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ZHAW School of Management and Law

## Switzerland Lagging Behind in the Digitalization of Health Care

**In an international comparison, the Swiss health care system continues to lag behind in terms of digital transformation. However, the pandemic has accelerated digitalization efforts and the Swiss are open to solutions, according to the new Digital Health Report issued by ZHAW.**

With regard to the digitalization of health care, Switzerland continues to be in a mid-table position internationally. According to several rankings, it has not gained any significant ground in recent years. Even within the country, the level of digitization in health care is below average compared to other sectors. These are the findings of the latest Digital Health Report published by the Winterthur Institute of Health Economics at the ZHAW School of Management and Law. It is based on a comprehensive review of existing studies and a survey of around 20 experts. The study was supported by Roche, Synpulse, SWICA, and Swiss Post.

### Low Priority in Daily Life

“Especially the Corona crisis has revealed serious digitalization gaps in the Swiss health care system. In fact, the number of daily cases sometimes had to be transmitted by fax,” says ZHAW health economist Alfred Angerer. In addition to the low standard of electronic communication between health care providers, the digitalization backlog is also reflected, among other things, in the delayed implementation of digital health care services, such as the electronic patient dossier, telemedicine, or digital prescriptions. The reasons for the slow progress are a shortage of specialists, regulatory hurdles, and, above all, the rather low priority that digitization has had in the day-to-day work of many health care institutions to date.

### More Remote Consultations

In part, however, the pandemic has now triggered a digitalization surge: For example, the number of medical consultations via the Internet and by phone has increased significantly, and various institutions have stepped up their investments in digitalization measures. “How sustainable this acceleration will be is still unclear at the moment,” Angerer explains. Even apart from the Corona crisis, there has been strong growth in the number of digitalization initiatives in recent years, particularly in in-home care (Spitex) and in retirement and nursing homes. In addition, there are



now more than 200 digital health start-ups in Switzerland. The trend is increasing rapidly.

The study by ZHAW also shows that Swiss residents would welcome more digital services and that patients have increasingly higher expectations, for example concerning the electronic exchange with health care providers or access to personal data. This is especially true for young people. “Overall, this need is still not sufficiently met today, according to Angerer.”

### **A Need for Acceleration**

The electronic patient dossier, one of the main pillars of health care digitalization, is considered a positive development by a majority of the population as well as by health care professionals. Accordingly, the experts consulted expect it to be introduced together with electronic prescriptions in the coming years. This is not a foregone conclusion, however, but will require increased commitment from all players. Both patients and service providers generally regard digitalization as important, and most professional groups in the health care sector would like to see it implemented more rapidly.

As in previous years, experts assume that telemedicine and electronic patient dossiers, in particular, will have a positive effect on the quality and cost-efficiency of public health care. Globally, the digital health sector is growing strongly, with investment in related businesses peaking at around 20 billion Swiss francs in 2020 and digital health market revenue expected to grow to around 1,000 billion Swiss francs by 2025.

### **Contact**

- Alfred Angerer, Winterthur Institute of Health Economics, ZHAW School of Management and Law, phone: +41 (0)58 934 66 72, email: [alfred.angerer@zhaw.ch](mailto:alfred.angerer@zhaw.ch)
- Frederic Härvelid, Communications, ZHAW School of Management and Law, phone: +41 (0)58 934 51 21, email: [frederic.haervelid@zhaw.ch](mailto:frederic.haervelid@zhaw.ch)