

Canton of Zürich
Department for Economic Affairs
Office for Economy and Labour

Cluster Data 2019

Key Facts and Figures on the Economic Significance of Selected Industry Clusters in the Canton of Zurich



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The information in this publication is based on the data available in January 2019.

The publication at hand may be cited with due reference to the source.

Due to conceptual changes made to this publication, the data herein is only conditionally comparable with the data of previous publications that formed an integral part of the Cluster Report.

Further information on cluster-specific topics is available at www.standort.zh.ch/cluster.

February 2019

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Introduction

We support and promote networking of seminal industries

Clusters are groups within the same sector of industry that play a major role in the development of Zurich by virtue of the high concentration of companies, research & educational facilities and professional organisations. By supporting and promoting the networking of these institutions and companies along the value creation chain, we strive to increase the innovative strength within, and among, the various clusters. The Canton of Zurich is characterised by a broad diversity of industries that include not only financial services providers but also ICT enterprises, numerous companies in the Creative Industries sector, a growing number of Life Sciences companies and Tourism as important economic pillars.

The objectives of our cluster strategy are, on the one hand, to strengthen resident companies and create additional partnerships between the various stakeholders in the innovation ecosystem and, on the other hand, to promote the relocation of companies that complement the ecosystem. In other words, we see it as our task to support, expedite and connect.

With this publication, which has been created in close collaboration with the Statistical Office Canton of Zurich, we present the latest available data on the economic significance and development of these industry groups.

Division of Business and Economic Development – Office for Economy and Labour of the Canton of Zurich

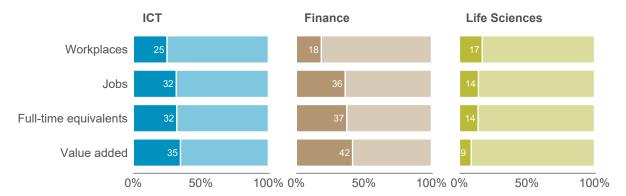
Overview

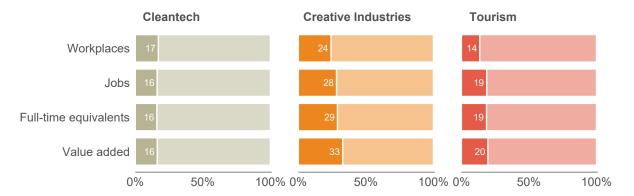
Cluster Figures at a Glance Canton of Zurich, 2016

| | Workplaces | Jobs | Full-time equivalents | Value added in million CHF |
|----------------------------|------------|-----------|-----------------------|----------------------------|
| ICT | 5,291 | 53,935 | 48,910 | 11,034 |
| Finance | 3,934 | 91,784 | 82,348 | 24,903 |
| Life Sciences | 958 | 20,103 | 18,097 | 4,685 |
| Cleantech | 15,153 | 100,683 | 88,036 | 9,111 |
| Creative Industries | 18,417 | 80,803 | 58,771 | 8,834 |
| Tourism | 4,491 | 47,544 | 34,942 | 2,128 |
| | | | | |
| Overall economy ZH | 118,225 | 1,014,859 | 787,274 | 133,395 |
| Overall economy CH | 680,100 | 5,120,335 | 4,001,093 | 637,865 |
| Share ZH of CH | 17.4% | 19.8% | 19.7% | 20.9% |

Significance Canton of Zurich

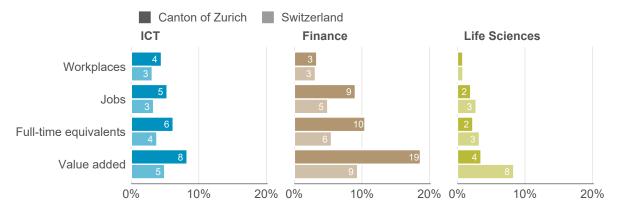
Share of Swiss (nationwide) cluster, 2016, in %, rounded

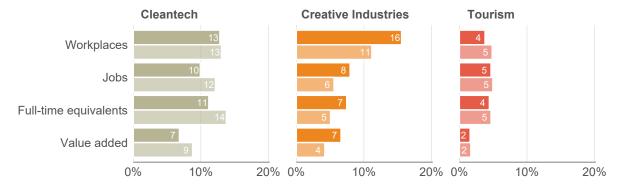




Share of Clusters in the Overall Economy

Canton of Zurich and Switzerland, 2016, in %, rounded

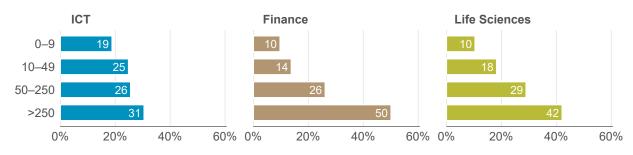


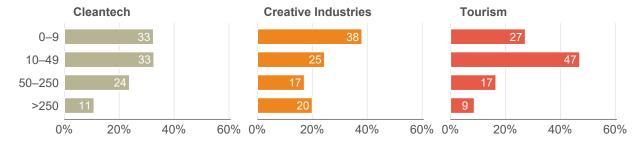


Data source: FSO (STATENT, VGR)

Clusters by Workplace Size

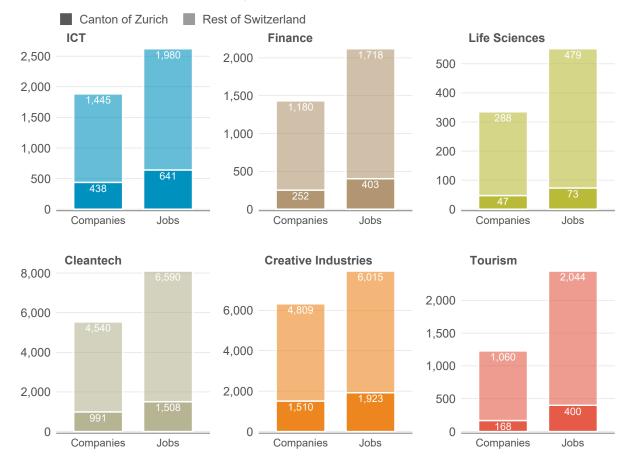
Share of workplaces, Canton of Zurich, 2016, in %





Newly Founded Companies by Clusters

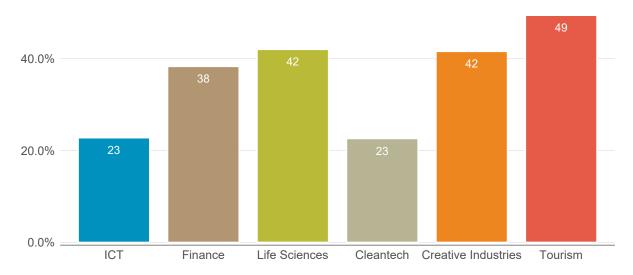
Canton of Zurich and rest of Switzerland, 2016



Data source: FSO (UDEMO)

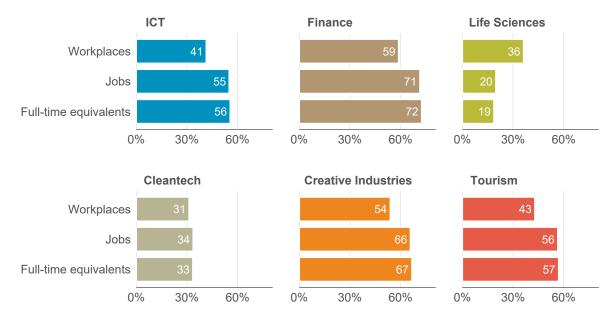
Percentage of Women by Clusters

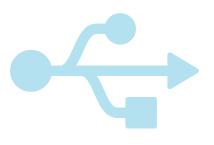
Canton of Zurich - Jobs, 2016, in % 60.0%



Share of Cantonal Clusters, City of Zurich

Canton of Zurich, 2016 in %

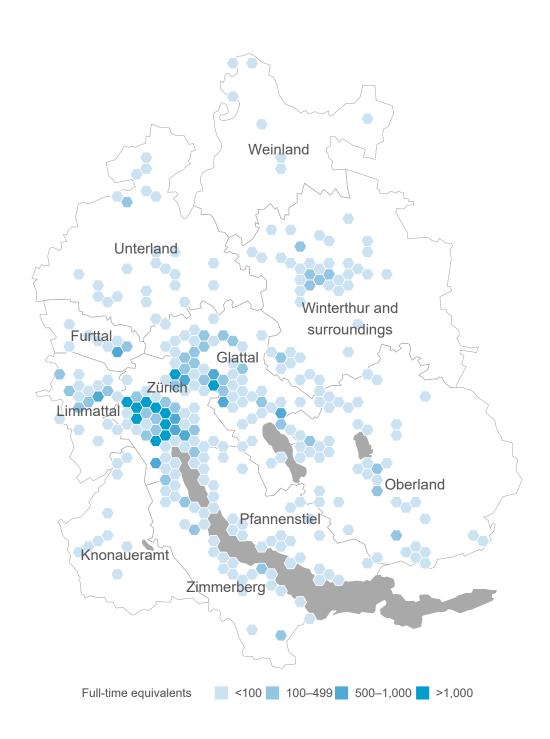




ICT

The Information and Communications Technology cluster includes the following sub-segments

IT services
Telecommunications
Trade and distribution
Hardware

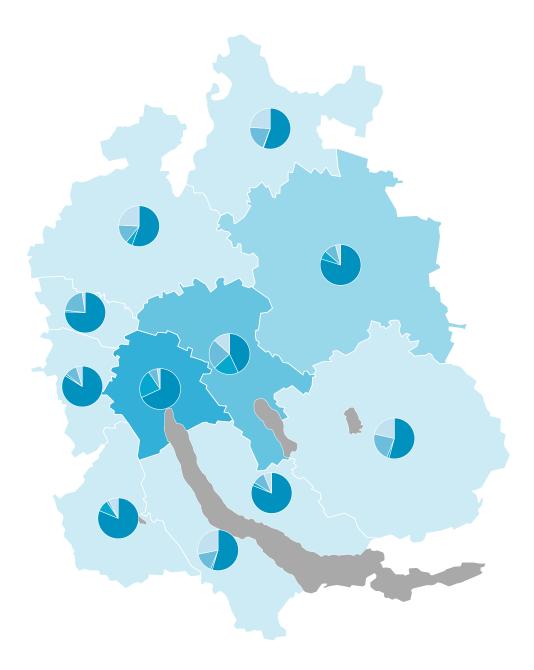


Cluster Facts and Figures with Sub-Segments Canton of Zurich, 2016

| | Workplaces | Jobs | Full-time equivalents | Value added in million CHF |
|--|------------|---------|-----------------------|----------------------------|
| IT services | 4,512 | 34,944 | 31,046 | 5,899 |
| Telecommunications | 234 | 8,918 | 8,537 | 2,722 |
| Trade and distribution | 380 | 6,455 | 5,976 | 1,750 |
| Hardware | 165 | 3,618 | 3,350 | 662 |
| | | | | |
| Total ZH | 5,291 | 53,935 | 48,910 | 11,034 |
| Total CH | 21,207 | 169,645 | 152,026 | 31,607 |
| Share ZH of CH | 24.9% | 31.8% | 32.2% | 34.9% |
| Share of cluster in overall economy ZH | 4.5% | 5.3% | 6.2% | 8.3% |

Regional Distribution of the ICT Cluster

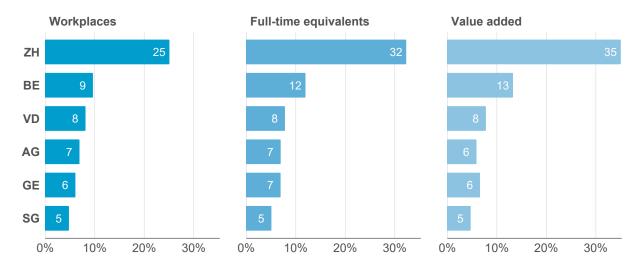
Full-time equivalents by region, Canton of Zurich, 2016





Cantons with High Share of ICT Overall Market

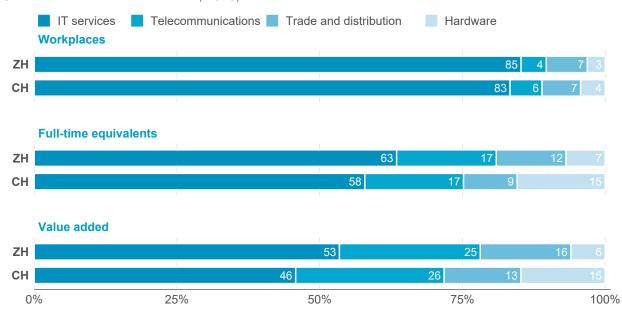
Overall market share, 2016, in %



Data source: FSO (STATENT, VGR)

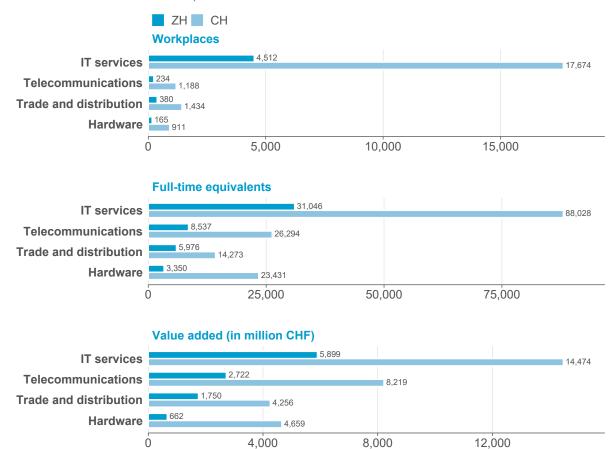
ICT Sub-Segments

Canton of Zurich and Switzerland, 2016, in %



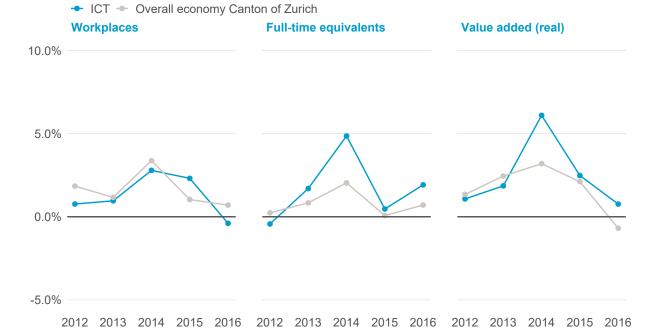
ICT Sub-Segments

Canton of Zurich and Switzerland, 2016



Growth Rates

ICT cluster and overall economy, Canton of Zurich, 2012-2016, in %



Data source: FSO (STATENT, VGR)

Method change in estimating full-time equivalents as of 2015. Please see the data sources for further details.

Newly Founded Companies in the ICT Cluster

Canton of Zurich



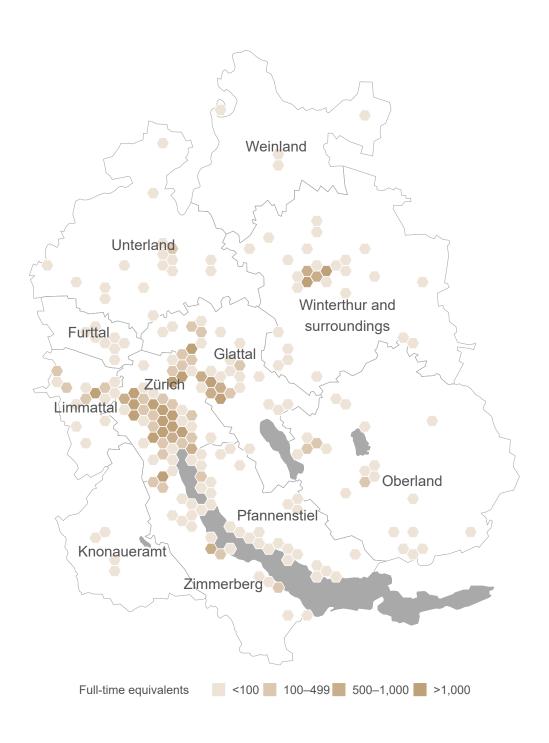
Data source: FSO (UDEMO)



Finance

The Finance cluster includes the following sub-segments

Banks
Insurances
Other financial services providers



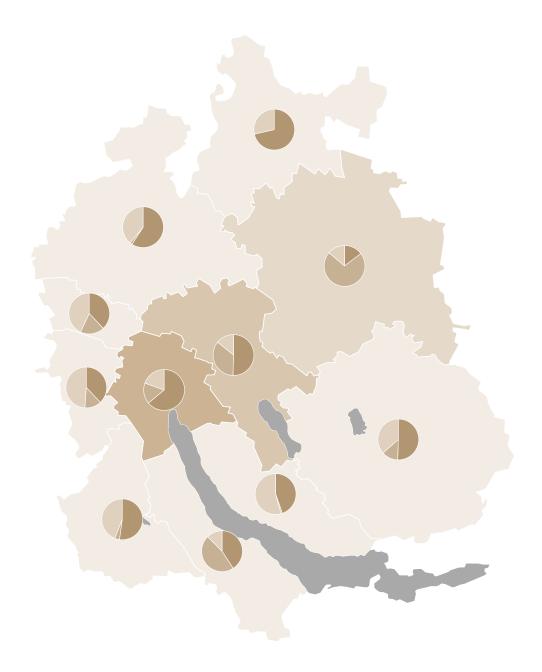
Cluster Facts and Figures with Sub-Segments

Canton of Zurich, 2016

| | Workplaces | Jobs | Full-time equivalents | Value added in million CHF |
|--|------------|---------|-----------------------|----------------------------|
| Banks | 1,389 | 51,536 | 47,428 | 10,691 |
| Insurances | 249 | 21,052 | 18,375 | 8,578 |
| Other financial services providers | 2,296 | 19,196 | 16,545 | 5,633 |
| | | | | |
| Total CH | 21,287 | 253,825 | 220,599 | 59,823 |
| Total ZH | 3,934 | 91,784 | 82,348 | 24,903 |
| Share ZH of CH | 18.5% | 36.2% | 37.3% | 41.6% |
| Share of cluster in overall economy ZH | 3.3% | 9% | 10.5% | 18.7% |

Regional Distribution of the Finance Cluster

Full-time equivalents by region, Canton of Zurich, 2016





Finance Cluster in the Greater Zurich Area

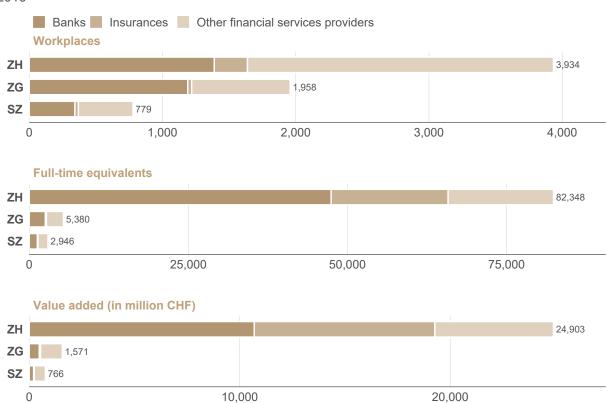
2016

| | Workplaces | Full-time equivalents | Value added in million CHF |
|---------------------|------------|--------------------------|----------------------------|
| ZH | 3,934 | 82,348 | 24,903 |
| ZG | 1,958 | 5,380 | 1,571 |
| SZ | 779 | 2,946 | 766 |
| Total Zurich region | 6,671 | 90,674 | 27,240 |

Data source: FSO (STATENT, VGR)

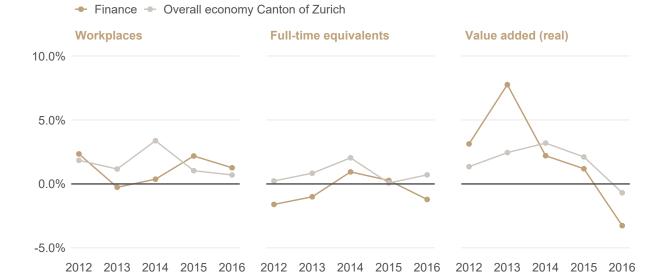
Finance Cluster in the Greater Zurich Area with Sub-Segments

2016



Growth Rates

Finance cluster and overall economy, Canton of Zurich, 2012-2016, in %

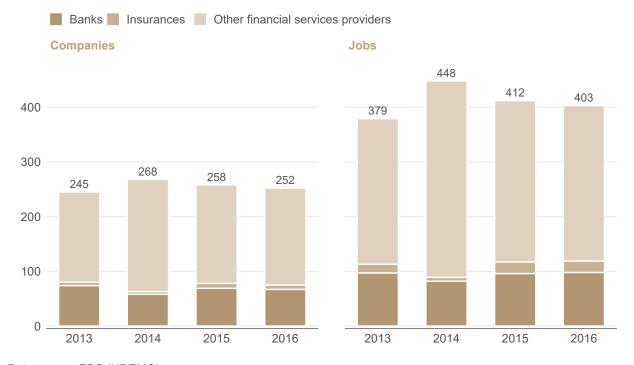


Data source: FSO (STATENT, VGR)

Method change in estimating full-time equivalents as of 2015. Please see the data sources for further details.

Newly Founded Companies in the Finance Cluster

Canton of Zurich



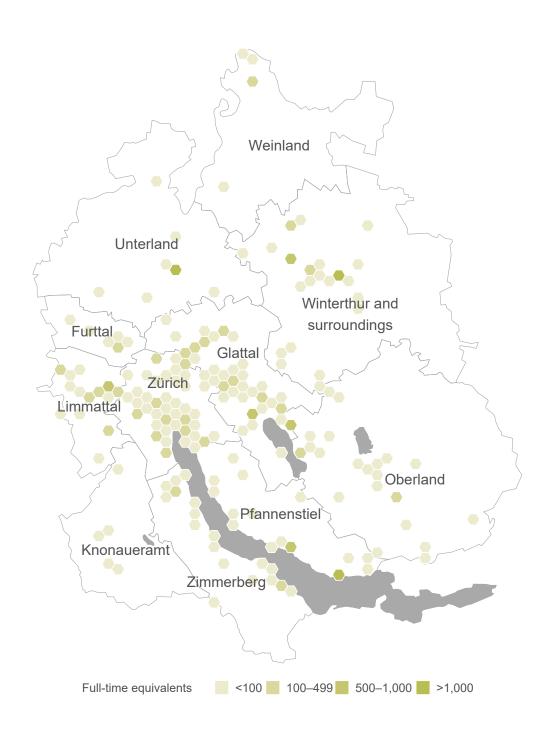
Data source: FSO (UDEMO)



Life Sciences

The Life Sciences cluster includes the following sub-segments

Medical technology and control & measuring devices
Biotechnology
Pharmaceutical industry
Wholesale
Research and laboratories



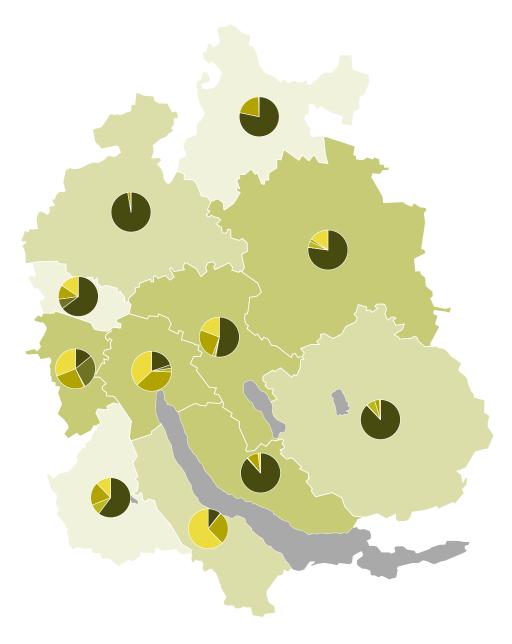
Cluster Facts and Figures with Sub-Segments

Canton of Zurich, 2016

| | Workplaces | Jobs | Full-time equivalents | Value added in million CHF |
|--|------------|---------|-----------------------|----------------------------|
| Medical technology | 411 | 10,686 | 9,888 | 2,021 |
| Biotechnology | 41 | 780 | 692 | 234 |
| Pharmaceutical industry | 27 | 484 | 429 | 354 |
| Wholesale | 243 | 3,764 | 3,369 | 993 |
| Research and laboratories | 236 | 4,389 | 3,720 | 1,083 |
| | | | | |
| Total ZH | 958 | 20,103 | 18,097 | 4,685 |
| Total CH | 5,664 | 142,672 | 130,787 | 53,281 |
| Share ZH of CH | 16.9% | 14.1% | 13.8% | 8.8% |
| Share of cluster in overall economy ZH | 0.8% | 2% | 2.3% | 3.5% |

Regional Distribution of the Life Sciences Cluster

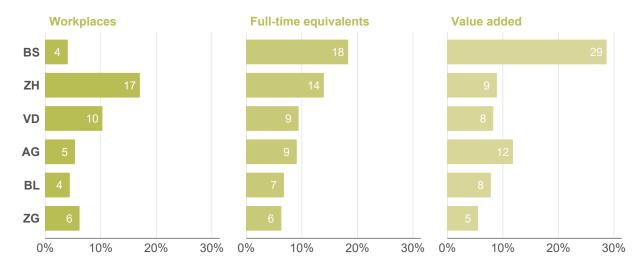
Full-time equivalents by region, Canton of Zurich, 2016





Cantons with a High Share of the Life Sciences Overall Market

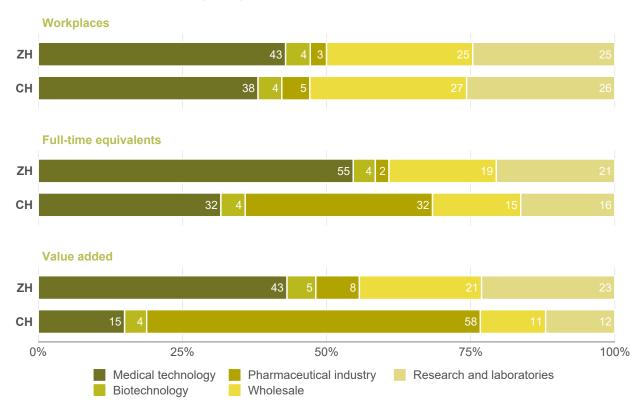
2016, in %



Data source: FSO (STATENT, VGR)

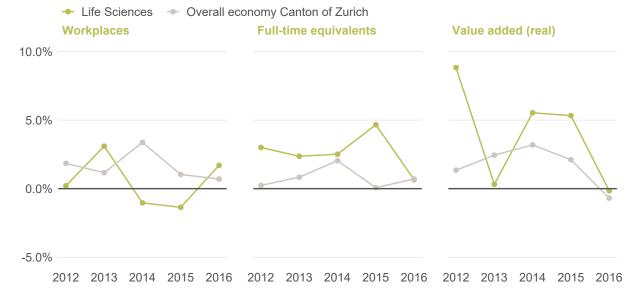
Life Sciences Sub-Segments

Canton of Zurich and Switzerland, 2016, in %



Growth Rates

Life Sciences cluster and overall economy, Canton of Zurich, 2012-2016, in %

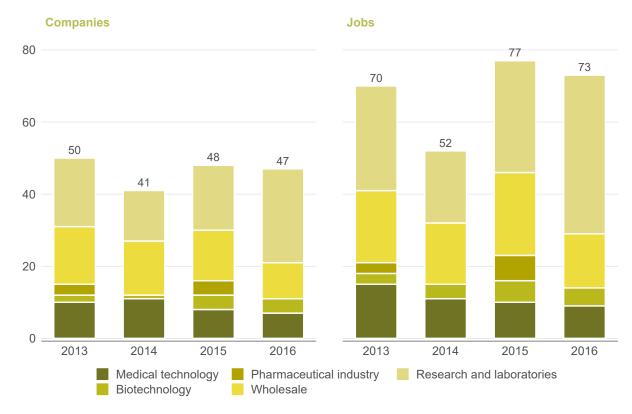


Data source: FSO (STATENT, VGR)

Method change in estimating full-time equivalents as of 2015. Please see the data sources for further details.

Newly Founded Companies in the Life Sciences Cluster

Canton of Zurich



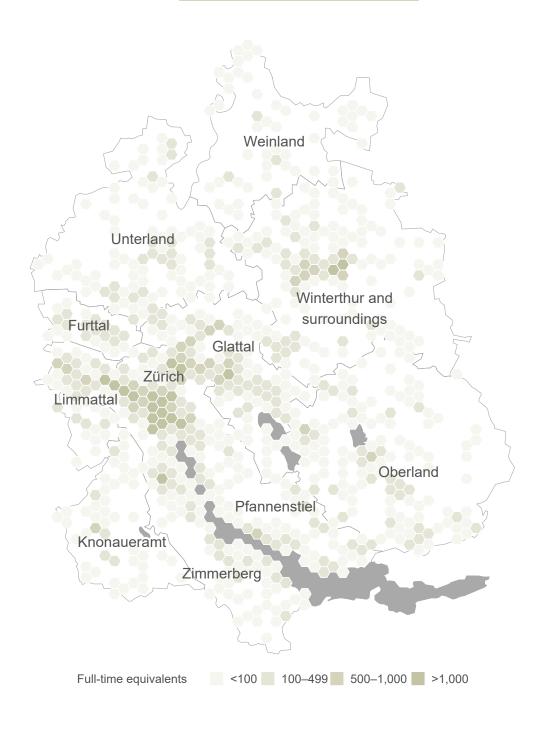
Data source: FSO (UDEMO)



Cleantech

The Cleantech cluster includes the following sub-segments

Energy efficiency
Renewable energy
Circular economy
Mobility
Raw material efficiency
Water resource management
Other Cleantech areas

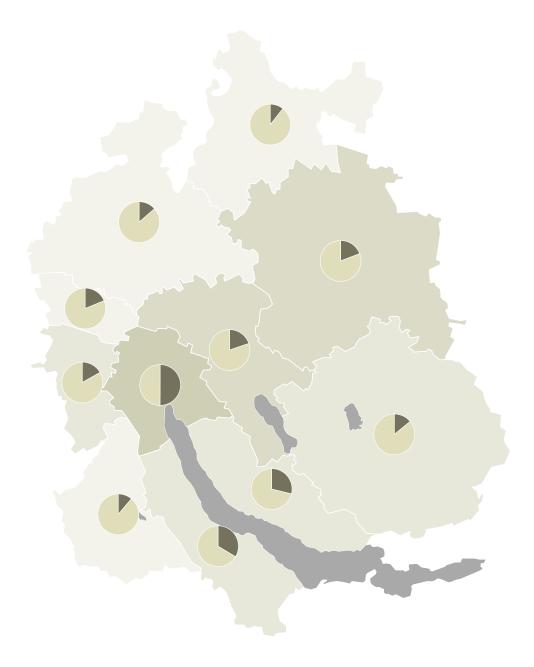


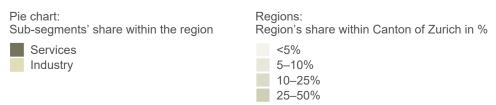
Cluster Facts and Figures with Sub-Segments Canton of Zurich, 2016

| | Workplaces | Jobs | Full-time equivalents | Value added in million CHF |
|--|------------|---------|-----------------------|----------------------------|
| Energy efficiency | 2,904 | 30,123 | 27,629 | 2,799 |
| Renewable energy | 41 | 1,931 | 1,802 | 301 |
| Circular economy | 1,890 | 11,529 | 10,191 | 768 |
| Mobility | 1,341 | 5,720 | 4,727 | 476 |
| Raw material efficiency | 2,745 | 19,167 | 17,015 | 2,085 |
| Water resource management | 222 | 3,025 | 2,676 | 285 |
| Other Cleantech areas | 6,010 | 29,188 | 23,996 | 2,399 |
| | | | | |
| Total ZH | 15,153 | 100,683 | 88,036 | 9,111 |
| Total CH | 88,715 | 622,230 | 551,088 | 55,996 |
| Share ZH of CH | 17.1% | 16.2% | 16.0% | 16.3% |
| Share of cluster in overall economy ZH | 12.8% | 9.9% | 11.2% | 6.8% |

Regional Distribution of the Cleantech Cluster

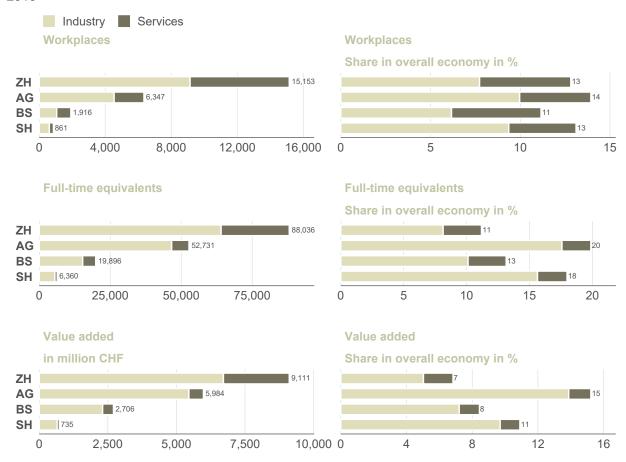
Full-time equivalents by region, Canton of Zurich, 2016





Cantonal Comparison of Cleantech Cluster

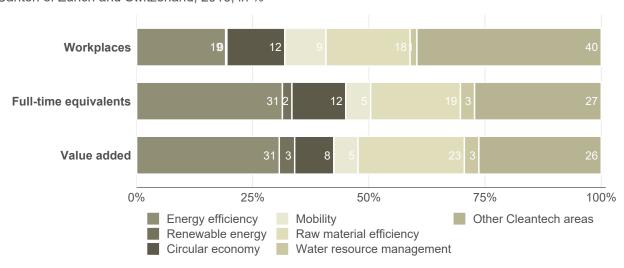
2016



Data source: FSO (STATENT, VGR)

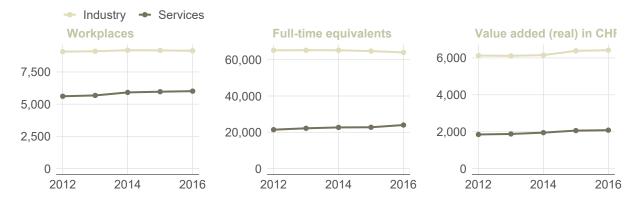
Cleantech Sub-Segments

Canton of Zurich and Switzerland, 2016, in %



Cleantech Sub-Segments

Canton of Zurich

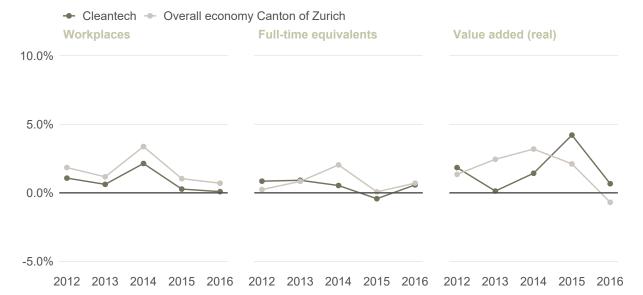


Data source: FSO (STATENT, VGR)

Method change in estimating full-time equivalents as of 2015. Please see the data sources for further details.

Growth Rates

Cleantech cluster and overall economy, Canton of Zurich, 2012-2016, in %

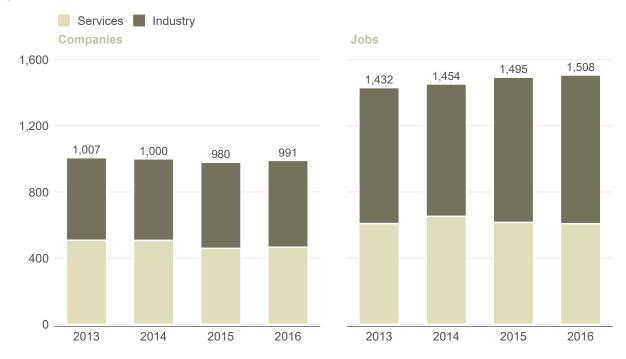


Data source: FSO (STATENT, VGR)

Method change in estimating full-time equivalents as of 2015. Please see the data sources for further details.

Newly Founded Companies in the Cleantech Cluster

Canton of Zurich



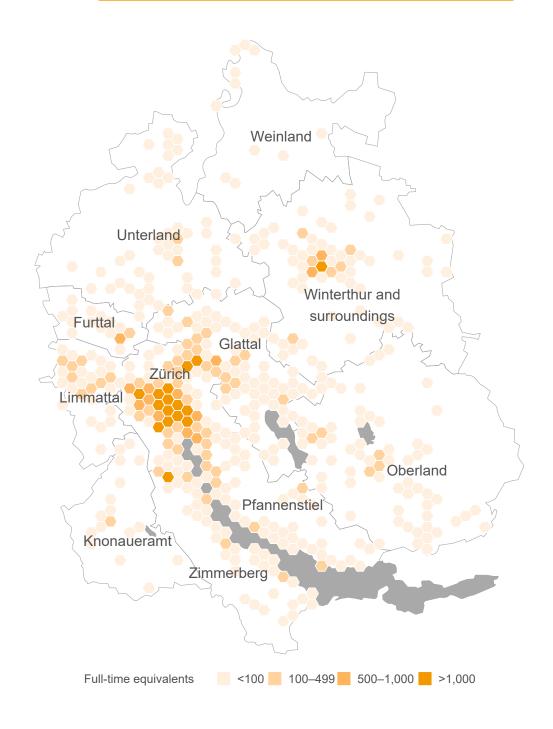
Data source: FSO, (UDEMO)

Creative Industries

The Creative Industries cluster includes the following sub-segments

Music industry
Book market
Art market
Film industry
Broadcasting market
Performing arts market
Design industry

Architecture market
Advertising market
Software / games industry
Arts and crafts
Press market
Recording industry



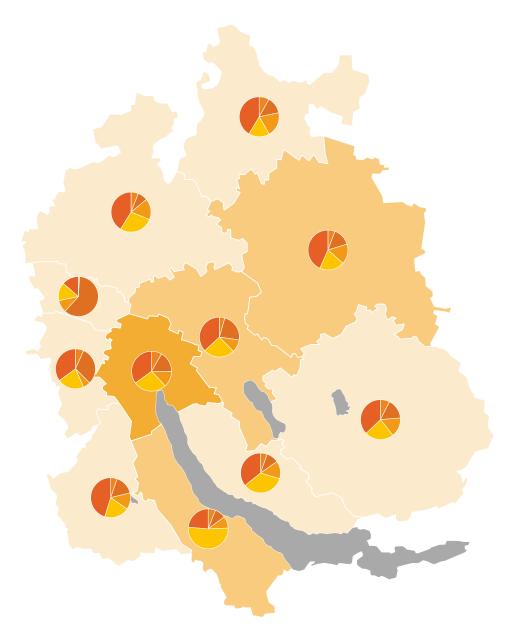
Cluster Facts and Figures with Sub-Segments

Canton of Zurich, 2016

| , | Workplaces | Jobs | Full-time equivalents | Value added in million CHF |
|--|------------|---------|-----------------------|----------------------------|
| Music industry | 2,232 | 7,407 | 3,938 | 521 |
| Book market | 1,102 | 3,153 | 2,117 | 267 |
| Art market | 1,303 | 3,130 | 1,609 | 154 |
| Film industry | 963 | 3,145 | 2,082 | 374 |
| Broadcasting market | 36 | 3,934 | 2,901 | 413 |
| Performing arts market | 711 | 3,716 | 1,938 | 308 |
| Design industry | 3,187 | 7,767 | 5,214 | 777 |
| Architecture market | 3,567 | 13,986 | 11,122 | 1,583 |
| Advertising market | 976 | 6,707 | 4,827 | 495 |
| Software / games industry | 2,391 | 17,312 | 15,264 | 2,897 |
| Arts and crafts | 204 | 346 | 247 | 45 |
| Press market | 1,526 | 8,559 | 6,071 | 854 |
| Recording industry | 219 | 1,643 | 1,442 | 145 |
| | | | | |
| Total ZH | 18,417 | 80,803 | 58,771 | 8,834 |
| Total CH | 76,017 | 285,748 | 202,924 | 26,915 |
| Share ZH of CH | 24.2% | 28.3% | 29% | 32.8% |
| Share of cluster in overall economy ZH | 15.6% | 8% | 7.5% | 6.6% |

Regional Distribution of the Creative Industries Cluster

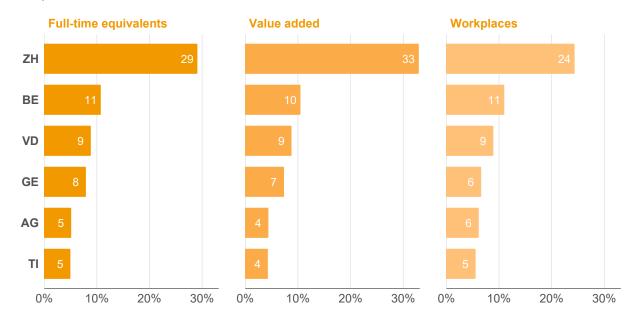
Full-time equivalents by region, Canton of Zurich, 2016





Cantons with a High Share of the Creative Industries Overall Market

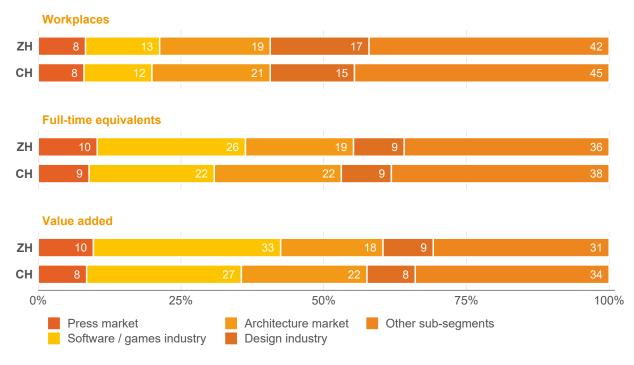
2016, in %



Data source: FSO (STATENT, VGR)

Creative Industries Sub-Segments

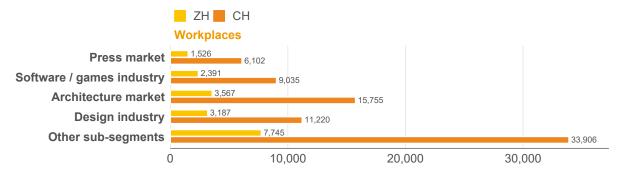
Canton of Zurich and Switzerland, share in cluster 2016 in %

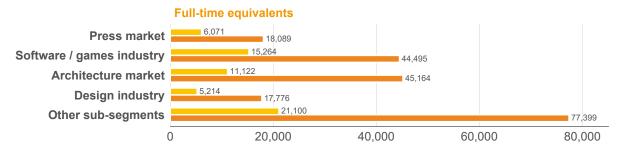


Data source: FSO (STATENT)

Creative Industries Sub-Segments

Canton of Zurich and Switzerland, 2016



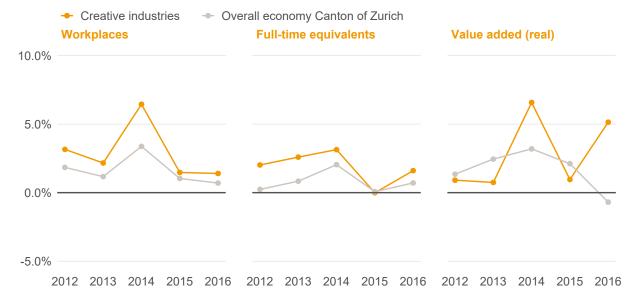




Data source: FSO (STATENT, VGR)

Growth Rates

Creative Industries cluster and overall economy, Canton of Zurich, 2012-2016, in %

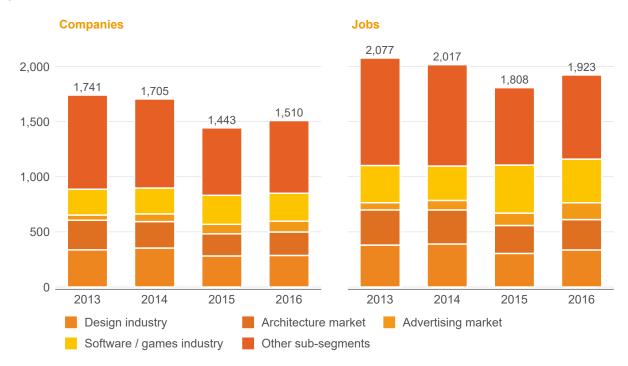


Data source: FSO (STATENT, VGR)

Method change in estimating full-time equivalents as of 2015. Please see the data sources for further details.

Newly Founded Companies in the Creative Industries Cluster

Canton of Zurich



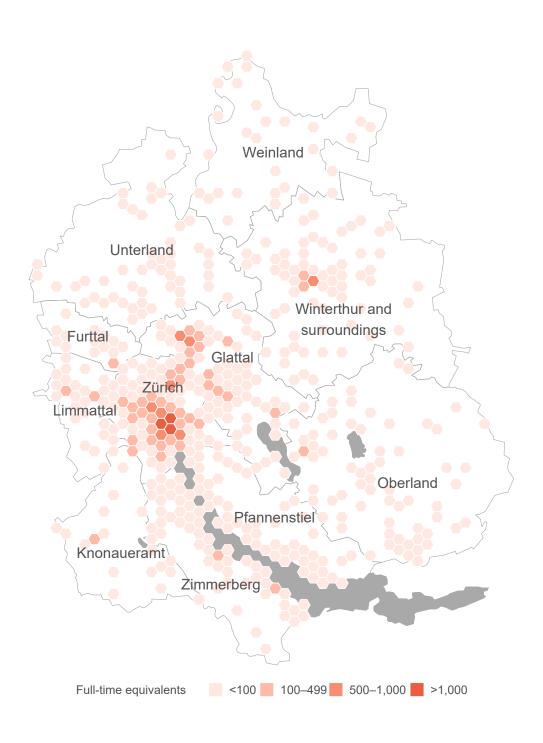
Data source: FSO (UDEMO)



Tourism

The Tourism cluster includes the following sub-segments

Accommodation Gastronomy



Cluster Facts and Figures with Sub-Segments

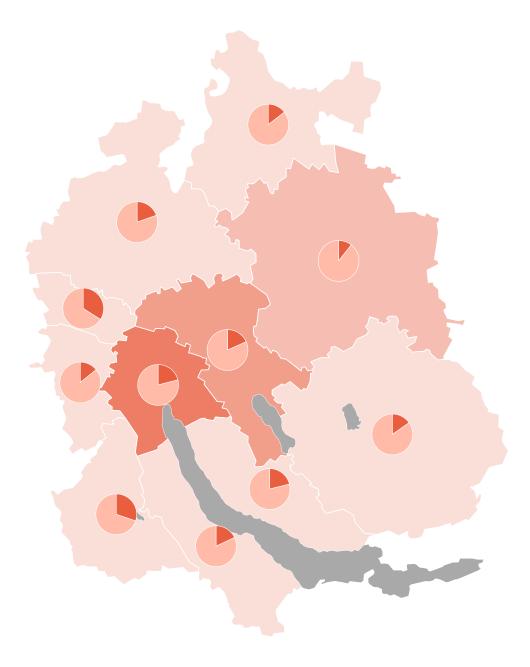
Canton of Zurich, 2016

| | Workplaces | Jobs | Full-time equivalents | Value added in million CHF |
|--|------------|---------|-----------------------|----------------------------|
| Accommodation | 345 | 8,136 | 6,801 | 418 |
| Gastronomy | 4,146 | 39,408 | 28,141 | 1,710 |
| | | | | |
| Total ZH | 4,491 | 47,544 | 34,942 | 2,128 |
| Total CH | 33,007 | 253,837 | 187,745 | 10,828 |
| Share ZH of CH | 13.6% | 18.7% | 18.6% | 19.7% |
| Share of cluster in overall economy ZH | 3.8% | 4.7% | 4.4% | 1.6% |

Data source: FSO (STATENT, VGR)

Regional Distribution of the Tourism Cluster

Full-time equivalents by region, Canton of Zurich, 2016

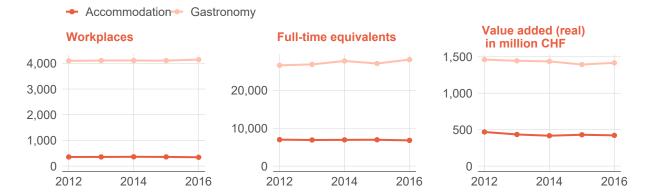




Data source: FSO (STATENT)

Tourism Sub-Segments

Canton of Zurich

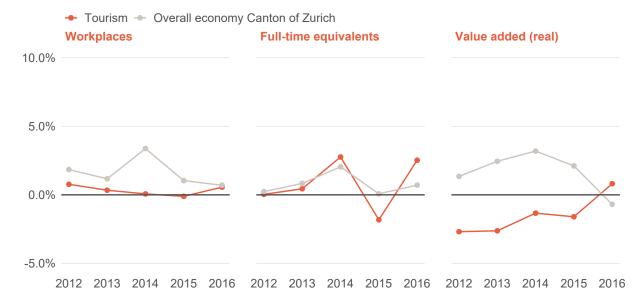


Data source: FSO (STATENT, VGR)

Method change in estimating full-time equivalents as of 2015. Please see the data sources for further details.

Growth Rates

Tourism cluster and overall economy, Canton of Zurich, 2012-2016, in %



Data source: FSO (STATENT, VGR)

Method change in estimating full-time equivalents as of 2015. Please see the data sources for further details.

Newly Founded Companies in the Tourism Cluster

Canton of Zurich



Data source: FSO (UDEMO)

Data Sources

Structural Business Statistics (STATENT)

The Structural Business Statistics, referred to as STATENT, provide key information about the structure of the Swiss economy. STATENT was introduced in 2011 and replaces the Business Census that was last conducted in 2008. STATENT includes all of the companies in Switzerland required to pay OASI pension contributions for employees with a minimum annual income of CHF 2,300. The evaluation units are the workplace and the company (institutional unit).

A workplace is defined as a company (sole proprietorship) or a part of a company (workshop, factory, etc.) that is located in a specific, topographically identifiable place where one or more persons perform tasks for the same company. The term "Jobs" encompasses all persons who perform a task with which goods and services can be produced. Collection of job-related data (employed and self-employed) in the STATENT is based on the OASI-liable salary.

For the purpose of calculating jobs in full-time equivalents, the work volume of all of the full-time and part-time jobs typically measured in working hours is converted into full-time jobs. The Federal Statistical Office has revised its estimation model for measuring full-time equivalents. This means that the figures from 2015 forward cannot be compared with the previous years.

Company Demographics (UDEMO)

The statistics of newly founded companies only include companies with market economy based activities that have actually been newly established. A newly founded company is deemed to exist when a new combination of production factors is created without any involvement of an already existing company. Therefore, companies resulting from mergers, takeovers or demergers or restructurings are not included as newly founded companies. The data collection to obtain statistics on newly founded companies was first conducted in 2013, analogous to STATENT.

The number of jobs corresponds to the average number of jobs during the activity period under review. This figure is calculated by dividing the total number of monthly jobs for a given year by the number of activity months of a company.

National Accounts (VGR)

The national accounts provide an accounting framework for a detailed and systematic description of a country's economy. The best known aggregate of the national accounts is the gross domestic product (GDP). GDP measures the value added created by economic activity on national territory. The cantonal and regional GDP are summary statistics published by the Federal Statistical Office that measure the development and structure of economic activity at cantonal and major regional level in Switzerland. The time series begins in 2008 and is based on the conceptual framework of the national accounts (VGR).

The Statistical Office Canton of Zurich uses both STATENT and VGR as data sources to estimate the value added of the sector groups, that is to say, of the clusters by canton. The method used is described here: www.statistik.zh.ch/wertschoepfung

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www.standort.zh.ch/ict

www.ezuerich.ch https://digital.swiss www.ictswitzerland.ch www.swissict.ch Reports of consulting firms, banks and think tanks

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Zurich Financial Centre Study 2019/2020 Zurich Finanical Centre Brochure 2019/2020 https://finanzplatz-zuerich.ch/en/ www.swissfintechinnovations.ch www.swissfinancestartups.com www.trustsquare.ch

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www.standort.zh.ch/cleantech
www.awel.zh.ch
https://lifefair.org/
https://www.s-ge.com/en/cleantech
http://svut.ch/index.html
www.swisscleantech.ch
http://www.climate-kic.org

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www.creativezurich.ch www.standort.zh.ch/creative www.stadt-zuerich.ch/wirtschaft www.creativeeconomies.com www.kreativwirtschaft.ch

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www.zuerich.com www.zuerich.ch

Division of Business and Economic Development Canton of Zurich

The Division of Business and Economic Development is the point of contact for resident companies and companies interested in setting up a business in the Canton of Zurich.

Our core competencies and activities include

- Relocation guidance for companies moving to Zurich
- Support of resident companies
- · Management of cluster initiatives
- Work permits
- Administrative relief for companies
- · External relations

We support companies interested in moving to Zurich, from the evaluation process right up to the successful start of business, thus helping them gain a foothold in the Zurich economic area. We do so in close collaboration with our internal and external partners.

With a view to strengthening seminal industries (such as Cleantech, Finance, Life Sciences, Creative Industries, Information and Communications Technology), we promote networking among companies and institutions in the Zurich area along the value added chain.

Our work permit team issues permits for citizens from non-EU and non-EFTA states. Last but not least, we offer guidance through the cantonal administration to local and foreign companies, and strive to facilitate administrative procedures.

In a nutshell: we support, expedite and connect as a link between business and public administration.

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