

# Google EU Economic Impact Report

## Switzerland

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### Central Claims

#### Economic Impact

Google's products and services are a key enabler of businesses, workers, and consumers. From online search to the AI Transformer model, Google's innovations have helped organize and unlock the power of information.

1. In total, Google products have been supporting **6 billion fr.** in economic activity in Switzerland.
2. In total, Google products supported **over 34,000 jobs** in Switzerland during the last year.
3. Google's products **Google Search, Google Maps, and Youtube** were named among the **ten most helpful innovations** of the last thirty years, as judged by the general public in Switzerland.

#### Consumer

Through steady iteration, Google's core products have continued to evolve and improve, saving time and money for people. By providing more affordable and open options, Google helps create greater choice and increases digital inclusion. Google's technology also has a significant societal impact: supporting people, businesses and cities as they improve their sustainability; increasing accessibility by making technology available to everyone; and supporting healthier living and fitness.

1. **62%** of consumers agree that they find the results of Google Search are trustworthy, **78%** relevant and **91%** helpful.
2. Every month, **66%** of Google Maps users use the service to **find a local business**.
3. **65%** of Shopping or Search users say they regularly use Google Shopping to compare the prices of products and services, with **91%** of those saying they find it helpful.
4. **42%** of Android users say that **affordability** is an important reason why they choose to use it, and **22%** of Chromebook users say that **affordability** is an important reason why they choose to use it.
5. By helping people **find more cost effective options**, Google Search and Maps help save the average person in Switzerland **200 fr. a year**.

6. You would have to compensate the average person **170 fr. per month for losing access to Google products.**
7. **87%** of adults agree that Google Search saves them time - dropping slightly to **75%** of adults who agree Google Assistant saves them time. In total, we estimate that they save **1.1. billion hours** of leisure time a year in Switzerland.
8. **23%** of workers in Switzerland say they **use Google Workspace** on a regular basis, and **10%** say **their job would be very difficult or impossible if they did not have access** to Google Workspace.
9. **56%** of users said Google's products - e.g. through eco-routing, or eco-certified label for hotels - makes it easier **to make more informed, sustainable choices.**

### Education and Skills

From primary school to on-the-job skills training, Google's products and services have created new ways for people to learn and build new skills throughout their lives.

1. Every year, the **digital skills people have learned through Google Search** boosts the economy in Switzerland by **11 billion fr.**
2. **69%** of users use Google Search to **learn a new skill** and continue their lifelong learning, and **45%** to **look for a new job** in the last year.
3. **25%** of people with only a **secondary school background** say they find it easier to learn through video and tools such as YouTube rather than through text, compared to **19%** with a **vocational education background**, and **12%** with a **university education background.**

## Central Claims - Businesses

Google's products are helping drive the competitiveness of European companies: increasing productivity for ordinary workers, enabling businesses of all sizes to compete and reach customers across the world, providing new platforms for independent creators to earn a living through, and supporting innovation in some of Europe's most dynamic firms.

1. **37%** of businesses say that paid search advertising is one of the most important ways **they reach new customers.**
2. **56%** of businesses say that one of Google's free of charge channels (e.g. Reviews, Shopping, Google Business Profiles, organic search, Maps) is one of the **most effective ways they connect with customers.**
3. Google Search and Ads have supported **1.3 billion fr. in exports** for Switzerland's economy in the last year.
4. In total we estimate that by creating a widely used open source platform Android has saved developers in Switzerland **over 302,000 development days** - the equivalent of **120 million fr.** in reduced development costs.
5. In 2022, we estimate that the Play store generated over **65 million fr.** in revenue for **developers in Switzerland.**
6. Based on the time saved for the average worker by Google Search and Google Workspace, we estimate that in a given year Google services are producing **a 43 billion fr. improvement in worker productivity for the economy of Switzerland.**
7. **55%** of start-ups<sup>1</sup> or **69%** of the fastest growing businesses<sup>2</sup> say Google products have helped **accelerate their growth.**
8. **38%** of small businesses say that the costs of starting a business have reduced substantially or dramatically because of internet tools such as Google Workspace or Google Business Profile.
9. **52%** of businesses agree that **integrating generative AI services** like Bard into Google Search would make day-to-day tasks easier, and **51%** for Google Workspace.

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<sup>1</sup> Businesses founded within the last 5 years

<sup>2</sup> Businesses with revenue growth in excess of 10% year-on-year

## Using AI to help solve societal and economic challenges

New and developing digital technologies such as AI, AR and the cloud have the potential to unlock the power of the world's information still further, helping tackle some of our largest economic and societal challenges. Google pioneered technologies are likely to remain at the center of this.

1. AI tools are widely supported to help solve societal challenges:
  - a. **45%** of people say they support AI tools being used to **track their medical data**
  - b. **48%** of people say they support AI tools being used to **help them make more environmentally sustainable choices in their life**
  - c. **60%** of people say they support AI tools being used to **help process government and customer service requests faster**
  - d. **56%** of people say they support AI tools being used to **eliminate mindless tasks at work**
  - e. **65%** of people say they support AI tools being used to **unlock advancements in drug discovery and development**
  - f. **60%** of people say they support AI tools being used to **monitor agricultural health to ensure food supply availability**
  - g. **70%** of people say they support AI tools being used to **help people/governments reduce the risks they face from extreme weather events** e.g. wildfires, flooding, heatwaves, etc.
  - h. **69%** of people say they support AI tools being used to **monitor and manage water use and quality**
  - i. **63%** of people say they support AI tools being used to **reduce carbon emissions by managing energy use**
2. Generative AI could increase the size of GVA in Switzerland by **80 billion fr. or the equivalent of 11% of GVA<sup>3</sup>**, while generative AI tools could save the average worker over **130 hours** a year.
3. By deploying AI across businesses to help with pre-emptive risk monitoring and upskilling workers in cybersecurity, Switzerland **could mitigate 130 million fr. worth of cybersecurity risks**.
4. **80%** of workers across Switzerland think that generative AI tools will help them be more productive. This drops to **74%** of office workers.

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<sup>3</sup> Following the methodology of Goldman Sachs, we assumed no productivity improvements to types of tasks other than those identified by them. In addition, we assume capital intensity remains constant.

5. **42%** of workers are worried that AI could do their job better than them in the future.
6. **44%** of employers plan to invest in AI based automation in the next five years. Of those, **76%** said that they are likely to **reallocate existing workers' time to other more valuable tasks**, compared to just 48% who think it is likely that they will reduce their workforce.
7. **39%** of businesses agree that generative AI is likely to **significantly improve the productivity of their business** in the next few years.

## Additional Claims

### Polling and Modelling Claims

1. **57%** of consumers and **46%** of businesses say they **plan to explore AI tools more in the next year**.
2. **10%** of workers have already used generative AI tools in their job - and a further **38%** think it is likely they will do so in the next five years.
3. In total, we estimate that **Google Cloud is creating** at least **2.9 billion fr. a year** in **business time savings** for Switzerland's economy.
4. **Google Ads contributes 778 million fr.** to the economic growth potential of small and medium-sized businesses.
5. In the last year, **Google Ads contributed 1.0 billion fr.** in added value to Switzerland's economy.