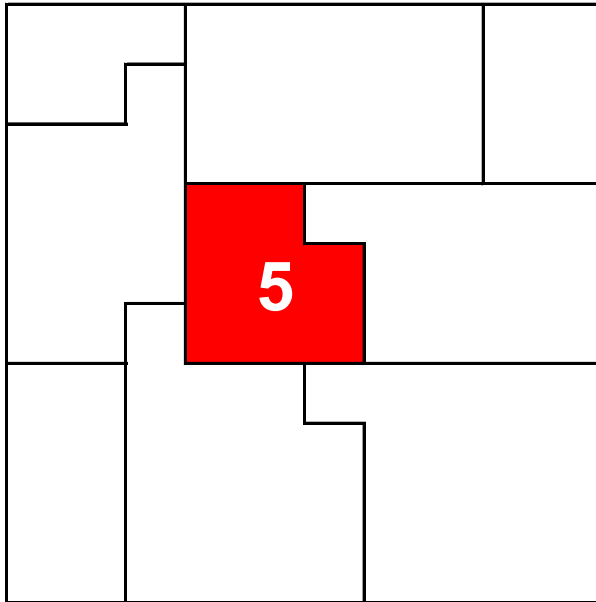


Segment 5: Public-oriented enterprises

Segmentation of demand in office market



5.1 Public-oriented enterprises: Introduction

Public-oriented enterprises are active in the property and public administration, publishing, broadcasting, educational and engineering fields and include associations. They tend to be average sized and are often to be found in discreet, established positions in all parts of Switzerland. Accessibility by public transport and by mobilised individual transport is of average importance. In general the micro-location and visibility are important but are not the top priority.



Space efficiency and technical equipment are fairly average. The rooms are often organised as single or group offices. There is a preference for entrances of their own. Larger businesses are more likely to look for single tenant buildings. Longterm leases are common in this segment. Location decisions are taken following lengthy processes and may be part of a political process. One relevant criterion is proximity to other institutions whose activities are linked.

5.2 Public-oriented enterprises: 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.

STU sport association

The STU sport association employs 40 workers on the outskirts of an agglomeration centre. From there the association coordinates fixtures, organises training for officials and trainers and manages marketing rights. The meeting room and the entrance area have an important representative role as main sponsors and international officials are regular visitors. The employees on the other hand appreciate the good transport connections, including a local railway service, and the nearby motorway access.

The cantonal authorisations office

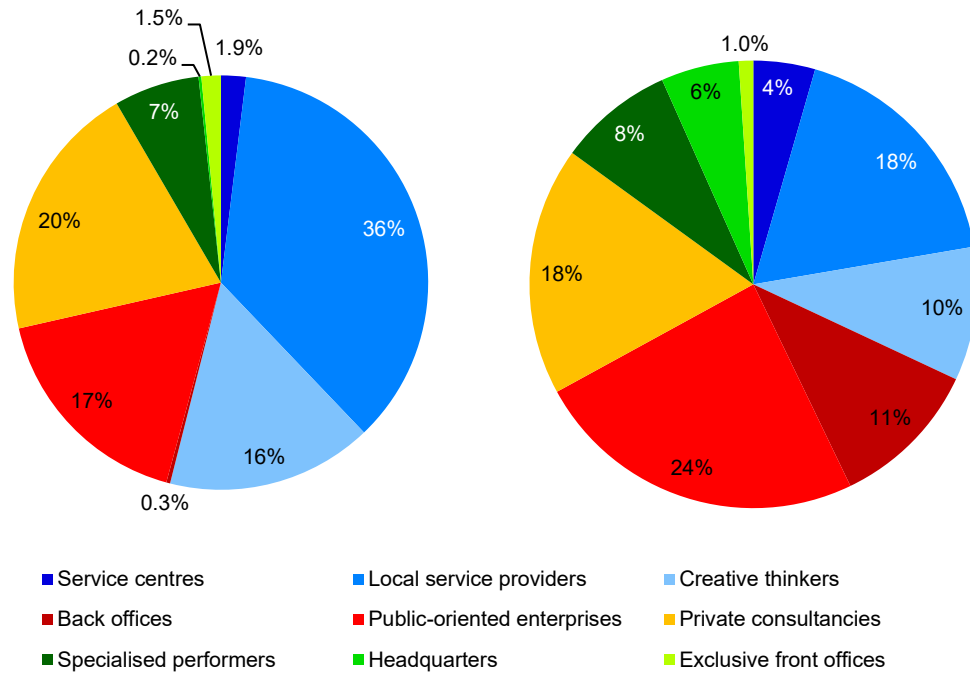
The cantonal authorisations office is four tram stops away from the central station in an urban, mixed use district. Proximity to other administrative offices is important. The 150 employees share a 40-year-old but recently renovated service building, occupying 3,000 m². The entrance area is rather dark and comprises several counters. Applicants wait in the hall. There is no seating area. In the first floor are four meeting rooms of different sizes. The directors are on the top floor. The arrangement of the offices is adapted as far as possible to the activities and needs of the employees, in so far as the structure of the building permits.

5.3 Who are the Public-oriented enterprises?

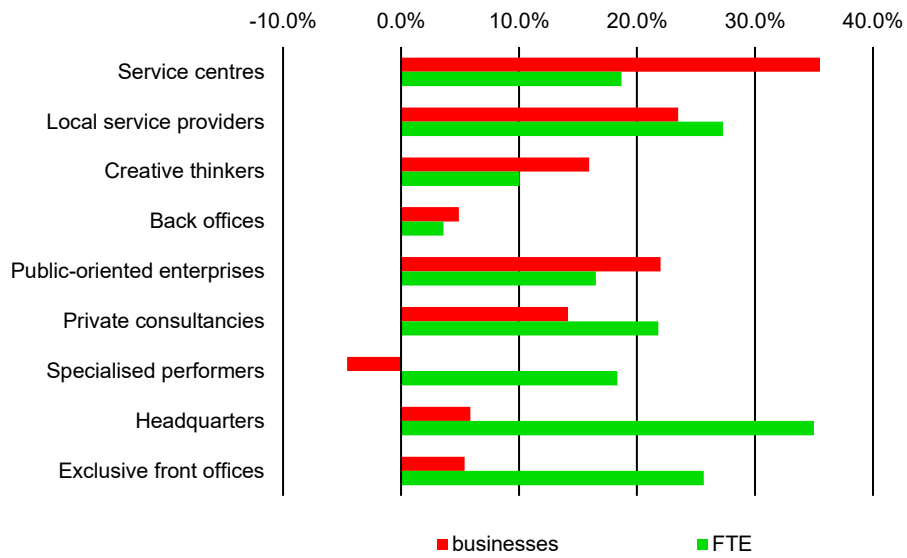
Characteristic	Typical features
Strength of value added (labour productivity)	<p>Average productivity</p> <p>Low High</p>
Typical businesses	<p>Property management/renting/sales, public administration, association, publisher, state school, broadcaster, engineering office, social security, pension scheme</p>
Size of business	<p>Small to large enterprise</p> <p><10 FTE 10-49 FTE 50-249 FTE 250+ FTE</p>
Required surface area	<p>Average to large</p>
Required surface area per employee (m2)	<p>Average</p>
Which demand segments in the housing market work in the Public-oriented enterprises?	
Rural-traditional	<p>Some Many</p>
Modern worker	
Transitional-alternative	
Traditional middle class	
Liberal middle class	
Established-alternative	
Upper middle class	
Professional elite	
Urban elite	

5.4 Public-oriented enterprises: 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



5.5 How do the Public-oriented enterprises work?

Characteristic	Typical features					
Office location	All locations but central preferred					
Working environment	Respectable, established, ordinary					
Desire to relocate	Low to average					
	<div style="display: flex; justify-content: space-between; align-items: center;"> Low High </div>					
Price sensitivity	Average					
	<div style="display: flex; justify-content: space-between; align-items: center;"> Low High </div>					
Architecture	Mainstream, inconspicuous					
Form of office organisation	Group office Cellular office Combi office Open-plan office Business club Branch-specific					
Propensity						
Standard of fittings	Fairly high					
	<div style="display: flex; justify-content: space-between; align-items: center;"> Low High </div>					
Technical requirements	Average					
	<div style="display: flex; justify-content: space-between; align-items: center;"> Low High </div>					
Willingness to pay for high environmental standards	Average					
	<div style="display: flex; justify-content: space-between; align-items: center;"> Low High </div>					
Requirements of the office building	Space efficiency secondary, average visibility, preference for own entry and single tenant building					

5.6 Public-oriented enterprises: 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	Average											
Central location preferred		<div style="display: flex; justify-content: space-around; font-size: small;"> Periphery Town centre Agglo./town outskirts Town 1B situation Town 1A situation </div> <div style="display: flex; align-items: center; margin-top: 5px;"> Low <table border="1" style="border-collapse: collapse; text-align: center;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table> High </div>										
Intercommunal accessibility												
with relation to road network	Average	<div style="display: flex; justify-content: space-between; font-size: x-small;"> Less important Very important </div> <table border="1" style="border-collapse: collapse; text-align: center; width: 100%;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>										
with relation to public transport	Fairly important	<table border="1" style="border-collapse: collapse; text-align: center; width: 100%;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>										
Parking spaces	Average	<div style="display: flex; justify-content: space-between; font-size: x-small;"> Less important Very important </div> <table border="1" style="border-collapse: collapse; text-align: center; width: 100%;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>										
Shops and eating establishments within walking distance	Average to important	<div style="display: flex; justify-content: space-between; font-size: x-small;"> Less important Very important </div> <table border="1" style="border-collapse: collapse; text-align: center; width: 100%;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>										
Proximity to customers	Average	<div style="display: flex; justify-content: space-between; font-size: x-small;"> Less important Very important </div> <table border="1" style="border-collapse: collapse; text-align: center; width: 100%;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>										
Proximity to service providers	Fairly important	<div style="display: flex; justify-content: space-between; font-size: x-small;"> Less important Very important </div> <table border="1" style="border-collapse: collapse; text-align: center; width: 100%;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>										
Reputation of the district	Fairly important	<div style="display: flex; justify-content: space-between; font-size: x-small;"> Less important Very important </div> <table border="1" style="border-collapse: collapse; text-align: center; width: 100%;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px; background-color: red;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>										