

Ukraine | April 2025 | 1st Round

# GovTech Pulse Research



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# 01

## About Research

The GovTech Public Pulse Research is the first public opinion survey launched by GGTC Kyiv in partnership with Info Sapiens. Integrated into the national Omnibus project, conducted on a permanent basis, this survey offers a recurring snapshot of how citizens perceive digital public services. Beyond this data, the survey results tell a broader story: one that highlights the growing significance of socially responsible business, reflects public satisfaction levels, and reveals evolving expectations around advanced technologies.



**Valeriya Ionan**  
Deputy Minister for Eurointegration, Ministry of Digital Transformation of Ukraine



Over nearly six years, Ukraine has redefined what a digital state can be — setting a new global benchmark for citizen-centric governance. From one of the world's first digital passports to record-fast online business registration, we've implemented digital reforms that fundamentally changed how government interacts with people through Diia ecosystem ([Diia App and Portal](#), [Diia Education](#), [Diia.Business](#), [Diia.City](#), [Diia.Engine](#), and [Diia.Digital Hromada](#)).

With Ukrainians in mind, we've delivered practical, tech-driven solutions that responded to real needs — in peacetime, through the COVID-19 crisis, and during the full-scale russian invasion — eRecovery, IDP status, Diia TV and Diia Radio, online marriage, and others. Even in wartime, Ukraine is proving that the future of government can be digital, adaptive, and deeply human.

The goal of the survey is both to understand the actual level of usage and satisfaction with digital services across the state, as well as figure out the vision of the future technology development in the public sector. Several questions in the Ukrainian poll within Omnibus were designed based on the Deloitte Digital Citizen Survey to compare the state of public opinion of Ukrainians with the respondents of 13 other global states.



**Victor Liakh**  
President of East Europe Foundation



I firmly believe that only data can provide clear answers to complex questions. This report is more than just a snapshot of public opinion — it is a practical tool for policymakers, analysts, donors, and businesses. It helps us clearly see where the digital state is performing well and where it needs strengthening. A high level of satisfaction with government digital services is both a sign of trust and a challenge. When 75% of citizens say 'yes,' expectations grow — and so does the responsibility. This is especially meaningful for us, as more than 60 digital public services have been developed by East Europe Foundation in partnership with the Ukrainian government under the Swiss-Ukrainian EGAP Programme. We therefore share this responsibility with the state



A key role in the implementation of this poll was played by the Info Sapiens research agency, which funded the fieldwork and data analysis. Their contribution is a remarkable example of socially responsible business - one that not only values high-quality data but is also willing to invest in changes that benefit society as a whole. The GGTC Kyiv Team was involved in the development of the methodology and promotion of the collected data.

The results give the GGTC Kyiv access to deep, validated insights that support evidence-based decision-making in the field of digital transformation, with a clear focus on human needs.



**Tetiana Prykhodko**  
Head of the GovTech Observatory, Global Government  
Technology Centre in Kyiv



We launched the GovTech Pulse Research to systematically gather public opinion on GovTech, aiming to build a long-term evidence base for identifying patterns, trends, and root causes. Historical data plays a critical role in anticipating future developments by highlighting what has succeeded or failed in the past. In response to globalisation and the need for comparability, we have integrated several questions from the Deloitte Digital Survey in our project to assess the current state of GovTech in Ukraine. We are deeply grateful to our partner, Info Sapiens, whose pro bono support assisted in turning this vision into reality. This contribution is especially meaningful within the full-scale war challenges.



**Zoia Lytvyn**  
Head of the Global Government  
Technology Centre in Kyiv



At GGTC Kyiv, we see data not just as a metric, but as a call to build trust and design digital services that are truly citizen-centered. That is why the GovTech public opinion survey marks one more milestone on Ukraine's path toward a citizen-centered digital state — one that is inclusive, data-driven, and future-ready.



**Dmytro Savchuk**  
Director of the Info Sapiens  
Limited Liability Company



The introduction of digital services by the state is designed not only to make receiving public services more convenient and faster, but also to add transparency to this process. That is why the “digital state” is an important element of anti-corruption policy. In particular, the NACP, in its annual monitoring, began measuring the population's awareness of the provision of public services online in 2023. The results of the NACP's research for 2023 and 2024 statistically confirm the conclusion about the increase in the level of use of public digital services: in 2024, the average awareness of the population about such services in general increased significantly, compared to 2023 (29%), and is 36%. At the same time, the proportion of people who used the services, and not only knew enough about them to use them when needed, increased statistically significantly.

# 02

## Key Findings

### KEY FINDING 1

#### Digital services are widely used, but not by all

55% of Ukrainians reported using digital services in the past year. The highest usage is among men, youth, and residents of large cities, while older adults and rural populations remain less engaged.

### KEY FINDING 2

#### Citizens are highly satisfied with digital services

75% of respondents are satisfied with government digital services, and 86% are satisfied with digital business services. Positive ratings dominate, with only 3-4% expressing dissatisfaction.

### KEY FINDING 3

#### Digital engagement is rising, especially among the young

38% of respondents have increased their use of digital services since 2019. Growth is strongest among people aged 16-49. In contrast, only 11% report using digital services less than before.

### KEY FINDING 4

#### Emerging technologies enjoy broad public support

A majority support the development of drones (84%), cybersecurity (77%), and 5G/6G networks (76%). Youth are the most enthusiastic, but older generations also show strong support for technologies related to safety and infrastructure.

### KEY FINDING 5

#### AI remains controversial and divides generations

Only 47% of Ukrainians support the development of AI. While three-quarters of youth aged 16-19 support it, only 35% of those aged 60+ agree.

### KEY FINDING 6

#### Ukraine's digital government services close in on private sector benchmarks

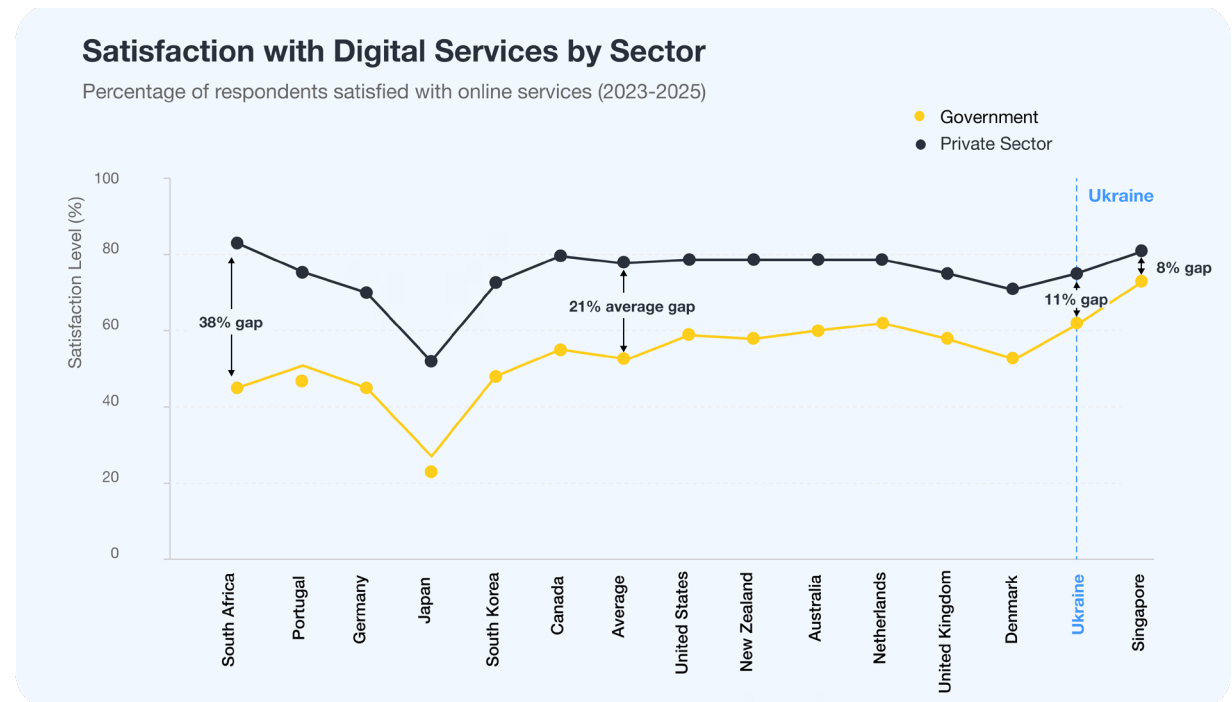
In Ukraine in 2025, digital business services continue to lead in user satisfaction, outperforming government services by 11 percentage points (86% vs. 75%). While this difference aligns with global patterns, the relatively narrow gap, significantly smaller than the 21% average observed across 13 states in Deloitte's 2023 study, highlights Ukraine's progress in enhancing the quality and user experience of its digital public services.

# 03

## Data Distribution in Ukraine and 13 states

To better understand Ukraine's digital experience, the findings were compared with international data. The most recent available results from Deloitte's 2023 Digital Citizen Survey were used to place Ukraine's data in a global context and highlight how digital service use and satisfaction align with global trends.

Across both Ukraine [2025] and the 13 countries included in Deloitte's study [2023], users consistently report greater satisfaction with digital solutions provided by the private sector 11% point satisfaction gap in favor of business-provided digital services—comparable to Singapore's 8% gap in 2023. Notably, the average gap across the 13 surveyed countries stands at a significantly higher 21%, underscoring a broader trend of stronger performance by the private sector in meeting user expectations for digital service delivery by government bodies.



*Ukraine: In Apr 2025, Omnibus surveyed 1,000 individuals to understand their use of government and business digital services. The survey results are weighted for age, gender, and region. The margin error does not exceed 3.1% with a confidence level of 0.95. The survey took place in all of Ukraine except for the temporarily occupied territories of the Autonomous Republic of Crimea and the city of Sevastopol, Donetsk and Luhansk regions, and other areas under occupation, as well as territories where Ukrainian mobile communication is unavailable.*

*Global: In Nov–Dec 2022, Deloitte surveyed 5,800 individuals to understand their use of government digital services in 13 countries. The survey results are weighted for age, income, and gender.*

# 04

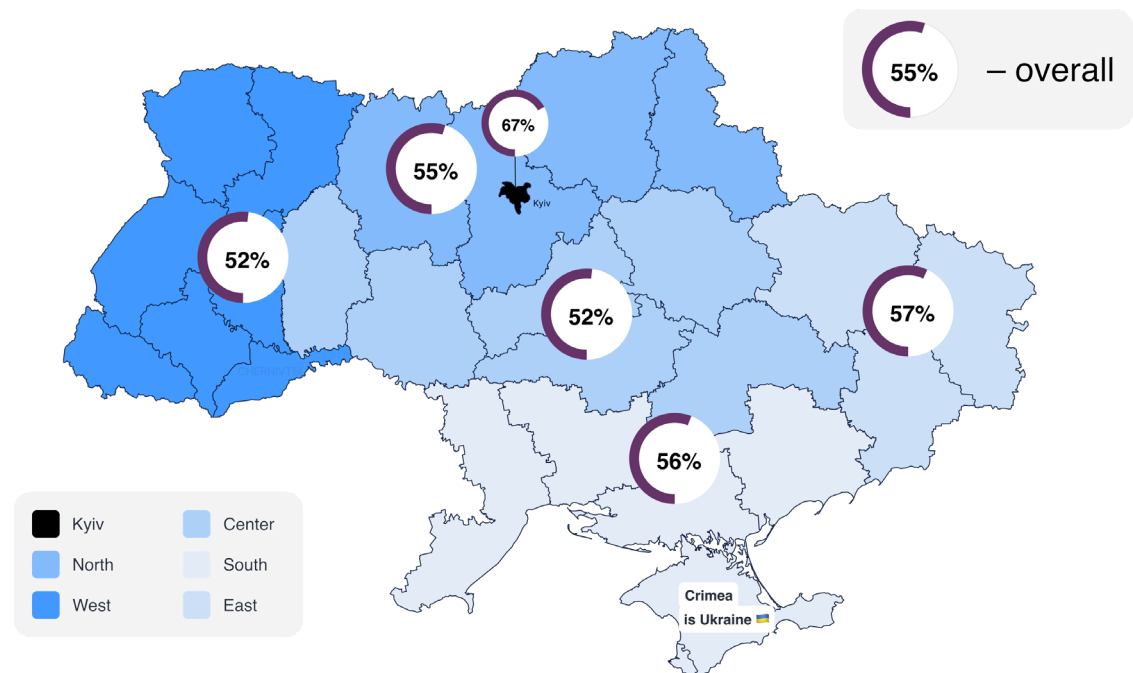
## Extensive Results

Digital public services play an essential role in improving daily interactions between citizens and the state. To better understand how Ukrainians use and perceive digital services, GGTC Kyiv together with Omnibus, in a pro bono collaboration with Info Sapiens, conducted a nationwide survey in April 2025. The analysis explores public satisfaction with digital government and business services, changes in usage since 2019, and attitudes toward the development of innovative technologies such as artificial intelligence, 5G/6G networks, unmanned systems, and cybersecurity. The findings highlight both the growing digital engagement of citizens and the need to address digital exclusion among specific groups.

### 1

#### Usage of any digital services (governmental or private) over the past year

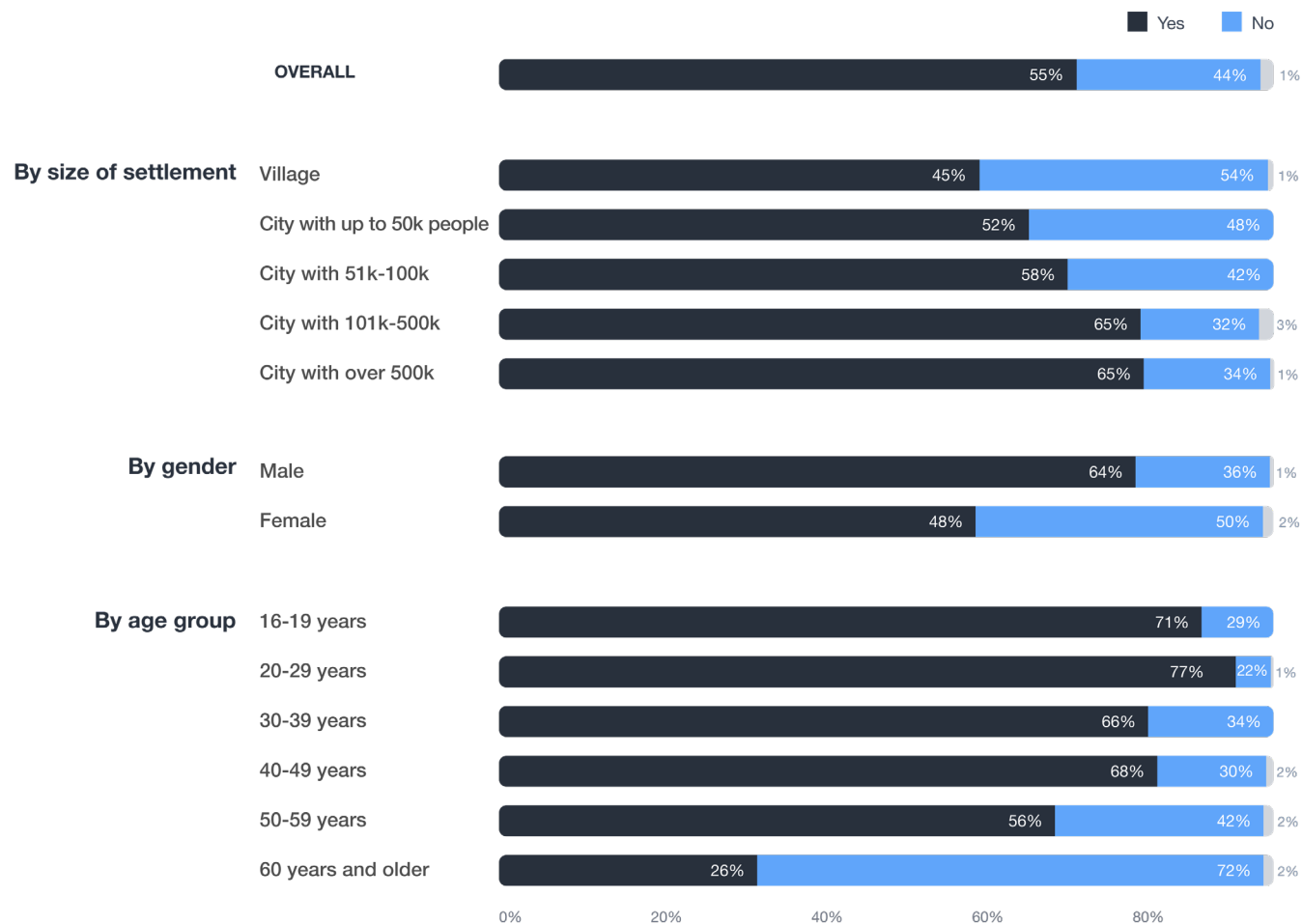
55% of Ukrainians used digital services over the past year. The share of users is significantly higher among men (nearly two out of three) than among women (nearly one out of two), and it is also notably higher among younger and middle-aged groups. The highest share of digital service users is found in large cities, while the lowest is in rural areas.



Data reflect responses from a nationally representative sample of 1,000 Ukrainians aged 16+, surveyed in April 2025. Results highlight demographic and differences in digital adoption across the country. In regions where hostilities are ongoing, the figures don't include the temporarily occupied territories of the region as of the report's publication date.

# 1

## Usage of any digital services (governmental or private) over the past year



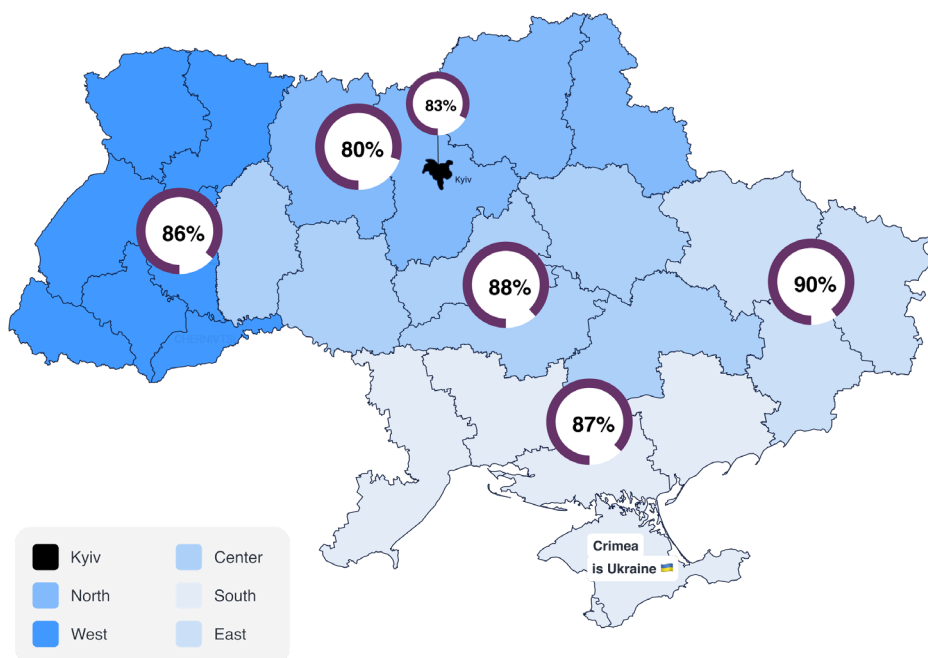
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## 2

### Region breakdown of satisfaction with private digital services

The satisfaction with private digital services is generally high across all regions of Ukraine. The East region reports the highest satisfaction level at 90%. The North region has the lowest satisfaction at 80%, but it still shows a strong level of approval for private digital services overall.

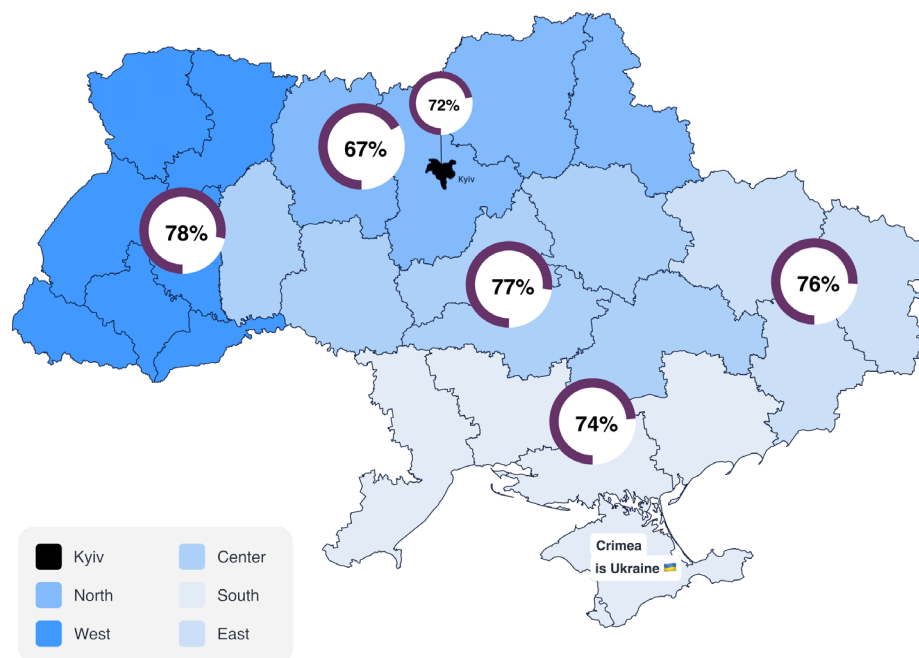


Regional data shows consistently high satisfaction with private digital services across Ukraine, suggesting strong user experiences regardless of geography.

## 3

### Region breakdown of satisfaction with governmental digital services

The satisfaction with governmental digital services varies across Ukraine, with some regions showing higher satisfaction than others. The West region reports the highest satisfaction at 78%. Kyiv, while still showing a positive response, has the lowest satisfaction at 72%, followed by the North region at 67%.



Findings show variation in satisfaction with public digital services across regions. In regions where hostilities are ongoing, the figures don't include the temporarily occupied territories of the region as of the report's publication date.

## 4

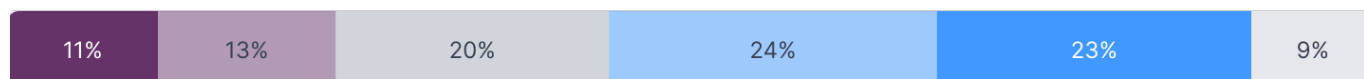
To what extent do you agree with the statement:  
“I would be glad if government institutions  
developed the following technologies in Ukraine”  
- cybersecurity, artificial intelligence, 5G/6G  
networks, and unmanned systems?

The vast majority of respondents support the development of technologies such as unmanned systems (84%), cybersecurity (77%), and mobile networks for faster data transmission (76%) by the government. At the same time, only about one in two (47%) agree with the development of artificial intelligence.

### Cybersecurity



### AI



### 5G/6G



### Unmanned aerial vehicle

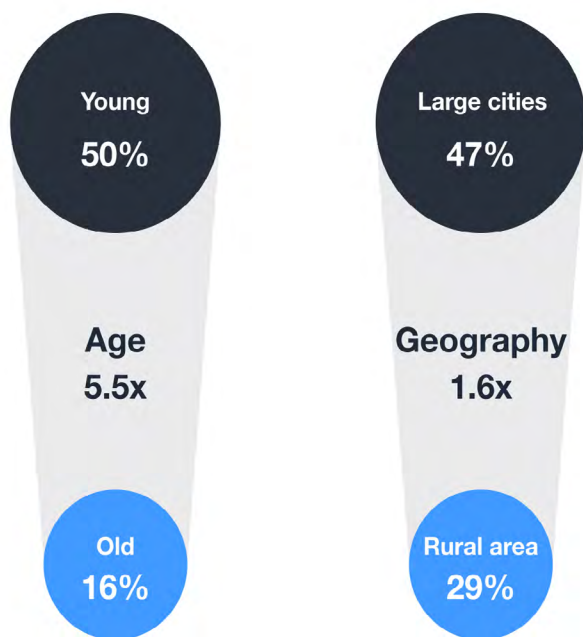


*Note: % might not add up due to rounding off*

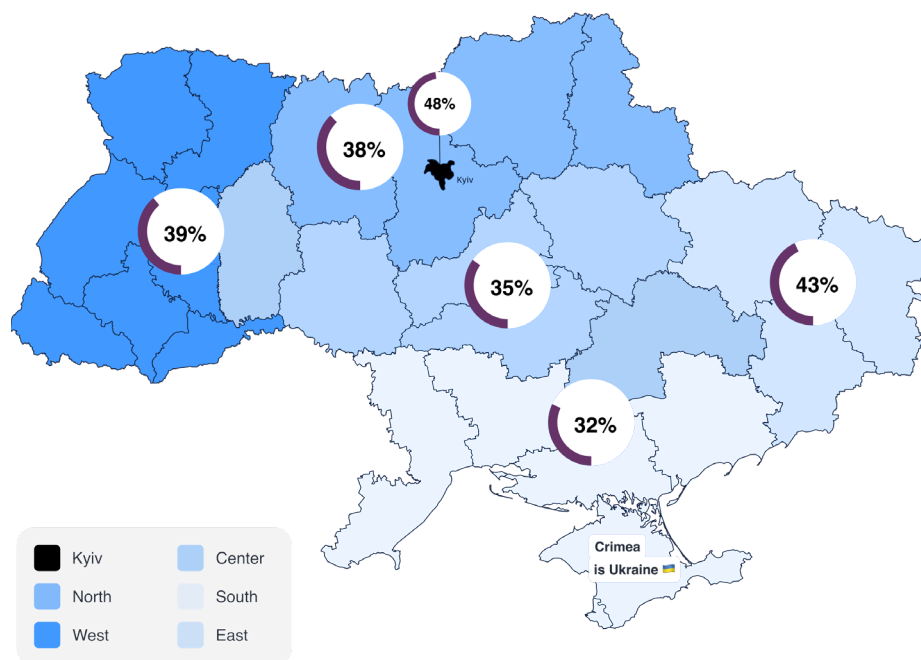
*Respondents were asked to assess their agreement with government-led development of key technologies. The results reveal strong support for cybersecurity, networks, and drones, while views on artificial intelligence are more divided, especially across age groups.*

## 5

Change in your use of government digital services since 2019 [COVID-19 pandemic period]



38% of Ukrainians believe their use of government services has increased, with the highest proportion among younger and middle-aged groups, while 11% have reduced their usage, particularly among the youngest. The use of government digital services has increased more in large cities, with no significant regional differences observed. Kyiv and the South are leading in the increase of digital service usage, while regions like the West and North show slightly lower figures.



*In regions where hostilities are ongoing, the figures don't include the temporarily occupied territories of the region as of the report's publication date.*

# 05

## Methodology

### Methodological Framework

The survey was conducted by Info Sapiens Research Agency at the request of GGTC Kyiv within the national Omnibus project to collect data on the current state of the digital ecosystem in Ukraine.

Omnibus is a monthly nationally representative survey conducted on demand of several clients using face-to-face interviews at respondents' homes. During martial law, the method of data collection was changed to telephone interviews (CATI).

Source: [Info Sapiens](#)

The inaugural wave of data collection took place between April 10 and April 24, 2025, marking the launch of a long-term research effort. Moving forward, the survey will be conducted biannually, establishing a consistent rhythm of insights into public sentiment over time.

### Sampling

Ukraine's survey consists of 1,000 respondents and is representative of the population of Ukraine aged 16 and older by gender, age, region, and size of settlement of residence before the full-scale invasion, according to the latest available data from the State Statistics Service of Ukraine as of January 1, 2022. The survey was conducted using the CATI method (computer-assisted telephone interviews) based on a random sample of mobile phone numbers.

### Geography

The survey was conducted in the territory of Ukraine controlled by the Government of Ukraine. The sample did not include residents of territories temporarily not controlled by the Ukrainian authorities, especially the Autonomous Republic of Crimea, the city of Sevastopol, Donetsk and Luhansk regions, as well as other areas where Ukrainian mobile networks are inaccessible.

### Statistical Validity

As a probability-based survey, the results are statistically robust within a 95% confidence interval. With a sample size of 1,000 respondents, the theoretical margin of error does not exceed 3.1%, providing a reliable foundation for interpreting public opinion trends with confidence.

# 06

## Contributors

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# 07

## Reach out to us

### About GGTC Kyiv

The GGTC Kyiv represents the second centre globally with a focus on GovTech and is supported by EGAP Programme, implemented by East Europe Foundation with support from Switzerland, and initiated by the Ministry of Digital Transformation of Ukraine and the World Economic Forum.



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### About Info Sapiens

The Info Sapiens research agency conducts public opinion research, social, political, and marketing research, and MEL research. The team complies with the ICC/ESOMAR International Code of Marketing and Social Research Practice.



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