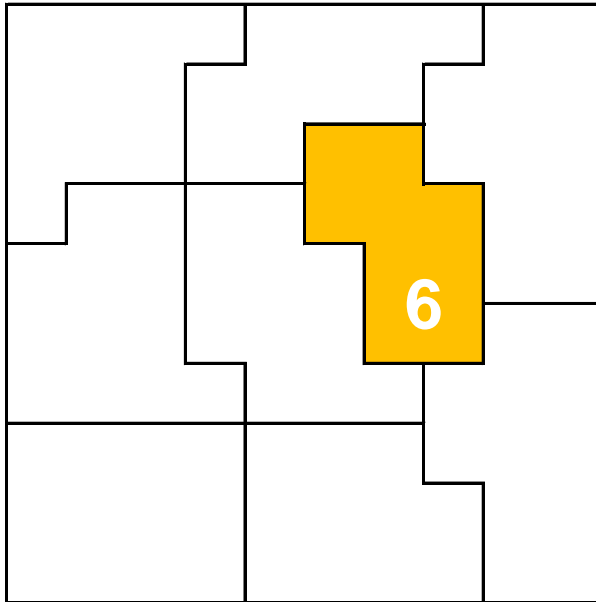


Segment 6: Established-alternative

Segmentation of demand in the housing market



**FP
RE**

Fahrländer Partner AG
Raumentwicklung
Seebahnstrasse 89
8003 Zürich

+41 44 466 70 00
info@fpre.ch
www.fpre.ch

Münzrain 10
3005 Bern

+41 31 348 70 00
bern@fpre.ch
www.fpre.ch

sotomo

6.1 Established-alternative: Introduction

Around 11 % of Swiss households belong to the established-alternative segment. Personal fulfilment is central to their lifestyle. They have a keen interest in culture and a strong environmental and social awareness. Naturalness and authenticity are important values for them. Material goods, consumption and status symbols are less important. Daily life and leisure activities normally taken place within the region in which they live. They take holidays frequently and travel widely.

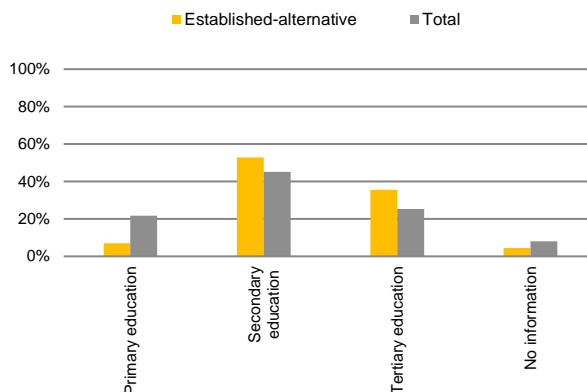


Established alternatives live in average-sized rented apartments in blocks or in shared accommodation. Measured against their financial means they tend not to have a strong desire to own their own home. Cultural offer and an attractive neighbourhood are more important, be it in the city, in a suburban context or in the country.

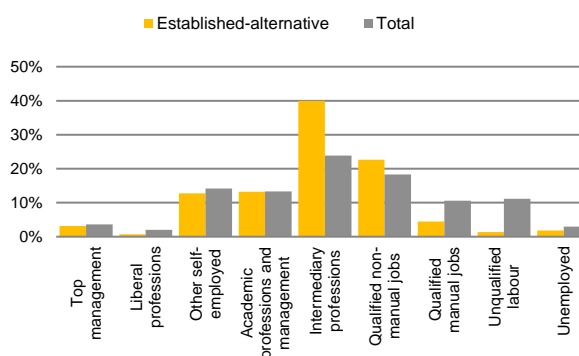
6.2 Who are the Established-alternative?

Characteristic	Typical characteristic
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Educational level Average to higher educational level



Profession Intermediate and qualified non-manual professions, often in the public sector and social services (healthcare, education)

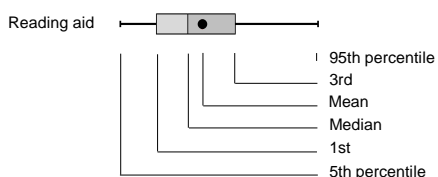
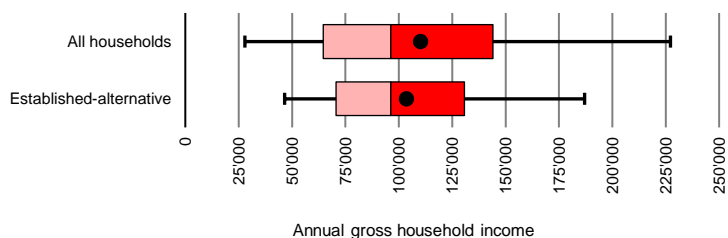


Professional status Intermediate position

Income Average income

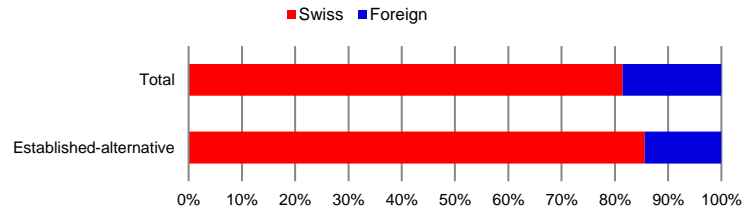


Income distribution



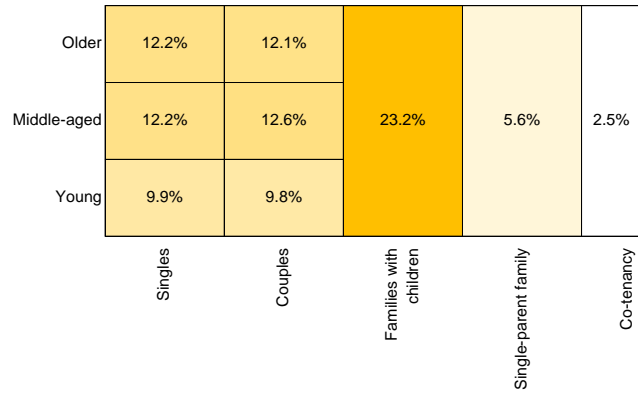
Characteristic Typical characteristic

Nationality



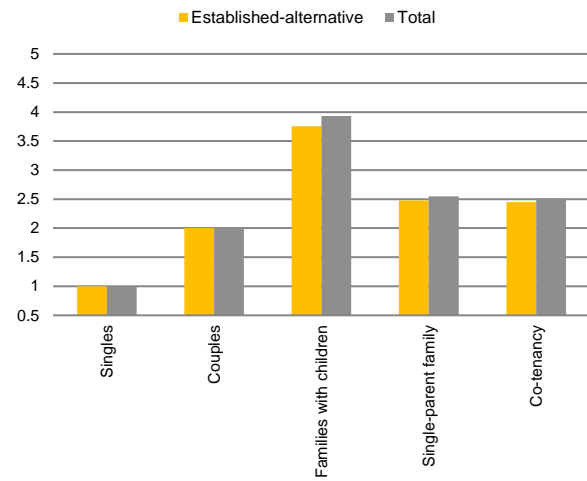
Stage in Life

Families



Average number of persons per household

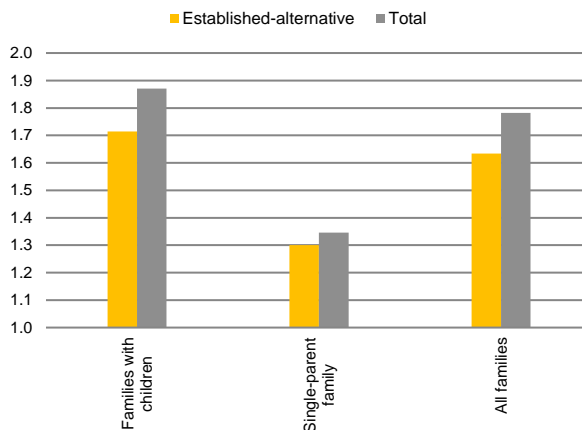
2.1 persons



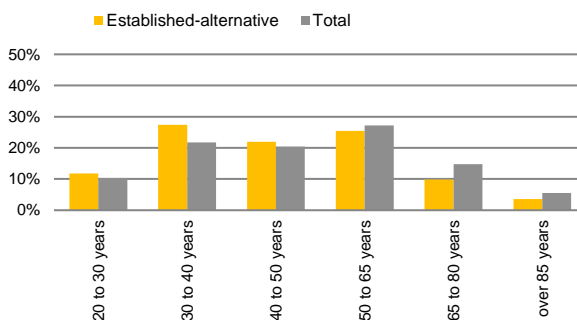
Source: Fahrländer Partner & sotomo.

Characteristic	Typical characteristic
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Average number of children per family 1.6 children

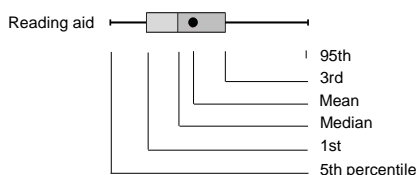
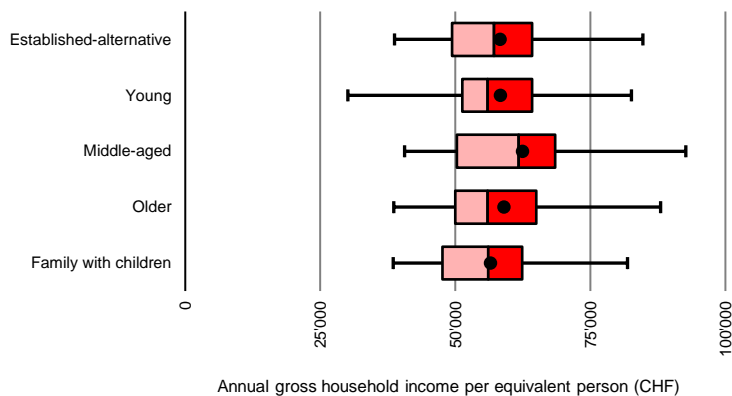


Average age of the reference person



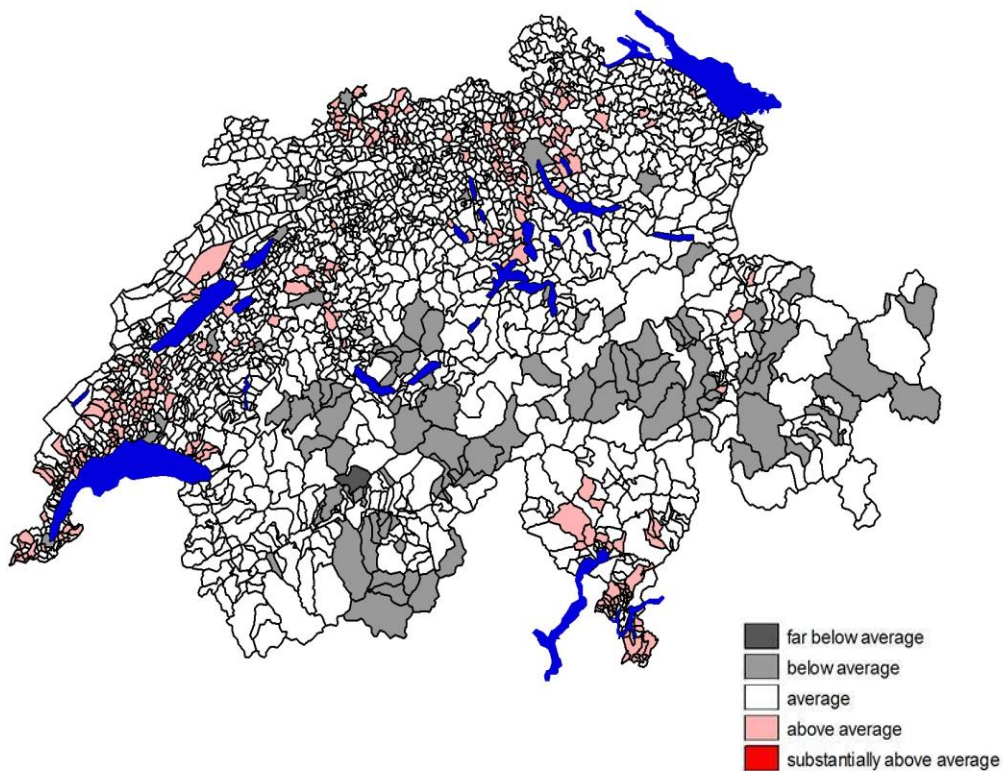
Income

Income distribution per equivalence person



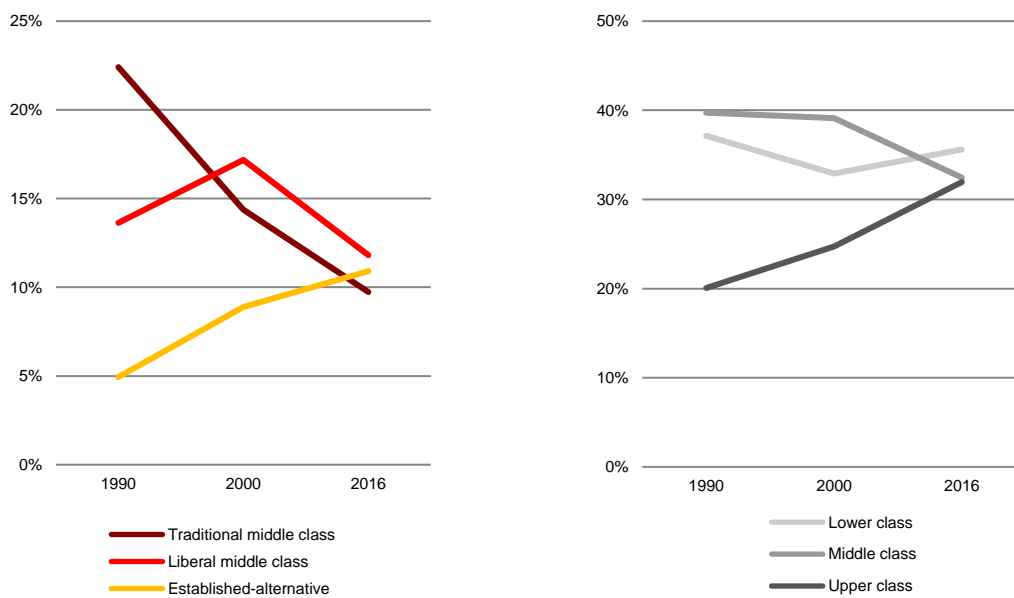
6.3 Established-alternative: distribution and development

Difference between percentage in communes and nationwide percentage



Source: BFS, BFS Geostat / swisstopo, Fahrländer Partner & sotomo.

Development of demand segments and social strata



Source: Fahrländer Partner & sotomo.

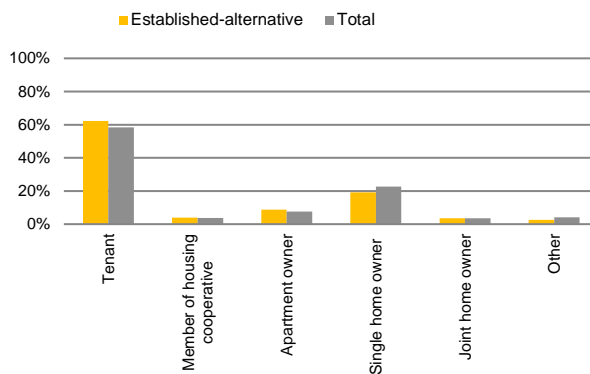
6.4 How live the Established-alternative?

Characteristic	Typical characteristic																																	
Place of residence	Agglomerations, average and smaller centres and peri-urban communes																																	
	<table border="1"> <caption>Place of residence: Comparison of Established-alternative vs Total</caption> <thead> <tr> <th>Residence Type</th> <th>Established-alternative (%)</th> <th>Total (%)</th> </tr> </thead> <tbody> <tr> <td>Centres</td> <td>~40</td> <td>~35</td> </tr> <tr> <td>Suburban communes</td> <td>~30</td> <td>~30</td> </tr> <tr> <td>High-income communes</td> <td>~5</td> <td>~5</td> </tr> <tr> <td>Peri-urban communes</td> <td>~10</td> <td>~10</td> </tr> <tr> <td>Communes in tourism areas</td> <td>~2</td> <td>~2</td> </tr> <tr> <td>Industrial and tertiary communes</td> <td>~5</td> <td>~10</td> </tr> <tr> <td>Rural and agricultural communes</td> <td>~10</td> <td>~15</td> </tr> </tbody> </table>	Residence Type	Established-alternative (%)	Total (%)	Centres	~40	~35	Suburban communes	~30	~30	High-income communes	~5	~5	Peri-urban communes	~10	~10	Communes in tourism areas	~2	~2	Industrial and tertiary communes	~5	~10	Rural and agricultural communes	~10	~15									
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Neighbourhood	Mixed, green spaces																																	
Type of transport	Public transport, bicycle, Car-sharing in the city, in the countryside MIT																																	
	<table border="1"> <caption>Type of transport: Comparison of Established-alternative vs Total</caption> <thead> <tr> <th>Transport Mode</th> <th>Established-alternative (%)</th> <th>Total (%)</th> </tr> </thead> <tbody> <tr> <td>No journey to work</td> <td>~8</td> <td>~10</td> </tr> <tr> <td>By foot</td> <td>~8</td> <td>~10</td> </tr> <tr> <td>Public transport</td> <td>~15</td> <td>~15</td> </tr> <tr> <td>Public transport & individual transport</td> <td>~5</td> <td>~5</td> </tr> <tr> <td>Public transport & bicycle</td> <td>~3</td> <td>~3</td> </tr> <tr> <td>Motorised individual transport</td> <td>~45</td> <td>~45</td> </tr> <tr> <td>Motorised individual transport & bicycle</td> <td>~2</td> <td>~2</td> </tr> <tr> <td>Bicycle</td> <td>~5</td> <td>~5</td> </tr> <tr> <td>Various</td> <td>~1</td> <td>~1</td> </tr> <tr> <td>Unknown</td> <td>~8</td> <td>~12</td> </tr> </tbody> </table>	Transport Mode	Established-alternative (%)	Total (%)	No journey to work	~8	~10	By foot	~8	~10	Public transport	~15	~15	Public transport & individual transport	~5	~5	Public transport & bicycle	~3	~3	Motorised individual transport	~45	~45	Motorised individual transport & bicycle	~2	~2	Bicycle	~5	~5	Various	~1	~1	Unknown	~8	~12
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Desire to move	Average																																	
	<p>Low High</p>																																	
Price sensitivity	Average																																	
	<p>Low High</p>																																	
Owned apartments quota	Average																																	
	<p>Low High</p>																																	
Single family house quota	Low, preference for shared accommodation in a multiple-occupancy building																																	
	<p>Low High</p>																																	
Desire to buy	Average																																	
	<p>Low High</p>																																	

Source: Fahrländer Partner & sotomo.

Characteristic Typical characteristic

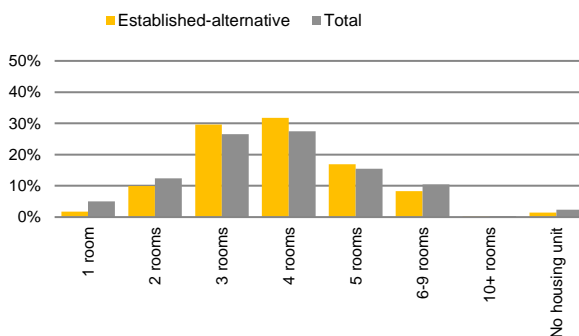
Type of property



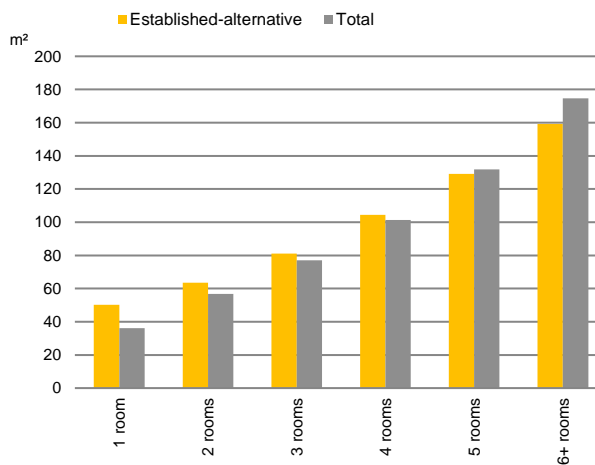
Apartment layout Closed

Architecture Atmospheric, modern-homely, preference for well renovated old buildings

Number of rooms 3-5 rooms



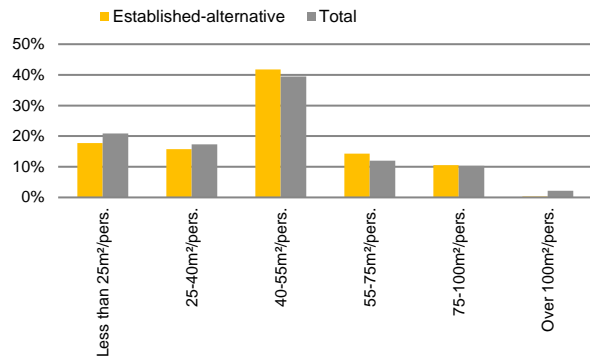
Living area



Source: Fahrländer Partner & sotomo.

Characteristic	Typical characteristic
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Living area per person



Required surface area per person Average



Standard of finishing Average

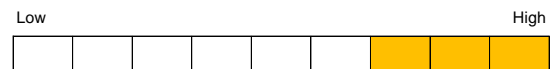


Materials and appliances Natural materials, plenty of wood

Technical fittings Average



Willingness to pay more for green products High



Other specific requirements None

Source: Fahrländer Partner & sotomo.

6.5 Established-alternative: Neighbourhood

Finding an apartment is a process characterised by the preferences and constraints that influence demand. In the segments of demand of the higher social strata preferences play a greater role, whereas restrictions are more important among the lower strata. The following information relates to the results of the process.

Characteristic	Typical characteristic	
Preference for an urban environment	Average	<div style="display: flex; justify-content: space-between; width: 100%;"> Low High </div>
Preference for countryside	Average	<div style="display: flex; justify-content: space-between; width: 100%;"> Low High </div>
Sun & view	Average	<div style="display: flex; justify-content: space-between; width: 100%;"> Less important Important </div>
Access to amenities	Secondary	<div style="display: flex; justify-content: space-between; width: 100%;"> Less important Important </div>
Access to leisure facilities/recreation	Very important	<div style="display: flex; justify-content: space-between; width: 100%;"> Less important Important </div>
Access to cultural activities	Very important	<div style="display: flex; justify-content: space-between; width: 100%;"> Less important Important </div>
Importance of external spaces	Very High	<div style="display: flex; justify-content: space-between; width: 100%;"> Low High </div>
Small-scale development	Important	<div style="display: flex; justify-content: space-between; width: 100%;"> Less important Important </div>
Child-friendly	Average	<div style="display: flex; justify-content: space-between; width: 100%;"> Less important Important </div>

Source: Fahrländer Partner & sotomo.