

# SWITZERLAND

## COUNTRY REPORT

### Key findings:

- Four in five Swiss businesses (**83%**) now report that they are familiar with AI technologies. Rates of AI adoption are also high, with **49%** of businesses currently using AI in their operations.
- AI adopters report the leading benefits of AI to be increasing efficiencies (**49%**) and reducing costs (**41%**), and **80%** of those that have implemented AI into their operations note it has a positive impact on their business value.
- **54%** plan to hire staff to drive further AI implementation and development in the coming years.
- Respondents strongly identify Zurich (**62%**) as the leading AI hotspot in the country, far ahead of any other city or region.

## Introduction

Switzerland emerged as an AI trail-blazer among European countries in AWS' [Unlocking Study](#), which found that increased adoption of digital technologies like AI could unlock 127 billion CHF for Switzerland's economy.

Interest in AI among Swiss businesses continues to be strong, with **83%** reporting that they are now familiar with AI technologies. **49%** of businesses are currently using AI in their operations, indicating at the same time significant room for growth. The key barriers to adoption are attributed by businesses to concerns over data privacy (**36%**) and high AI implementation costs (**35%**).

However, **80%** of businesses that have already actively implemented AI in their operations note that the application of this technology is positively impacting their business value. Furthermore, **77%** report that AI is also yielding positive cost savings for them.

In an environment of continued interest for technological innovation and implementation into business operations, AWS has focused this report on the tangible impact that AI adoption has had on firms as well as its primary use-cases, cities where adoption is growing fastest and the key drivers of this, and a sector specific break-down.

## AI primary use-cases and impact

Swiss businesses strongly anticipate that AI will continue to increase in importance and value. They strongly report that they expect AI to play a key role in driving industry-wide innovation over the next five years (**91%**) as well improving workforce skills and capabilities (**89%**).

As businesses have continued to implement AI further into their daily operations, additional key use-cases are beginning to emerge. AI systems are currently primarily employed by businesses for internal activities such as process automation and optimisation (**51%**), but AI is also regularly used by businesses to support with customer service and support tasks (**45%**). High levels of AI use for customer service orientated tasks is largely driven by a strong perception among businesses that AI can enhance customer experience (**41%**).

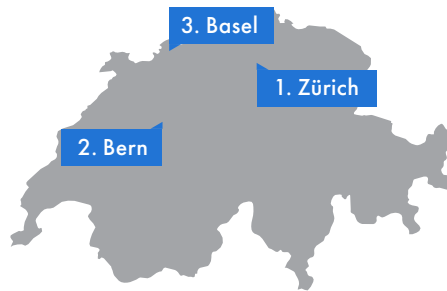


Adopters also point to AI's ability to increase operational efficiencies like supply chain management (**49%**) and reduce costs of labour or machinery (**41%**) as two primary benefits, and **35%** plan to hire more workers with AI skills in the next 12 months to drive further AI implementation and development. Recruitment plans are also driven by the positive impact of AI on workforce productivity (**77%**).

Swiss businesses also feel largely positive about AI's impact on the labour market, with close to half (**48%**) predicting that AI will have a positive impact on job creation, compared to only **17%** who think it will have a negative impact.

## AI hotspots

As AI has been implemented in Switzerland across many industries, geographical AI hotspots have begun to emerge. The primary hotspot is Zurich, with **62%** of businesses identifying it as the leading AI region. Bern (**9%**) and Basel (**4%**) were also identified as an emerging hotspots.



### Top 3 cities most frequently identified by Swiss businesses as AI Hotspots

1. Zürich
2. Bern
3. Basel

Businesses suggest that the growth of AI hotspots like Zurich have been largely driven by the finance and insurance sector (**49%**), the IT sector (**43%**), and the education sector (**27%**). They also strongly associate AI hotspots with areas that are home to strong research institutions and academic excellence (**51%**) and provide easy access to investment and funding (**41%**).

AI hotspots are likely to become centres of economic activity in the coming years, with **95%** of businesses reporting that the availability of skilled AI professionals is an important factor in deciding where their company should be located.

## Sector specific insights

As part of this report, an industry specific questionnaire was sent to firms operating in the financial services and healthcare sectors, as well as to start-ups.

### Financial services



**97%** of financial services firms report being familiar with AI technologies, compared to **83%** across all sectors.



AI has a significant impact on employee productivity in the financial sector, with **39%** of adopters reporting improvements compared to **20%** across all businesses.



However, there is a notable gap between financial service firms and businesses in other sectors when it comes to plans to integrate skilled AI professionals into their workforces. Just over a third of firms (**37%**) plan to hire skilled AI professionals, compared to **54%** across all industries.

**97%** of businesses in the financial services industry report that they are familiar with AI, more than any other surveyed sectors. A strong majority (**74%**) of financial services firms have adopted AI technologies, compared to **49%** across all sectors.

The primary AI use cases in financial services firms are for process automation and optimisation (**53%**), and customer service and support (**53%**).

Financial services firms which have adopted AI are very optimistic about its potential to raise business performance, citing increased efficiency (**64%**) and reduced costs (**61%**) following AI implementation. This is significantly above the national average, where just under half (**49%**) witnessed improved efficiency and only **41%** of firms attested to reduced costs.

AI has also had a notably large impact on employee productivity in the financial sector, with **39%** of financial services adopters reporting improvements in this area compared to **20%** across all sectors.

**86%** of financial services adopters also report that AI has made a positive impact on their business value, compared to **80%** across all sectors.

The financial services sector leads in AI familiarity and implementation. At the same time over a third (**37%**) of firms plan to hire skilled AI professionals, compared to **54%** across all industries.

## Healthcare industry:



**92%** of healthcare businesses are currently familiar with AI compared to **80%** of all Swiss businesses, and **58%** have implemented AI technologies into their business.



However, adoption is held back by the perceived high costs of integrating AI (**33%**) and data privacy and security concerns (**33%**).



Healthcare businesses that have adopted AI report positive impacts on efficiency (**73%**), and product development over the coming years (**92%**).

Familiarity with AI is significantly higher in the healthcare sector (**92%**) than across all Swiss industries (**80%**). **48%** of healthcare businesses have now implemented AI technologies, slightly below the Swiss average.

Healthcare businesses report that reasons for the discrepancy between high rates of familiarity and slightly lower implementation rates are perceived high costs of integrating AI (**33%**) and data privacy and security concerns (**33%**).

At the same time, healthcare businesses are also aware of the benefits AI can deliver. **92%** believe that integrating AI technologies will have a markedly positive impact on business value, competitiveness, and product development over the next five years (**92%**).

Moreover, there is a strong belief among businesses that have adopted AI that it has a positive impact on efficiency (**73%**), and patient experience (**55%**).

## Start-ups:



**93%** of start-ups are familiar with AI, and **69%** have implemented it into their operations.



**64%** believe AI will transform large parts of their industry in the coming years, driving major improvements and innovation.



Continued growth in AI implementation for start-ups is likely to depend on access to funding and investment opportunities, as **43%** consider this as influential to their decisions relating to AI investment.

The vast majority of Swiss start-ups are familiar with AI (**93%**), and **69%** have adopted it into their business practices.

High implementation rates correlate with the belief that AI will transform the start-up space in the next five years. **64%** of respondents also expect AI to transform large parts of their industry, driving major improvements and innovation.

Start-ups are preparing for further AI transformations in their hiring plans, with **43%** planning to hire professionals with AI skills in the coming years to drive AI implementation and development.

Continued growth in AI implementation for start-ups is highly dependent on access to funding and investment opportunities, as **43%** of respondents consider this as influential to decisions relating to AI investment, compared to **31%** of all businesses.

## Conclusion

The study results demonstrate that Swiss companies recognize AI's potential for their businesses and are increasingly reaping the benefits of advanced technologies. Switzerland reinforces its AI leadership position with persistently high ambitions, driven by a high level of AI familiarity and the realisation among AI adopters that the technology significantly enhances company value and employee productivity. Consequently, businesses plan to further hire personnel with strong AI competencies in the months ahead.

## Methodology

The fieldwork for this study was undertaken by Strand Partners' research team for Amazon Web Services. This research has followed the guidance set forth by [ESOMAR](#).

We surveyed 1,000 nationally representative business leaders in Switzerland (i.e. founders, CEOs or C-suite staff). Business leaders were representative by size, sector, and NUTS1 region.

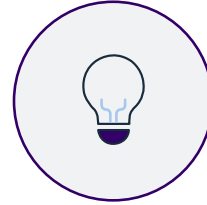
**Alongside the 1,000 above, we provided additional samples of 100 each for the below industries, to ensure insightful and accurate reporting on their AI adoption.**



Financial Services



Healthcare &  
Pharmaceutical



Start-ups