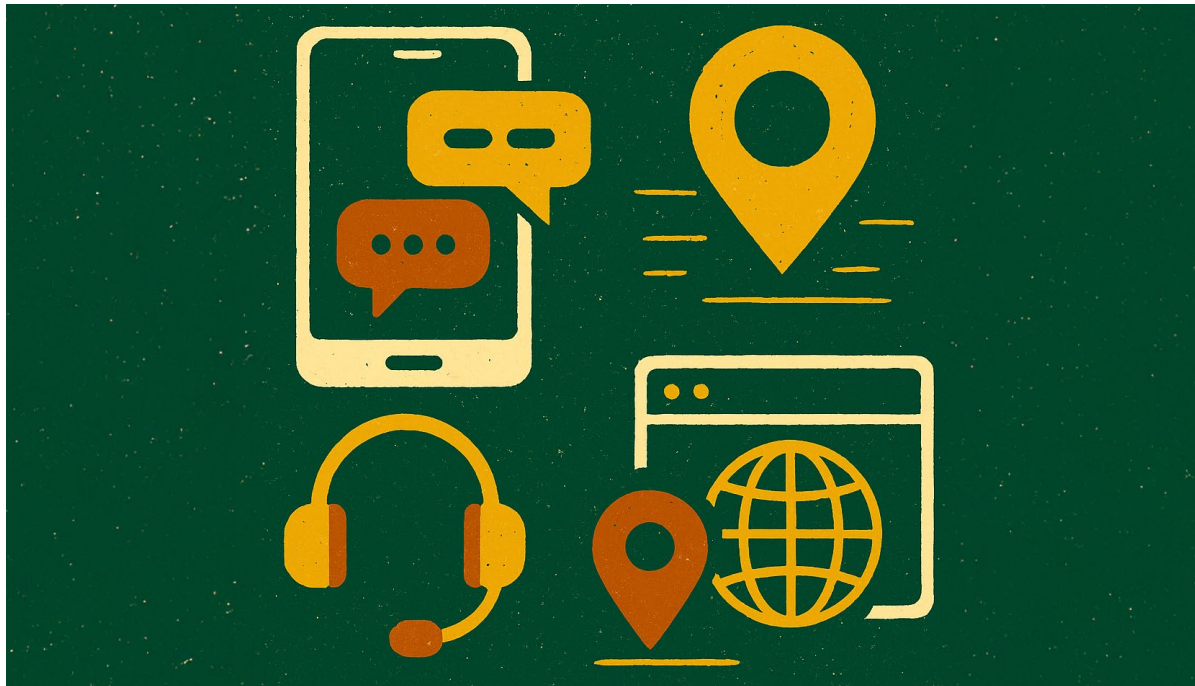
### Recognised Features



While the percentage of respondents who are currently using self storage is high in Ireland, so is the number of people considering using it. The challenge for the industry is to convert these people into actual users. As other countries, there is a significant portion of the population considering but not using. Do they end up storing their goods somewhere other than self storage and what was the main reason they did not end up becoming self storage users?

### Usage

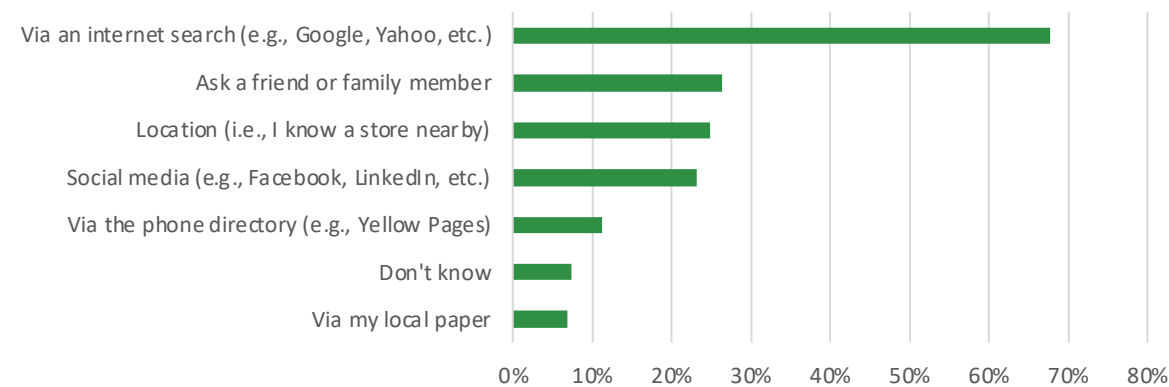




## Contact Methods

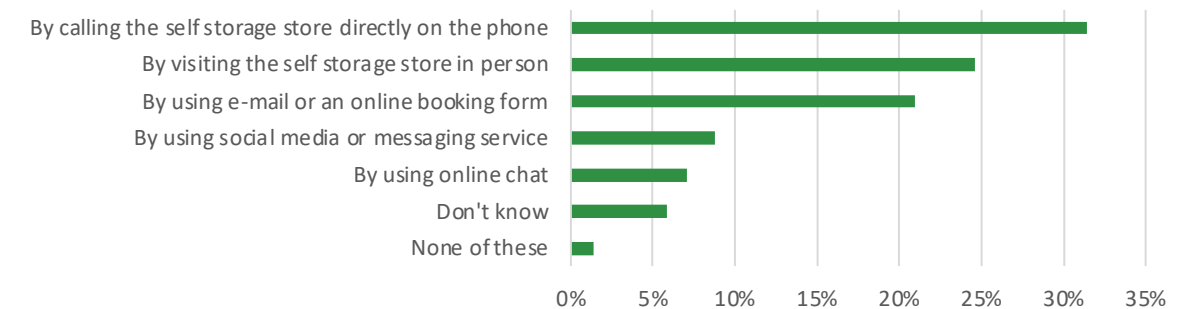
Despite the fact that store visibility was the main driver for recognition of a self storage store, customers will still likely use the internet to find a store to use. Referrals are also a popular means to select a store. This shows businesses should be actively encouraging existing and past customers to refer new business and supply exceptional service to have their customers talking about them. Social media was higher in Ireland than other European countries suggesting businesses should be active in their local social media communities.

How would you find a store to use?



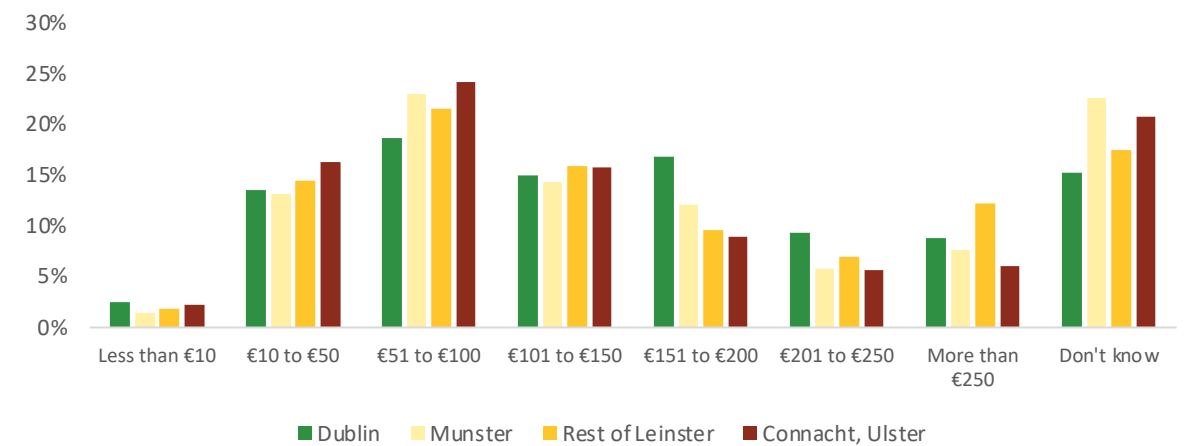
When asked how they would contact a store to make a booking there is a clear preference for personal contact with only 37% of people selecting online methods. While customers may research online, they prefer to speak to someone in person to make the booking. This is likely as people new to self storage would rather talk to someone to make sure they have the correct unit size and understand the process having not used it before. People that had used self storage in the past were almost twice as likely to contact a store via email or social media as they felt they understood the process and did not need assistance with the booking process.

How would you contact the store to make a booking?

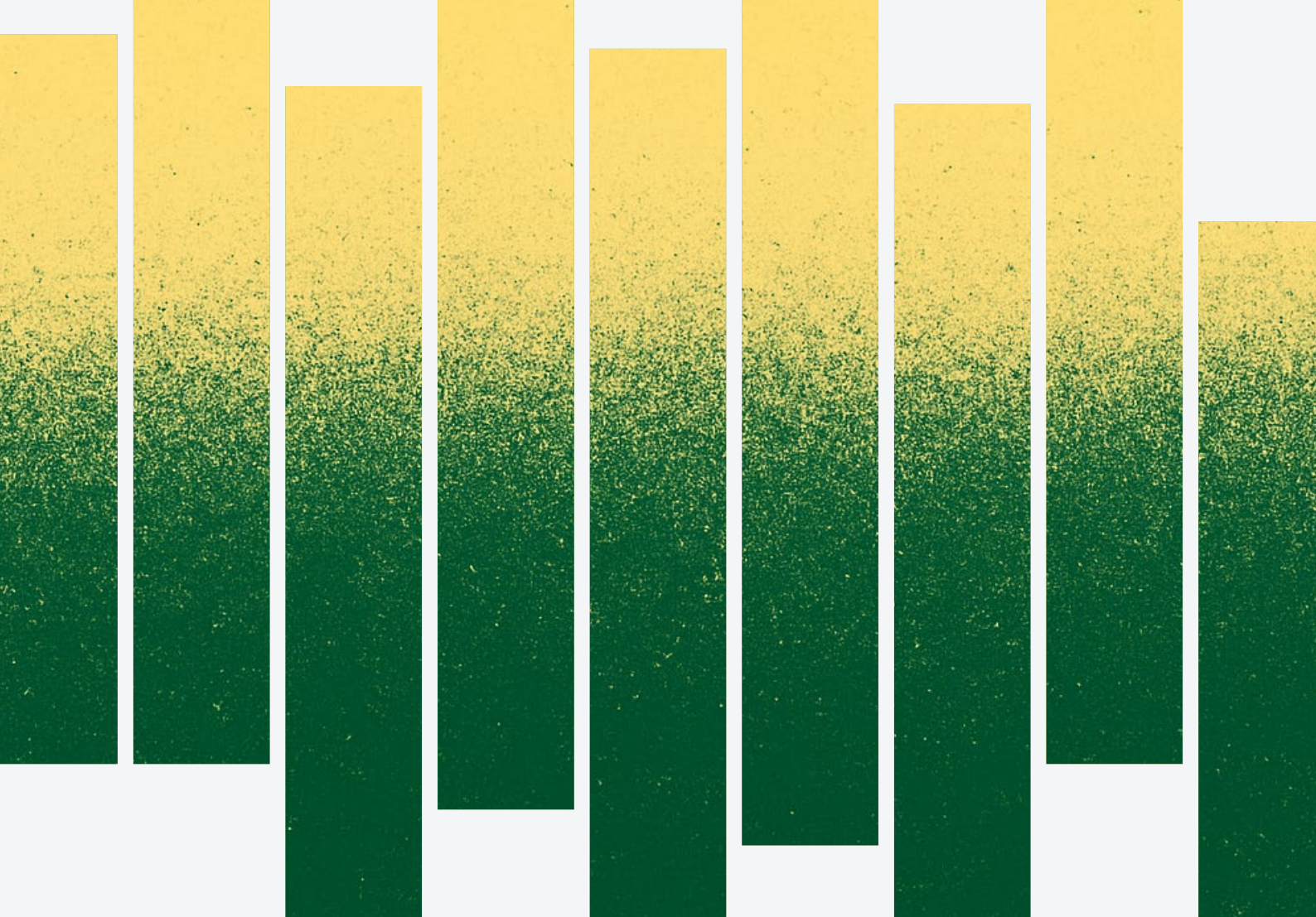


Most people do not have a clear idea of how much a self storage unit would cost with most of those people that suggested a price coming in lower than the actual cost. The question asked to price a 100 square foot unit, giving an explanation on what that unit would typically hold. In Dublin a unit that size is likely to be over €200 a month, it may be €150-€200 in some regional areas. This price misconception is one of the reasons the industry promotes up front discounts, in order to encourage the customer to try using self storage. Customer data shows us that once people experience the convenience and service from their local self storage company they consider it good value. We also know that the vast majority of people use self storage for longer periods than they initially expect.

How much would a self storage unit cost?







# IRELAND SELF STORAGE INDUSTRY REPORT **2025**

---



**E:** [info@selfstorageassociation.ie](mailto:info@selfstorageassociation.ie)  
**T:** +01234 56789  
**W:** [www.selfstorageassociation.ie](http://www.selfstorageassociation.ie)



**FEDESSA**  
Federation of European  
Self Storage Associations

**E:** [info@fedessa.org](mailto:info@fedessa.org)  
**T:** +32 472 94 33 24  
**W:** [www.fedessa.org](http://www.fedessa.org)