



**HUMIDITY
CONTROLLED**

INVESTOR DAY

21 NOVEMBER 2018

WELCOME AND INTRODUCTION

ANDREW CATSOULIS
MANAGING DIRECTOR



OPERATIONS

JAMES KIERNAN
GENERAL MANAGER - OPERATIONS



OPERATIONAL PLATFORM



PROPERTY

PROCESS

CUSTOMER

PEOPLE

PRODUCT

B28

B29

B30

B31



OPERATIONS

SCALABLE & EFFICIENT

- Drive organic growth
- Increase customer satisfaction
- Achieve operational excellence
- Develop team capability
- Effective asset management



CONTACT CENTRE

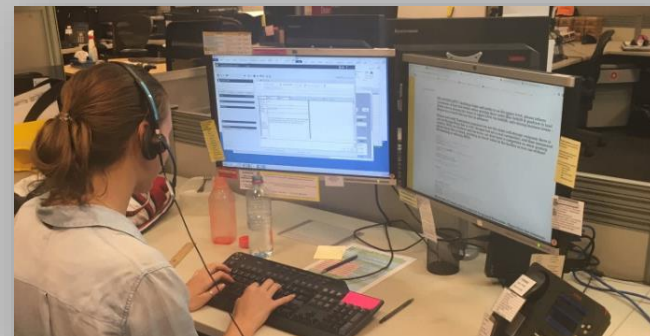


SPECIFIC FOCUS

OMNICHANNEL

CONTACT CENTRE TRANSFORMATION

- Improved customer experience
- Improved contact centre and team efficiency
- Improved response times and conversion



THIRD PARTY LOGISTIC SOLUTIONS (3PL)

Storage

- Multiple Forward Service Locations (FSLs)
- Multiple technician hubs

Service

- Full inventory management
- Pick & Pack
- Delivery
- 24 hour service

Business Outcomes

- Higher yield per sqm
- Service offering for a niche market
- No additional resources



REVENUE MANAGEMENT

MICHAEL LEE
SENIOR COMMERCIAL ANALYST
REVENUE MANAGEMENT



KEYS OF REVENUE MANAGEMENT

■ PRODUCT

- Unit sizing
- Customer service
- Ancillary services

■ PLACE

- Location
- Contact channels
- Unit layout

■ PRICE

- Competitor analysis
- Customer behaviours
- Unit specific pricing



STRATEGY

MAXIMISE REVENUE (REVPAM) WHILST
MAINTAINING OCCUPANCY GROWTH



- Maximise revenue
- Maintain occupancy growth
- Centre specific strategy
- Creating value

Revenue Optimisation

Unit rates

Promotions

Occupancy
Supply/
Demand

Competitors

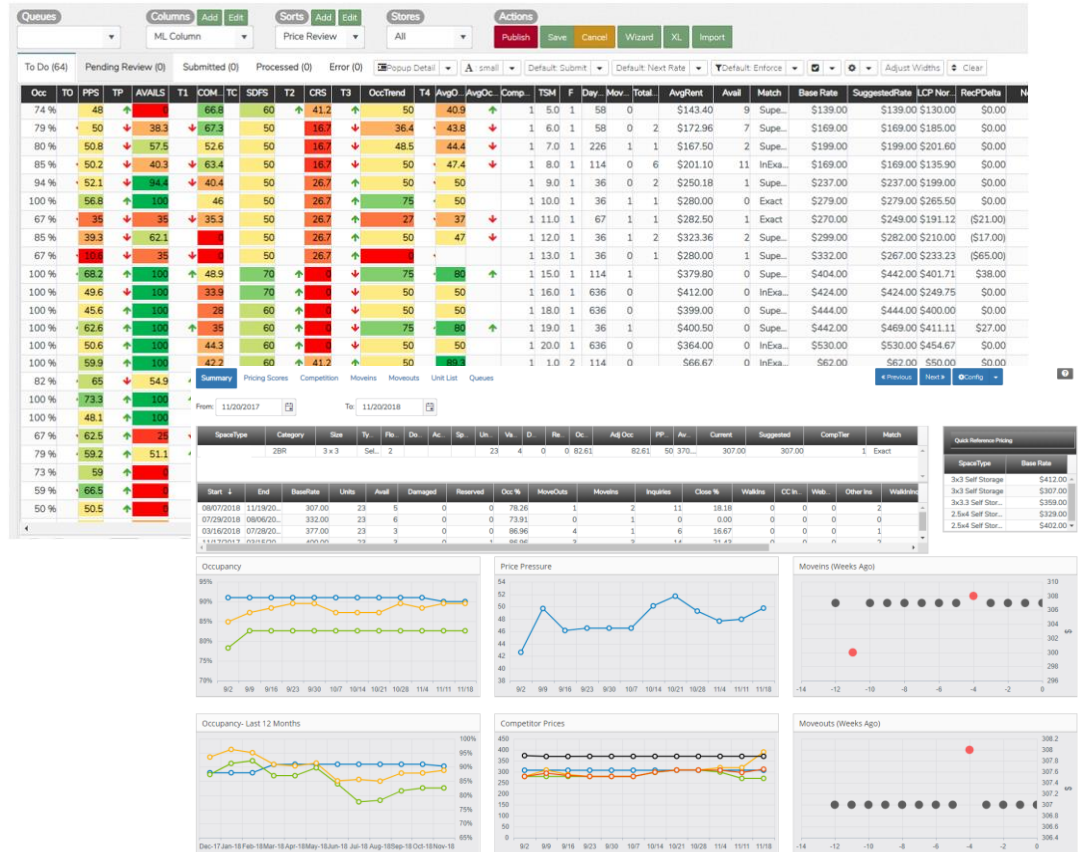
Utilisation

Timing



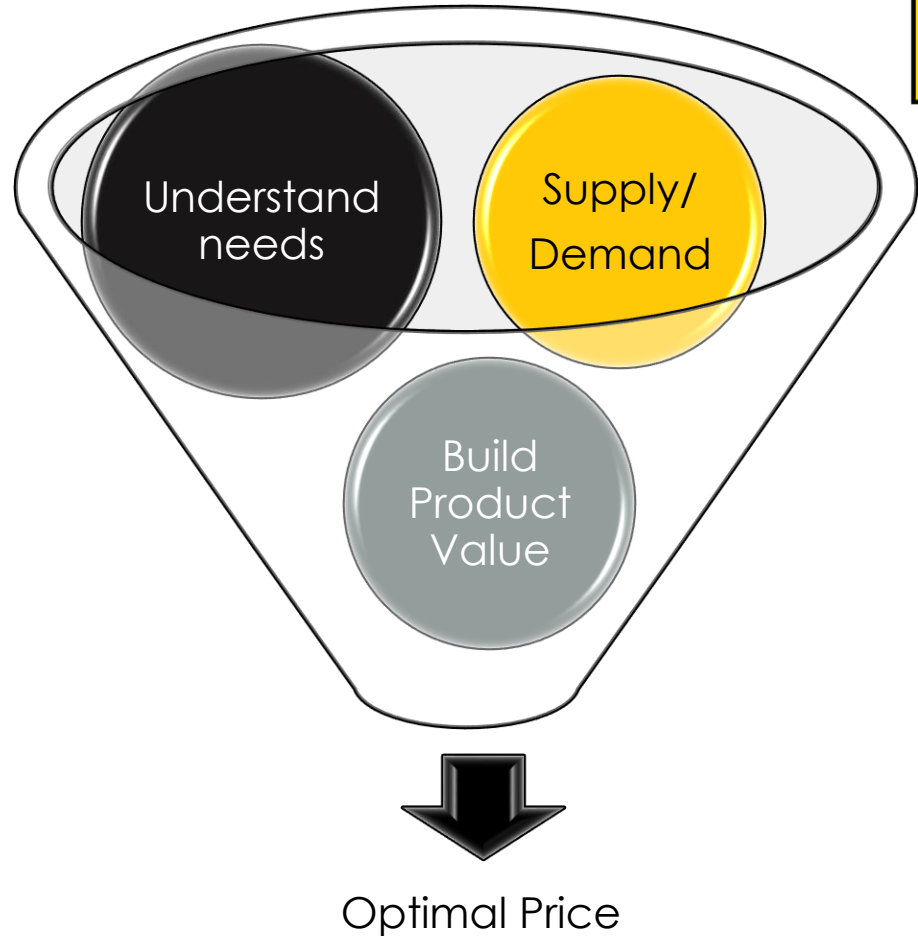
Pricing System

- Fully supported and client specific advice
- Competitor data
- Trend indicators
- System recommended rate
- Human factor



Unit Desirability Index (UDI)

- Simplified sales process
- System upgrades pricing automatically
- Meet customer need at optimal price

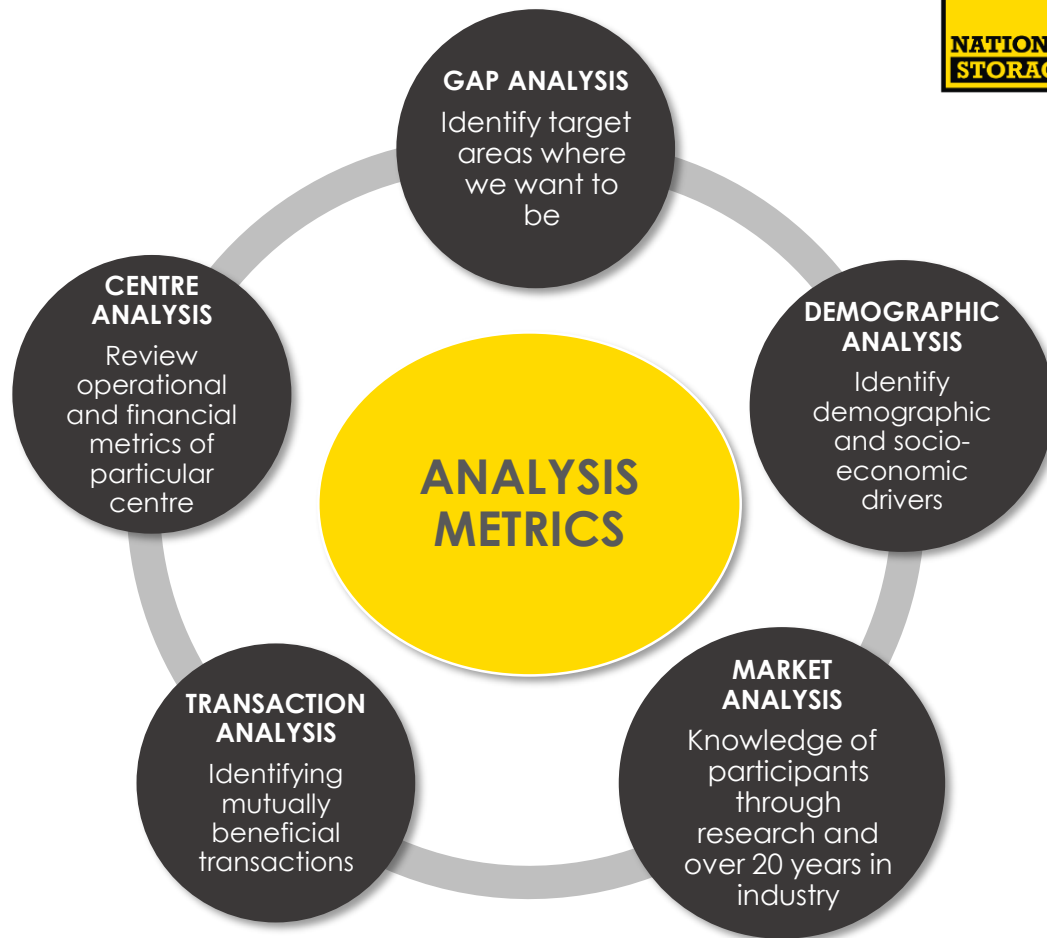


ACQUISITIONS

KRISTY CHERRY
GENERAL MANAGER ACQUISITIONS &
SPECIAL PROJECTS

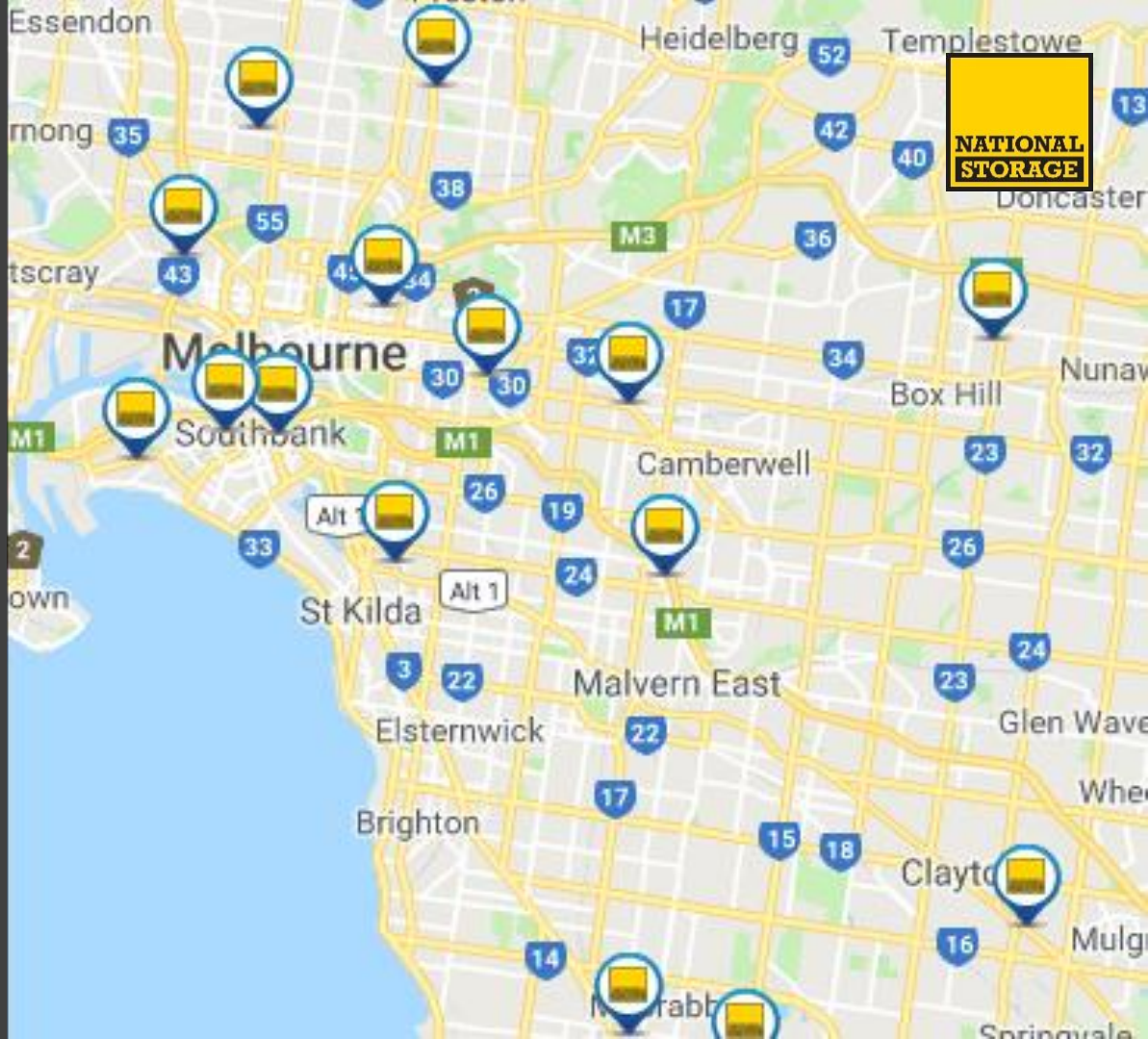


IDENTIFY ACQUISITION OPPORTUNITIES



ACQUISITION PIPELINE

- Strong Pipeline
- \$100m under active consideration
- Highly fragmented industry



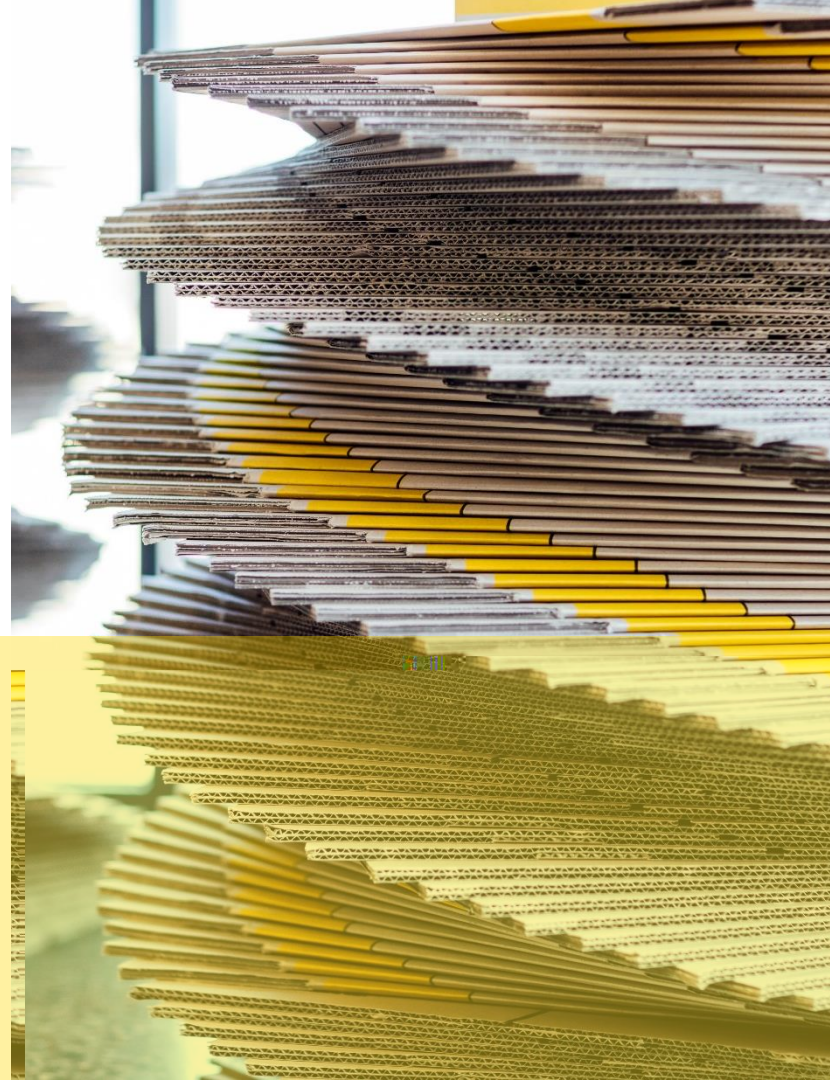
ACQUISITION AND INTEGRATIONS PROCESS



MARKETING & TECHNOLOGY

MARCUS BARRON
GENERAL MANAGER TECHNOLOGY

"To be the enabler of business success and take National Storage to greater levels of efficiency, while improving the customer experience."



MARKETING - STRATEGY

- Increase brand awareness
- Increase product offering awareness
- Deliver quality enquiries
- Improve conversion rates and channel efficiency
- Scalable, measurable platform

Insights



Strategy



Execution



Review

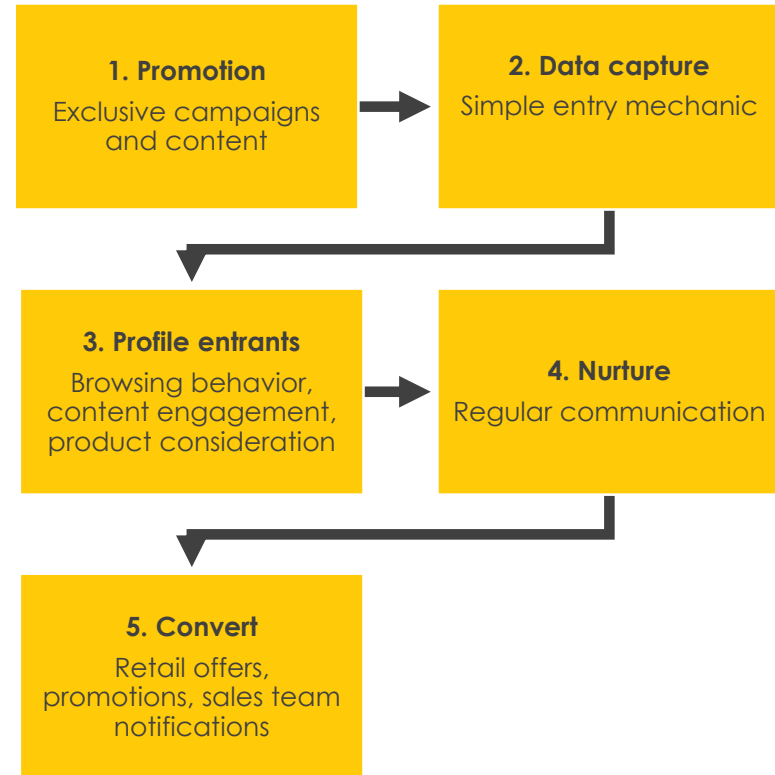


MARKETING – SPONSORSHIP



MARKETING - SPONSORSHIP

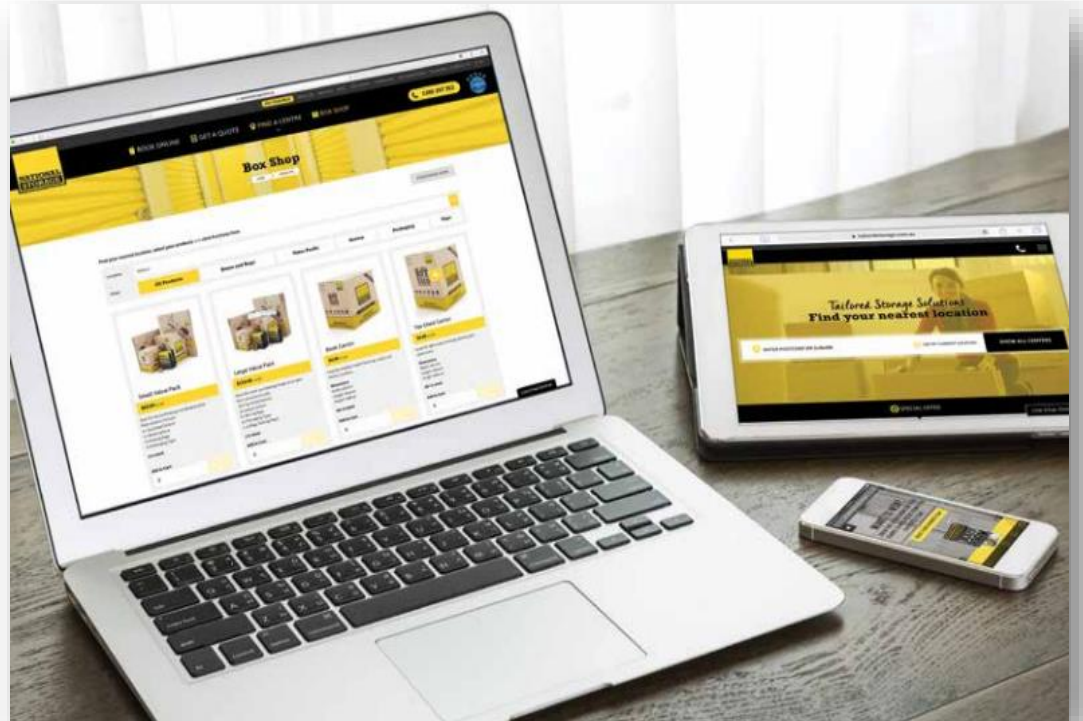
- Driving brand awareness
- Building positive brand association
- Engaging with fans via game day activations and digital campaign initiatives
- Keeping National Storage front of mind on an ongoing basis



INSIGHT DRIVEN DECISION-MAKING

CUSTOMER FOCUS

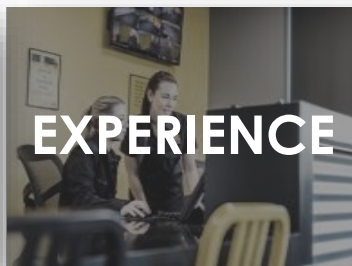
- Marketing & Technology working together to develop custom insights and analytics platform
- Turning customer interactions into marketing insights
- Marketing automation to deliver efficiencies and target specific market segments
- Embracing digital transformation – paperless move-ins, app development and enhancing the digital customer experience



TECHNOLOGY STRATEGY



ANALYTICS



IT INFRASTRUCTURE

AUTOMATION DRIVING OPERATIONAL EFFICIENCY



ENQUIRY PROCESS

- Custom developments to streamline enquiry process in the Contact Centre
- Provides competitive advantage in the information we track on customers and how we interact electronically
- The next step in our fully automated customer experience
- Opens up new revenue opportunities without additional resourcing and proves concept for online click-through marketing

Username: Password:

ENQUIRY SUBMISSION

1,149 - Rothwell

Change Log

Now Enquiry Search Enquiry Logout

Service Enquiry Save to Stelink Close Enquiry

Tenant Info:

Tenant Name: Michael NP

Email:

Address:

Phone Numbers:

Pin code: 380876044

Location: L149

Tenant ID: 494938

Email:

Items to be stored:

Situation / package:

Customer:

As this is an email enquiry, limited information has been provided. Quoting a range of both a hardstand and a driveway unit.

Customer is to be followed up, to see if the email was received. Run through the quote, answer any questions/objections and secure the booking.

How soon?

How long for?

Do you need Packaging?

How often do you need access?

Unit Name W L Price Location Floor

0362	3	5.5	270	L149	0
\$200	3	5	112	L149	0

Unit Refresh

Unit Discounts

Unit Rates

Unit Select

Unit Search for L149 - Rothwell

Unit Type	Size	Floor	Name/Number	Facil	Add (Units)	Est		
unit type	sq	floor	name	Facil				
Show 10 - 10 entries								
Unit Name	Width	Length	Area	Price	Unit Type	Unit Notes	Occupancy %	UnitID
0000	0.0000	0.0000	18	\$112	Hardstand		74.0741	130289
0001	0.0000	0.0000	18	\$112	Hardstand		74.0741	130275
0004	0.0000	0.0000	18	\$112	Hardstand		74.0741	130276
0457	0.0000	0.0000	16.6	\$340	Self Storage 3		87.1439	136137
0676	0.0000	0.0000	16.6	\$381	Self Storage 3		87.1439	135390
0062	0.0000	0.0000	16.6	\$270	Self Storage 0		88.0000	129161
0063	0.0000	0.0000	16.6	\$270	Self Storage 0		88.0000	129162
0066	0.0000	0.0000	16.6	\$270	Self Storage 0		88.0000	129494
0066	0.0000	0.0000	16.6	\$270	Self Storage 0		88.0000	129495
0069	0.0000	0.0000	16.6	\$270	Self Storage 0		88.0000	129496

Showing 1 to 10 of 72 selected row selected

Site Name	Distance KM	Unit Name	Width	Length	Area	Price	Unit Type	Unit Notes	Occupancy %	UnitID
Cabot Road South	15.93	0003	0.0000	0.0000	18	\$07	Hardstand	Hardstand storage	61.5305	10778
Cabot Road South	15.93	0004	0.0000	0.0000	18	\$07	Hardstand	Hardstand storage	61.5305	10778
Cabot Road South	15.93	0005	0.0000	0.0000	18	\$07	Hardstand	Hardstand storage	61.5305	10777
Cabot Road South	15.93	0016	0.0000	0.0000	18	\$07	Hardstand	Hardstand storage	61.5305	10829
Cabot Road South	15.93	0019	0.0000	0.0000	18	\$07	Hardstand	Hardstand storage	61.5305	10862
Aspley	17.37	010	0.0000	0.0000	18	\$084	Self Storage 3	Internal unit second floor	87.5000	10468
Aspley	17.37	003	0.0000	0.0000	18	\$084	Self Storage 3	Internal unit second floor	87.5000	10470

ENHANCING OUR ASSETS

USING TECHNOLOGY TO EXTRACT FURTHER VALUE FROM REAL ESTATE ASSETS

• SOLAR POWER

- Stream 1: 54 Storage Centres, 4000 Solar Panels and cost savings of \$400k/year
- Stream 2: 57 Storage Centres, 6000 Solar Panels and further cost savings

• TELECOMMUNICATIONS

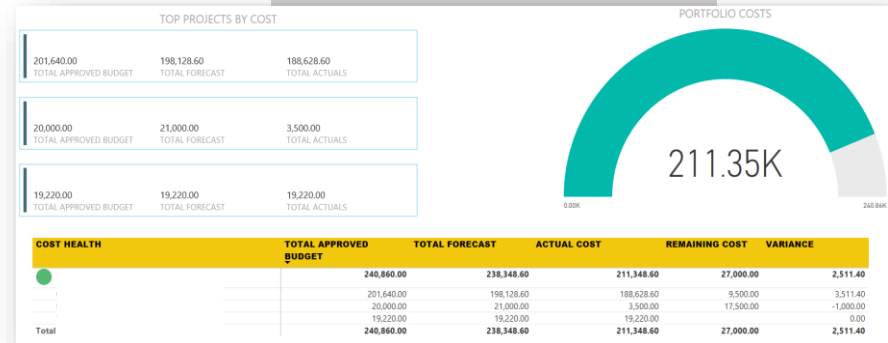
- Working with major telecommunications providers to position mobile towers on assets (over 15 NS properties to date)
- Investigating opportunities with tier-two telecommunications providers to deliver multiple revenue streams from telco sector





PROJECT MANAGEMENT FOCUS

- New Project Management Office (PMO) structure
- Real-time access to progress on all projects through Project Dashboards
- Enhances ability to deliver projects on-time and on-budget
- Provides visibility for better oversight
- Improves scalability of the platform and facilitates delivery of multiple projects more efficiently



PEOPLE

MANNY LYNCH- PEOPLE

“Attract, Engage and Retain the Right People to increase Performance through building a Safe, Healthy, Motivated and Capable Workforce.”



NATIONAL STORAGE PEOPLE

ATTRACT

ENGAGE

RETAIN

SAFELY

NATIONAL
STORAGE



PEOPLE

432

HEAD OFFICE	51
CONTACT CENTRE	27
CENTRE STAFF	354



ATTRACT

- Multi-disciplined business role opportunities
- Personalised development plans
- Values in action
- Dedicated Recruitment Manager

**NATIONAL
STORAGE**



ENGAGE

- Challenge often, reward excellence
- Let the leaders lead
- Sense of common purpose
- Embrace technology
- Wellbeing for yourself, not by yourself



RETAIN

- Celebrate milestones
- Demonstrated career pathways
- Recruit complimentary skillsets
- Being part of the journey



SAFELY

No Harm to Anyone at Anytime

- 24/7
- Whole of person
- Everyone's responsibility
- Reward and recognise



ASSET TOURS

FORTITUDE VALLEY
KELVIN GROVE
SPRINGWOOD
NERANG
CARRARA
ROBINA
BUNDALL



FORTITUDE VALLEY

114 MONTPELIER ROAD, BOWEN HILLS QLD 4006

NUMBER OF UNITS

732

NLA

6,900sqm

OCCUPIED NLA %

82%

OCCUPIED WINE VAULTS

95%

FEATURES

- Fully trained Storage Consultants
- Different sized units including bulk storage & mini warehouse storage (over 30sqm)
- CCTV camera surveillance
- Pin coded access 7 days
- Self-managed records management
- Climate controlled storage
- Good lifts or hoist, forklift, pallet jacks and/or goods trolleys available
- Specialist wine storage
- Individually alarmed unit doors
- Undercover loading docks/area



KELVIN GROVE

345 KELVIN GROVE ROAD, KELVIN GROVE QLD 4059

NUMBER OF UNITS

562

NLA

5,600sqm

OCCUPIED NLA %

57%

OPENED NOV 2017

FEATURES

- Fully trained Storage Consultants
- Different sized units
- CCTV camera surveillance
- Self-managed records storage
- Undercover car storage
- Internal warehouse (multi-level)
- Humidity controlled storage
- Truck, caravan & boat storage (hardstand)
- 24hr access
- Goods lifts or hoist, forklift, pallet jacks and/or goods trolleys available
- Industrial bins available
- Individually alarms unit doors
- Undercover loading docks/areas



SPRINGWOOD

3421 PACIFIC HIGHWAY, SLACKS CREEK QLD 4127

NUMBER OF UNITS

644

NLA

6,300sqm

OCCUPIED NLA %

82%

FEATURES

- Fully trained Storage Consultants
- Different sized units
- CCTV camera surveillance
- Goods lifts or hoist, forklift, pallet jacks and/or goods trolleys available
- Pin coded access 7 days
- Truck, caravan & boat storage (hardstand)
- 24hr access available
- Driveway access
- On site industrial bins
- Individually alarmed unit doors
- Shipping container access
- Mini warehouse storage (over 30sqm)



NERANG

4 LAWRENCE DRIVE, NERANG QLD 4211

NUMBER OF UNITS

640

NLA

6,800sqm

OCCUPIED NLA %

84%

FEATURES

- Fully trained Storage Consultants
- Different sized units
- CCTV camera surveillance
- Pin coded access 7 days
- Truck, caravan & boat storage (hardstand)
- Goods lifts or hoist, forklift, pallet jacks and/or goods trolley available
- 24hr access
- Driveway access
- On site industrial bins
- Individually alarmed units
- Shipping container access
- Mini warehouse storage (over 30sqm)



CARRARA

116 SPENCER ROAD, CARRARA QLD 4211

NUMBER OF UNITS

541

NLA

5,700sqm

OCCUPIED NLA %

50%

OPENED OCT 2016

FEATURES

- Fully trained Storage Consultants
- Different sized units
- CCTV camera surveillance
- Self-managed records storage
- Undercover car storage
- Internal warehouse (multi-level)
- Humidity controlled storage
- Truck, caravan & boat storage (hardstand)
- 24hr access
- Driveway access
- Goods lifts or hoist, forklift, pallet jacks and/or goods trolleys available
- Industrial bins available
- Individually alarmed unit doors
- Undercover loading docks/area



ROBINA

177 SCOTTSDALE DRIVE, ROBINA QLD

NUMBER OF UNITS

952

NLA

10,200sqm

OCCUPIED NLA %

90%

FEATURES

- Fully trained Storage Consultants
- Different sized units
- CCTV camera surveillance
- Self-managed records storage
- Truck, caravan & boat storage (hardstand)
- 24hr access available
- Goods lifts or hoist, forklift, pallet jacks and/or goods trolleys available
- On site industrial bins
- Individually alarmed unit doors
- Undercover loading docks/area



ROBINA

243 SCOTTSDALE DRIVE, ROBINA QLD

CONCEPT SUMMARY

To increase capacity and product diversity of existing facility to higher and better use

SITE AREA

3,110 sqm

CURRENT USE

Currently underutilised as hardstand

PROPOSED USE

New 6 storey self storage facility with 150sqm office/retail space

INDICATIVE YIELD

Circa 10,000sqm GFA – 600+ Units (approx.)

TARGET CONSTRUCTION COMMENCEMENT

Mid 2019



CONCEPT IMAGE ONLY

BUNDALL

106-110 BUNDALL ROAD, BUNDALL QLD

NUMBER OF UNITS

606

NLA

6,300sqm

RETAIL & OFFICE

230sqm

ANTICIPATED COMPLETION
FEBRUARY 2019



THANK YOU

A photograph of a white building wall with vertical paneling. On the right side, there is a large yellow square sign with a black border. The sign contains the text "NATIONAL" in black and "STORAGE" in yellow, both in a bold, sans-serif font. To the left of the sign is a black door frame.

**NATIONAL
STORAGE**

**WWW.NATIONALSTORAGE.COM.AU
INVEST@NATIONALSTORAGE.COM.AU**