Canton of Zurich
Department for Economic Affairs Office for Economy
Division of Business and Economic Development

Zurich
Digital Health
Map 2024

Zurich: Growth Engine for Digital Health in Switzerland

The Canton of Zurich is a key driver of growth for Digital Health companies, due to its ideal conditions as a hub for higher education, a financial centre and a base of numerous healthcare, technology and insurance companies. This was the result of a joint analysis by the Division of Business and Economic Development of the Canton of Zurich and Health-Trends, a Swiss think tank for Digital Health. The findings are summarised in the Zurich Digital Health Map, now published for the second time since its debut in 2021.

Zurich as an Attractive Location for Digital Health

The Swiss Digital Health Szene has been evolving rapidly for some time. According to data from Health-Trends and a joint study by the ZHAW and Health-Trends from 2020, the Canton of Zurich is one of the most important hotspots for Digital Health, alongside other regions such as the Lake Geneva region and the greater Basel area[1]. Figures from Health-Trends, the Healthtech Cluster in Schlieren and the Digital Health Center Bülach show that at least 121 companies are currently active in the field of Digital Health in Zurich. They offer products and services for patients, doctors, hospitals and various healthcare companies, thereby significantly driving innovation in the healthcare sector beyond the national borders. As a result, around 30–40% of all Digital Health companies in Switzerland are located in the Canton of Zurich. According to estimates from Health-Trends, approximately 350–400 Digital Health companies are active across Switzerland.

The reasons for the high density of Digital Health companies in Zurich lie in the attractive location factors of the greater Zurich area: Zurich is home to leading academic institutions such as the ETH Zurich, the University of Zurich, the ZHAW and several other educational institutions, which supply the region with top-class talent in the fields of technology and health. In addition, the combination of a financial centre, the headquarters of numerous insurance and technology companies and a dynamic life sciences cluster leads to a powerful healthcare ecosystem. This ecosystem also includes the University Hospitals of Zurich, which play an key role in cutting-edge medical research and drive innovation in the Digital Health sector.

The "Zurich Digital Health Map 2024" illustrates the distribution of Zurich-based startups and other Digital Health companies across the various Digital Health segments. A company's logo was included on the map only if its headquarters were located in the Canton of Zurich at the time of analysis (end of May 2024) and its business model focused on Digital Health products and services.

What is Digital Health?

Digital Health is an umbrella term for the topic of digital transformation in the healthcare sector and, according to the classification model[2] of the Winterthur Institute of Health Economics (WIG) can be divided into four segments: Trend Health (lifestyle-oriented), E-Health (medicine-oriented), Tech Health (hardware-oriented) and Data Health (data-oriented).

The **Trend Health** segment primarily focuses on lifestyle topics in the field of Digital Health, such as tracking sleep, nutrition or sporting activities. A large amount of personal information is generated in these areas, which, however, often has only secondary medical relevance. In contrast, the **E-Health** segment, emphasizes the medical benefits particularly, the connectivity between patients and doctors. Through various e-health services, medically relevant data can be exchanged documented and tracked over time in digital form. The goal is to advance and simplify processes in the healthcare sector. The **Tech Health** segment is characterized by technology with a specific focus on hardware. Medical technology products play a central role within this segment. They are characterized by the fact that they can be digitally connected or controlled. The focus here is on cutting-edge technology products such as sensors, robotics and 3D printing. The **Data Health** segment deals with the generation and analysis of health-related data. Data health generally uses and interprets the data generated in the other three segments and is therefore closely linked to the other Digital Health segments. This segment often employs data-driven technologies such as artificial intelligence.

In summary, the Data Health and Tech Health segments are strongly shaped by technological aspects, while the Trend Health and E-Health segments focus primarily on management-oriented aspects such as processes, quality and marketing within the healthcare sector. The boundaries between the segments are fluid

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1 See also the Swiss Digital Health Startup Story:
   https://www.health-trends.ch/produkt/swiss-digital-health-startup-story-factsheet/
2 Further information on the Digital Health classification model according to Alfred Angerer et. al (2017) can be found here:
   https://digitalcollection.zhaw.ch/handle/11475/1458

Significant Increase of Digital Health Companies

As the "Zurich Digital Health Map" illustrates, there are currently at least 121 Digital Health companies in the Zurich area. Compared to the 2021 map, which featured a total of 70 companies, this represents a significant increase, which can be explained primarily by the fact that only Digital Health startups were mapped in 2021. For the 2024 map, small and medium-sized enterprises (SMEs) with a workforce of up to 250 employees were also included.

A total of **63 new companies** were added to the map in 2024, while **58 companies from 2021 remain on the map**. Additionally, **11 companies** that were listed on the 2021 map have been removed, as they are no **longer relevant** for various reasons – such as a change in service offerings, business closure, or relocation outside of the Canton of Zurich. The percentage distribution of companies across the four Digital Health segments in the entire Canton of Zurich is as follows:

– **Data Health**: 37 companies (30,6 %)
– **E-Health**: 37 companies (30,6 %)
– **Tech Health**: 28 companies (23,1 %)
– **Trend Health**: 19 companies (15,7 %)

These figures illustrate a nearly even distribution between the segments of **Data Health** and **E-Health**, while **Tech Health** and **Trend Health** account for smaller, yet still significant shares. The four segments and their relevance for the Canton of Zurich are described in detail below.
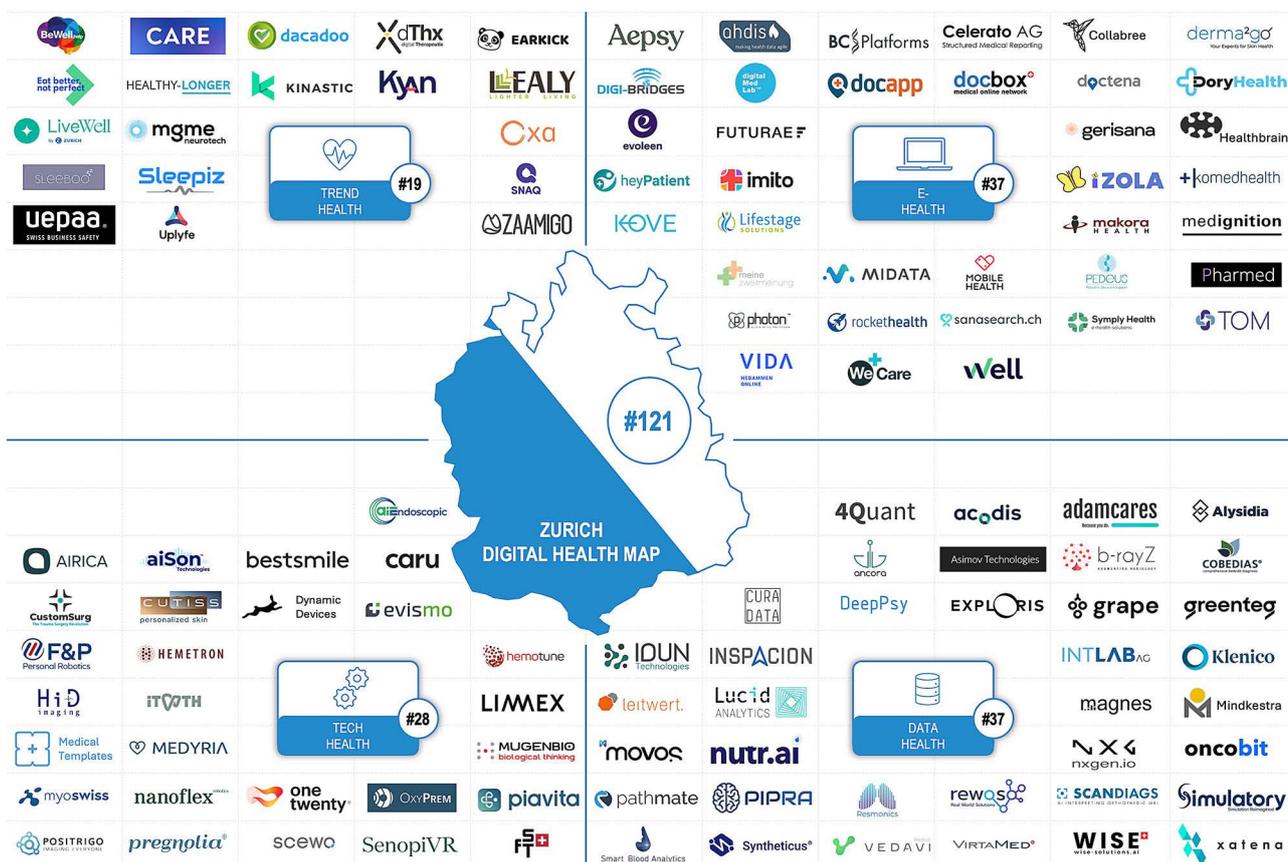

Figure 1: "Zurich Digital Health Map" for 2024

In the **E-Health** segment, there are a total of 37 companies, accounting for 30.6 % of all companies in the database. The companies in this segment cover various Digital Health services, including:

– **Telemedicine**: Several companies offer telemedicine solutions that enable patients to access healthcare services via digital platforms.
– **Mobile Health**: Many companies are developing mobile applications that help patients to monitor their health and communicate with healthcare providers, particularly in oncology and chronic diseases.

- **Data-Driven Health Platforms**: Some companies operate platforms that collect and analyse health data generated by mobile apps. These platforms promote innovation in the healthcare sector and offer services to support clinical decision-making.
- **Digital Health Guidance**: There are companies that assist patients in navigating the healthcare system by combining digital and physical healthcare services with insurance offerings.

All these companies focus on enhancing communication between patients and healthcare institutions, improving health monitoring, and digitally integrating health services.

In the **Data Health** segment, there are also 37 companies, accounting for 30.6% of all companies in the database. Companies in this segment offer a wide range of services and technologies, including:
- **Data Analysis and Evaluation**: Some companies are using advanced technologies such as artificial intelligence and machine learning to analyse health data, identify patterns and gain new insights.
- **Data Synthesis**: Some companies are developing platforms to create synthetic data while ensuring data privacy, which is particularly relevant for research and development in medicine.
- **Diagnosis and Visualization**: There are solutions that provide visual diagnostic tools for mental and physical health problems to improve treatment and promote personalized medical approaches.
- **Marketplace for Healthcare Services**: Some companies offer platforms that enable more efficient evaluation, tendering, and ordering of medical goods and services, optimizing the healthcare system.

The exact number of companies in each focus area varies, but the majority concentrate on the analysis and utilization of health data for diagnostic and organizational improvements in healthcare.

In the **Tech Health** segment, there are a total of 28 companies, accounting for 23.1% of all companies in the database. These companies cover various innovative areas, including:
- **Robotics and Assistive Technologies**: Some companies are developing technologies that support people with muscle or mobility problems, for example through exoskeletons or smart training devices.
- **Medical Technology Innovations**: Several companies focus on surgical instruments and medical technology products to improve treatment quality, for example in orthopaedics, sports medicine, or imaging.
- **Diagnostic Platforms**: Some companies are developing new platforms for early disease detection, enabling early and accurate diagnoses.
- **Workflow Optimization**: Various companies are developing technological solutions to increase efficiency in sonography and other medical procedures.

The overall focus of companies in the Tech Health segment is strongly geared towards improving diagnostic, treatment, and rehabilitation options through innovative technological solutions.

In the **Trend Health** segment, there are a total of 19 companies, accounting for 15.7% of all companies in the database. These companies focus on innovative approaches to health promotion and wellbeing, including:
- **Wellbeing and Prevention**: Some companies offer digital solutions to support the health and wellbeing of individuals and companies. These include programmes to promote a healthy lifestyle and mental health.
- **Diabetes Management**: There are apps that support people with diabetes by helping to better plan meals and monitor nutrient intake. These apps are often linked to glucose sensors.
- **Safety Solutions**: Some companies offer innovative safety applications, such as monitoring and rescuing workers who are in dangerous environments or working alone.

Companies in this segment are heavily focused on using technology to promote wellbeing, improve safety, and manage chronic disease.

Regional Clusters in the Zurich Area

In the dynamic landscape of the Digital Health sector in the Canton of Zurich, four regions stand out in particular: the City of Zurich, Schlieren, Winterthur and Bülach. These locations are developing into important hubs for Digital Health, with close ties to renowned universities, the presence of research and innovation parks, and access to international expertise playing a central role.

City of Zurich: The Centre of Digital Health

The City of Zurich is undoubtedly the centre of the Digital Health sector in the canton, housing the largest cluster with its 77 companies. Within this cluster, the E-Health segment dominates, accounting for almost 38% of companies. The Data Health segment is also strongly represented, making up 26%.

At the same time, the City of Zurich has the largest concentration of Digital Health companies at a single location in Switzerland. This concentration is no coincidence. Zurich stands out thanks to its excellent infrastructure, its proximity to prestigious universities such as ETH Zurich and the University of Zurich, and a strong talent pool of specialists. The combination of research, innovation and business makes the city a highly attractive location for companies in the Digital Health sector. In addition, Zurich boasts a well-developed innovation eco-system (particularly numerous coworking spaces, accelerators and incubators) as well as regular events that foster exchange and collaboration between companies, researchers and specialists. These factors create a thriving ecosystem that supports the growth and development of new Digital Health technologies.

Schlieren: An Up-and-Coming Cluster for Data Health and Tech Health

Schlieren, located just a short distance from the City of Zurich, is increasingly establishing itself as an important location for Data Health and Tech Health. With a total of 10 companies in these sectors, the city is emerging a strong player in the region.

The Data Health segment predominates, accounting for 50%, while Tech Health accounts for 40% of companies. Schlieren benefits from its reputation as an innovation hub, especially for MedTech and BioTech startups. The city is home to several prominent innovation and research parks, such as the Bio-Technopark Schlieren-Zurich or the Healthtechpark Zurich-Schlieren, which attract young companies and provide them with the infrastructure and support necessary for growth.

Another advantage of Schlieren is its close proximity to Zurich, coupled with excellent transport links, which facilitate access to key players and markets. This makes the city an attractive alternative for companies that seek to benefit not only from its proximity to Zurich, but also from the specific advantages of a smaller, more focused innovation hub.

Winterthur: A Technological Hotspot for Healthcare Innovations

Winterthur is also showing an upward trend in the field of Digital Health. With a total of 9 companies based in the city, the focus is particularly strong in the Tech Health segment, which accounts for 44% of the companies. Additionally, Trend Health and -E-Health also play a role, each accounting for 22% of the companies.

Winterthur benefits especially from its proximity to the very practice-oriented ZHAW university and a supportive innovation ecosystem that promotes young startups and drives technological progress. Through targeted initiatives (e.g. Digital Winterthur, ZHAW Digital Health Lab) and the establishment of a network of players in the healthcare sector, the city fostering a conducive environment for the development and establishment of Digital Health companies.

Bülach: A Digital Health Cluster Soon To Emerge in the North of Zurich

Bülach and the Digital Health Center Bülach (dhc) located there are also worth mentioning. The dhc was initiated around two years ago with support of the City of Bülach, the Division of Business and Economic Development of the Canton of Zurich and additional partners such as hospitals and health insurance companies. Although only one Digital Health company focusing on **Data Health** is currently based in Bülach, the dhc is already heavily involved in community building within the Digital Health sector. The dhc also recently launched a Digital Health Accelerator programme together with the startup incubator Tenity, which will run for a total of eight cohorts until the end of 2028. Startups participating in this programme will receive targeted coaching and benefit from extensive networking with potential investors and pilot partners. It is therefore anticipated that in the future, various companies represented on the **Zurich Digital Health Map** will establish a presence at the dhc.

The Signs for Digital Health in Zurich Are Positive

The "Zurich Digital Health Map" for the year 2024 highlights the rapid growth and increasing significance of the Digital Health sector in the Canton of Zurich. With a clear focus on E-Health and Data Health in the City of Zurich, Tech Health in Winterthur, Data Health and Tech Health in Schlieren, and a general Digital Health focus in Bülach, the canton offers a diverse and innovative environment for Digital Health companies. The proximity to leading research institutions, the excellent infrastructure and various, regionally based institutional Digital Health initiatives make these areas ideal locations for companies operating in the Digital Health sector. Organisations such as the Healthtechpark Zürich-Schlieren and the Digital Health Center Bülach play a key role in fostering this ecosystem.

Despite the positive development and promising future prospects in the Canton of Zurich, there is still room for improvement. Although Switzerland has made progress in the area of healthcare and MedTech investments in recent years in relative comparison with other countries, the proportion of investments in the Digital Health sector remains low in international comparison. There is a particular need for action in early-stage financing rounds, such as seed and pre-seed stages. Additionally, there are currently still few transparent options for monetizing Digital Health solutions in the existing Swiss healthcare system. Moving forward, a clear path (e.g. similar to the financing of Digital Health applications through DiGAs in Germany) must be defined by policymakers and health authorities to promote and establish the monetisation of Digital Health through existing healthcare tariff structures.

Despite these challenges, Zurich is expected to remain a central hub for healthcare innovation, thanks to its distinctive innovation infrastructures, proximity to business and research, increasing investments in research and development, and growing demand for Digital Health solutions.

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