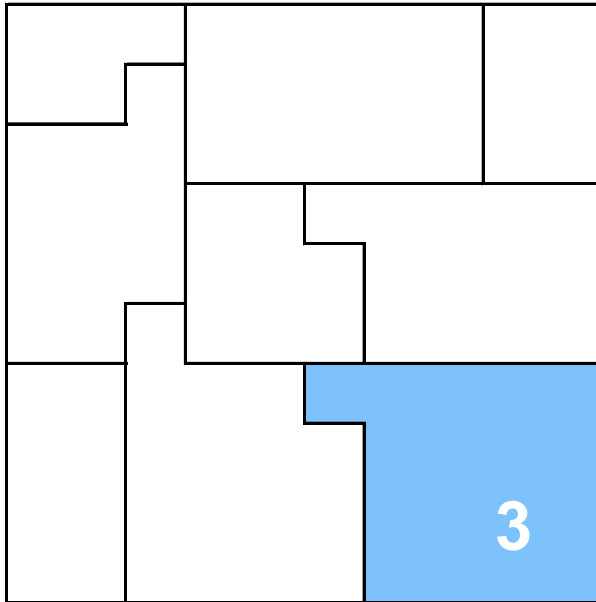


Segment 3: Creative thinkers

Segmentation of demand in office market



3.1 Creative thinkers: Introduction

Creative thinkers include firms in the branches of art and entertainment, architecture, advertising, recruitment and other liberal scientific or technical professions like photography, interior design and graphic design. Creative thinkers are often relatively low value added but have business dealings with financially stronger segments. As they are mainly reliant on proximity to their customers and prefer good accessibility – i.e. central locations or pedestrian zones – most of these businesses are to be found in busy, urban or trendy locations in towns. External visibility is fairly important.



They rent outside the central area or in cheaper districts on the edges of the central zone. Creative thinkers are often micro-businesses with few employees and therefore look for small office spaces. They usually rent offices in multi-tenant buildings or in buildings originally conceived for a different purpose. Creative thinkers are predisposed to be pioneers in the art of space conversion or interim uses. Office communities are no exception in this segment. The rooms have an average standard of finishing and often individualised interior design. Surface area is therefore normally rented in an empty space. The form of office organisation is branch-specific or, as in the classical businesses of this segment, cellular or groups of offices. Creative thinkers have a relatively high tendency to relocate. The location is often a subjective choice by the managers, although budget restrictions mean the location does not always fully match up with desires.

3.2 Creative thinkers: Examples of fictional businesses

The following examples provide an indication of the segments of demand. They are often exaggerated and may reflect clichés. They do not have a scientific foundation.

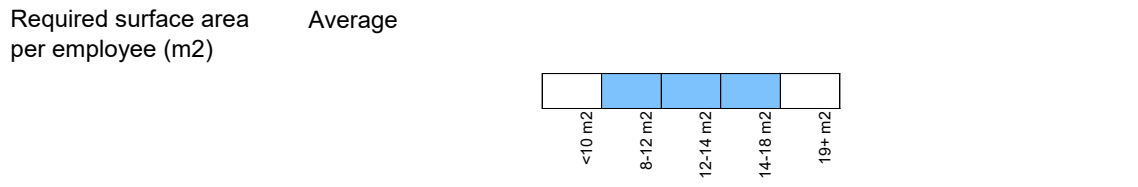
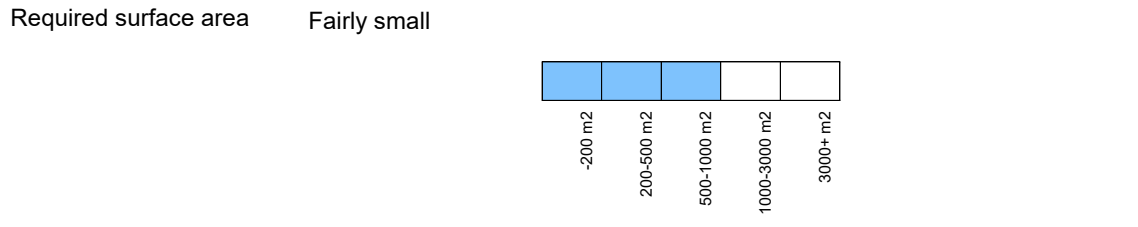
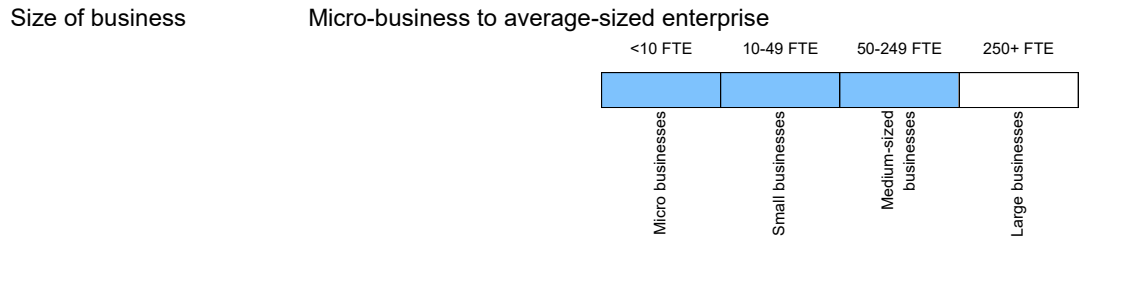
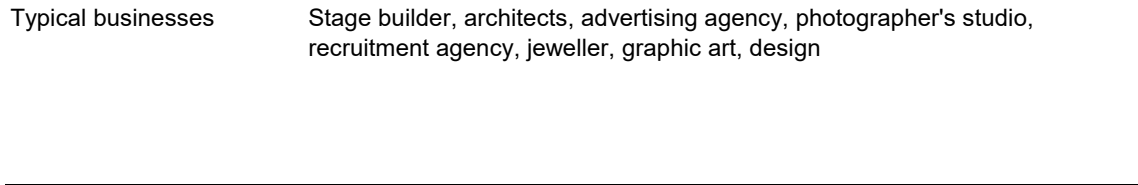
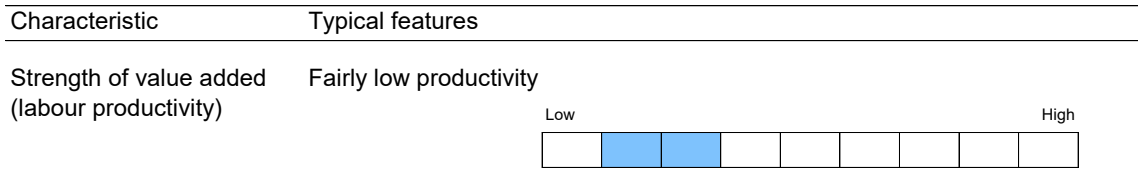
Graphic design office VisualX

The web designer Oliver opened a graphic design office eight months ago with two former student friends. The three of them only require 45 m² of office space in a 150 m² office occupied by a small architect's firm. The kitchen and toilets are shared. The office is in the upper ground floor of an apartment building in a residential area of a city district.

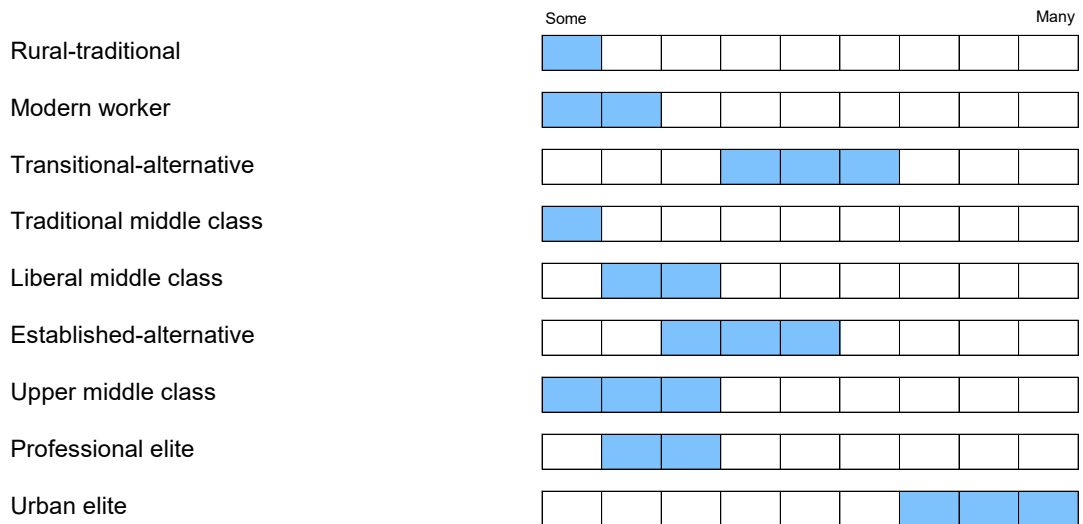
MN&P architect's office

The MN&P architect's office comprises the three founders and a further 12 employees. They rent the top floor of an approximately 80-year-old house in a busy city district, which was formerly a residential property. The rooms are bright and high-ceilinged. There is no entrance area. The old building structure occasionally leads to heating or power problems. As the floor is not raised the power cables are laid along the walls. The office has a bathroom and fully fitted kitchen. The employees value the roof terrace, especially in the summer months, which is also sometimes used for internal meetings. Working spaces are individually arranged depending on project groups. There is no overall concept.

3.3 Who are the Creative thinkers?

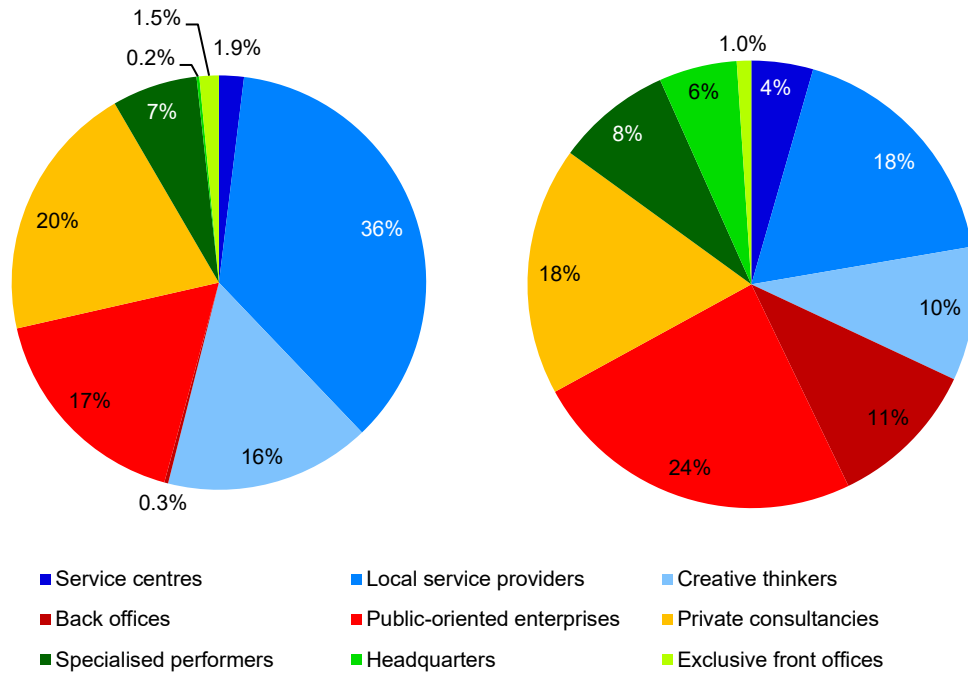


Which demand segments in the housing market work in the Creative thinkers?

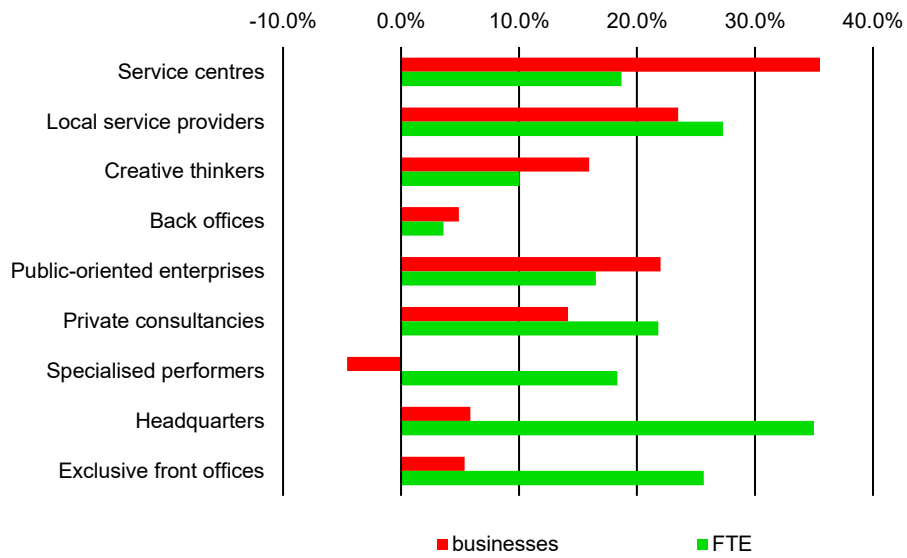


3.4 Creative thinkers: Distribution and development


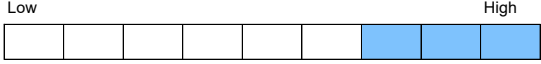
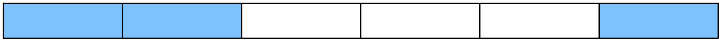



Distribution of Swiss businesses (left) and full-time positions (right) in office market (2023)



Development of the number of businesses and FTE in the segments of demand 2015-2023



3.5 How do the Creative thinkers work?

Characteristic	Typical features						
Office location	Medium centres, large centres, urban, on squares or roads leading off a main axis, in the old city, pedestrian zone						
Working environment	Busy, alternative, urban, mixed, multicultural						
Desire to relocate	Average to high 						
Price sensitivity	High 						
Architecture	Modern, style-conscious, superior architecture						
Form of office organisation	<table border="1" style="margin-left: auto; margin-right: auto;"> <tr> <td>Group office</td> <td>Cellular office</td> <td>Combi office</td> <td>Open-plan office</td> <td>Business club</td> <td>Branch-specific</td> </tr> </table>	Group office	Cellular office	Combi office	Open-plan office	Business club	Branch-specific
Group office	Cellular office	Combi office	Open-plan office	Business club	Branch-specific		
Propensity							
Standard of fittings	Average 						
Technical requirements	Low to average 						
Willingness to pay for high environmental standards	Low to average 						
Requirements of the office building	Individual interior layout, visibility fairly important, likely prefer multi-tenant building						

3.6 Creative thinkers: Working environment

The search for office premises is influenced by the preferences and restrictions affecting demand. The following details relate to the final results of the process.

Characteristic	Typical features	
Urban location preferred	Rather high	
Central location preferred		Periphery Town centre Agglo./town outskirts Town 1B situation Town 1A situation Low  High
Intercommunal accessibility		
with relation to road network	Important	Less important  Very important
with relation to public transport	Very important	Less important  Very important
Parking spaces	Secondary	Less important  Very important
Shops and eating establishments within walking distance	Very important	Less important  Very important
Proximity to customers	Important	Less important  Very important
Proximity to service providers	Average	Less important  Very important
Reputation of the district	Fairly important	Less important  Very important