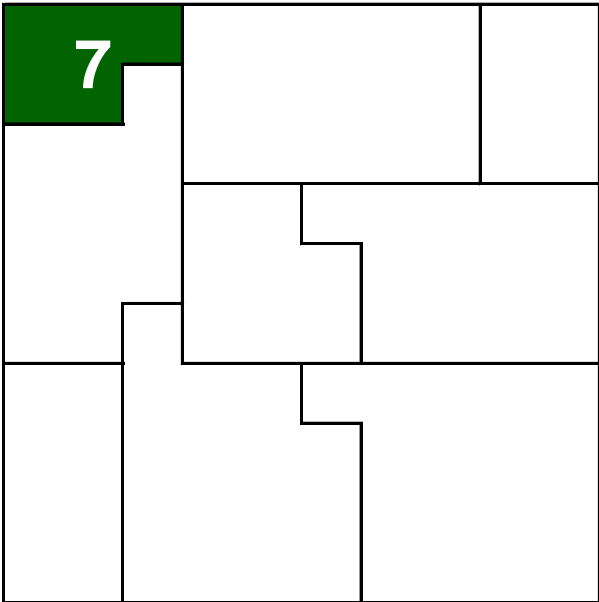


# Segment 7: Specialised performers

Segmentation of demand in office market



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## 7.1 Specialised performers: Introduction

Specialised performers are internationally-oriented firms in the commodities sector and the hedge fund and investment branch. They have very high value added. Apart from some large enterprises these are mainly small businesses located in medium-sized centres or in the outer commercial districts of large centres. Specialised performers place value on a quiet neighbourhood that has good connections for its staff. As they have no direct client contact they tend to be situated in localities with a mediocre reputation.



A fast connection to the nearest airport is important for the company's activity. Its office spaces are modern and well appointed. Security and flexibility are priorities. Because of their international area of activity macro-location factors (such as political conditions, taxation and the recruitment pool) tend to be more important than micro-location factors. They rent space in both single and multi tenant buildings. As a result of the high quality and individualised decor depending on outlay there may be an attachment to a specific location, provided other conditions are attractive. Macro-location factors are decisive when it comes to choosing a location. The decisions are frequently taken by persons and/or departments abroad, which are consequently hard to reach.

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## 7.2 Specialised performers: 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.

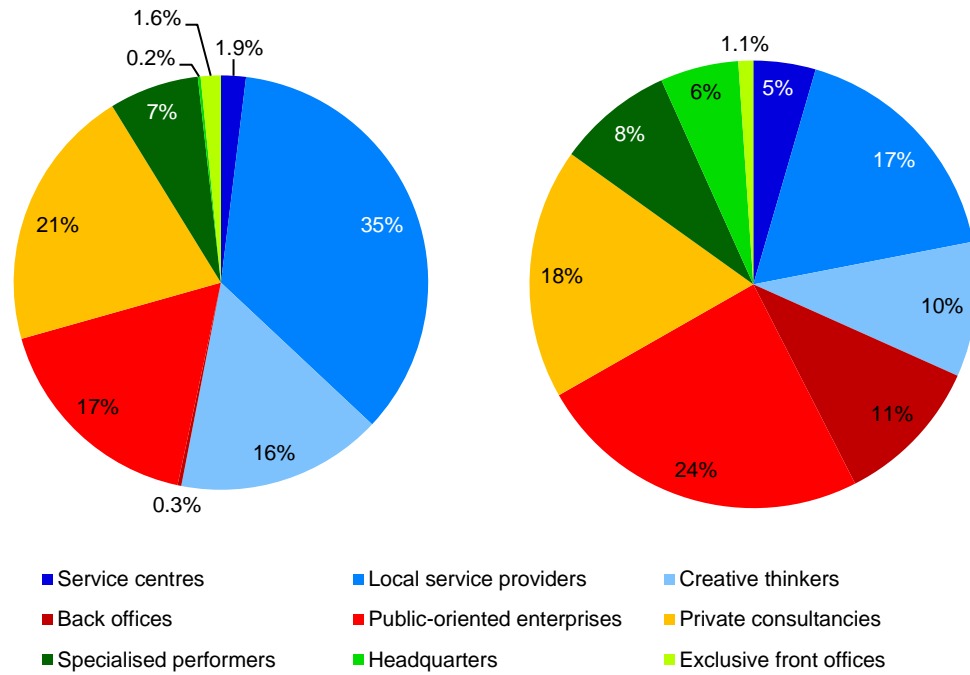
### **Commodities dealer**

A commodities dealer has its offices in a commune in the city suburbs. An important factor in the choice of location was the low taxation. The 300 employees mainly drive to work as depending on global trade working hours can vary greatly. As a result the underground garage is essential and the restaurant nearby is appreciated. The company had the building constructed 15 years ago to its own specification. The offices are very comfortable. The interior is modern and has the latest technology. Working spaces in the open-plan office are arranged according to a unitary model.

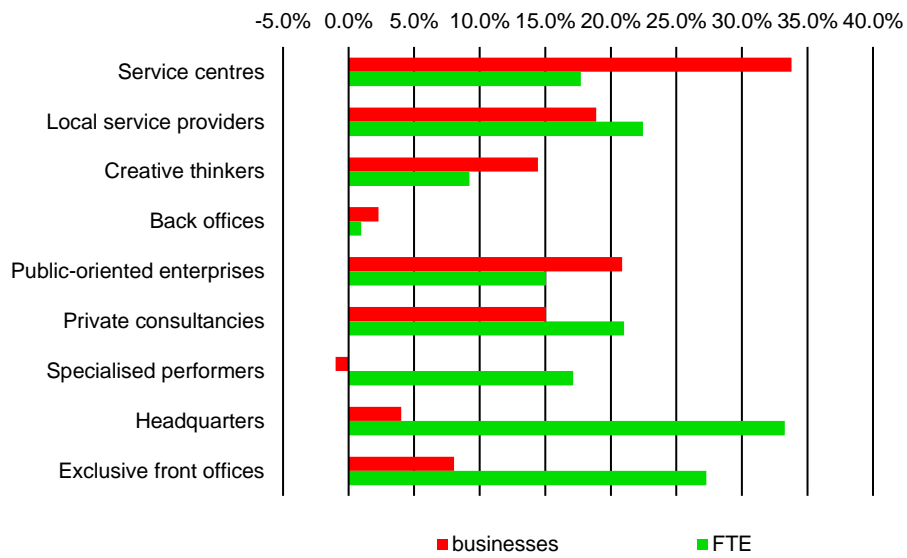


## 7.4 Specialised performers: Distribution and development




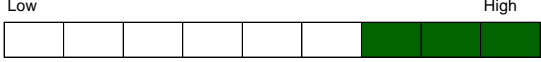
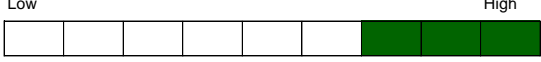
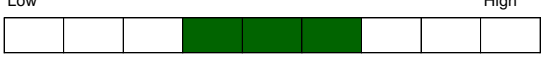
Distribution of Swiss businesses (left) and full-time positions (right) in office market (2022)



Development of the number of businesses and FTE in the segments of demand 2015-2022

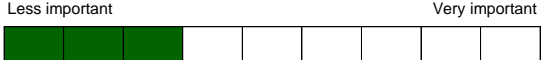


## 7.5 How do the Specialised performers work?

Characteristic	Typical features						
Office location	Agglomeration, outskirts of city, easily and generally accessible						
Working environment	Urban, quiet, respectable, international						
Desire to relocate	Average 						
Price sensitivity	Fairly low 						
Architecture	Modern						
Form of office organisation	<table border="1"> <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	High 						
Technical requirements	High 						
Willingness to pay for high environmental standards	Average 						
Requirements of the office building	Security, secured entry, flexibility, high demands of interior décor, visibility less important						

## 7.6 Specialised performers: 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		Periphery    Town centre    Agglo./town outskirts    Town 1B situation    Town 1A situation
		Low  High
Intercommunal accessibility		Less important  Very important
with relation to road network	Average	
with relation to public transport	Average	
Parking spaces	Fairly important	Less important  Very important
Shops and eating establishments within walking distance	Secondary	Less important  Very important
Proximity to customers	Secondary	Less important  Very important
Proximity to service providers	Secondary	Less important  Very important
Reputation of the district	Rather unimportant	Less important  Very important