



Ministry
of Digital Transformation
of Ukraine

Digital literacy of the population of Ukraine

2019

Methodology



Focus group discussion

Quantity: 4 Focus group discussions (by 2 Focus group discussions in urban and rural areas)

Objective: to obtain project target audience insights regarding needs to obtain digital skills and as to existing "pains" that can/to be addressed through starting digital literacy courses



Opinion polling of the population of Ukraine

Data collection methods: face-to-face interview in the home area of respondents.

Sampled population: 1800 people aged 18-70 years

Sample type: stratified, quota

Quota parameters: gender, age, place of residence

Objective: to obtain quantitative data on digital literacy of the population of Ukraine



Opinion polling of the population of Ukraine

Data collection method: questionnaire

Sampled population: 219 people aged 18-59 years with hearing impairments

Objective: to obtain quantitative data on digital literacy of the people with hearing impairments



Youth polls

Data collection method: group questionnaire survey in the place where they attend education

Sampled population: 859 people aged 10-17 years

Objective: to obtain quantitative data on digital literacy of middle and high school youth



Polling of the population of the occupied territories of Donetsk and Luhansk regions

Data collection methods: 400 persons aged 18-70 residing in the territories of Donetsk and Luhansk regions not controlled by the Government of Ukraine.

Sample type: stratified, quota

Quota parameters: gender, age

Objective: to obtain quantitative data on the digital literacy of the population residing in the territories of Donetsk and Luhansk regions not controlled by the Government of Ukraine

IMPORTANT:

The results of the polling of the population of the occupied territories of Donetsk and Luhansk regions are illustrative as a result of:

- lack of reliable statistics data on the actual sex-age structure of the population;
- inability to conduct a rural pollings – the polling was conducted in regional centers and cities.

Methodology

Abbreviations used in the report:



Ukraine as a whole:

The population of Ukraine aged 18–70 years except for the occupied territories of Donetsk and Luhansk regions including the Autonomous Republic of Crimea.



Uncontrolled territories:

Territories of Donetsk and Luhansk regions uncontrolled by the Government of Ukraine.



Region (regions are united into macro-regions):

Western – Volyn, Zakarpattia, Ivano-Frankivsk, Lviv, Rivne, Ternopil, Khmelnytskyi, Chernivtsi regions;

Central – Vinnytsia, Kirovohrad, Poltava, Cherkasy regions;

Northern – Zhytomyr, Kyiv, Sumy, Chernihiv regions, Kyiv;

Southern – Odesa, Mykolaiv, Kherson regions;

Eastern – Dnipropetrovsk, Donetsk, Zaporizhia, Luhansk, Kharkiv regions.

Key conclusions

The methodology used by the European Commission to calculate the Digital Economy and Society Index was used to determine the level of digital skills.

This index summarizes such indicators:

- connection to the Internet network;
- human capital;
- use of internet;
- integration of digital technology;
- digital public services.

Key conclusions

In the course of our study, the methodology of calculating one of the indicators – an indicator of digital skills, which content was substantially and linguistically adapted to the Ukrainian realities, was used to determine the level of digital skills of the Ukrainian population.

The level of digital skills includes four competence areas:

- 01 Information skills
- 02 Communication skills
- 03 Problem-solving skills
- 04 Software skills

Key conclusions

Each of the four competence areas consists of a set of certain actions that can be performed by an Internet user.

Each competence determines the level of skills according to the frequency and complexity of the activities performed.



no skills



basic



above basic

An overall digital skills index is calculated based on the levels determined for each of the four competencies.

Key conclusions

What digital skills are more developed
in the population of Ukraine as a whole?

37,9%

of Ukrainians aged 18-70 years
have digital skills at a below average level

15,1%

do not have any digital skills at all

Thus

53%

of the population of Ukraine are below the
average mark.

*according to the digital skills
assessment methodology used
by the European Commission.

Key conclusions

What digital skills are more advanced
in the population of Ukraine as a whole?

75,3%

Communication skills –
level above basic skills

74,4%

Information skills –
level above basic skills

What digital skills are more advanced
in the population of Ukraine as a whole?

55,6%

Problem solving skills –
level above basic skills

28,8%

Software Skills –
level above basic skills

Key conclusions

Where do Ukrainians use the Internet most often?

Mainly 86,5% of Ukrainians (those who have Internet connection and connected to the network for the last 3 months) use the Internet **at home**.

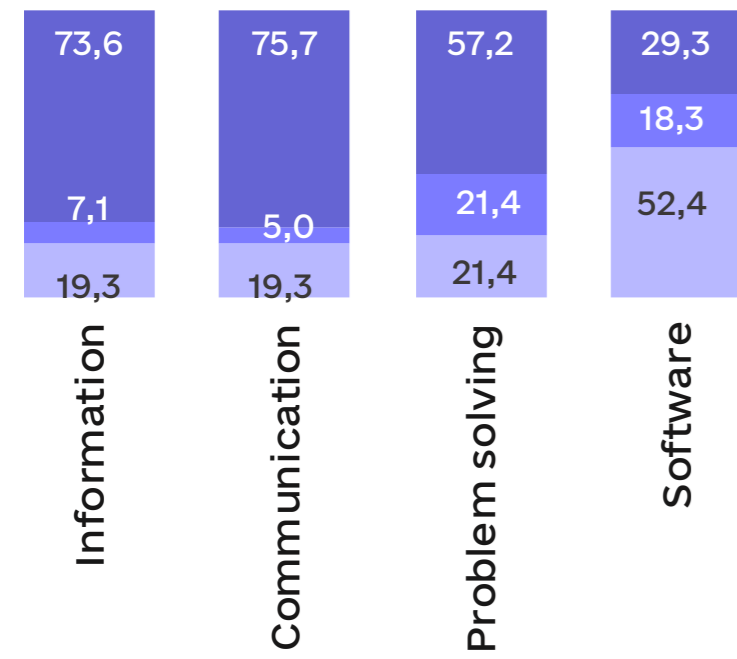
But youth aged 12-17 years, as well as hearing impaired people, heavily use the online space resource at their **place of study** and/or **work**, and the first category is the most active Internet user at catering establishments.

How much time is spent most often on the Internet?

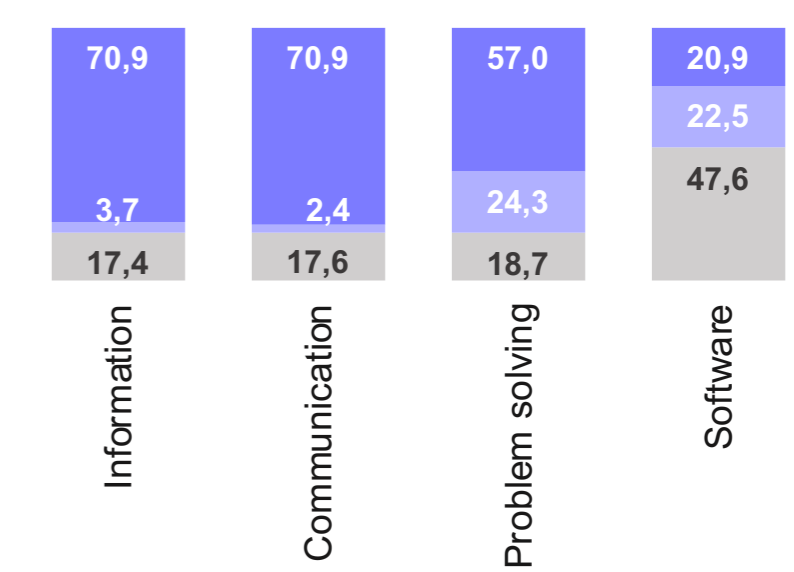
	Workday	Weekend
Population of Ukraine as a whole	2	3
Population of the uncontrolled territories	2	4
People with hearing impairments	3	2
Youth aged 10-17 years	3	5

Map of digital skills of Ukraine

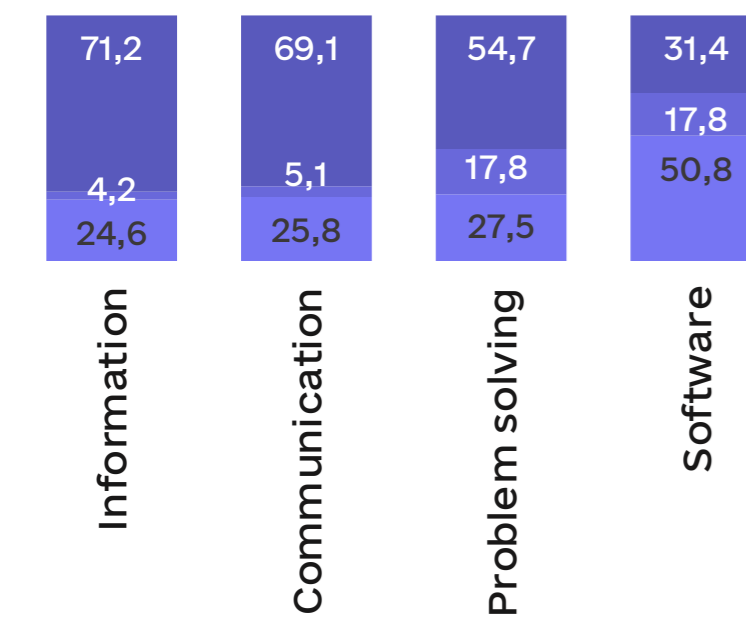
Western region



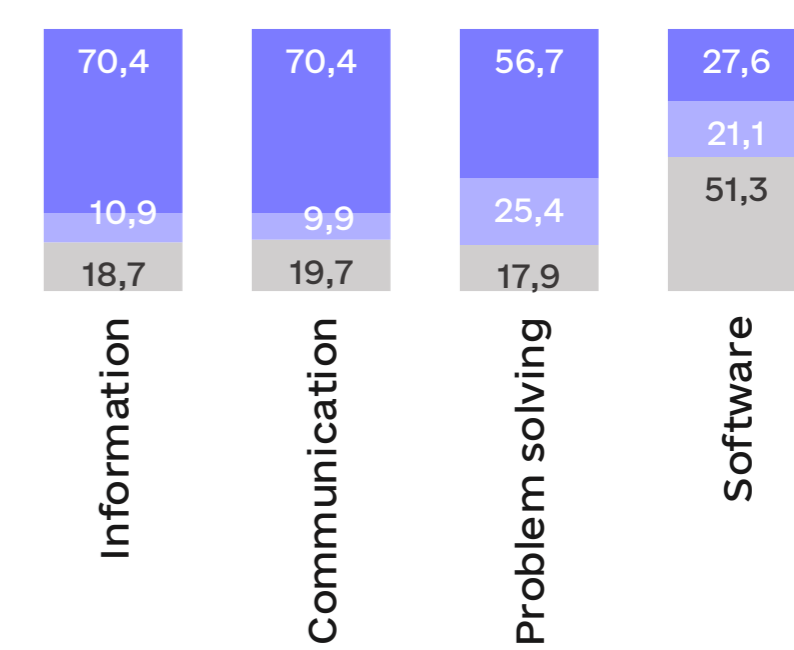
Northern region



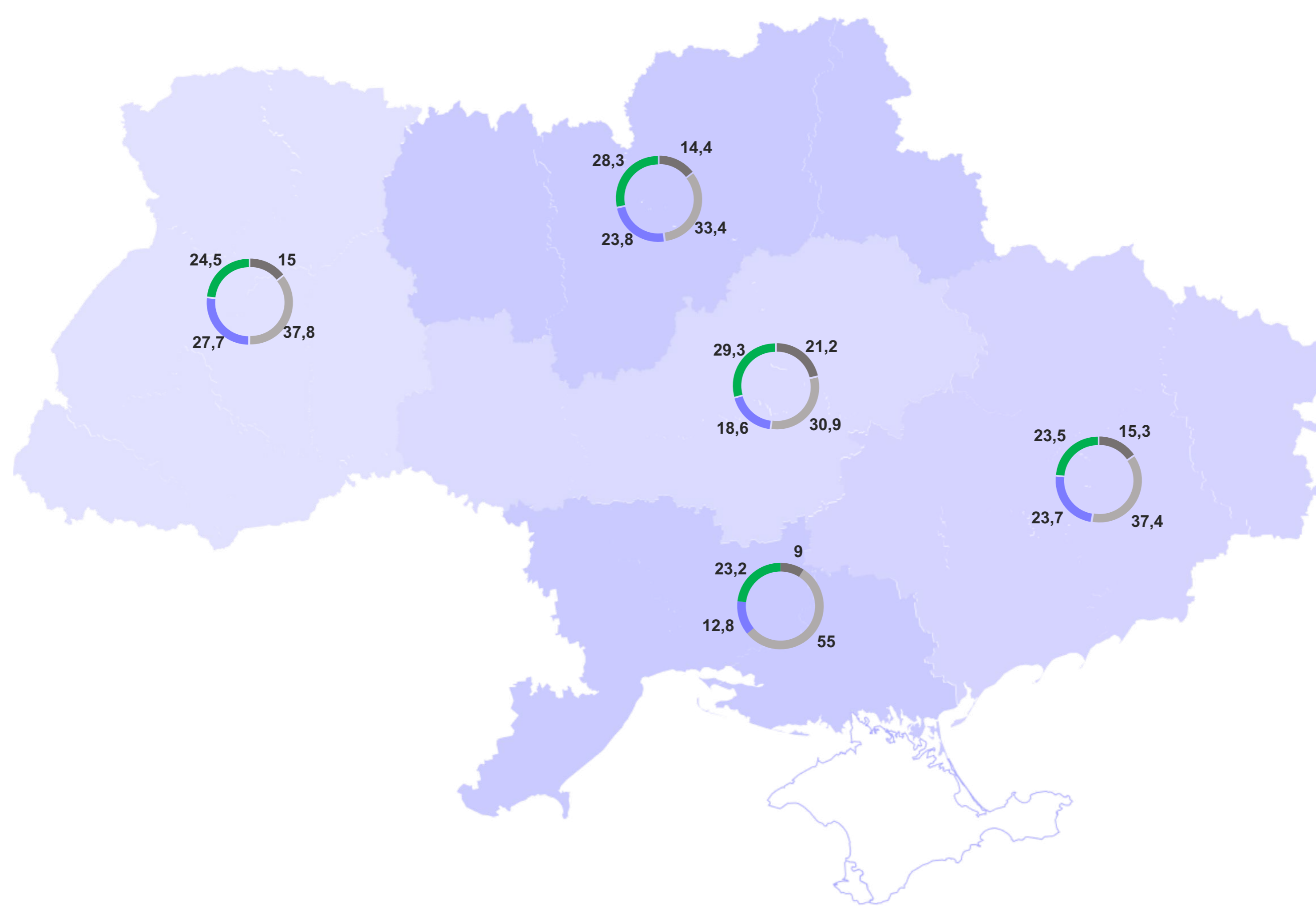
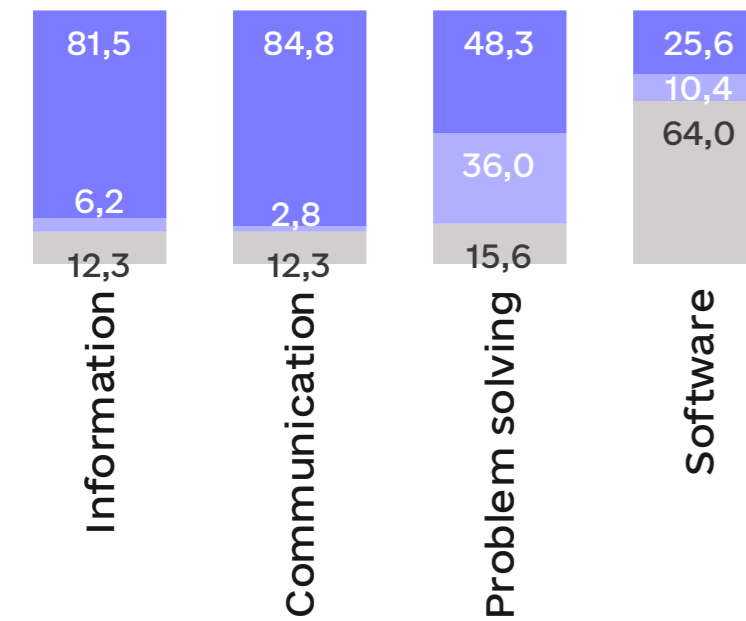
Central region



Eastern region



Southern region



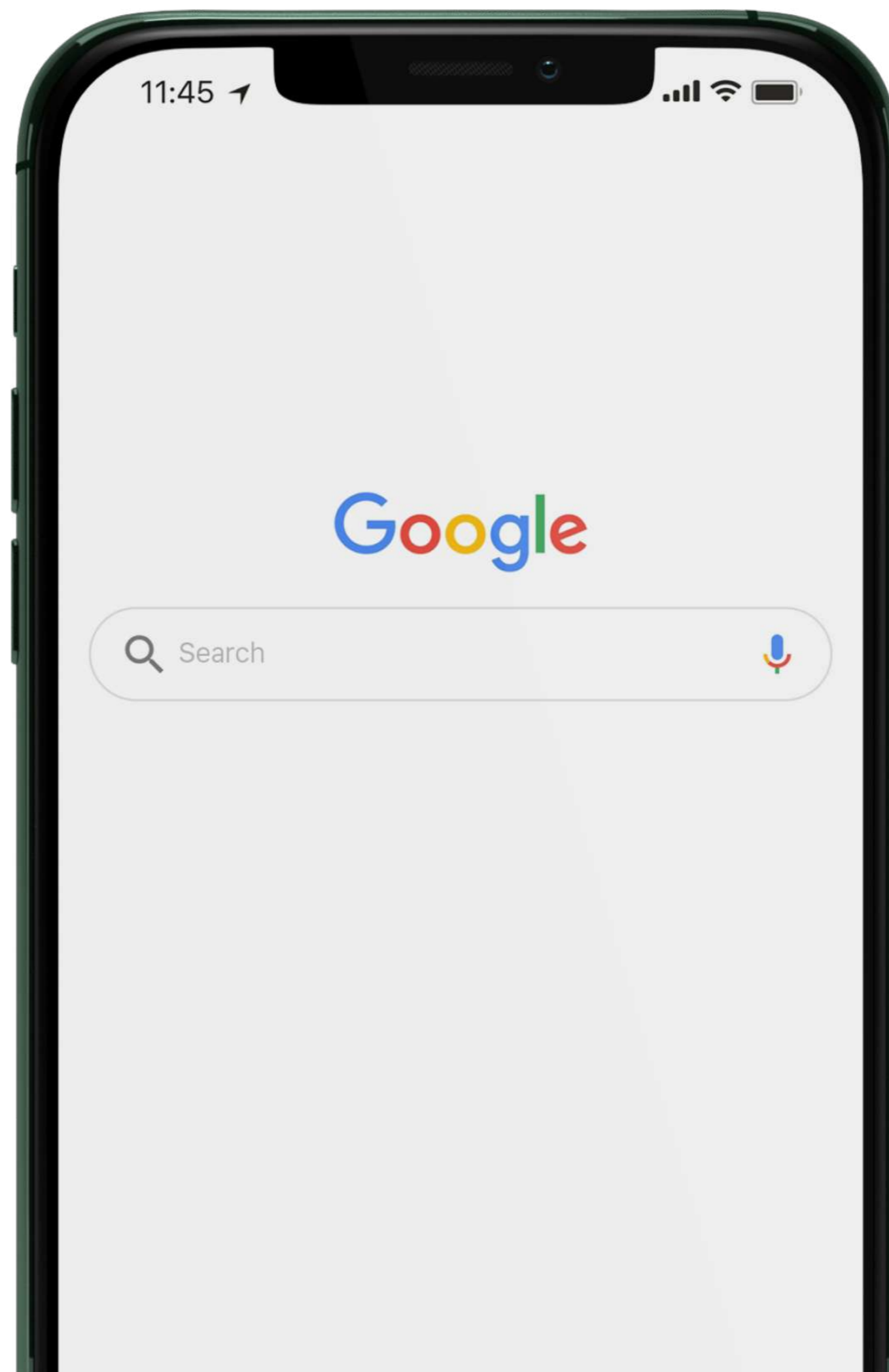
Symbols

	No skills		No skills
	Low skills		Low skills
	Basic skills		Basic skills
	Above basic skills		Above basic skills

except of the occupied territories of Donetsk and Luhansk regions, as well as the Autonomous Republic of Crimea

Key conclusions

What device do you use the most to access the Internet?



93,4%

Youth aged 18–29 years

85%

Population aged 30–59 years

64,5%

Population aged 60–70 years

Key conclusions

How many Ukrainians have been victims of fraudulent activity in the Internet?

34%

of Ukrainian citizens aged 18–70 years for the last year

37,1%

of the population in non-controlled territories

46,1%

of people with hearing impairment

49,5%

of youth aged 10–17 years

What fraudulent activities become the Ukrainians most often victims of?

– Receiving of fraudulent messages

Key conclusions

How many Ukrainians are interested in digital skills learning?

47%

of Ukrainians aged 18–70 years

61,4%

of the youth aged 18–29 years

67,5%

of middle and high school children
(10–17 years old)

65%

of people with hearing impairments

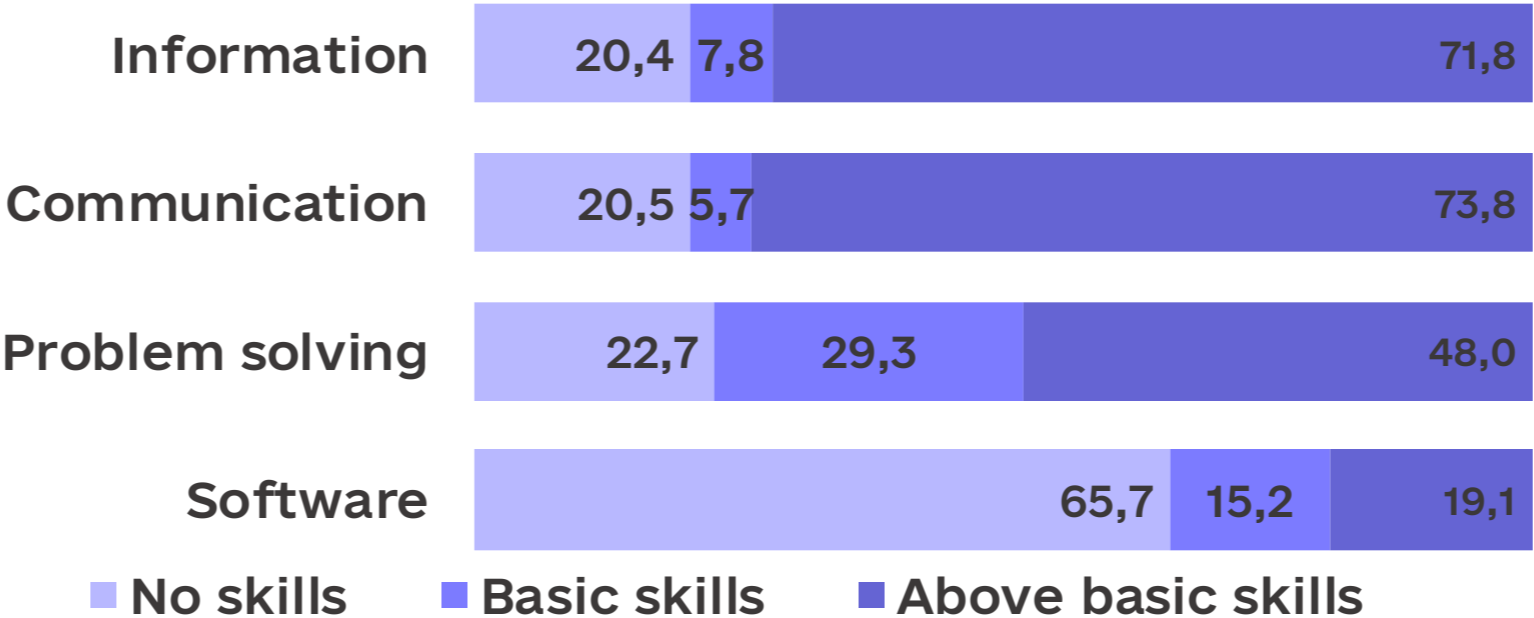
Relevance of digital skills learning Ukraine as a whole 🇺🇦

? 38,5%

Desire to learn is not relevant, status of target group "To develop request"



■ No skills ■ Low skills
■ Basic skills ■ Above basic skills



TOP-5 courses one would like to complete

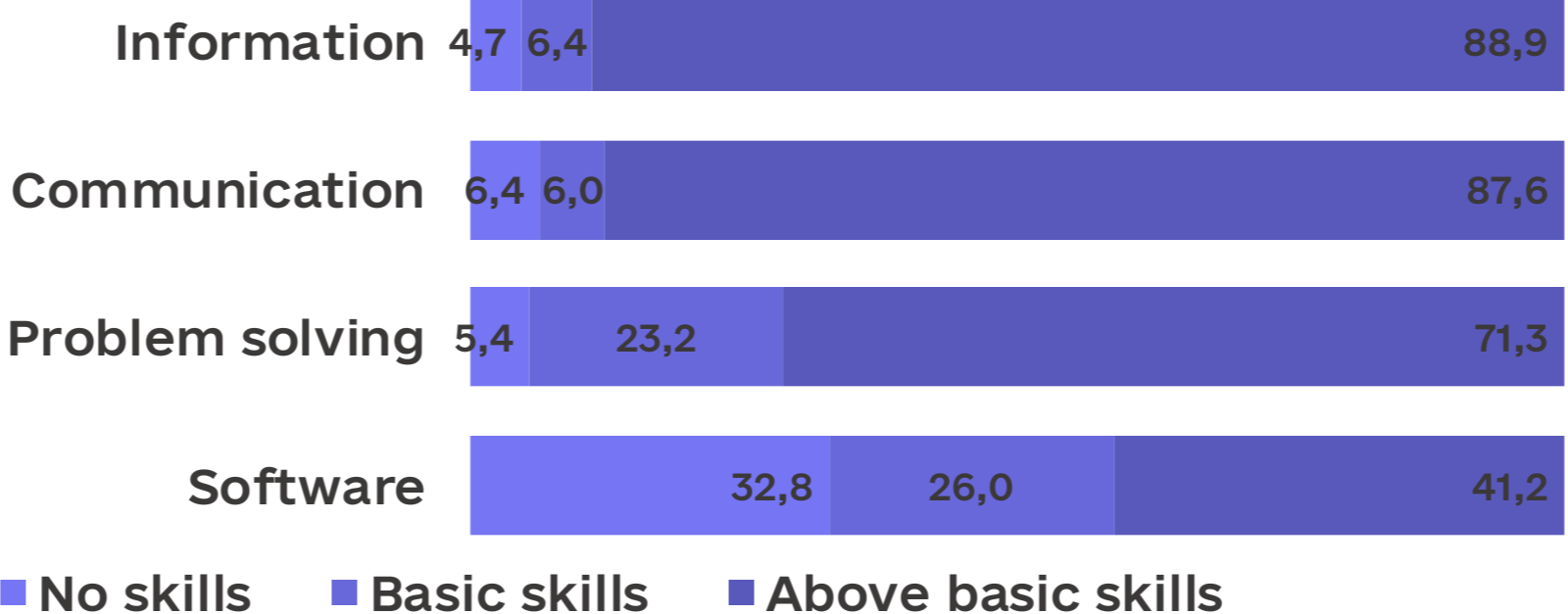
- 12,7% Online safety
- 11,8% Distinguishing reliable and unreliable sources of information
- 9,3% Online child safety
- 8,9% Fast and high-quality information search on the Internet
- 8,6% Use of online banking services

✓ 47,8%

Desire to learn is relevant, status of target group "To satisfy request"



■ No skills ■ Low skills
■ Basic skills ■ Above basic skills



TOP-5 courses one would like to complete

- 50,4% Online safety
- 43,4% Distinguishing reliable and unreliable sources of information
- 39,3% Online child safety
- 36,7% Fast and high-quality information search on the Internet
- 36,1% Use of online banking services

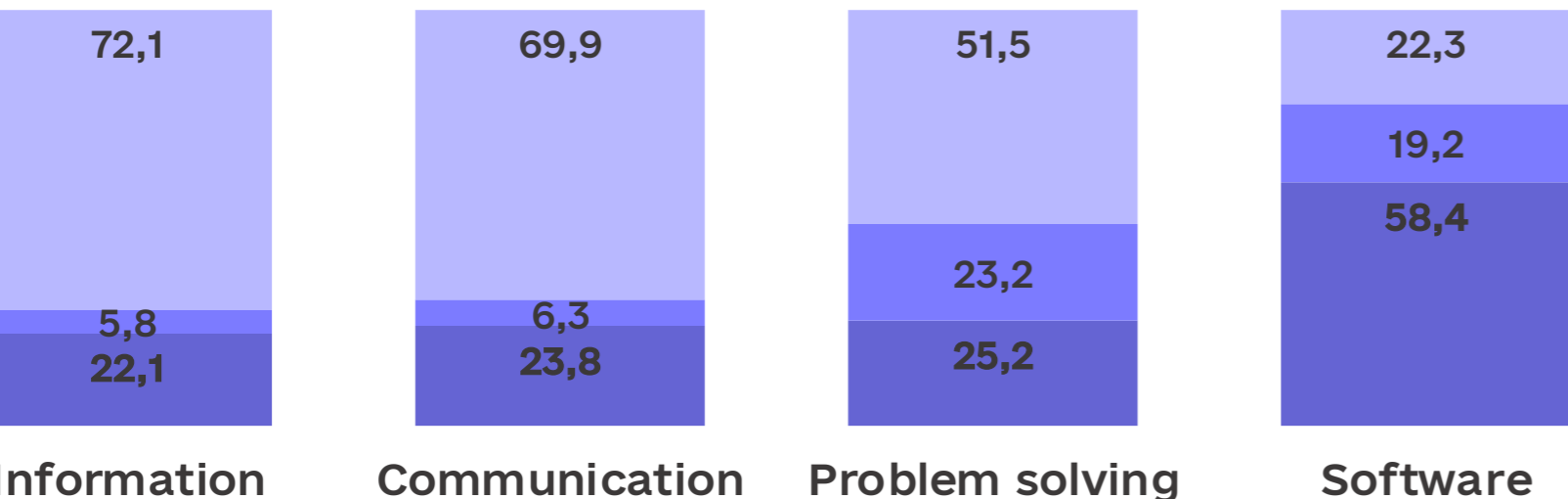
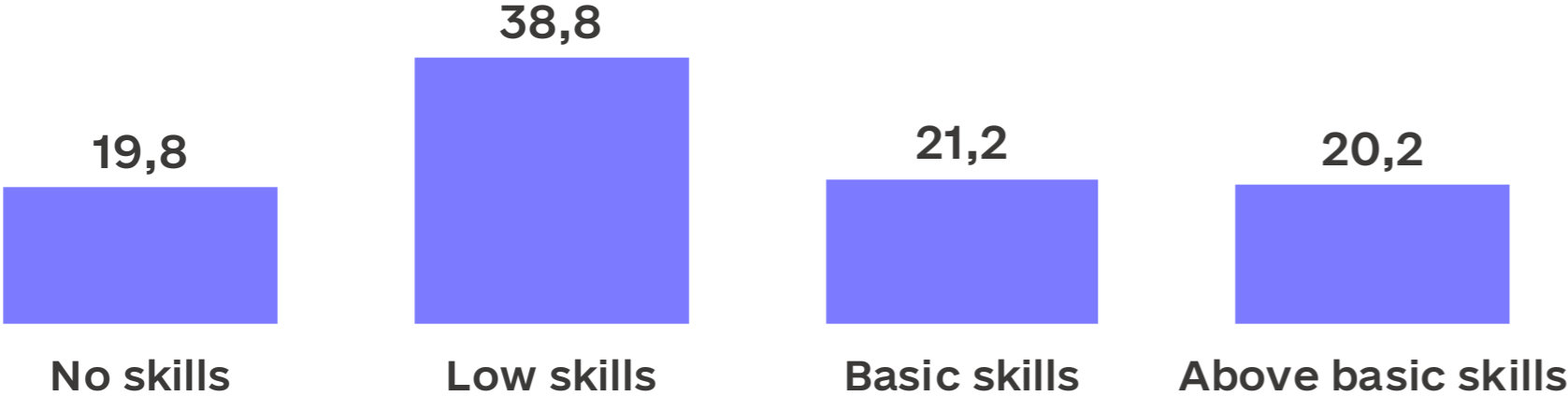
✗ 13,7%

no desire to learn and no internet connection

→ Status of non-target group

Relevance of digital skills learning Ukraine (portrait of rural area) 🏠

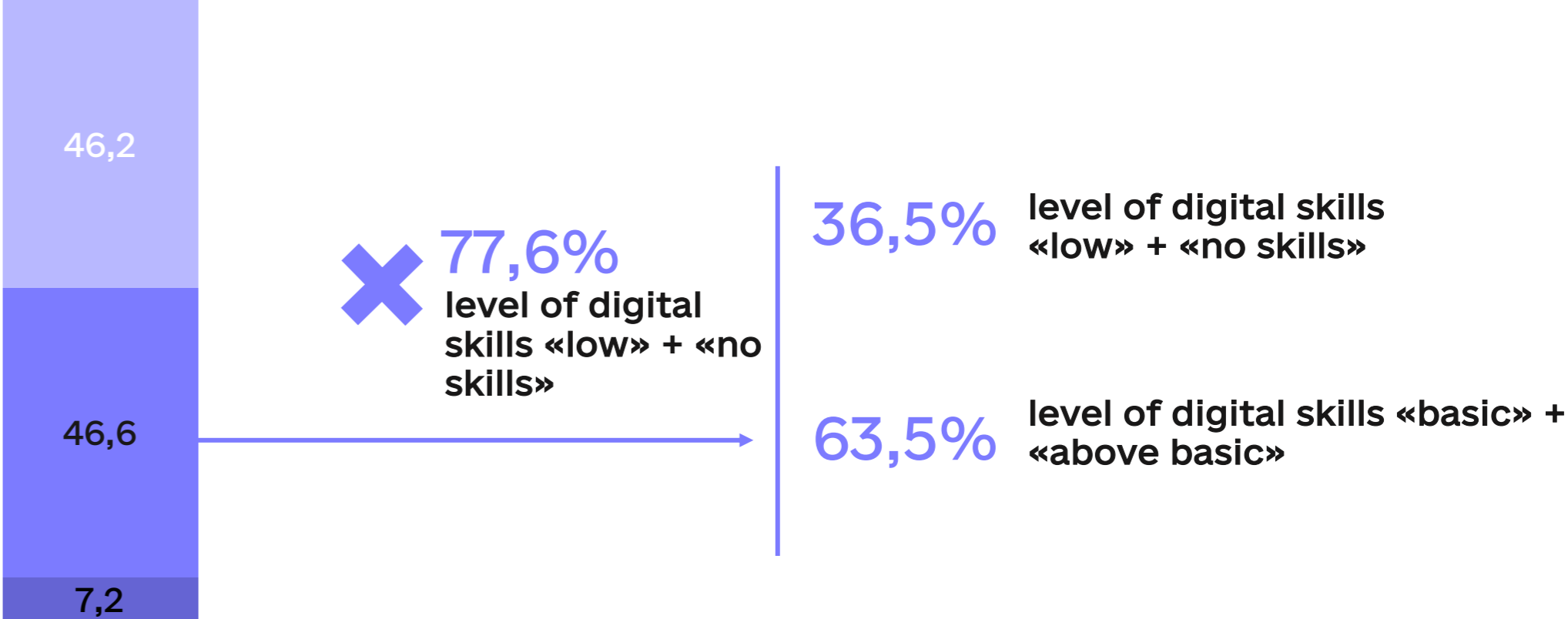
Level of digital skills (in %)



■ No skills ■ Basic skills ■ Above basic skills

TOP 5 courses the person would like to complete, among those who have an actual need for learning. Level of digital skills «low» + «no skills»

- 55,4% Online safety
- 52,2% Use of online banking services
- 48,9% Distinguishing reliable and unreliable sources of information
- 46,7% Fast and high-quality information search on the Internet
- 42,4% Making online purchases



■ Actual to one extent or another
■ Not relevant to one extent or another
■ Hard to say

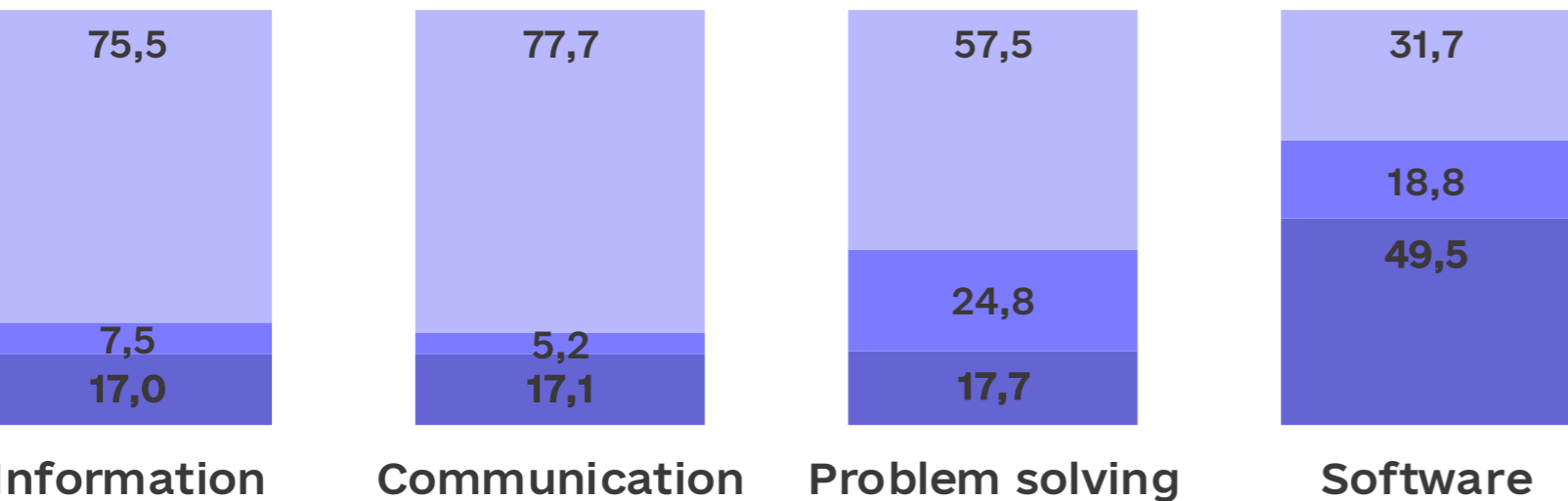
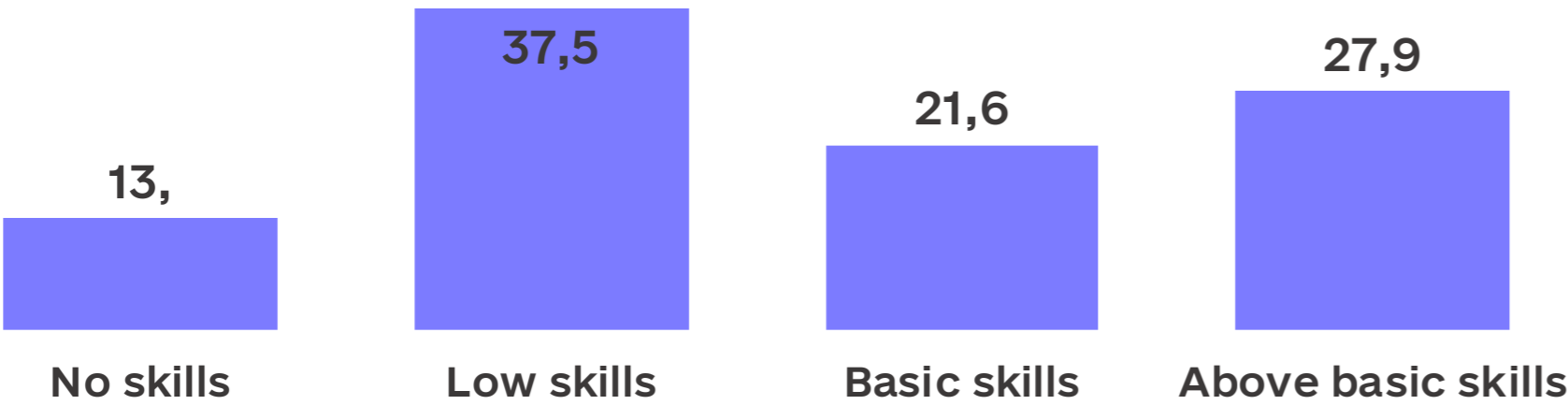
Top 5 courses the person would like to complete, among those who have an actual need for learning. Level of digital skills «basic» + «above basic»

- 55% Software installation
- 53,1% Online safety
- 51,9% Video processing, editing (non-professional level, for personal use)
- 46,9% Distinguishing reliable and unreliable sources of information
- 46,3% Use of online banking services

Relevance of digital skills learning Ukraine (portrait of urban area)



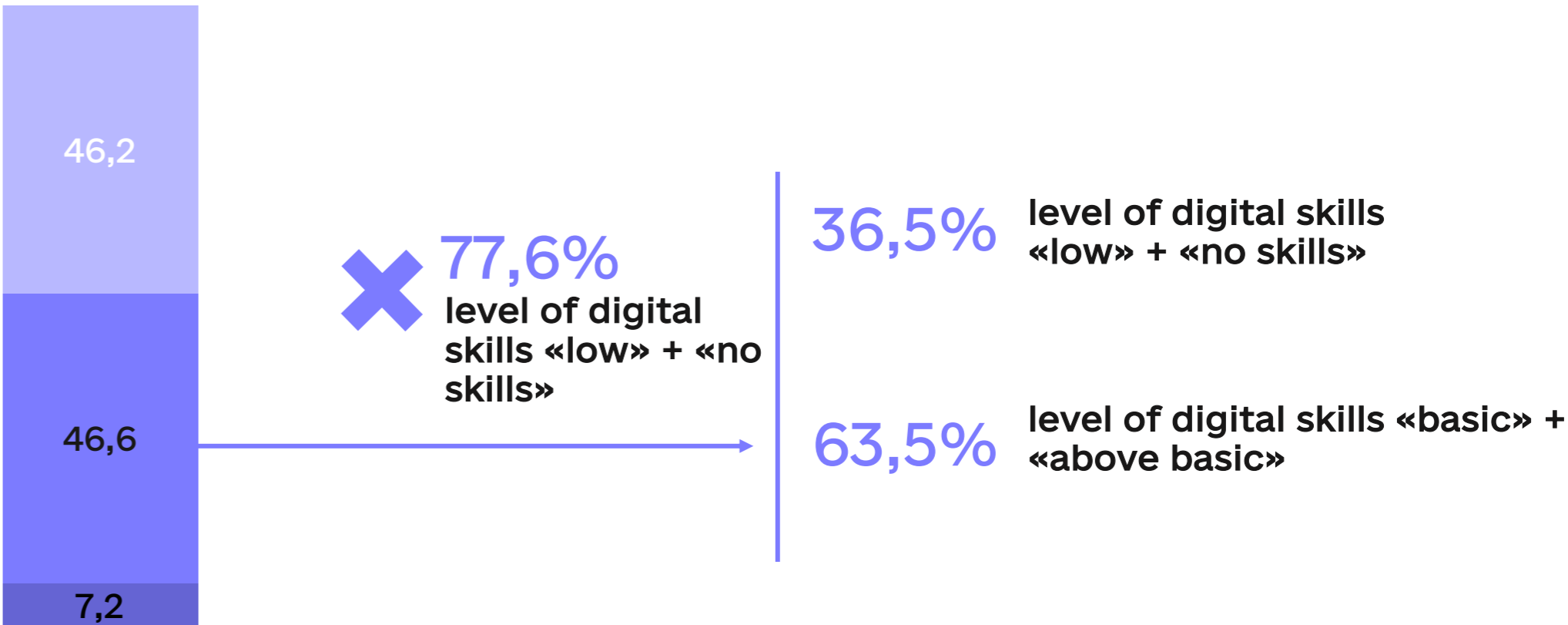
Level of digital skills (in %)



■ No skills ■ Basic skills ■ Above basic skills

TOP 5 courses the person would like to complete, among those who have an actual need for learning. Level of digital skills «low» + «no skills»

- 53,6% Online safety
- 47,4% Distinguishing reliable and unreliable sources of information
- 46,9% Use of online banking services
- 44,3% Fast and high-quality information search on the Internet
- 37,6% Online child safety



- Actual to one extent or another
- Not relevant to one extent or another
- Hard to say

Top 5 courses the person would like to complete, among those who have an actual need for learning. Level of digital skills «basic» + «above basic»

- 46,5% Online safety
- 43,8% Video processing, editing (non-professional level, for personal use)
- 42,3% Website Creation (template based)
- 40,5% Work with photo editors
- 38,8% Distinguishing between reliable and unreliable sources of information
- 38,8% The fundamentals of graphic design





Section 1

Level of digital skills



Portrait of people lacking digital skills

X 15,1%




Socio-demographic features

-  people aged 60–70 years
-  who reside outside the regional centers (in regional towns and villages)
-  with level of education: vocational secondary
-  employment status: Not employed population

Specific features of the Internet use

-  no access to the Internet network
-  never used the Internet

Relevance of digital skills learning


-  digital skills learning for them is not relevant
-  digital skills they want to develop:
 - Smartphone use
 - Social media use
 - Skills of searching information on the Internet
-  The most desirable form of digital skills learning: children (grandchildren) teach their parents (grandparents)

Portrait of people lacking digital skills

? 37,9%

Socio-demographic features

 People aged 30-59 years


 Who reside in cities
(outside the regional centers)


 With level of education:
vocational secondary

 Employment status:
employed population

Specific features of the Internet use


 No access to the
Internet network


 Used the Internet for the last 3
months

 For the last 3 months
used the Internet for:


- Making online calls
- Instant messages use
- Watching video

Relevance of digital skills learning

 Digital skills learning
for them is not relevant

 Digital skills they want to
develop:





- Online banking services use
- Online safety skills
- Skills to distinguish reliable and
unreliable sources of information

 The most desirable form
of digital skills learning:
online




Portrait of people lacking digital skills

? 21,5%




Socio-demographic features

-  People aged 30-39 years
-  Who reside in regional centers
-  With level of education: incomplete higher / higher
-  Employment status: employed population

Specific features of the Internet use

-  No access to the Internet network
-  Used the Internet for the last 3 months
-  For the last 3 months used the Internet for:
 - Instant messages use
 - Making online calls
 - Watching video
 - Search for information about goods and services





Relevance of digital skills learning

-  Digital skills learning for them is relevant
-  Digital skills they want to develop:
 - Online safety skills
 - Skills to distinguish reliable and unreliable sources of information
 - How to install software
 - Photo editing skills
-  The most desirable form of digital skills learning: online




Portrait of people lacking digital skills

✓ 25,5%




Socio-demographic features

-  People aged 18-29 years
-  Who reside in regional centers
-  With level of education: incomplete higher / higher
-  Employment status: employed population

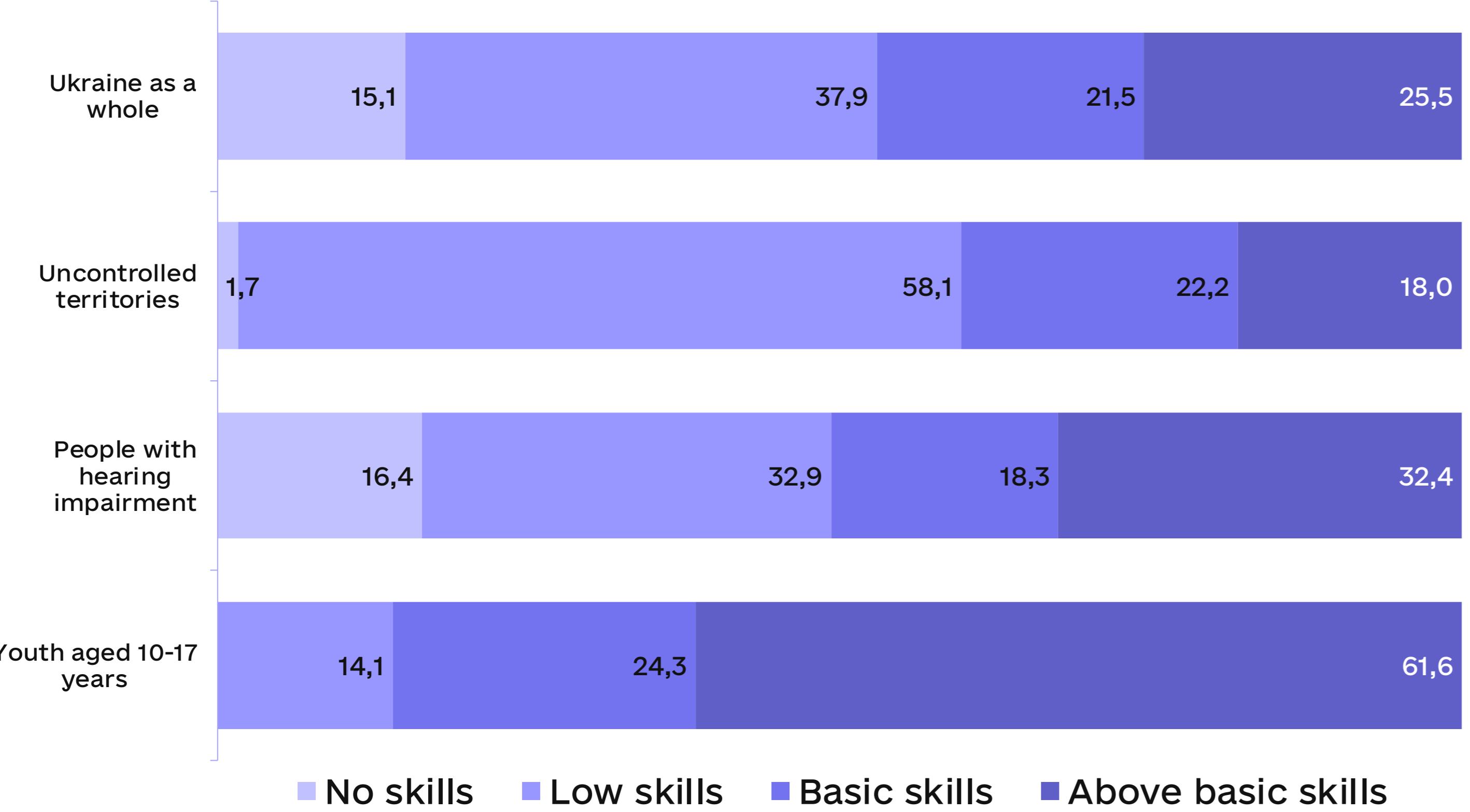
Specific features of the Internet use

-  Have access to the Internet network
-  Used the Internet within last 3 months
-  For the last 3 months used the Internet for:
 - Instant messages use
 - Making online calls
 - Watching video
 - Search for information about goods and services

Relevance of digital skills learning

-  Digital skills learning for them is relevant
-  Digital skills they want to develop:
 - Online safety skills
 - Video processing and editing skills
 - Photo editing skills
 - Skills to distinguish reliable and unreliable sources of information
 - How to install software
-  The most desirable form of digital skills learning: online

Overall digital skills assessment



No skills

No digital skills in all four areas (information, communication, problem-solving, software) and / or did not use Internet for the last 3 months.

Low skills

No digital skills in one of four competence areas.

Basic skills

Digital skills level is not below 'average' in all four areas.

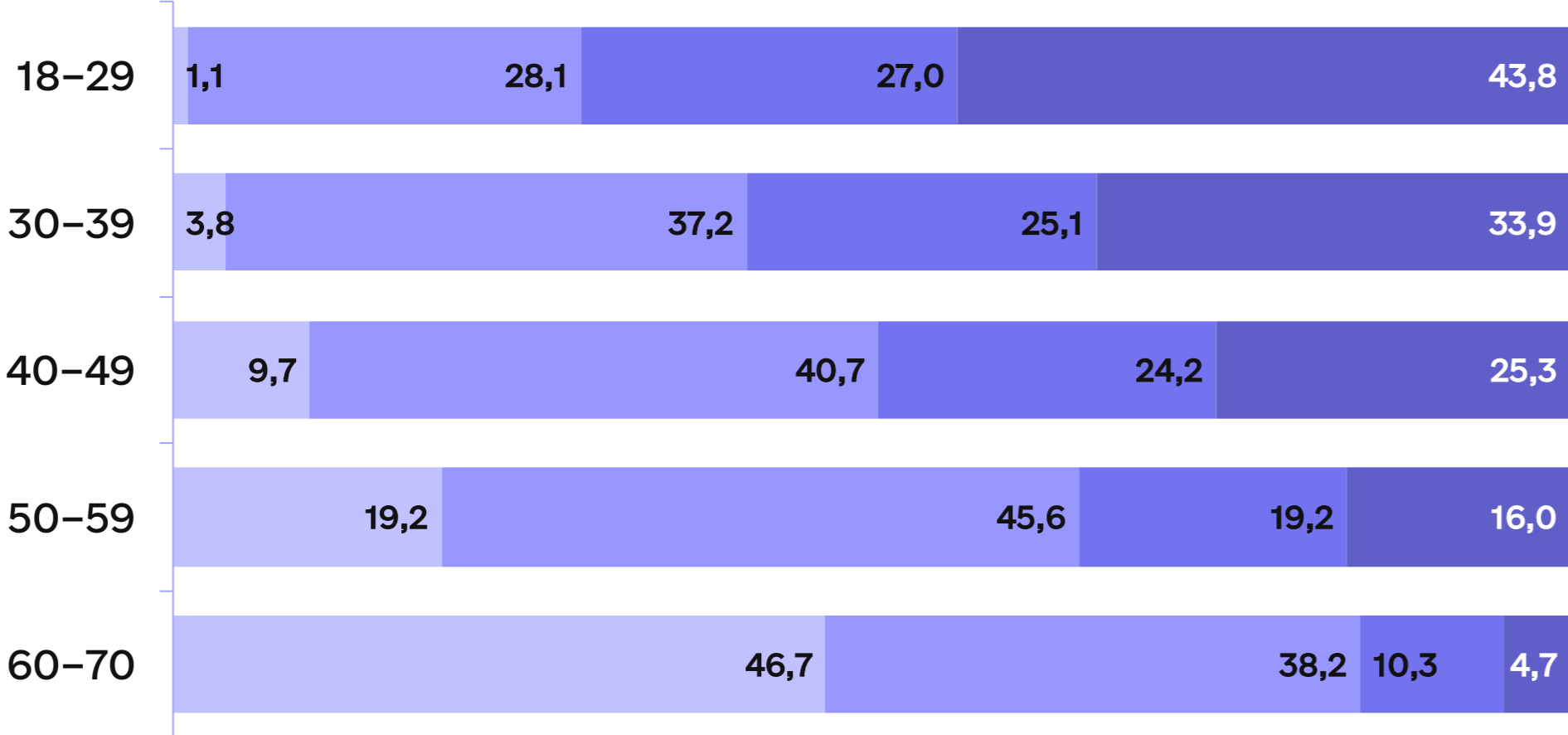
Above basic skills

Digital skills level is not below 'above average' in all four areas.

Overall digital skills assessment

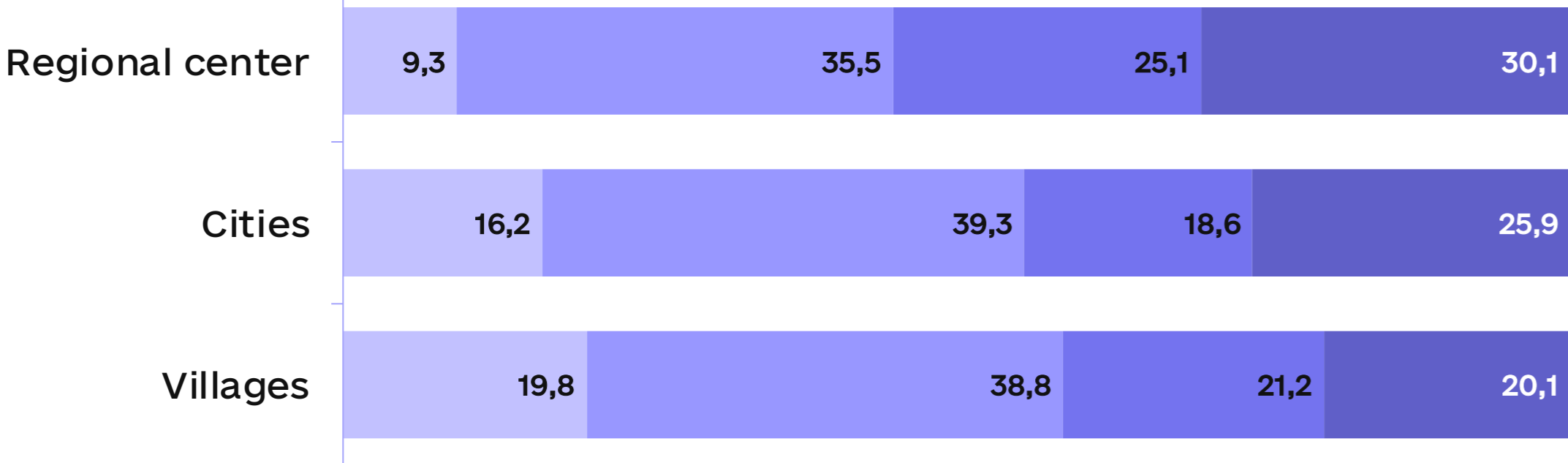
Ukraine as a whole 🇺🇦

By age (in %)

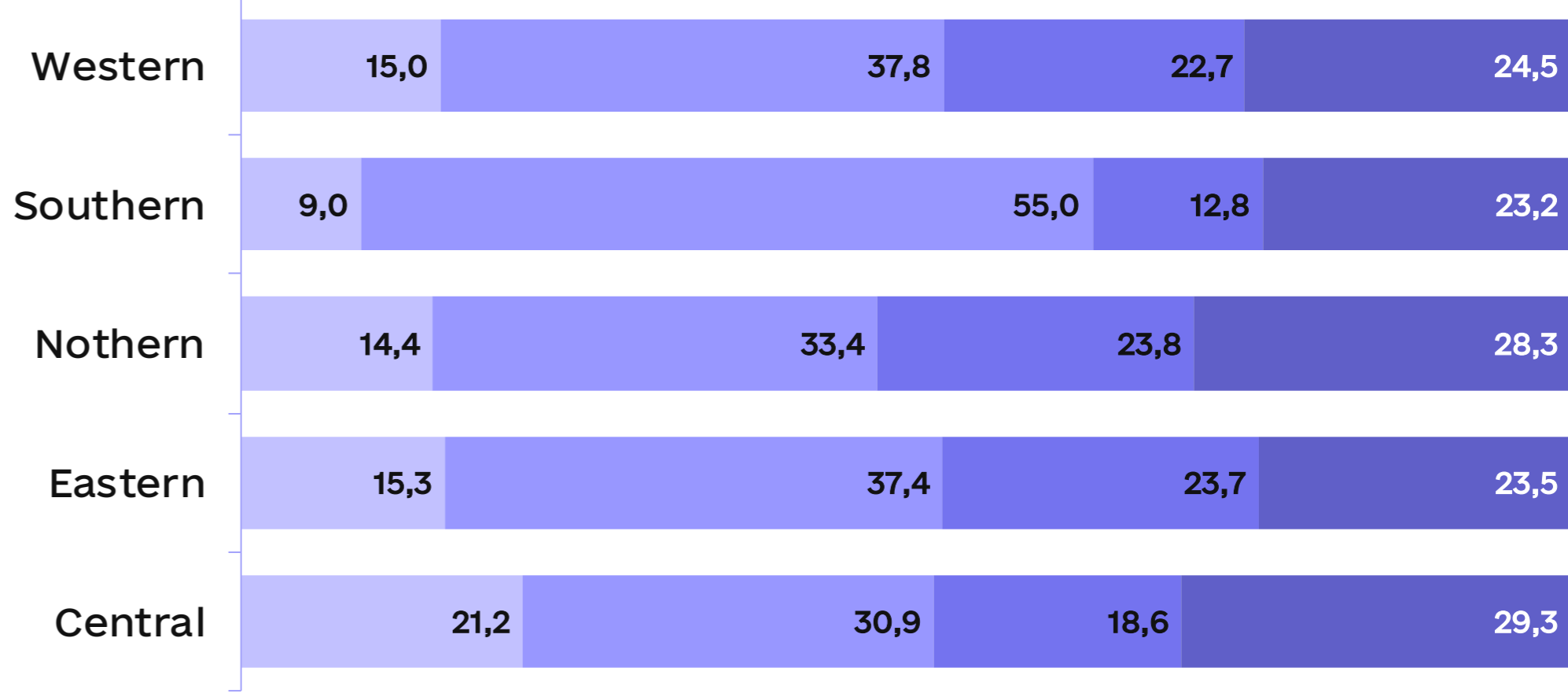


■ No skills ■ Low ■ Basic ■ Above basic

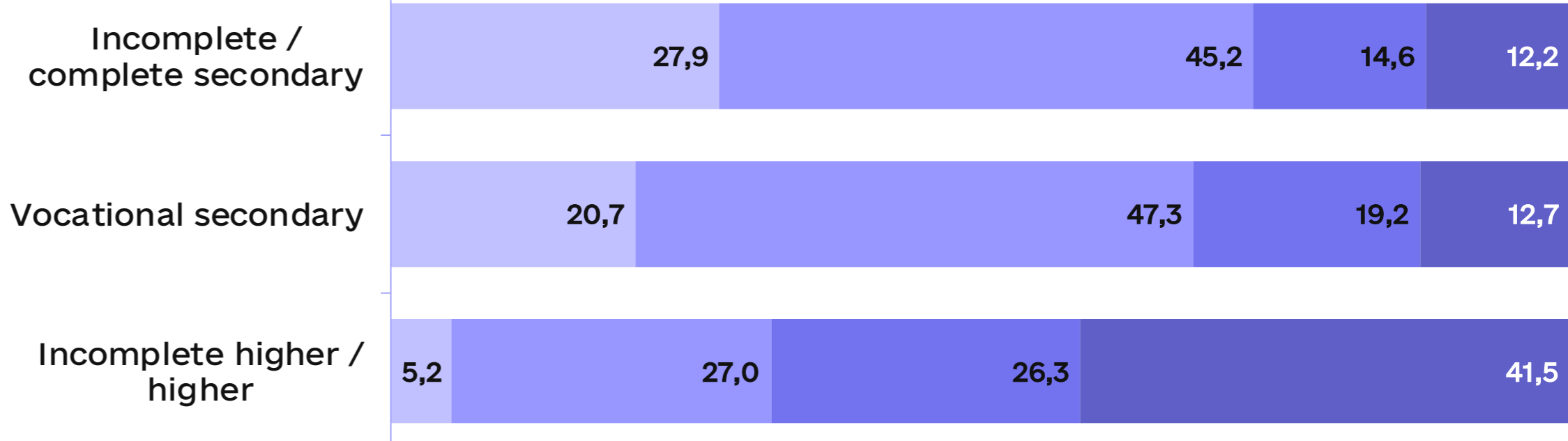
By type of area (in %)



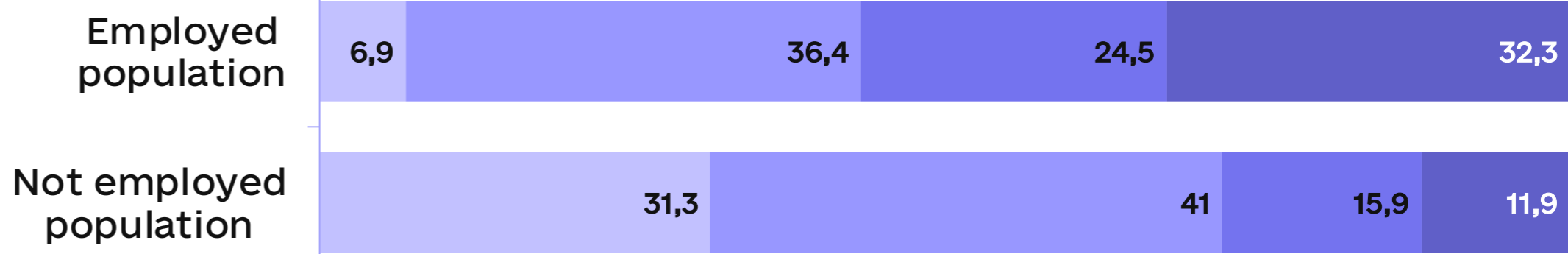
By region (in %)



By type of education level (in %)

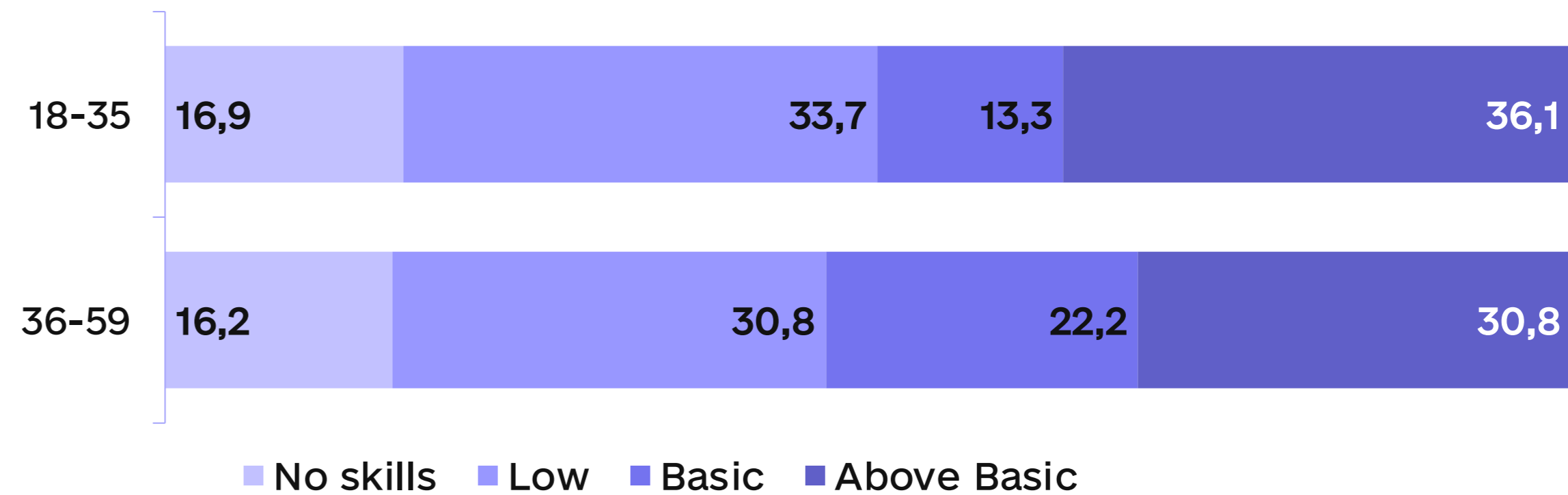


By employment status (in %)

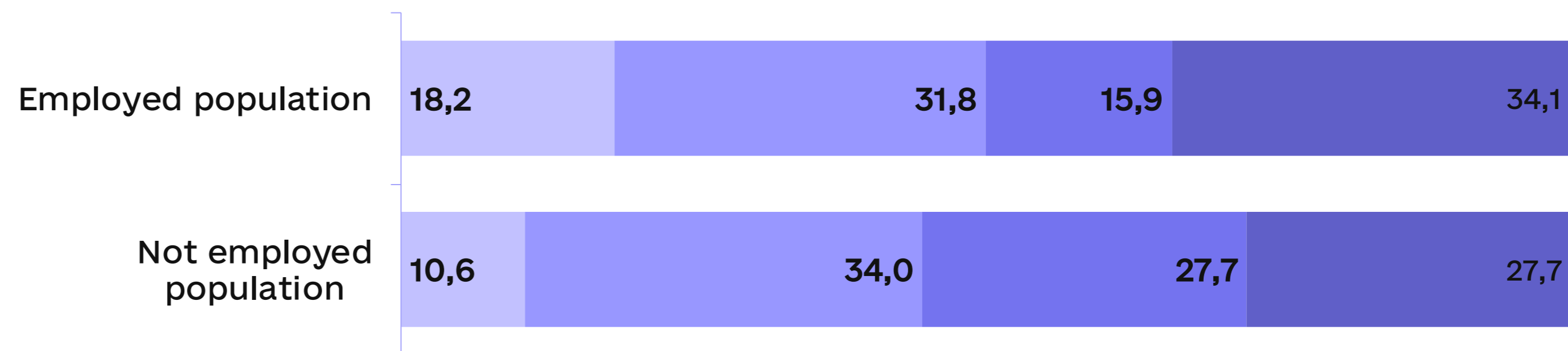


People with hearing impairment 🦻

By age (in %)

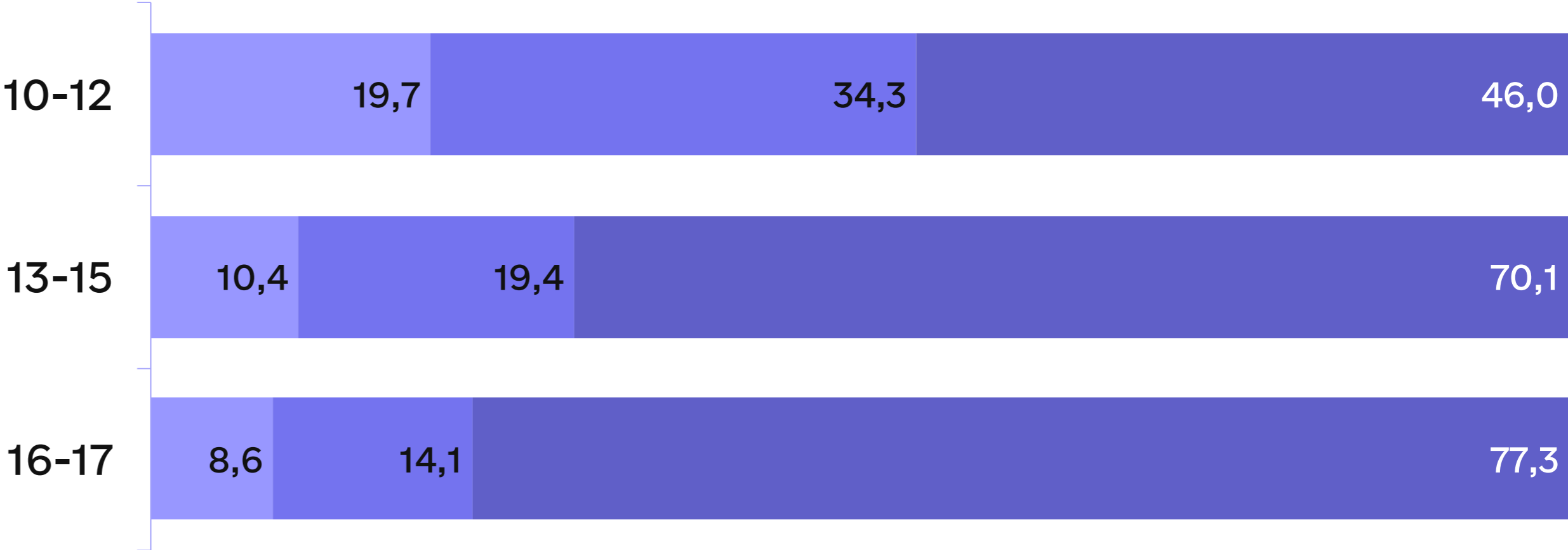


By employment status



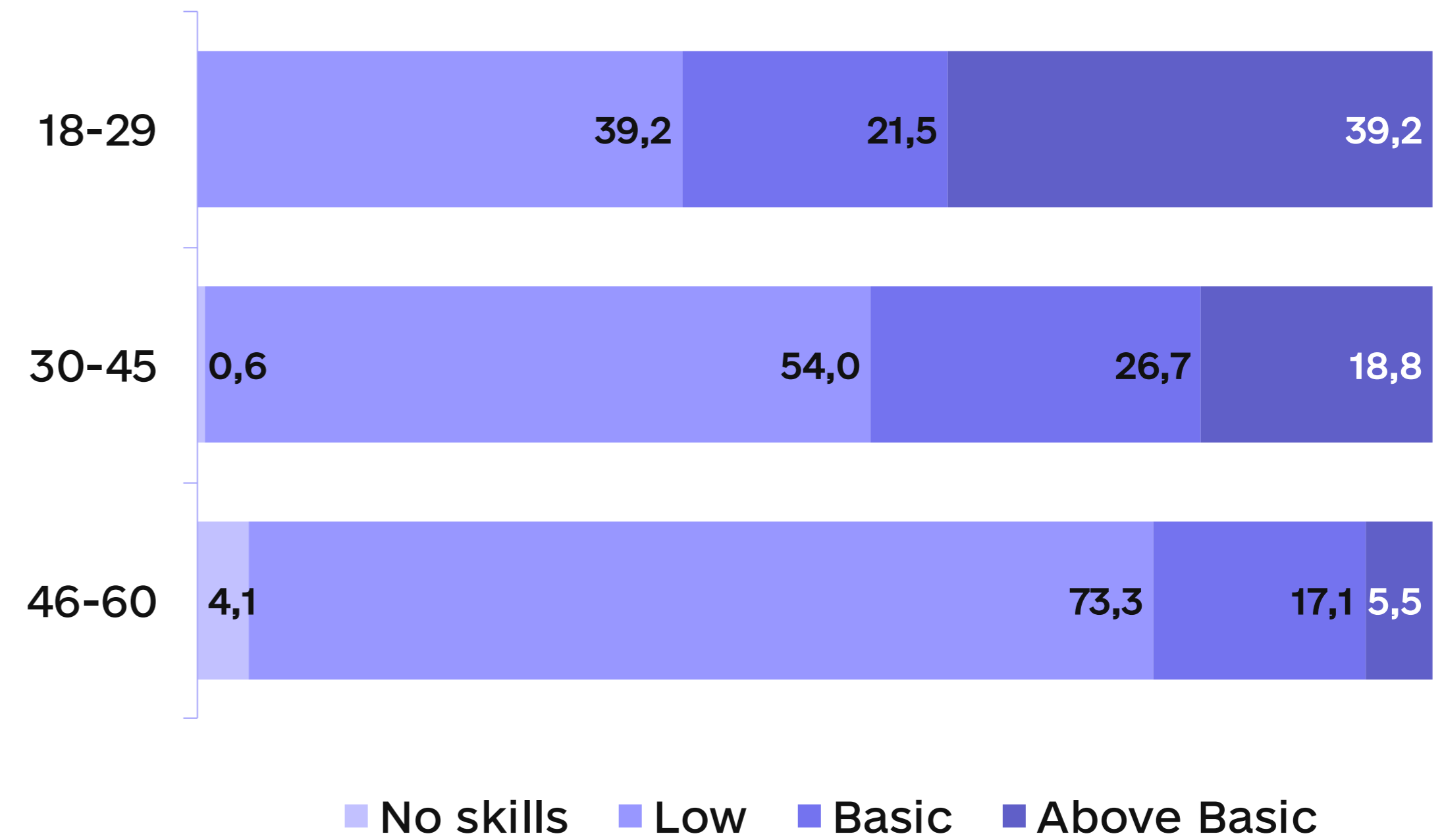
Youth aged 10-17 years 🧒

By age (in %)

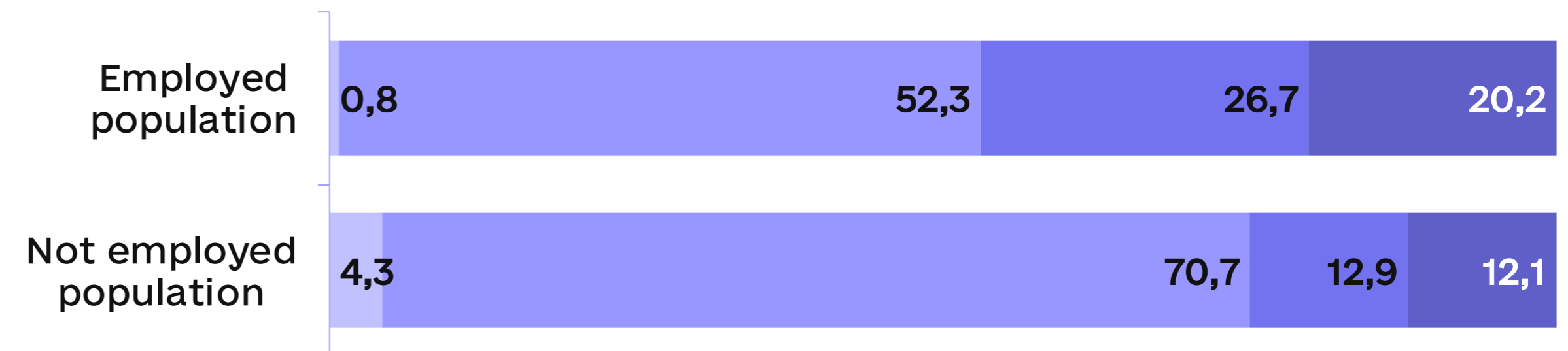


Uncontrolled territories 🚧

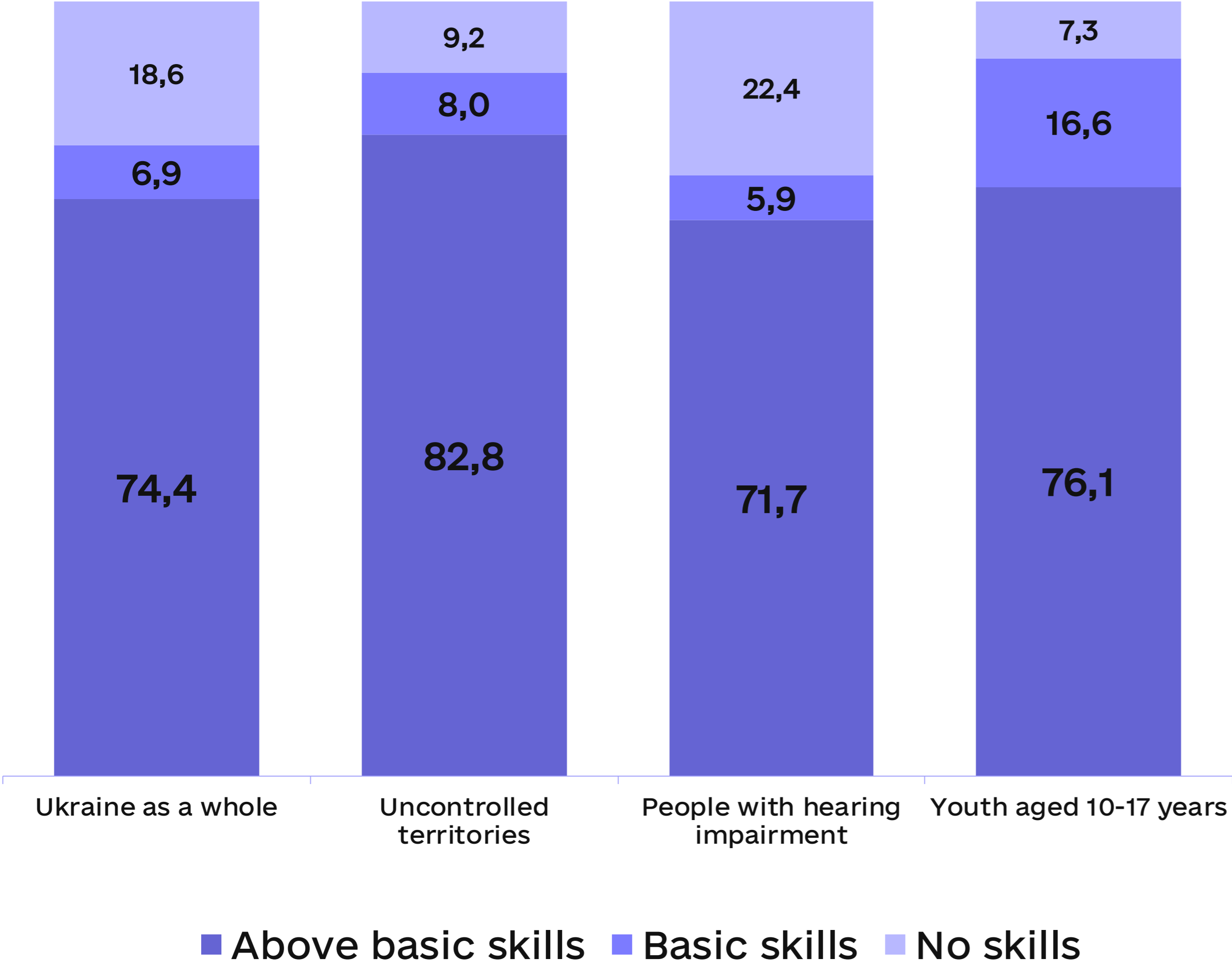
By age (in %)



By employment status



Information skills



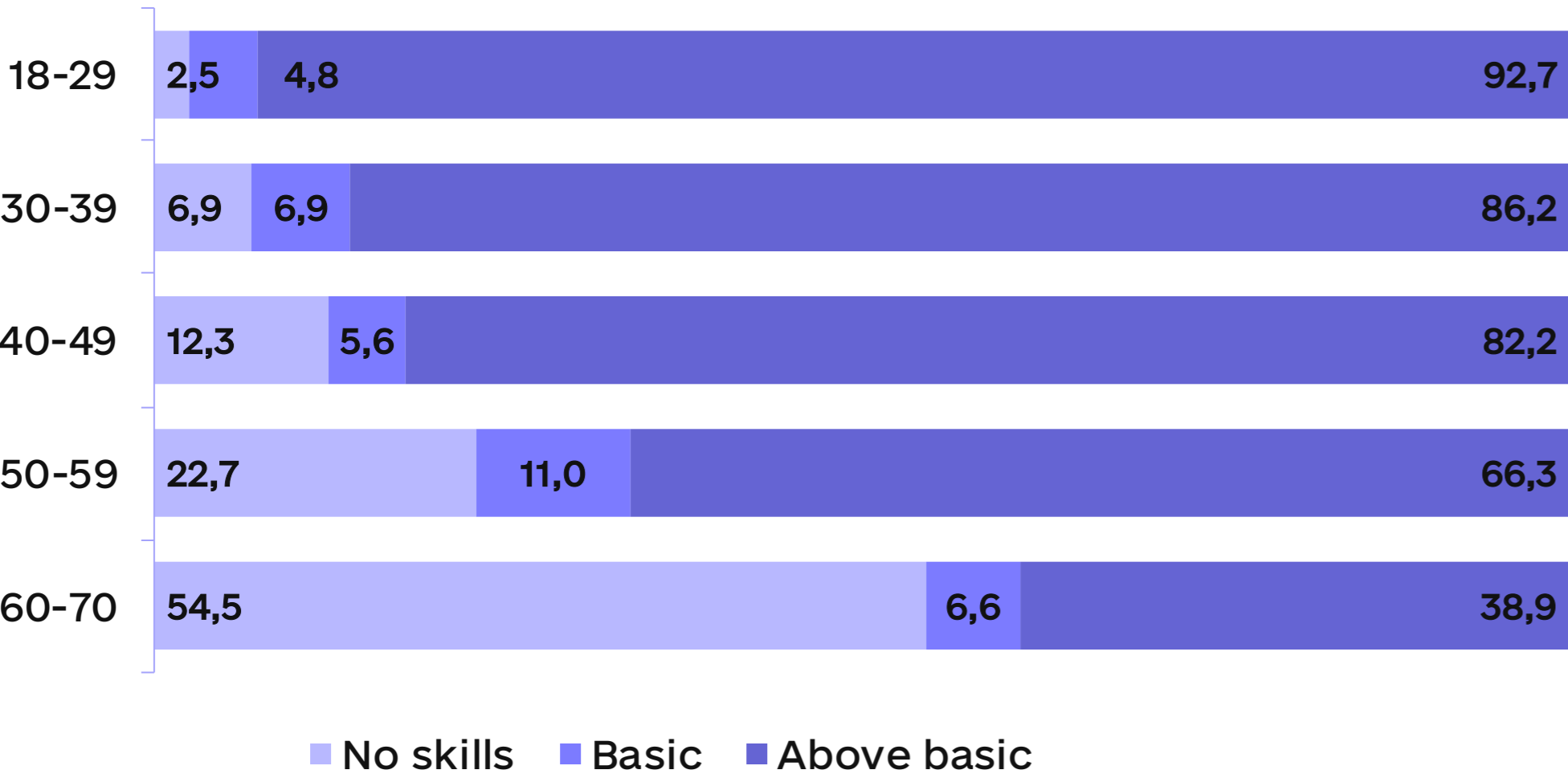
Digital competence definition:
to identify, search, download, store, organize and analyze digital information, according to its relevance and purpose.

- Skills:**
- To download/print official forms
 - To copy and /or move files/folders
 - To receive information from websites or apps
 - To submit of completed forms on the Internet
 - To search for information regarding work issues
 - To search for information regarding products and services
 - To search for information not related with work issues. e.g., regarding health-related issues (injuries, illnesses, nutrition, wellness, etc.), recipes, parenting, etc.
 - To search for Job or resume submission
 - To read online news websites, magazines, newspapers

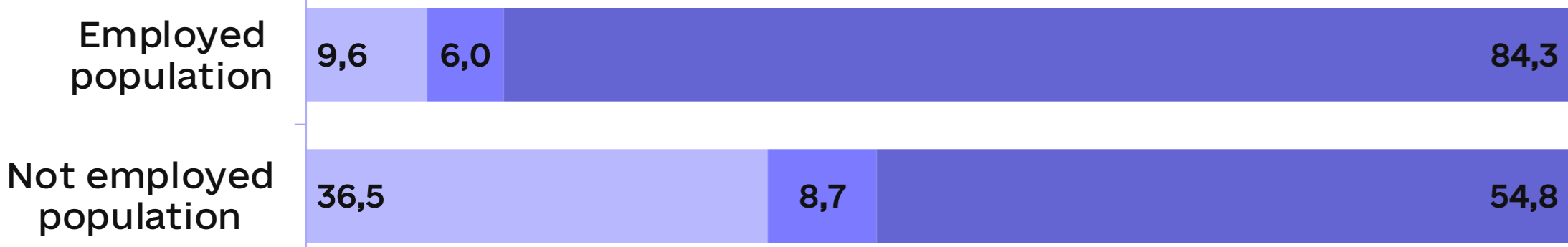
Information skills

Ukraine as a whole

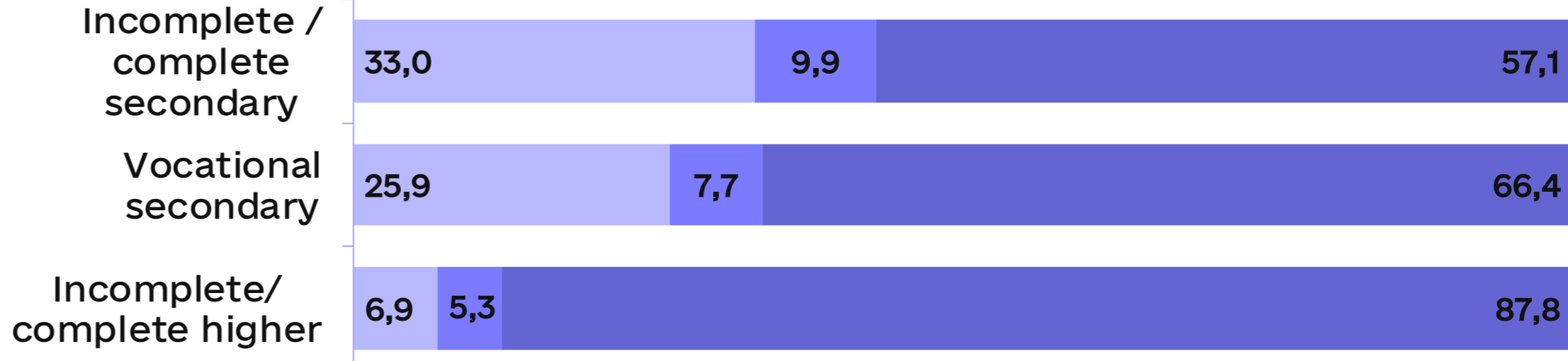
By age



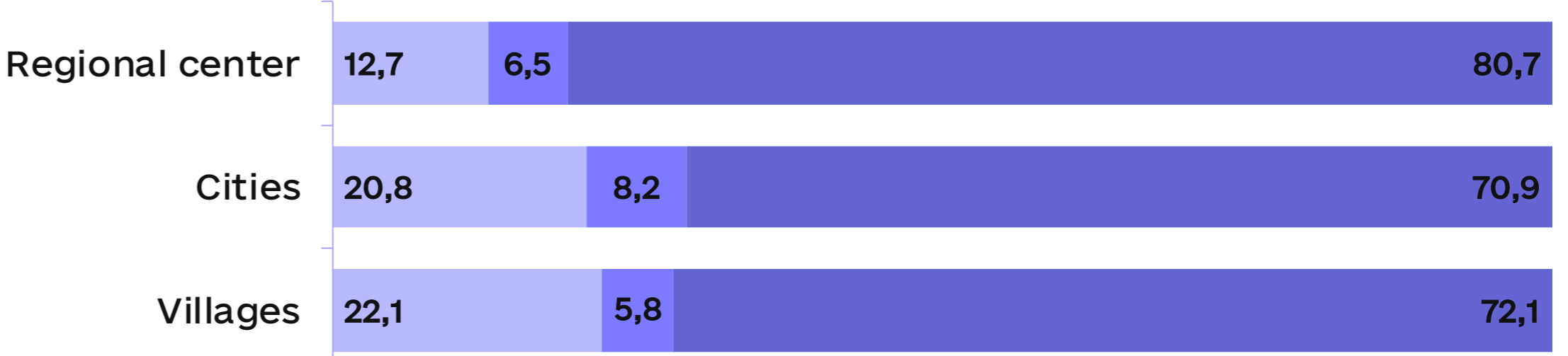
By employment status



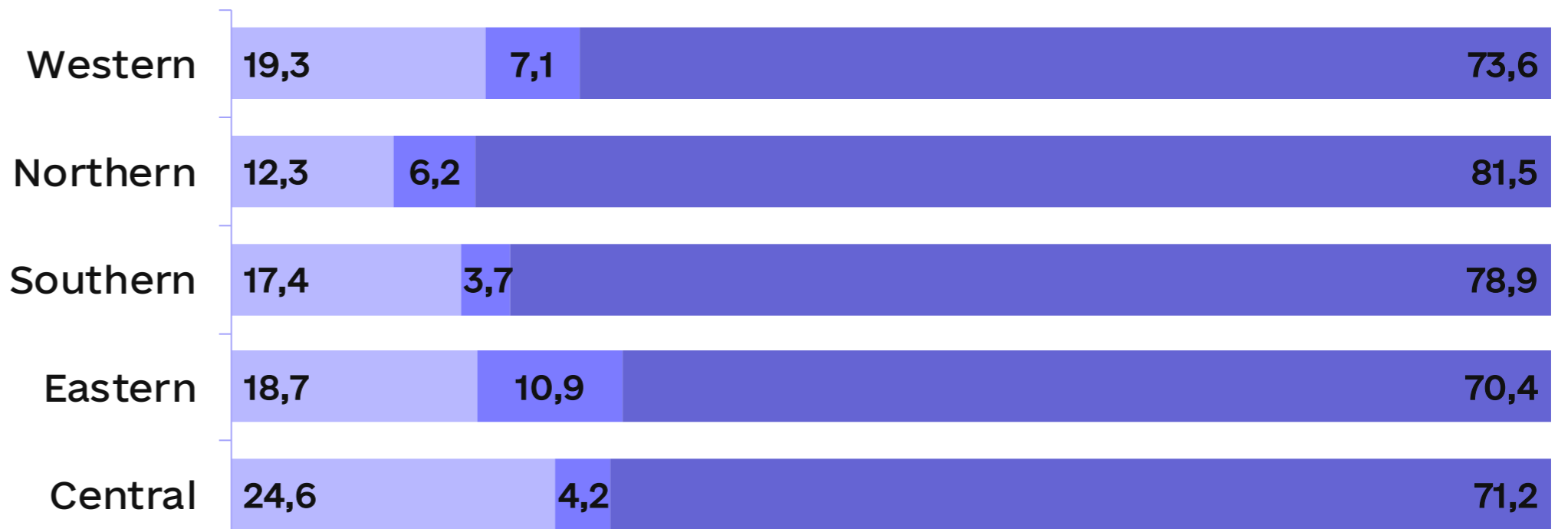
By education level



By type of area



By region

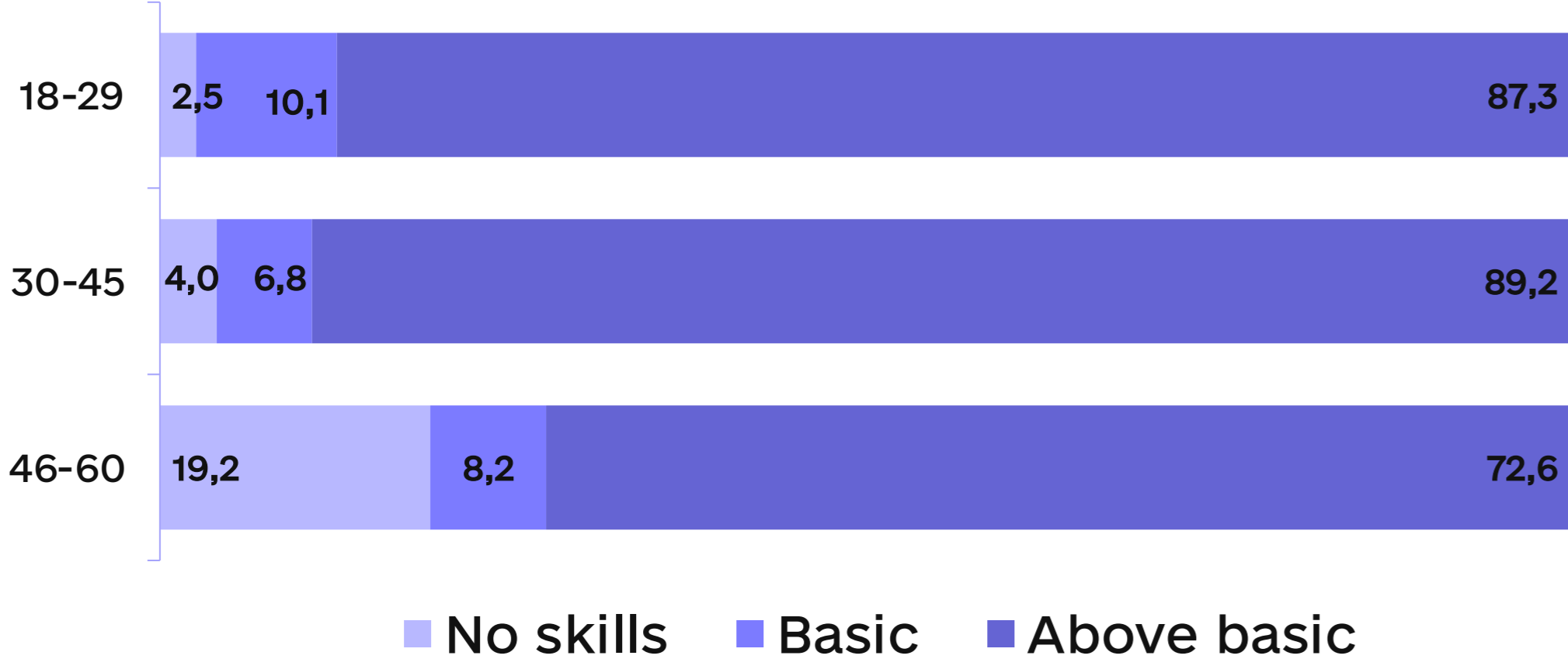


Information skills

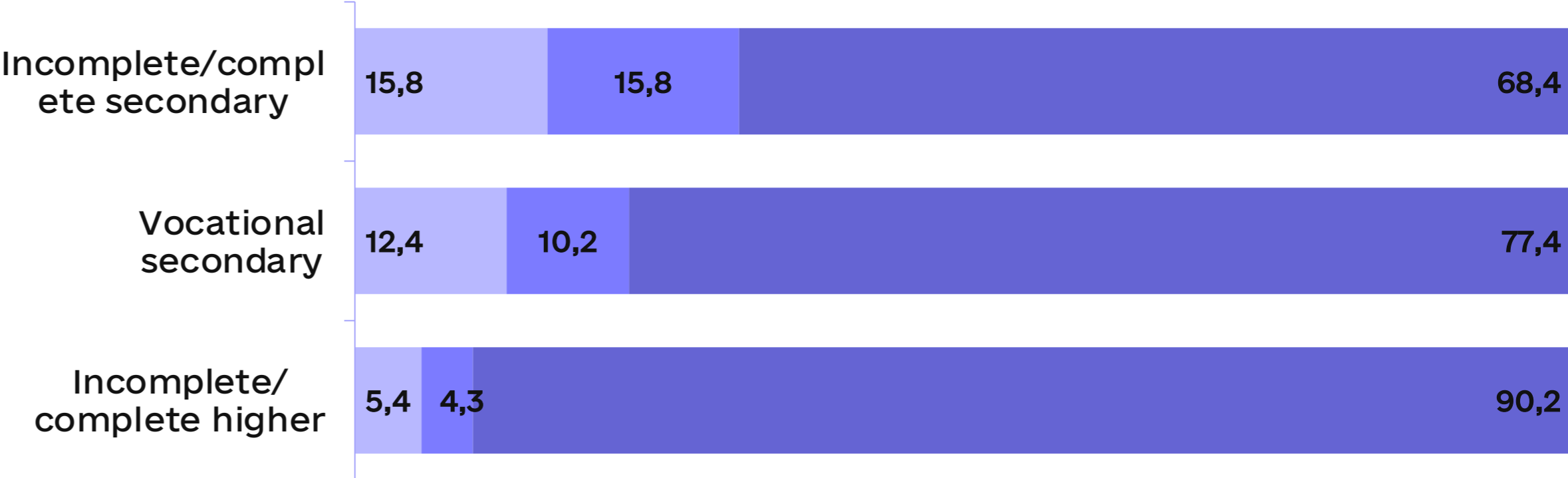
Uncontrolled territories



By age



By education level



By employment status

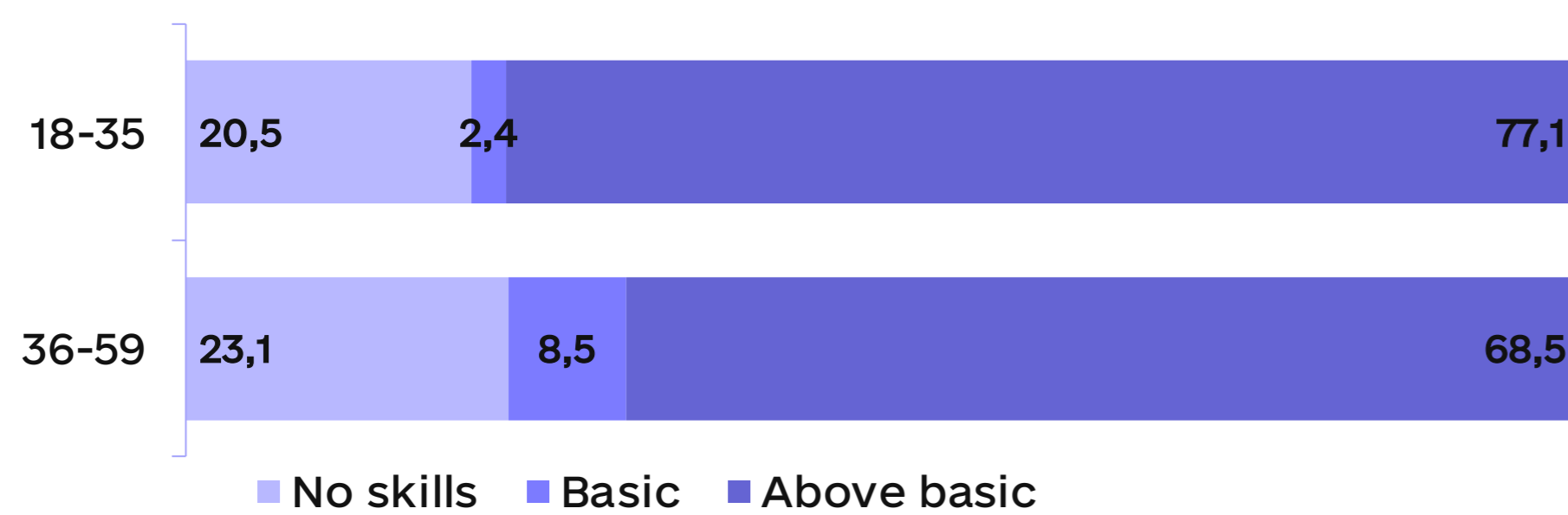


Information skills

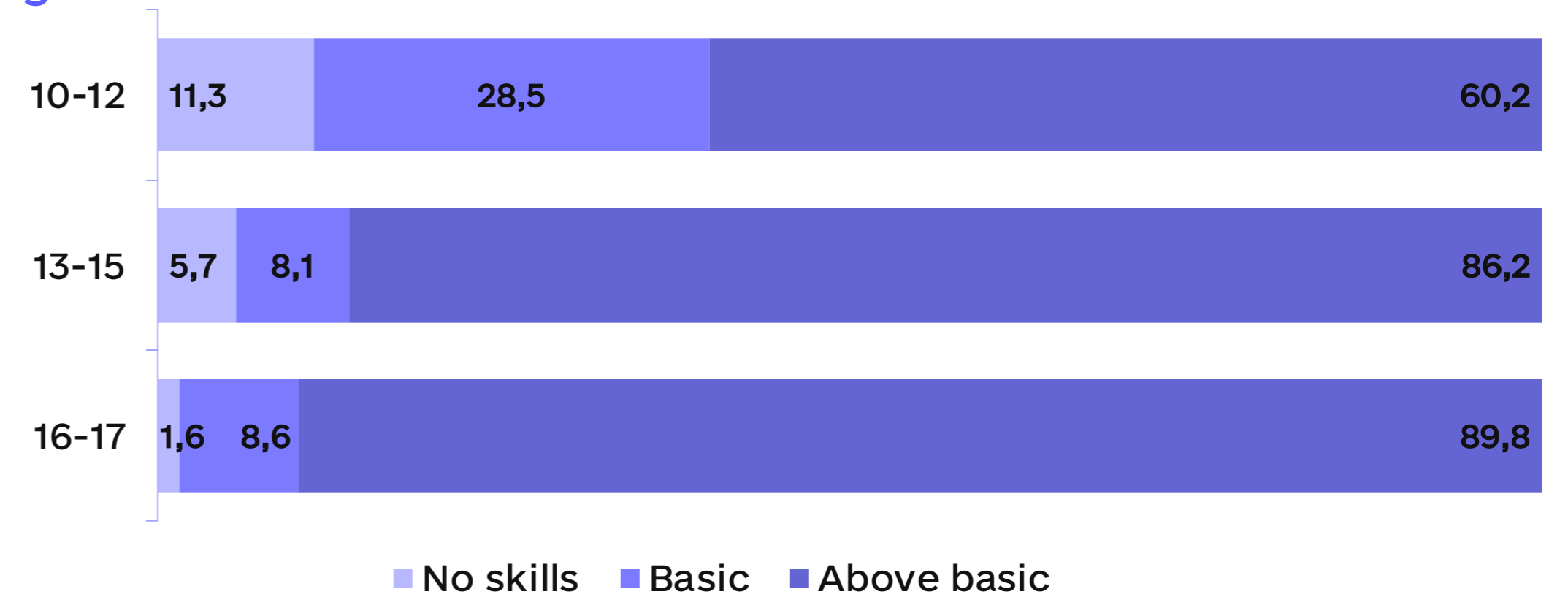
People with hearing impairment 🧑🏻‍🦻

Youth aged 10–17 years 🧑🏻

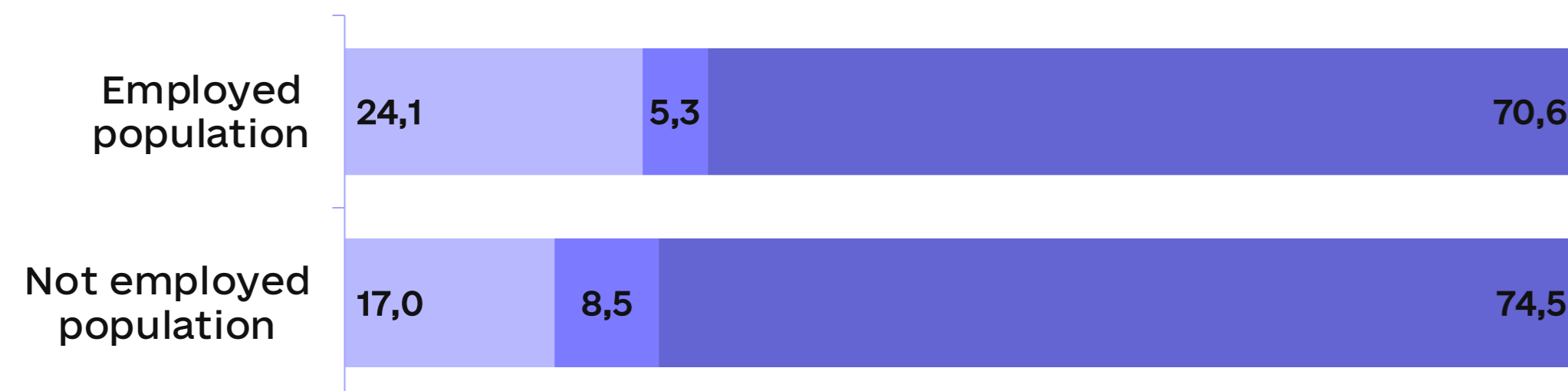
By age



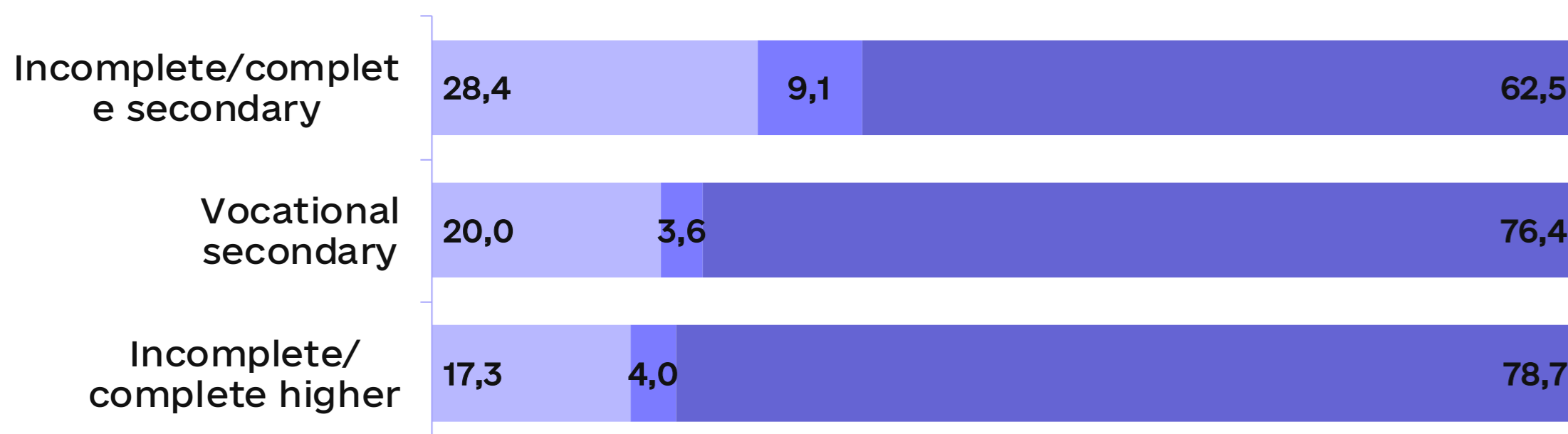
By age



By employment status



By education level



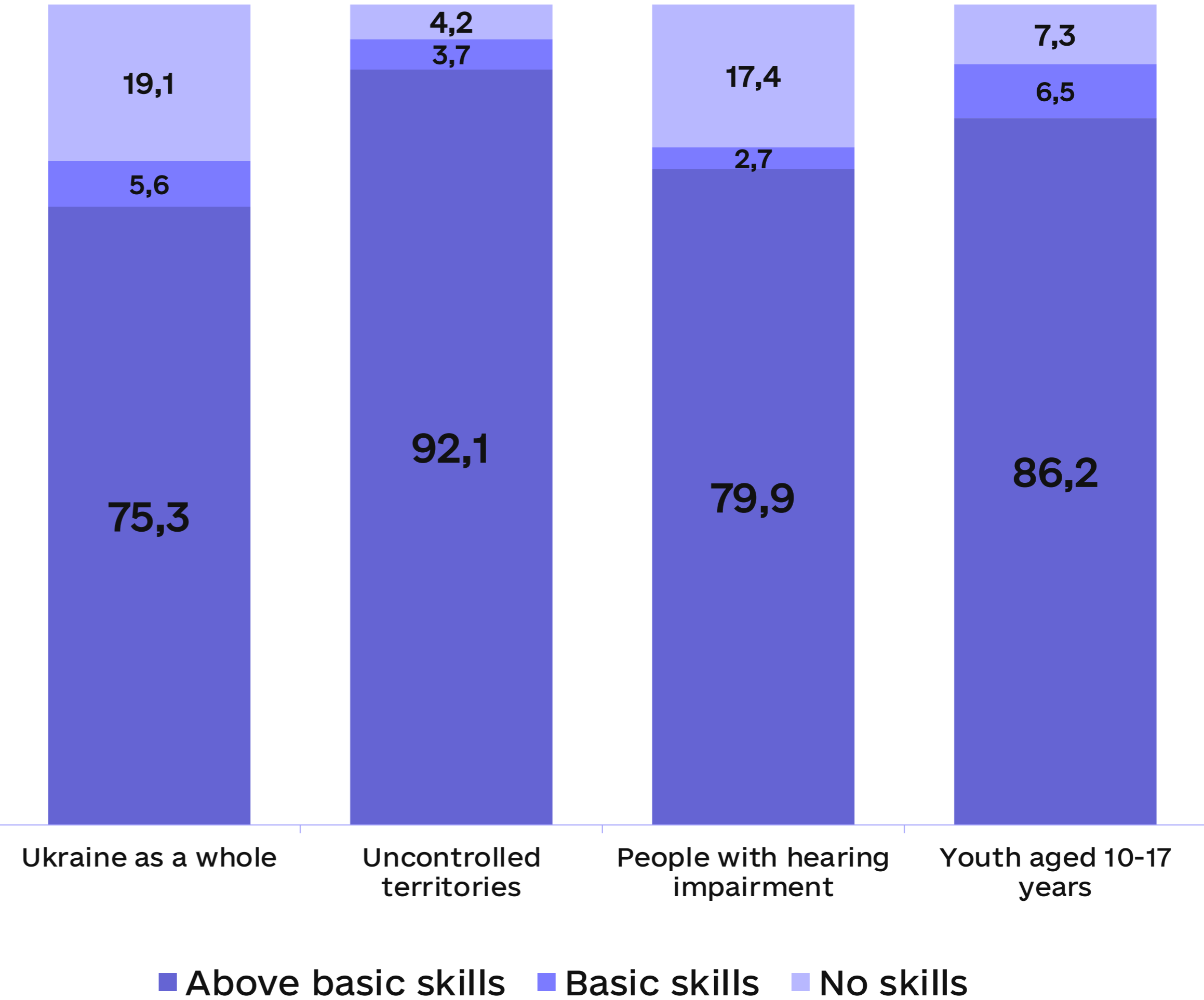
Communication skills

Digital competence definition:

to communicate in digital environments, to share resources via online tools, to connect with other people, and to collaborate with them using digital tools, engagement and participation in communities and networks.

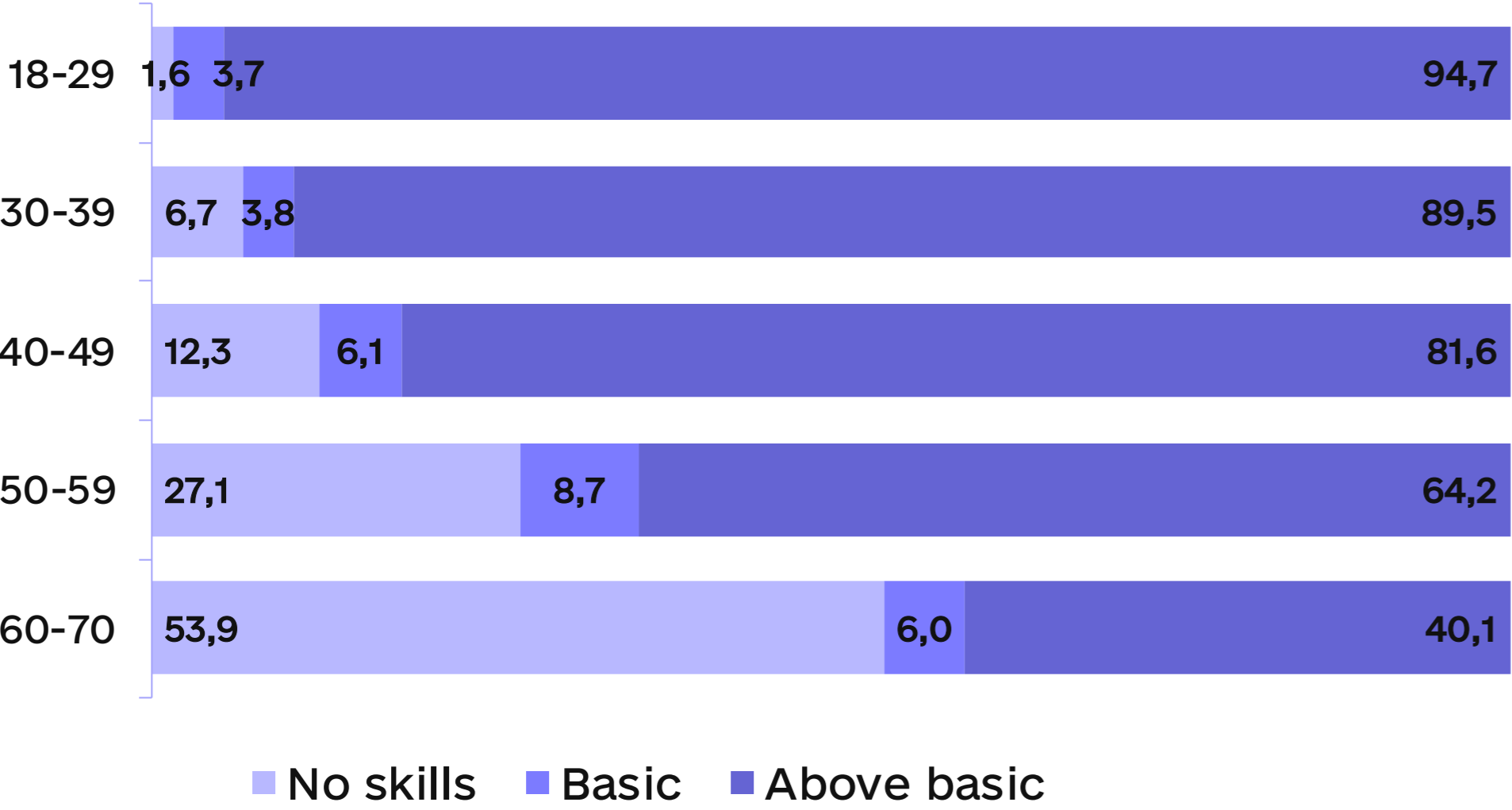
Skills:

- Instant messaging use, i.e. messages exchange, e.g. via Telegram, Messenger, WhatsApp, Viber
- To send/receive emails
- To upload self-created material (content) (text, photos, music, videos, software, etc.) to any website from which you can share or downloaded content
- To make calls (including video calls) via Internet, e.g., via Telegram, Messenger, WhatsApp, Facetime
- To create posts on social and/or political topics (blogs, social media)
- Participation in online consultations or voting on certain social or political issues (e.g., signing a petition, voting for public budget projects, participating in electronic consultations)
- Presence in social media (creating a user profile, posting on Facebook, Twitter, Instagram, Vkontakte, Odnoklasniki, etc.)

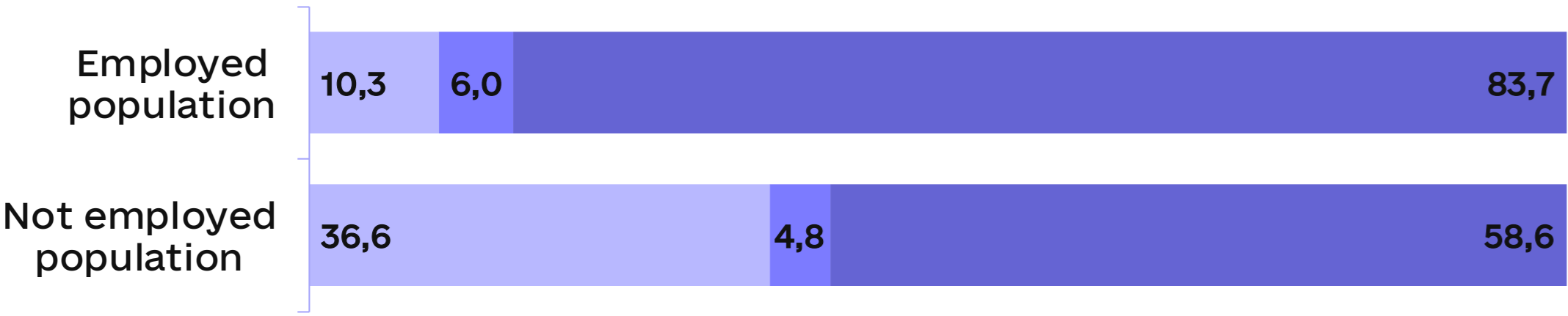


Communication skills Ukraine as a whole

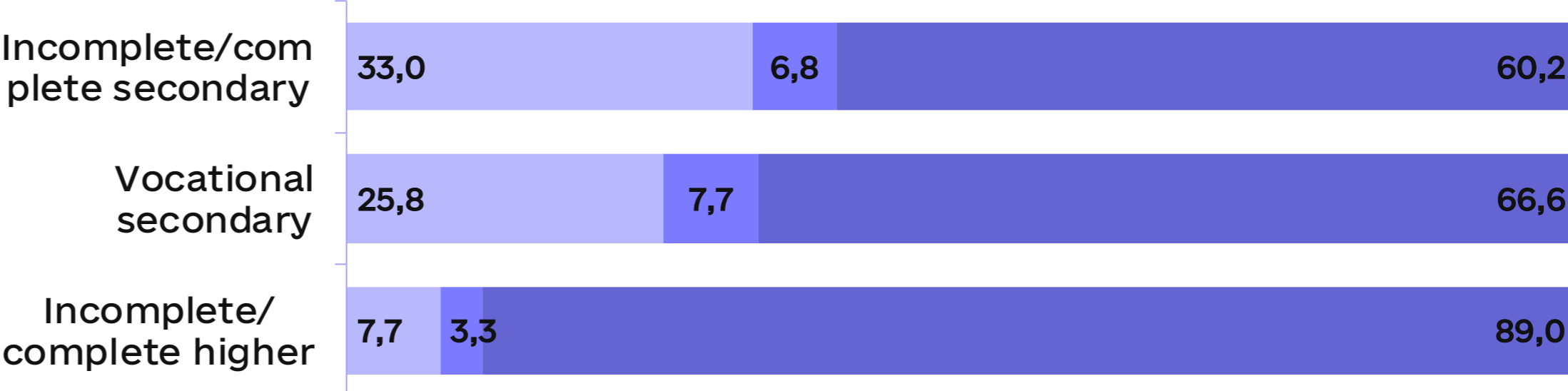
By age



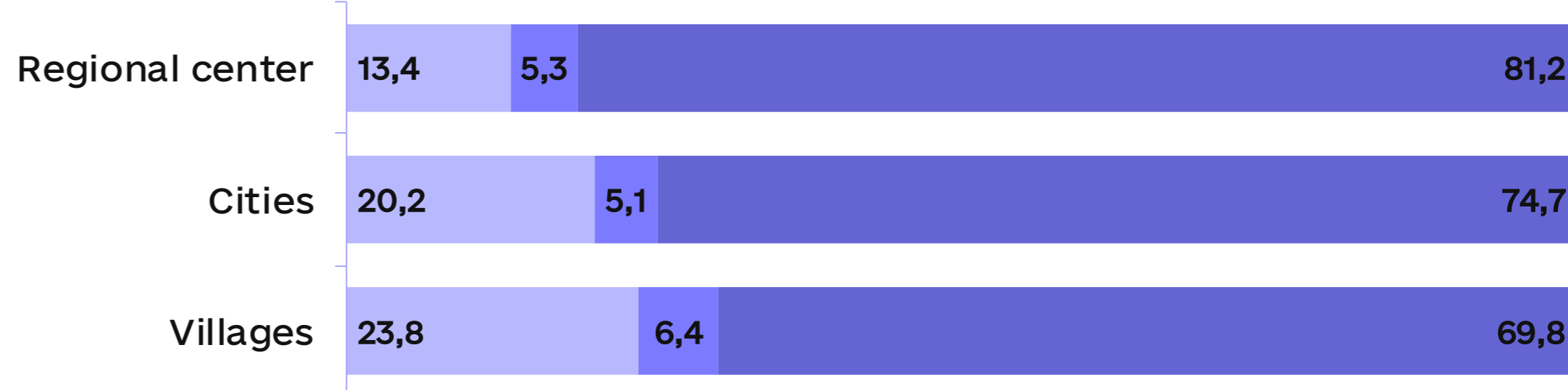
By employment status



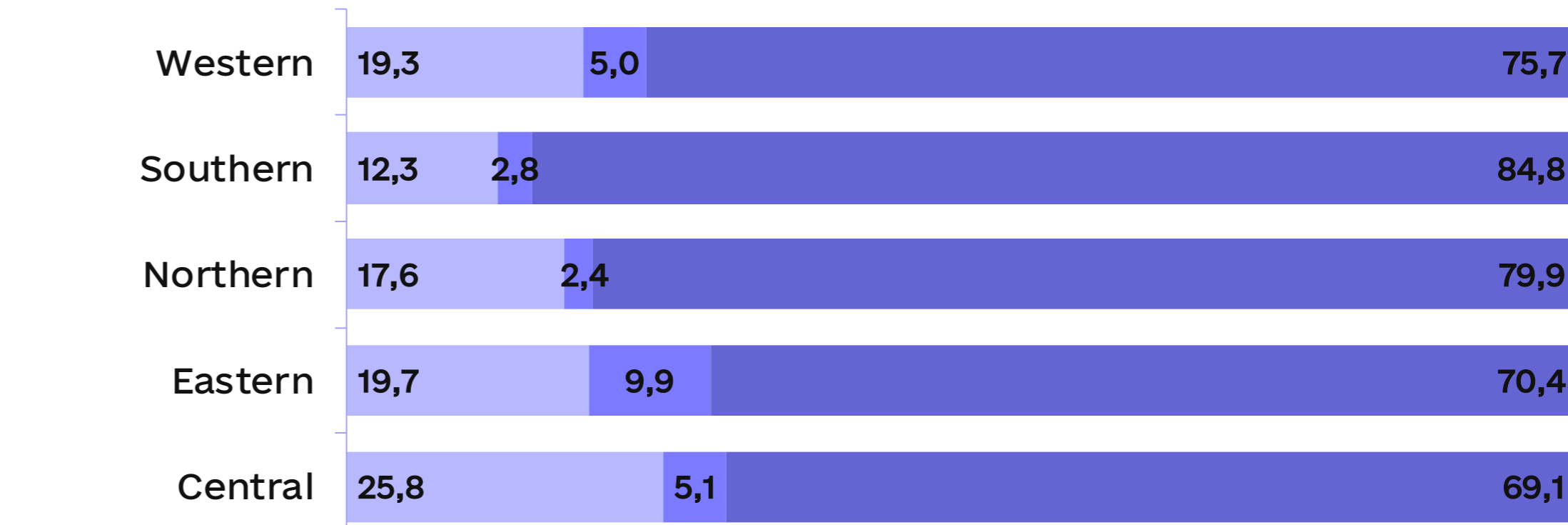
By educational level



By type of area



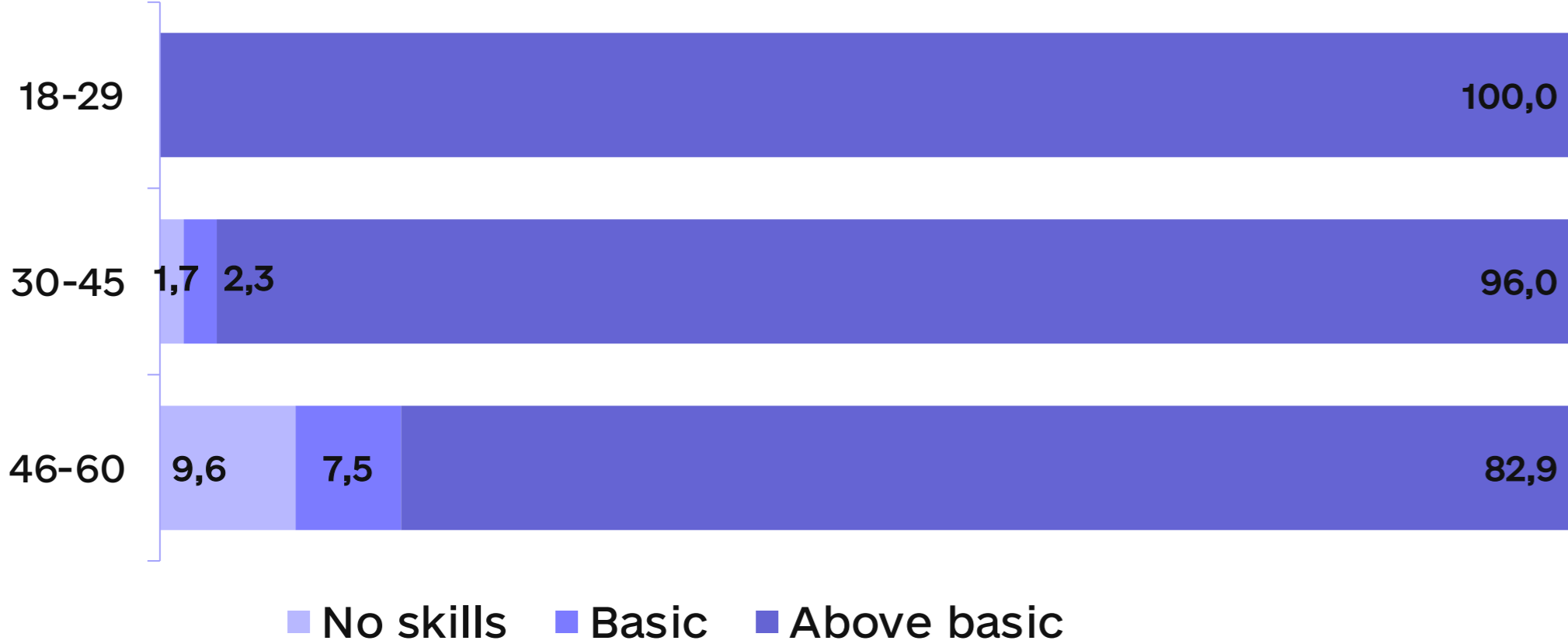
By region



Communication skills Uncontrolled territories



By age



By education level



By employment status



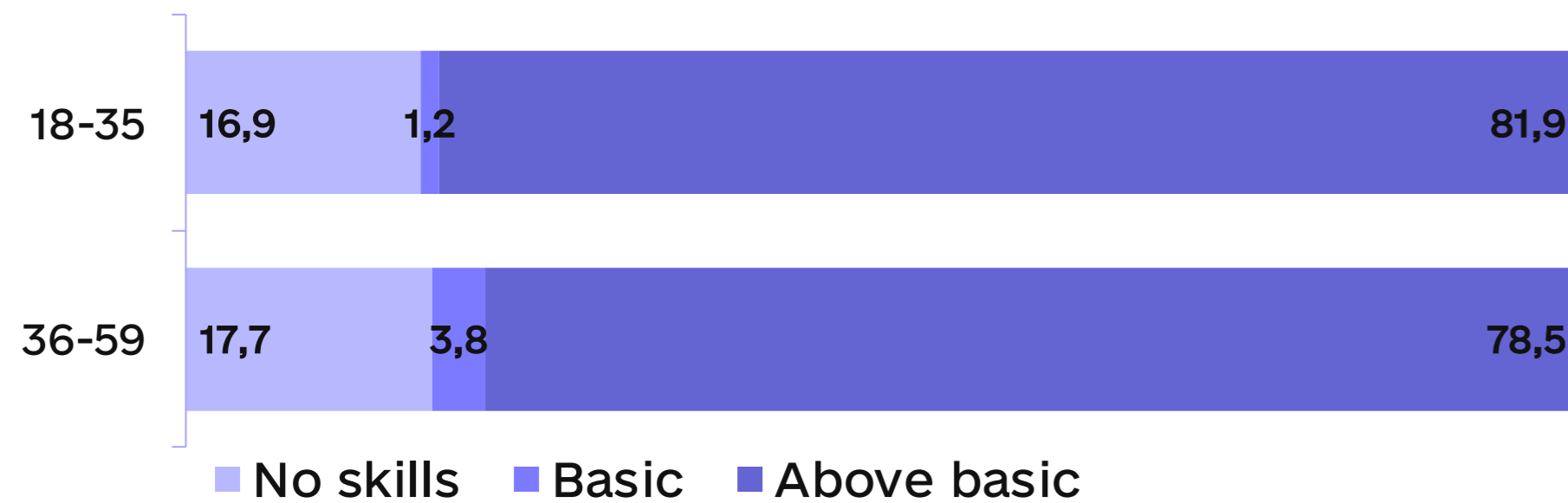
Information skills

People with hearing impairment 🧑🏻‍🦻

Information skills

Youth aged 10–17 years 🧑🏻

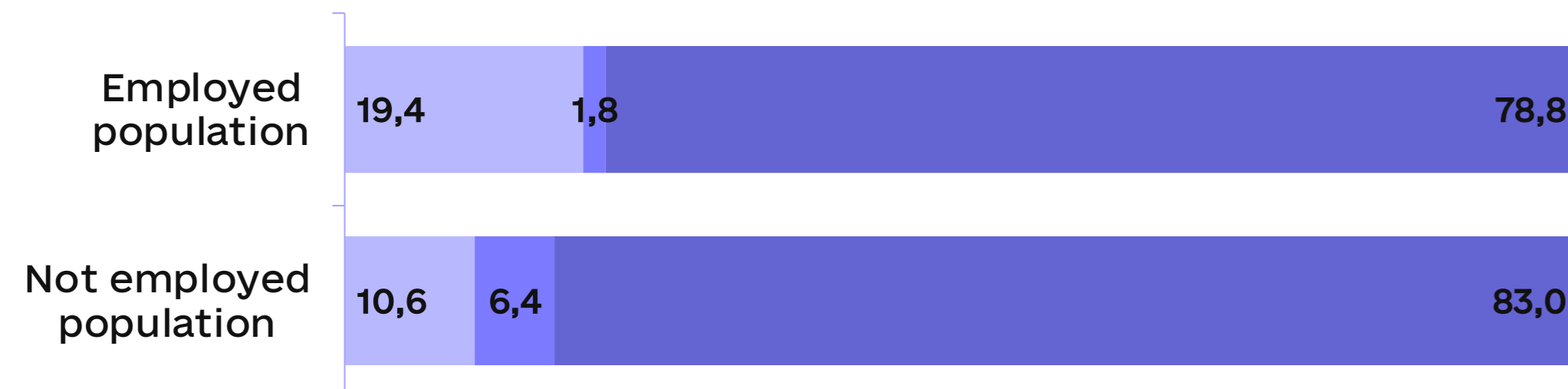
By age



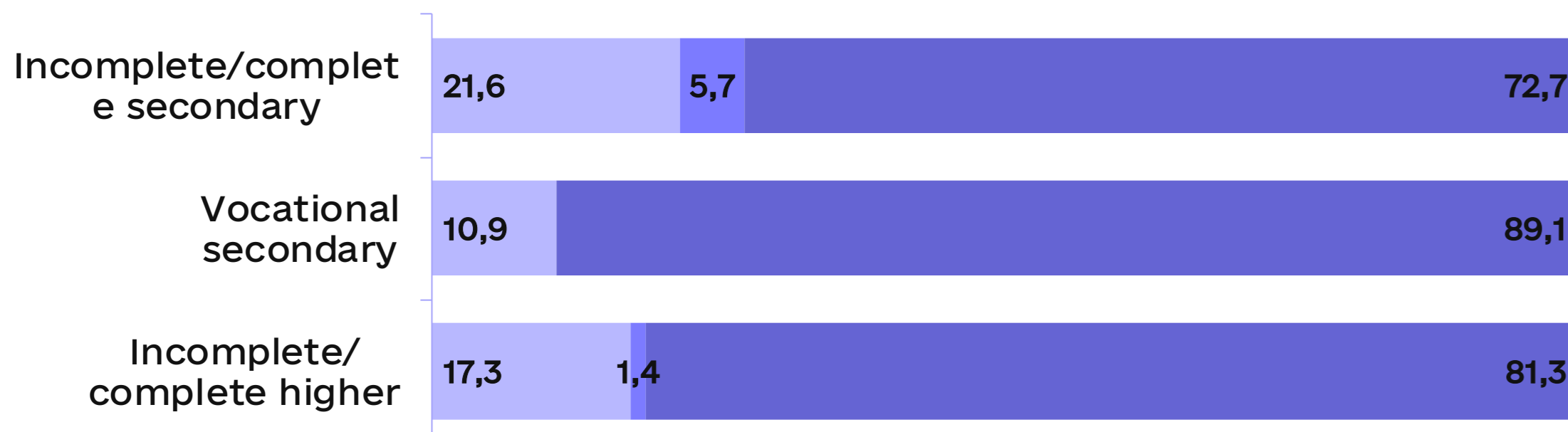
By age



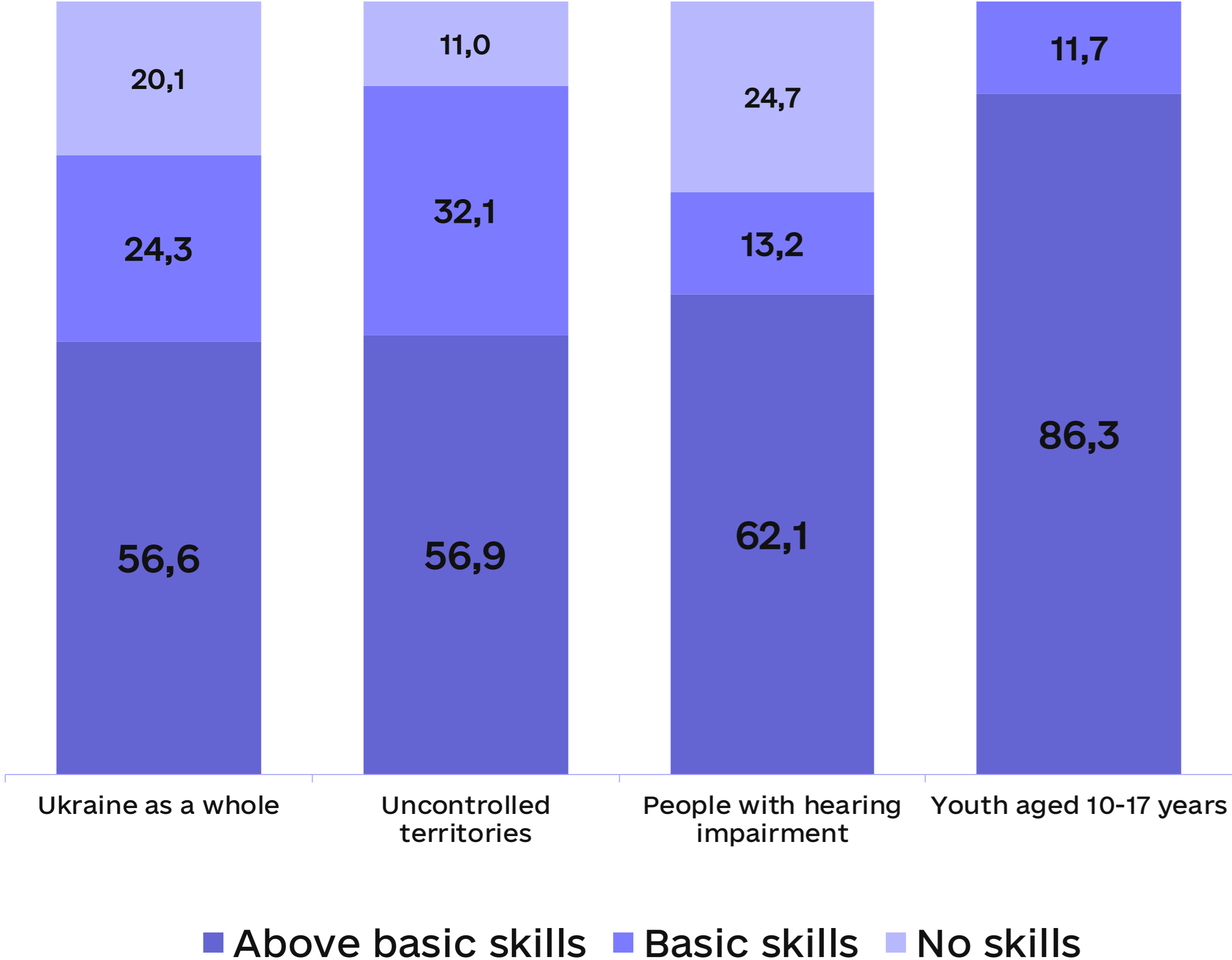
By employment status



By educational level



Problem solving skills

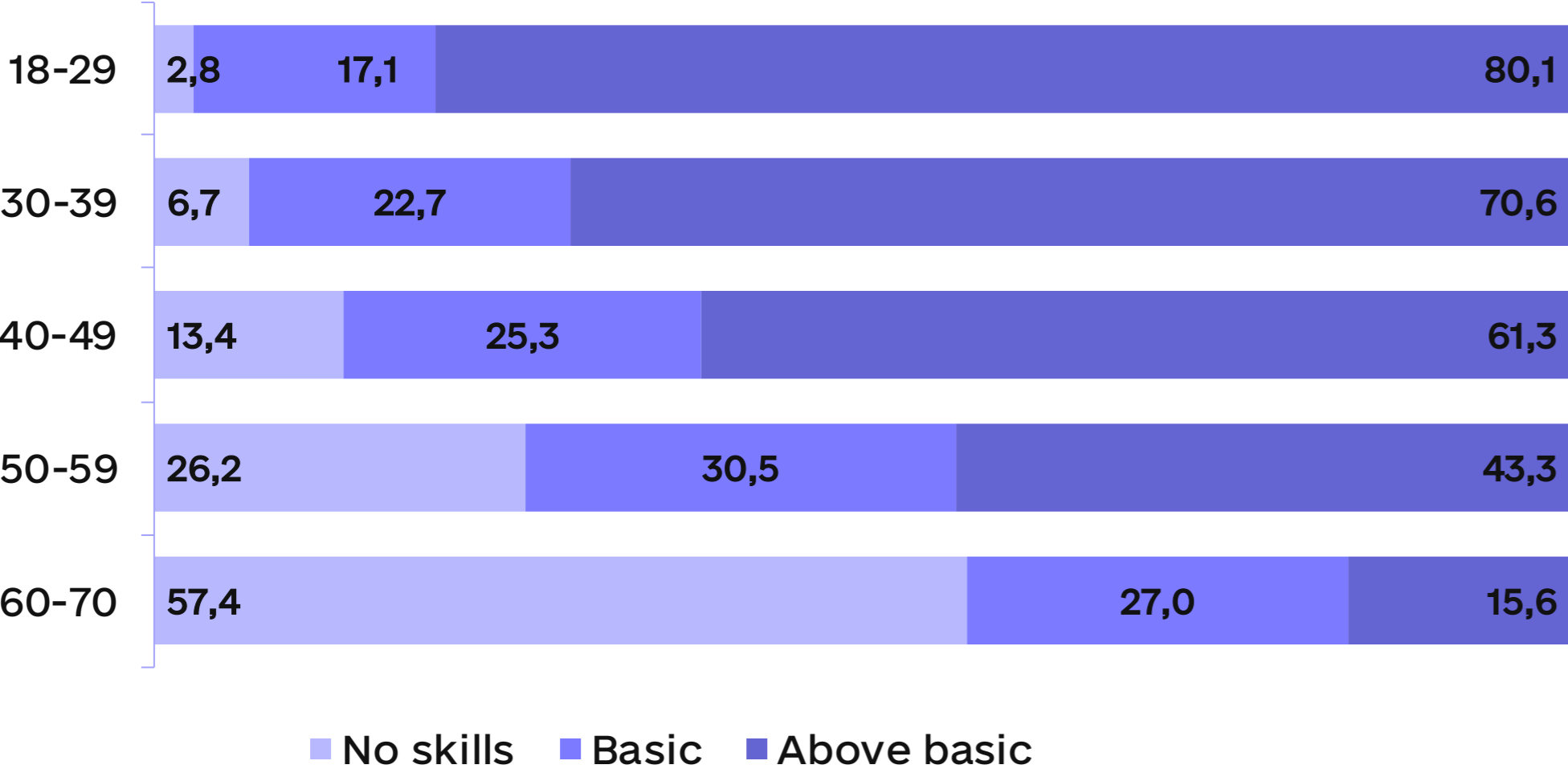


Digital competence definition:
to identify digital needs and resources, make informed decisions about what are the most appropriate digital tools for the purpose or how to solve conceptual problems using digital tools, creatively use technology, solve technical problems, update your own and others' competencies.

- Skills:**
- Online banking (to pay for utilities, mobile phone, card to card money transfer, etc.)
 - To watch video (video streams, concerts, etc.)
 - To buy/sell goods or services online
 - Listen to music (online radio, music streams, etc.)
 - Online learning (including recorded)
 - To complete online courses (including recorded)
To use study material online, in addition to the full online course (e.g., audiovisual materials, online learning software, electronic tools, textbooks.
 - To communicate with teachers or students using educational websites / portals.

Problem solving skills Ukraine as a whole

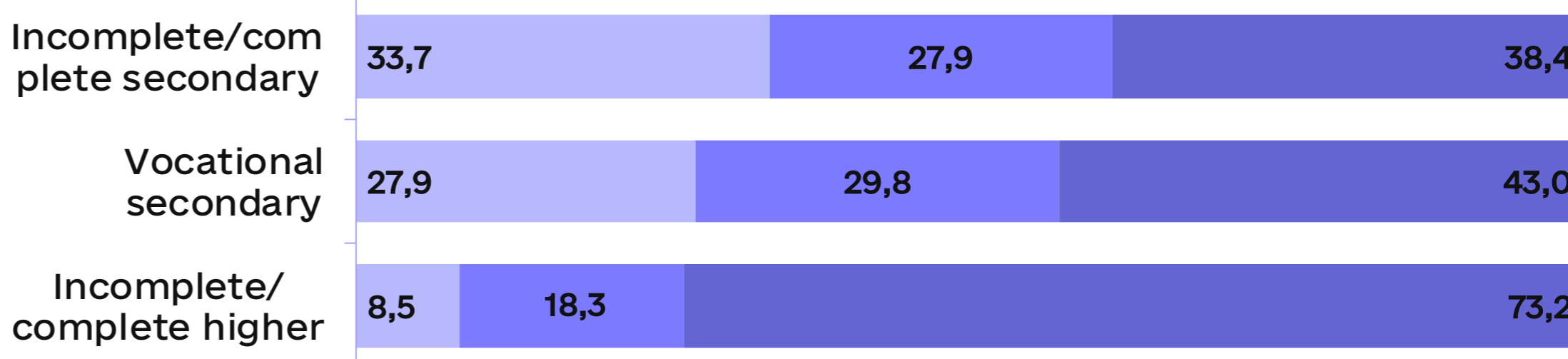
By age



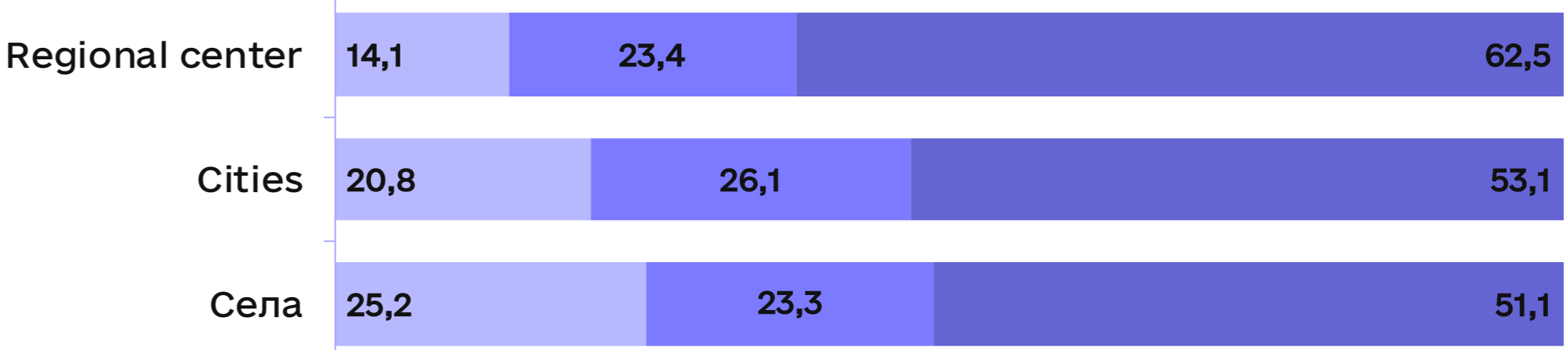
By employment status



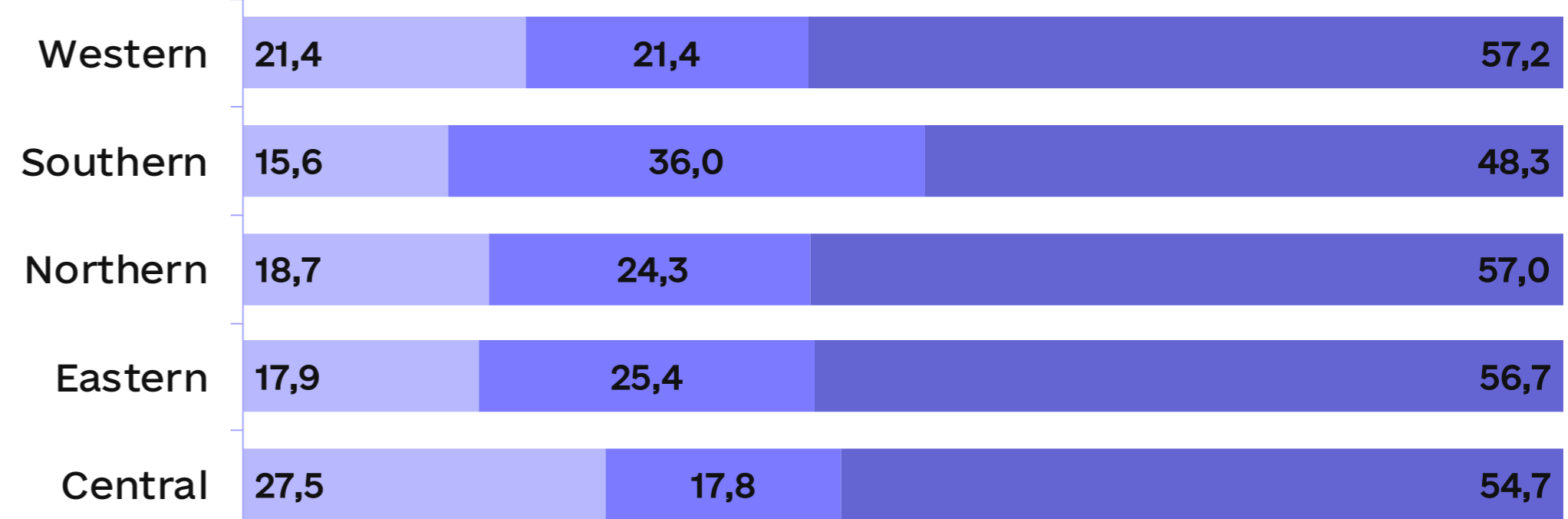
By educational level



By type of area

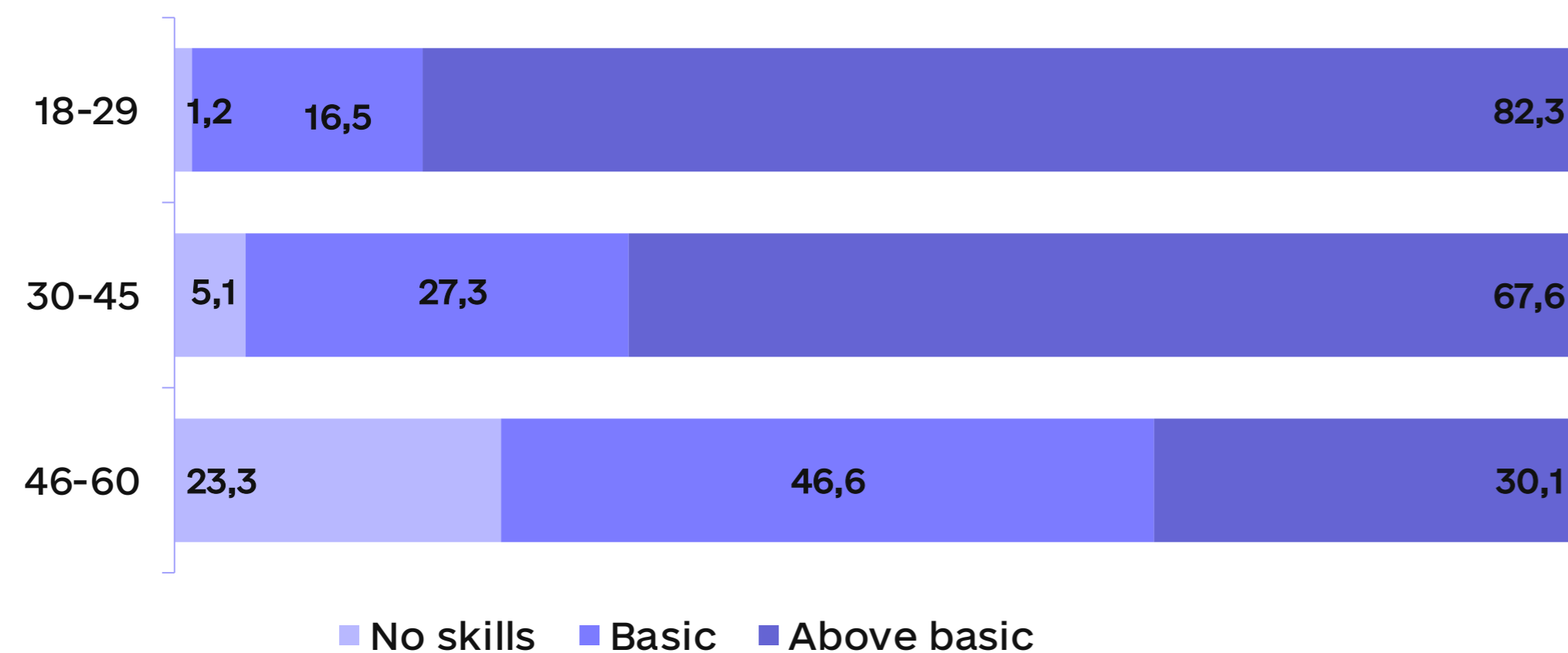


By region

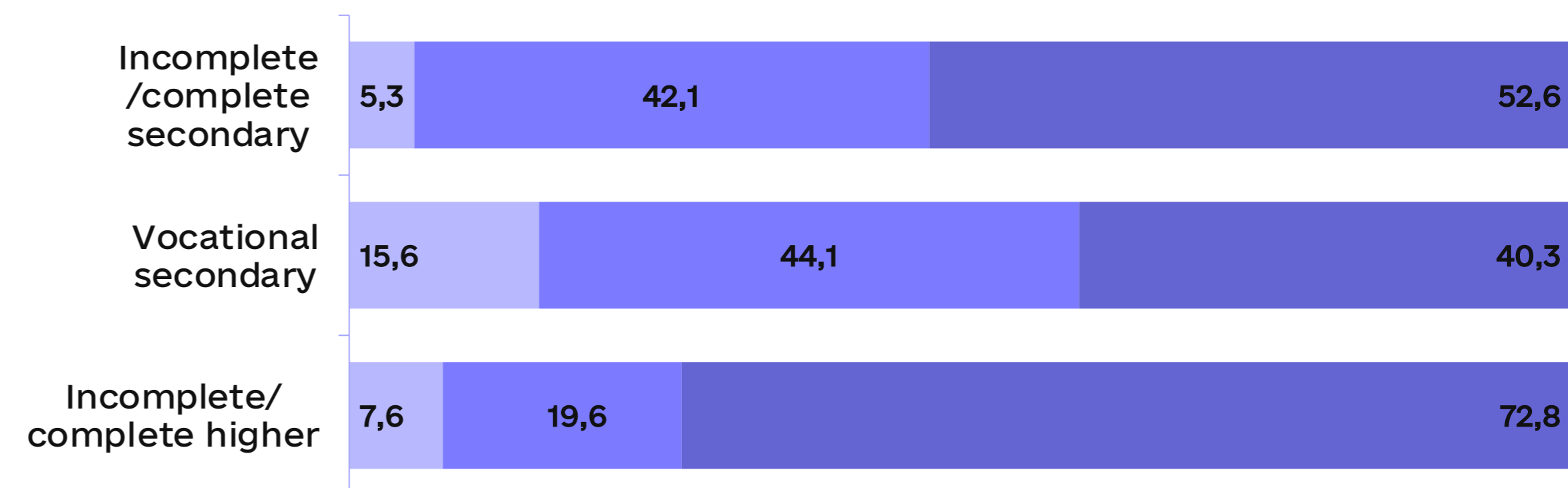


Communication skills Uncontrolled territories 🚧

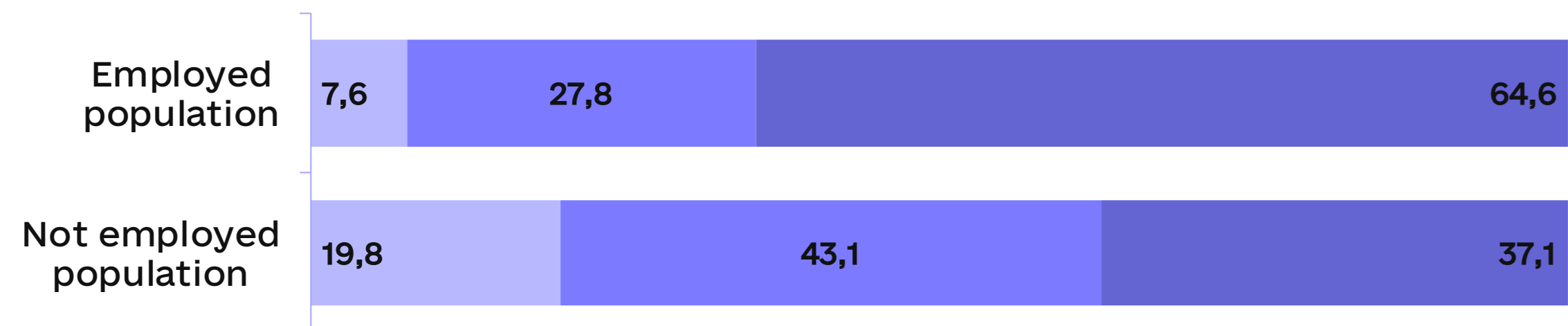
By age



By educational level



By employment status

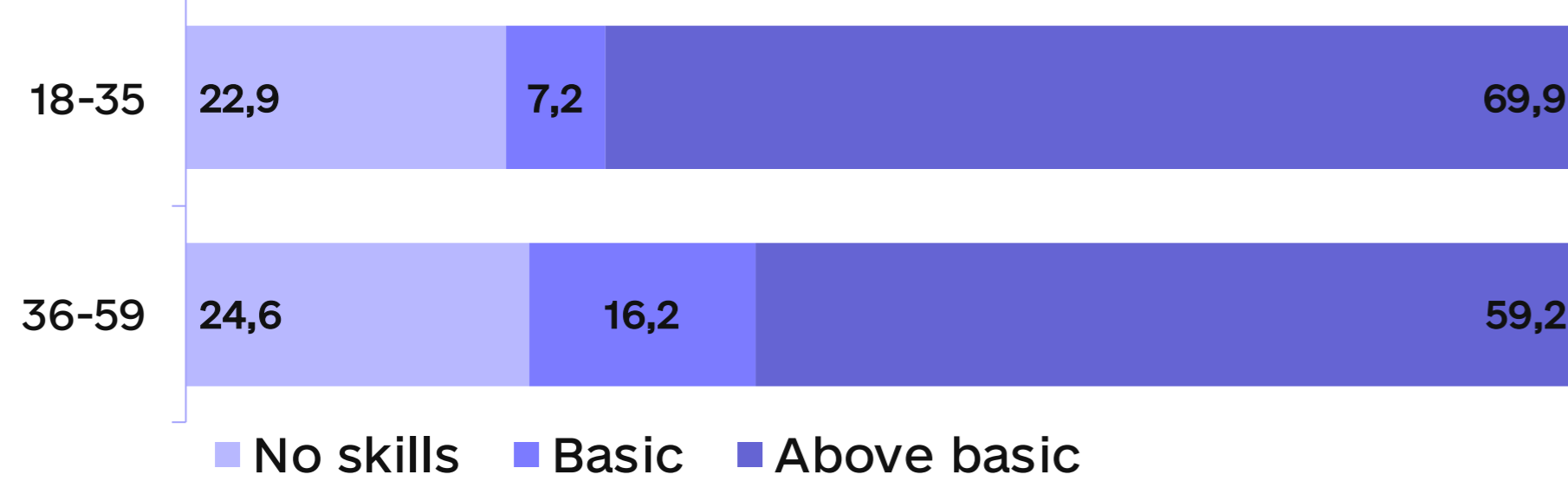


Information skills

People with hearing impairment 🧑🏻‍🦻

Youth aged 10–17 years 🧑🏻

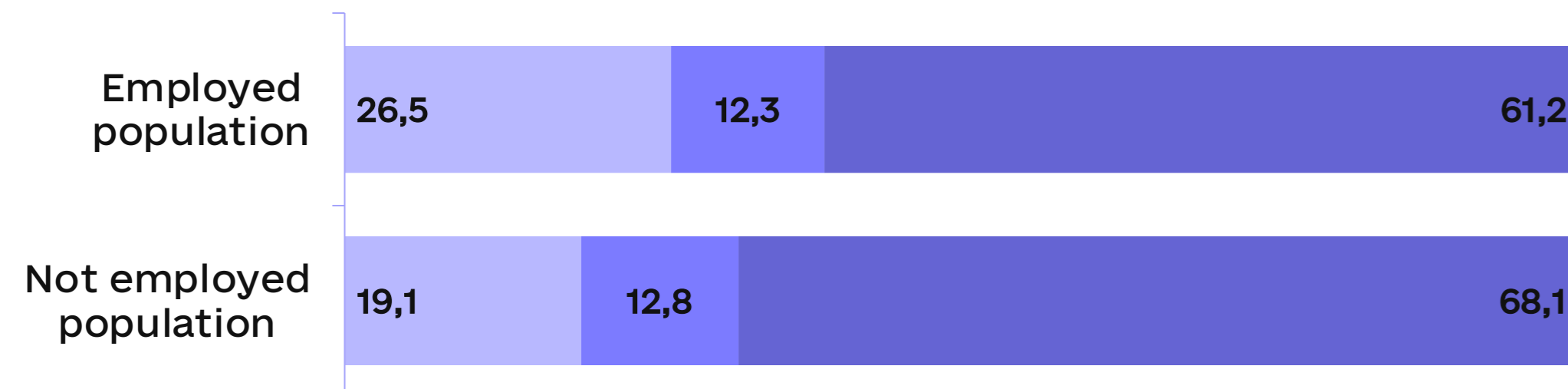
By age



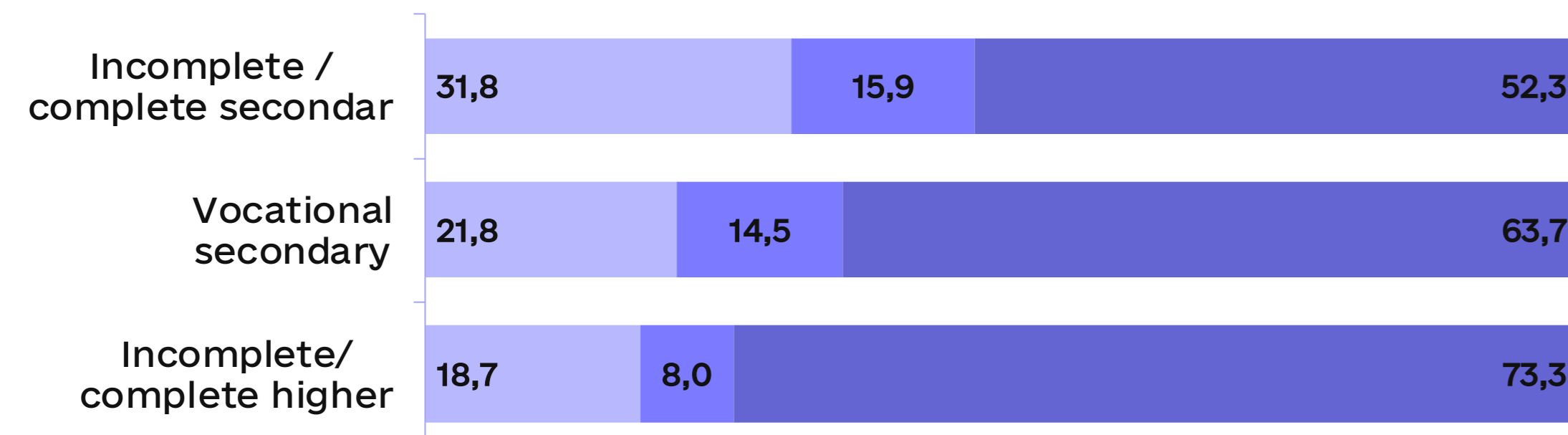
By age



By employment level



By educational level



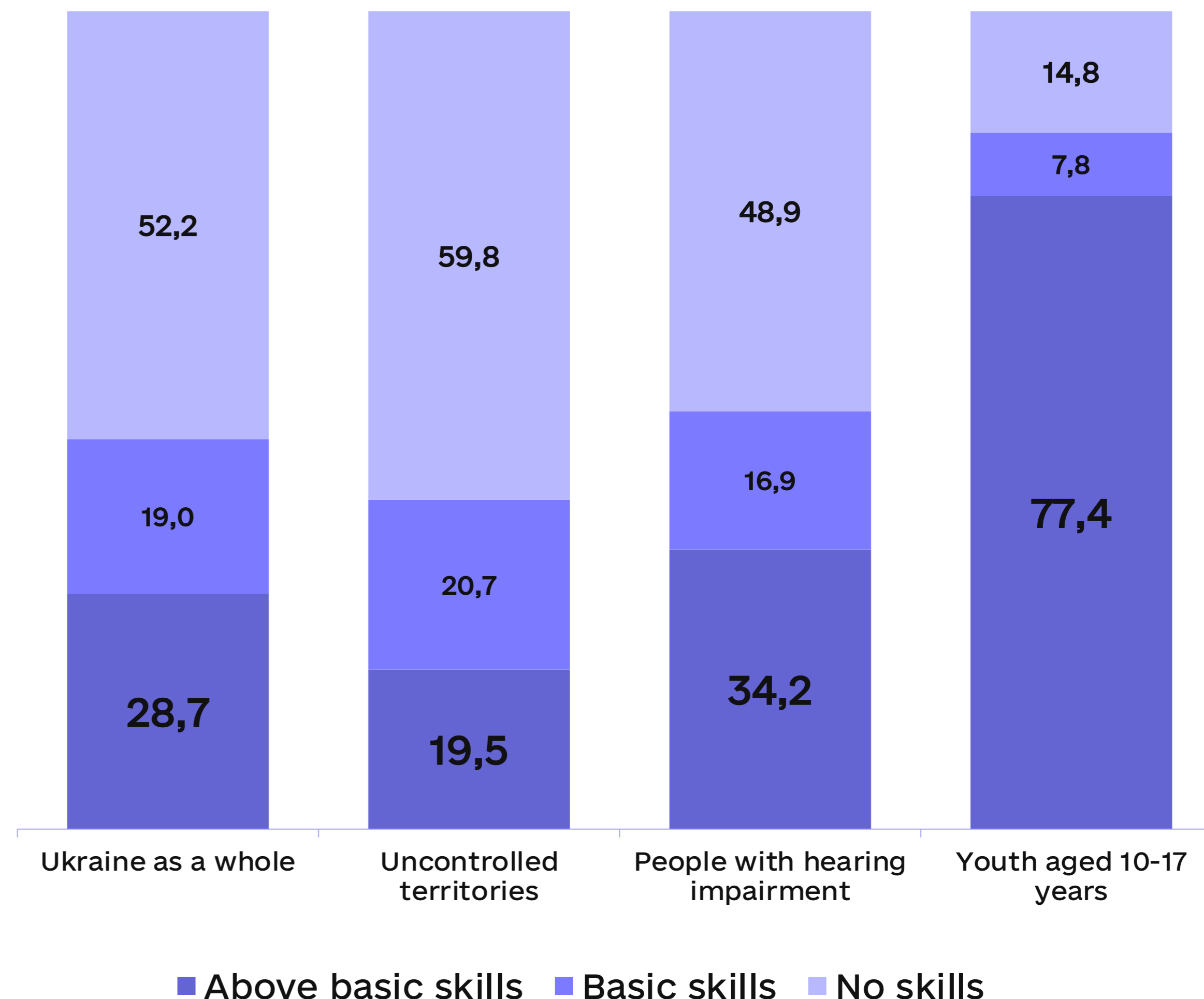
Software skills for content manipulation

Digital competence definition:

to create and edit new content (from word to images and videos processing); to integrate and modify prior knowledge and content; to make creative expressions, mass media and programming software; to deal with and use intellectual property rights and licenses.

Skills:

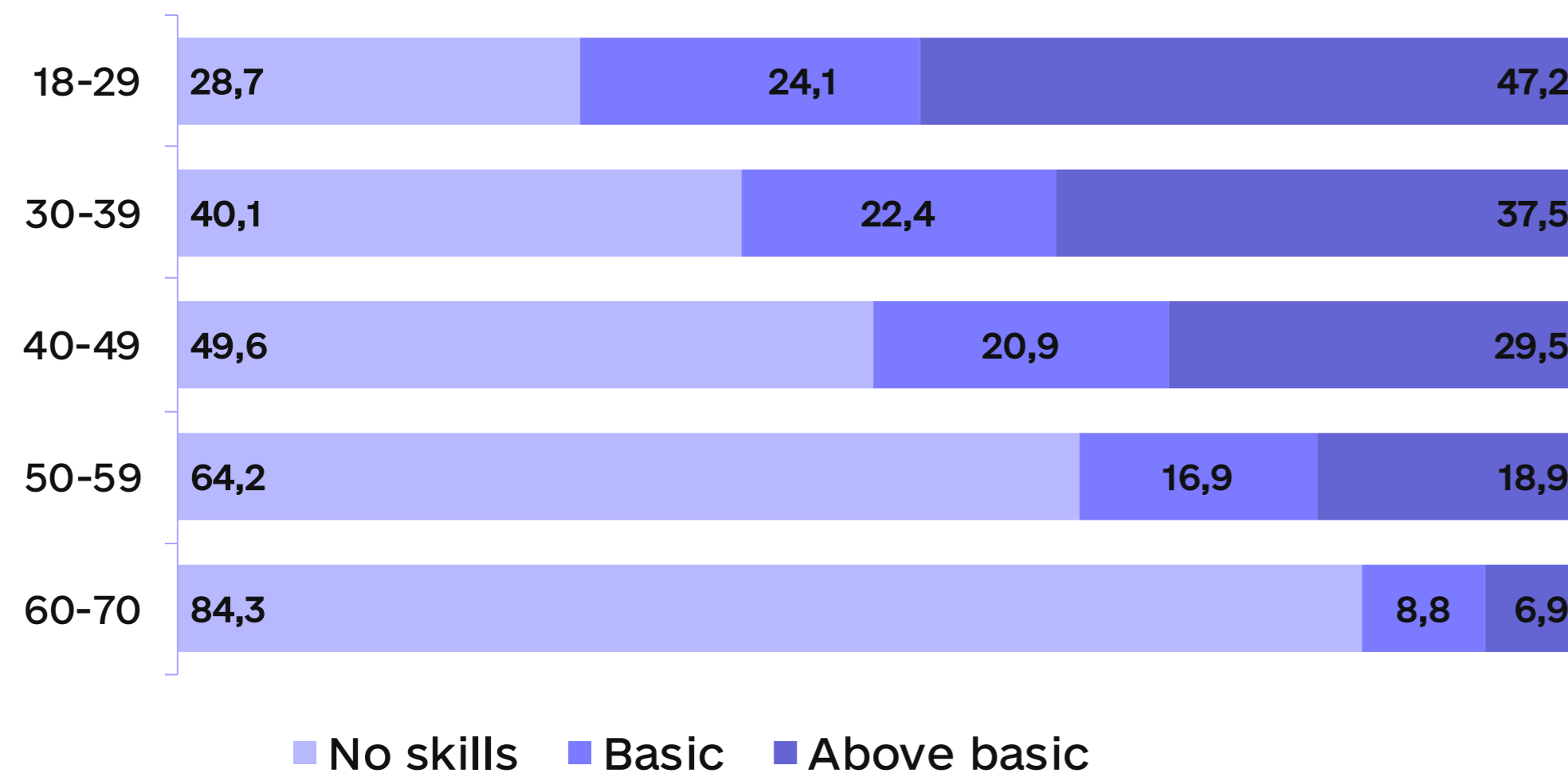
- To use photo, video or audio editing software
- To use software for work with texts (Word)
- To use data management software (Excel)
- To use advanced functions for organizing and analyzing data such as sorting, filtering, using formulas, creating diagrams
- To write a code in the programming language
- To create presentations or documents that integrate text, drawings, tables or diagrams



Software skills for content manipulation

Ukraine as a whole 🇺🇦

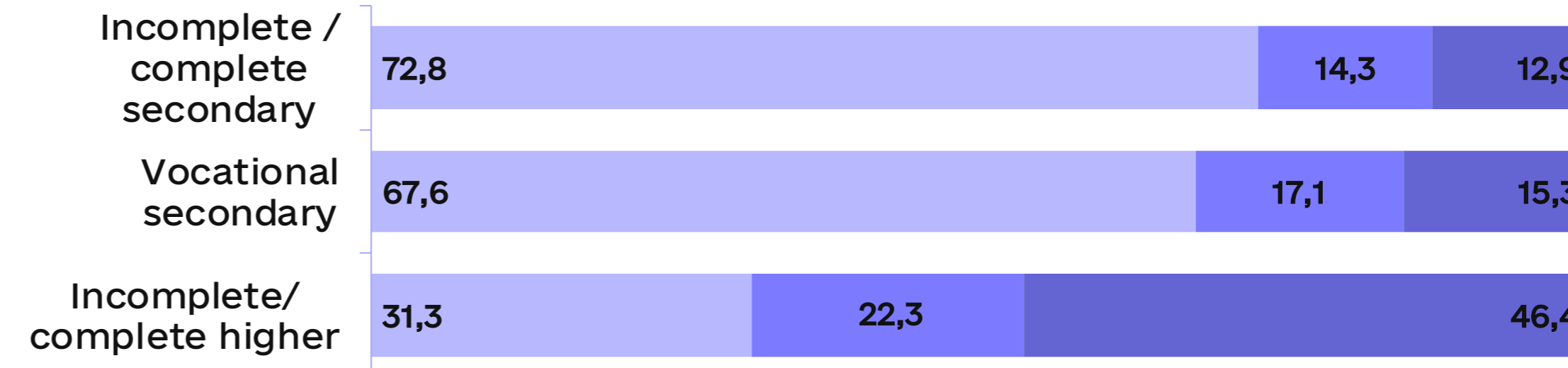
By age



By employment status



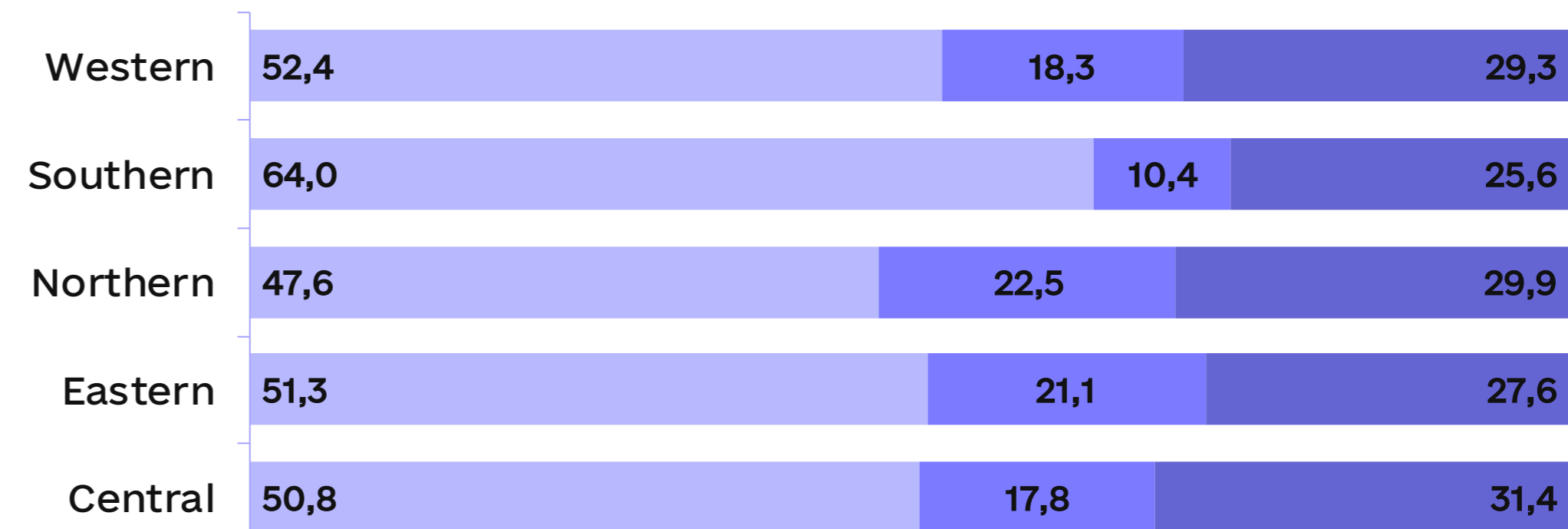
By educational level



By type of area



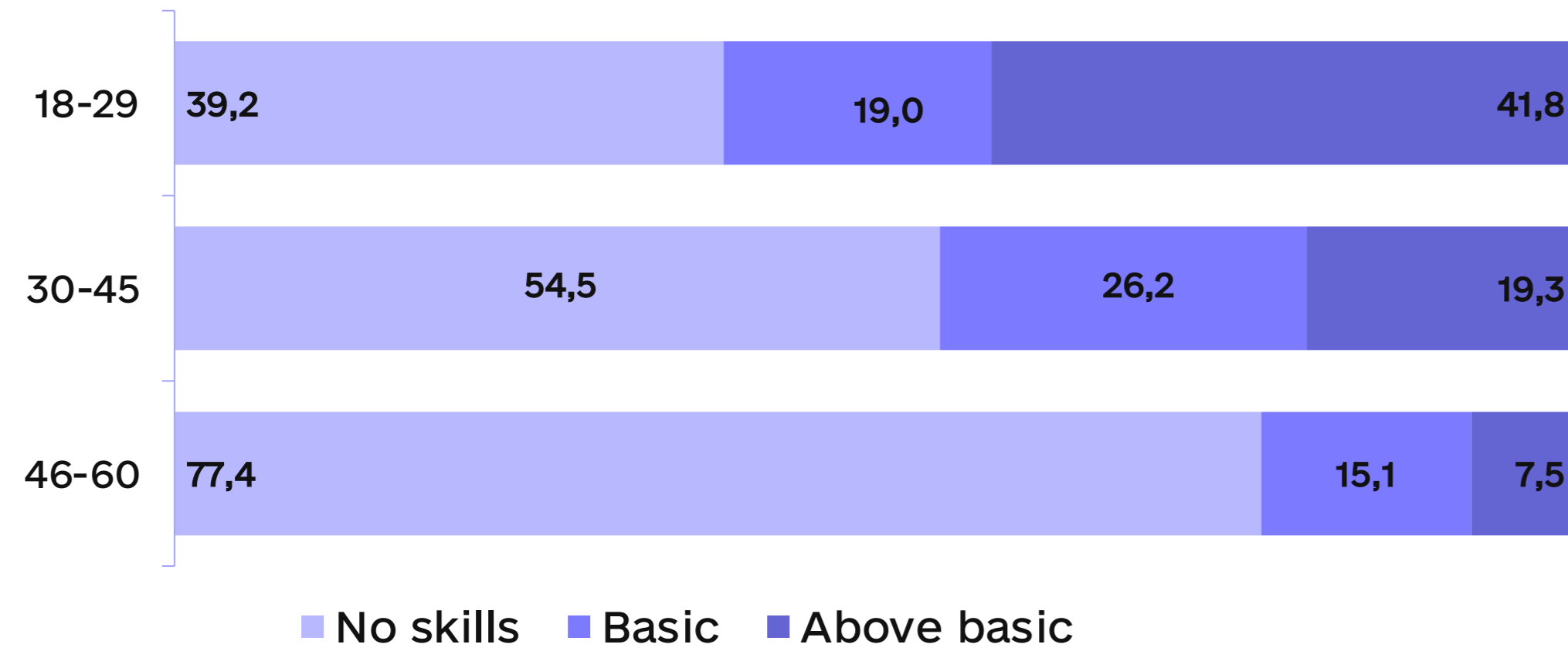
By region



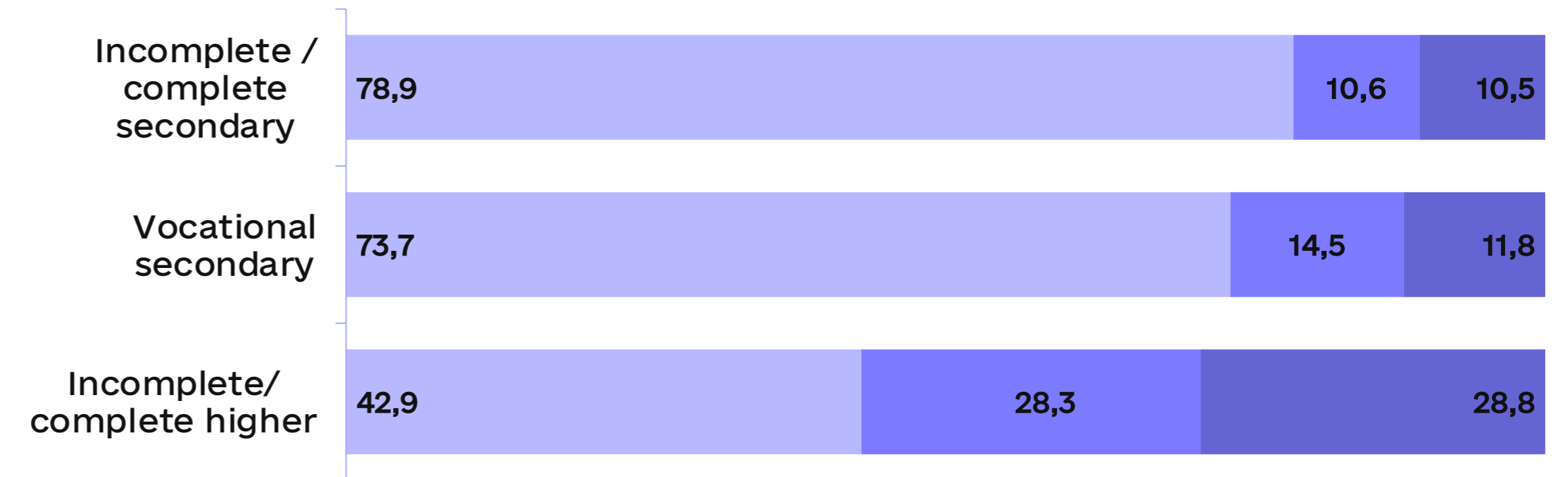
Software skills for content manipulation

Uncontrolled territories 🚧

By age



By educational level



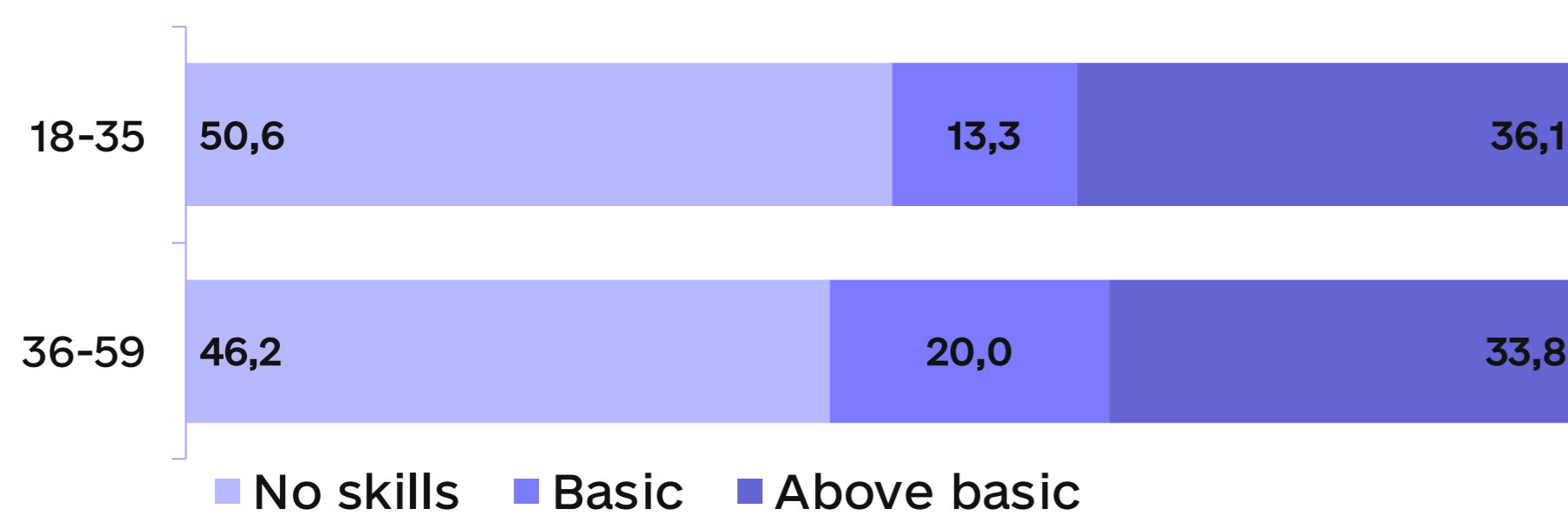
By employment status



Software skills for content manipulation People with hearing impairment 🧑🏻‍🦻

Youth aged 10–17 years 🧑🏻

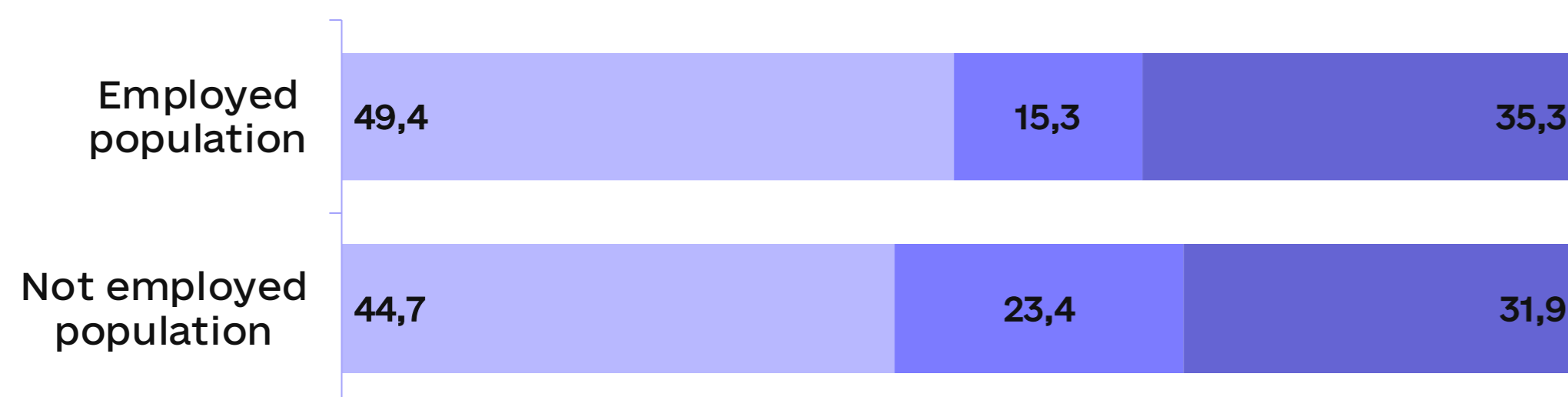
By age



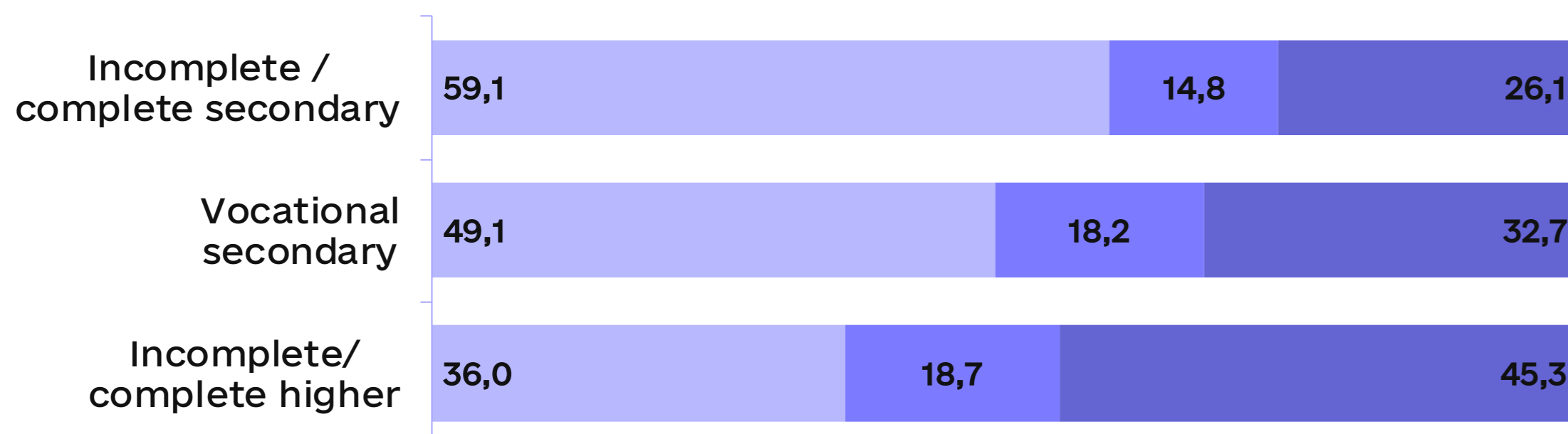
By age



By employment status

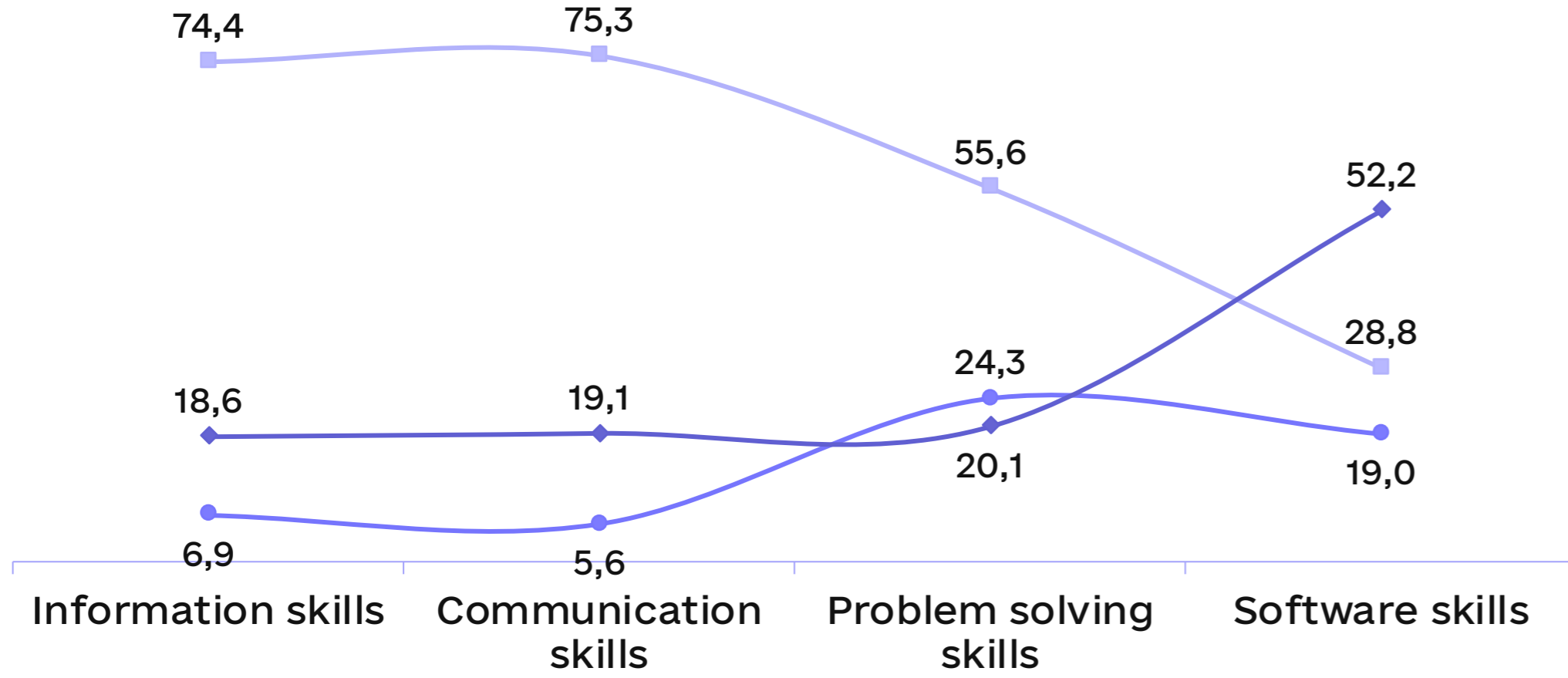


By educational level

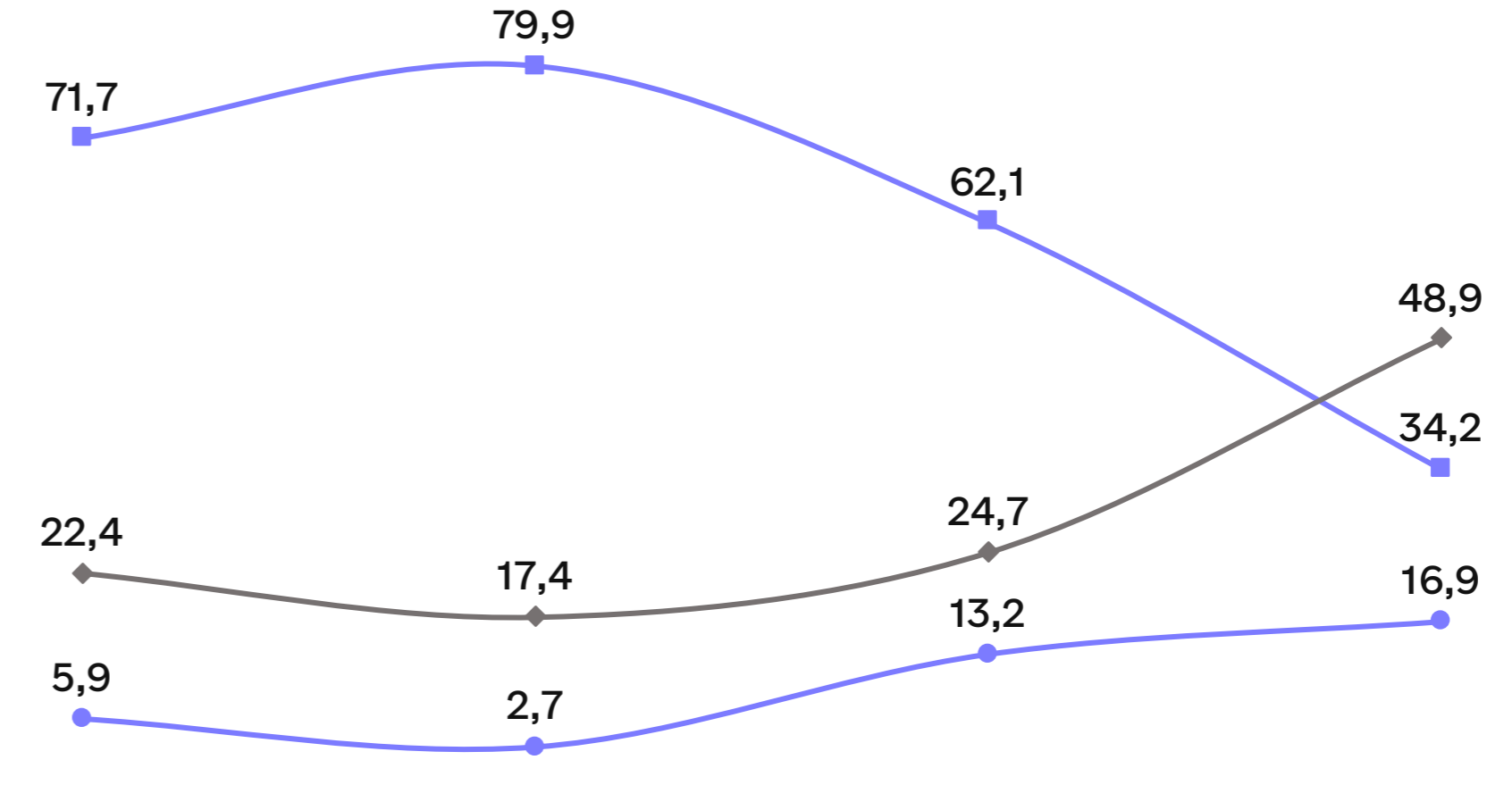


Level of digital skills

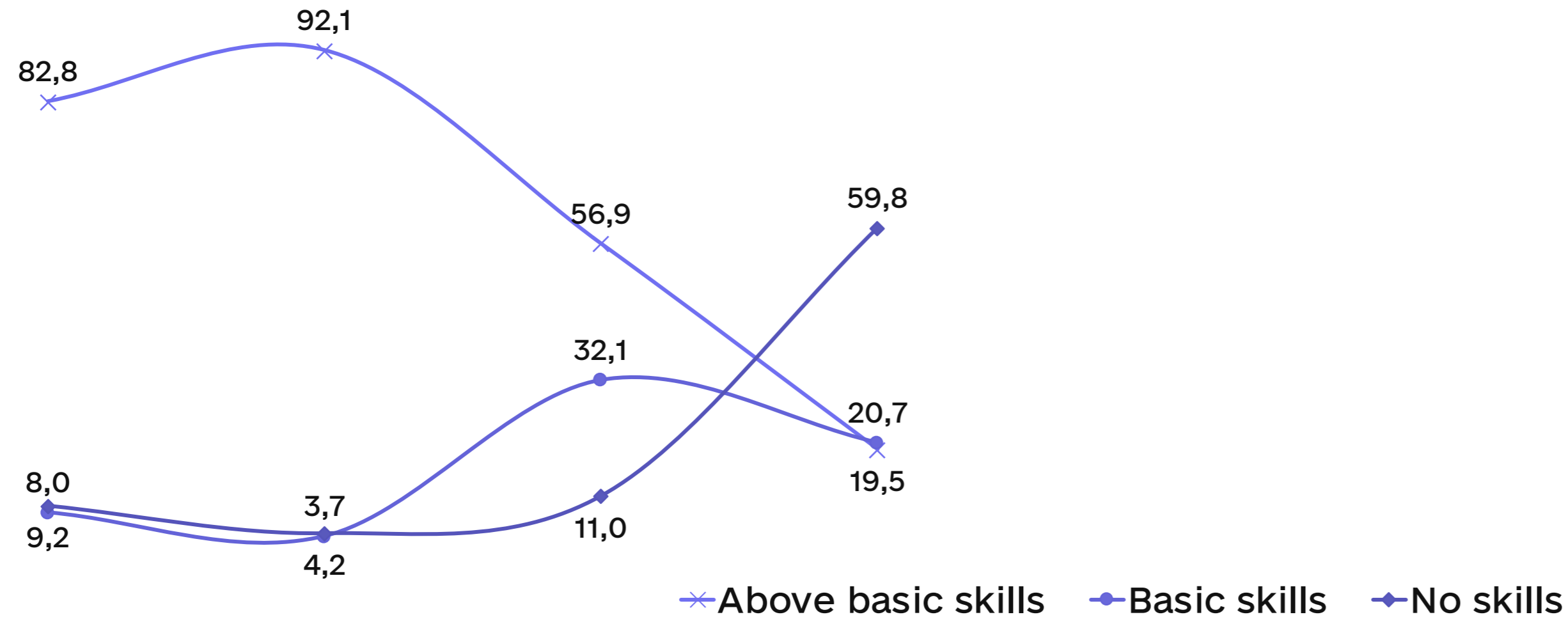
 Ukraine in a whole



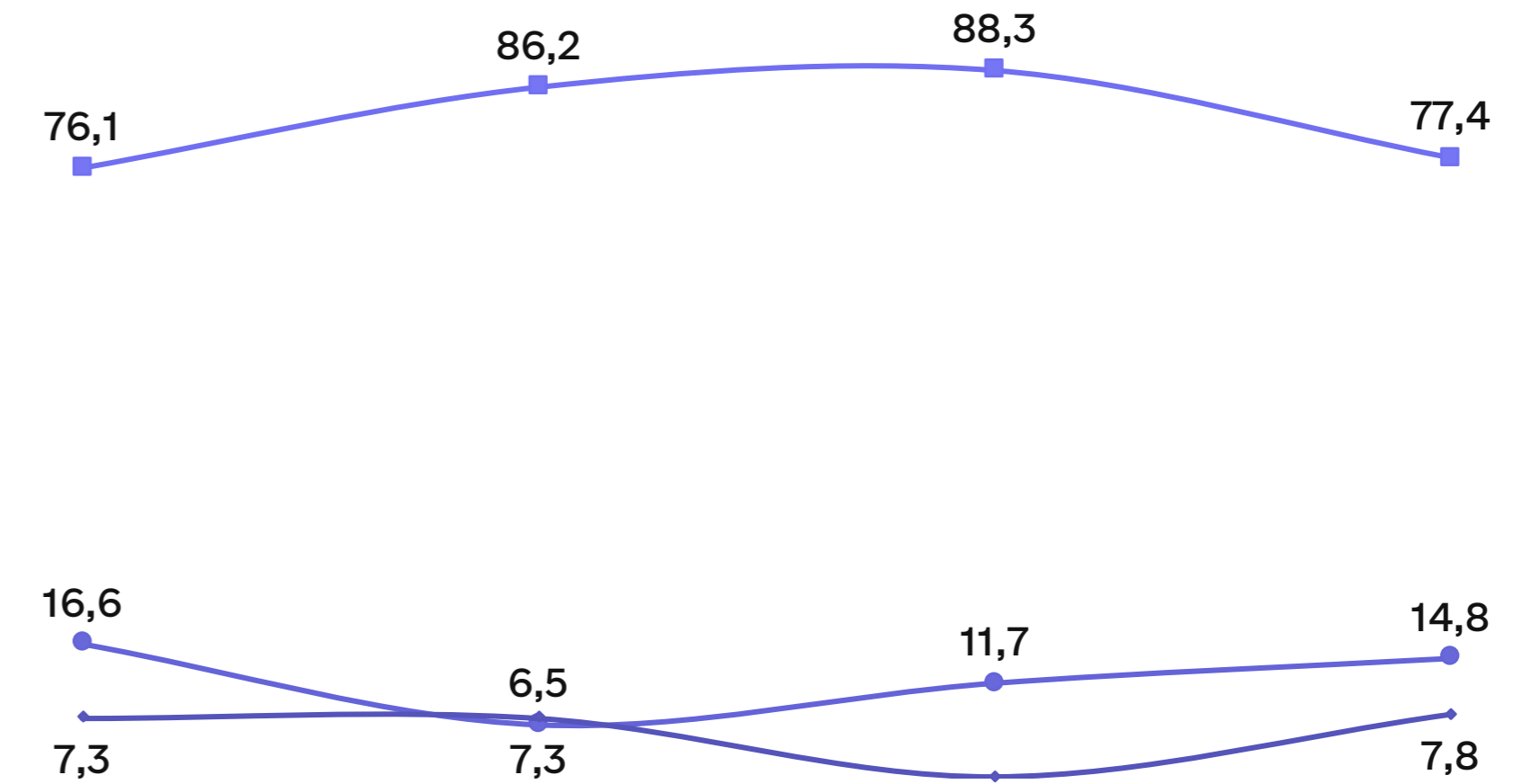
 People with hearing impairment



 Uncontrolled territories



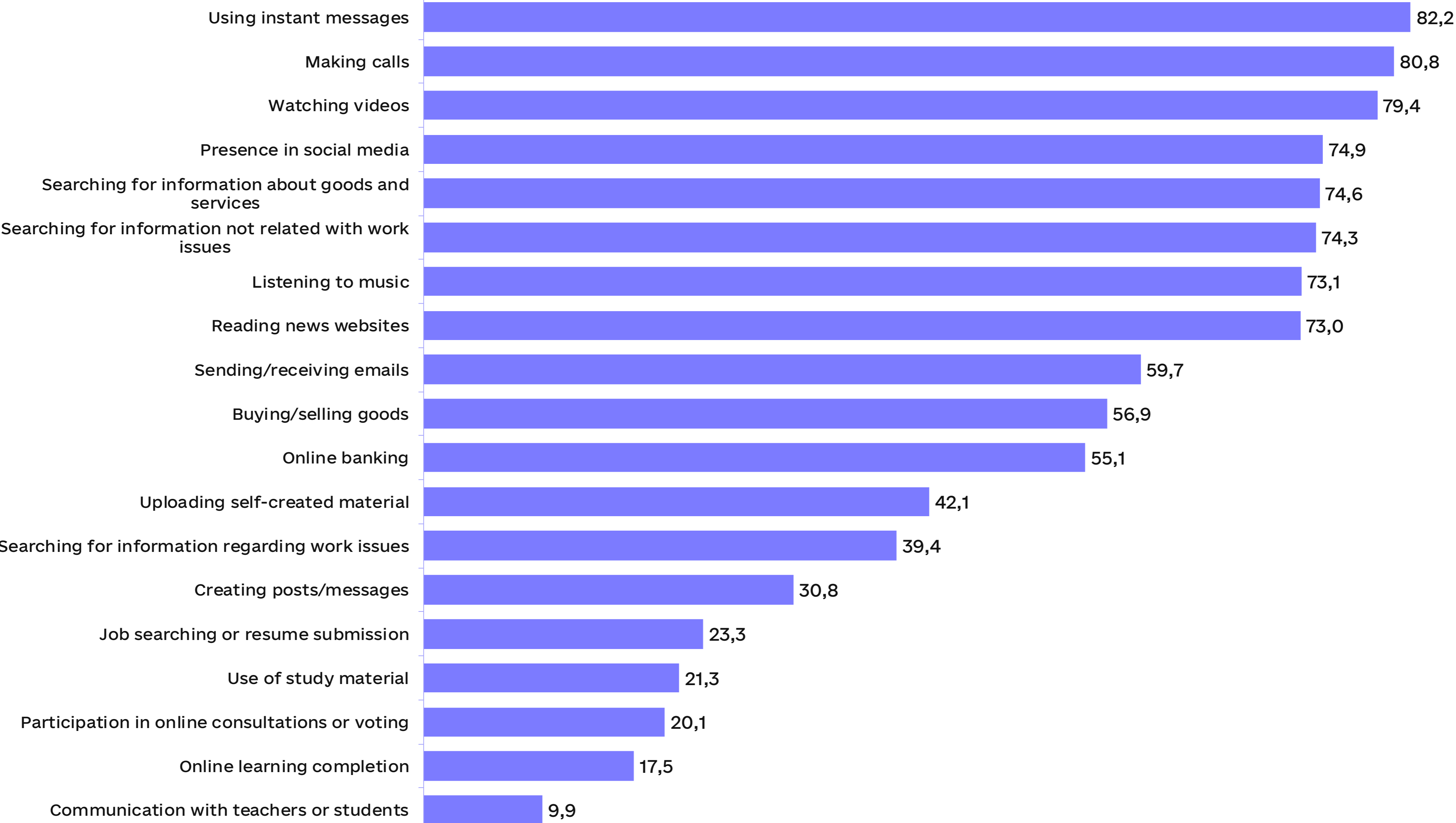
 Youth aged 10-17 years



✖ Above basic skills ● Basic skills ◆ No skills

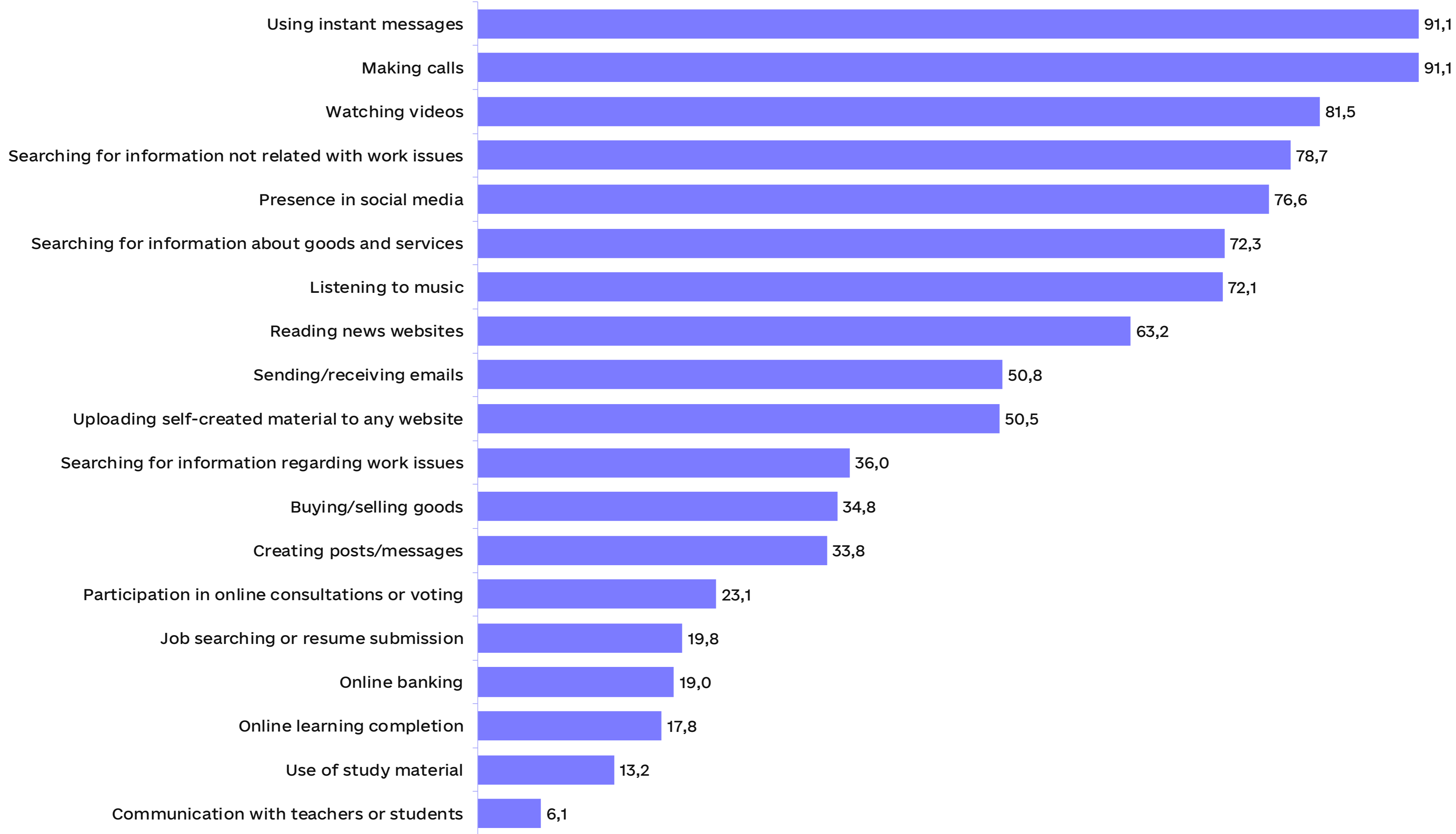
Internet use for the last 3 months

Ukraine as a whole 🇺🇦



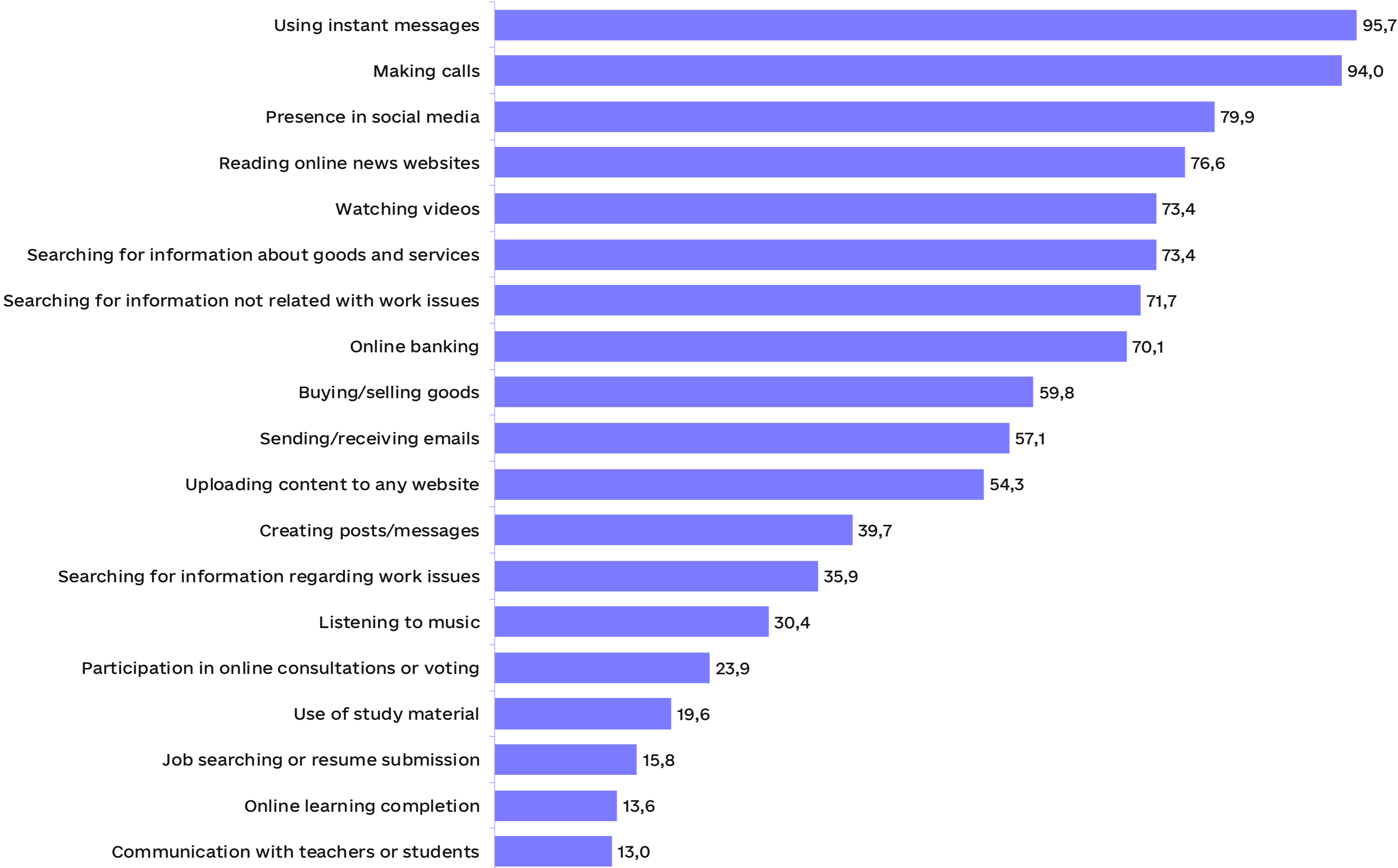
Internet use for the last 3 months

Uncontrolled territories



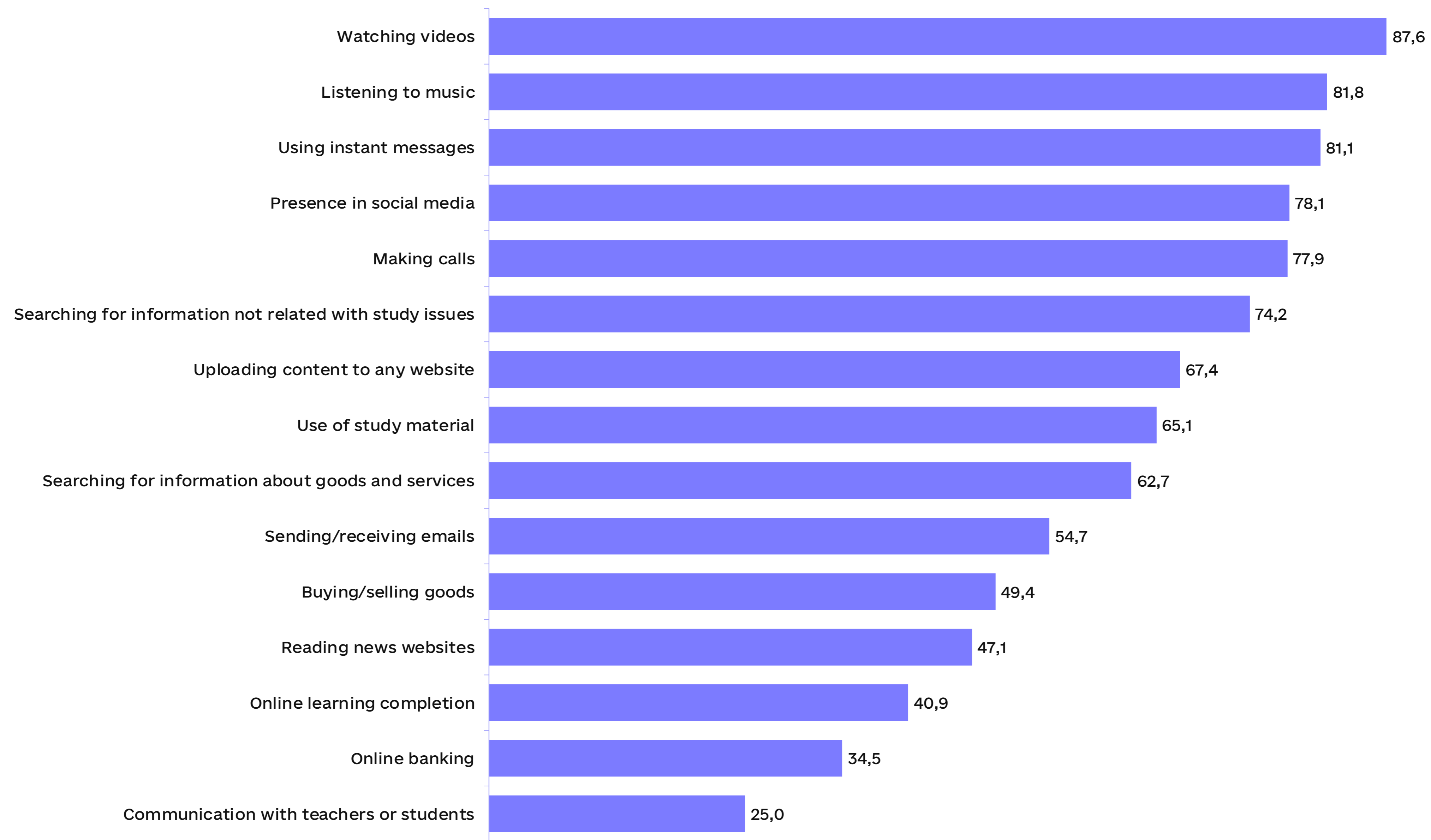
Internet use for the last 3 months

People with hearing impairment



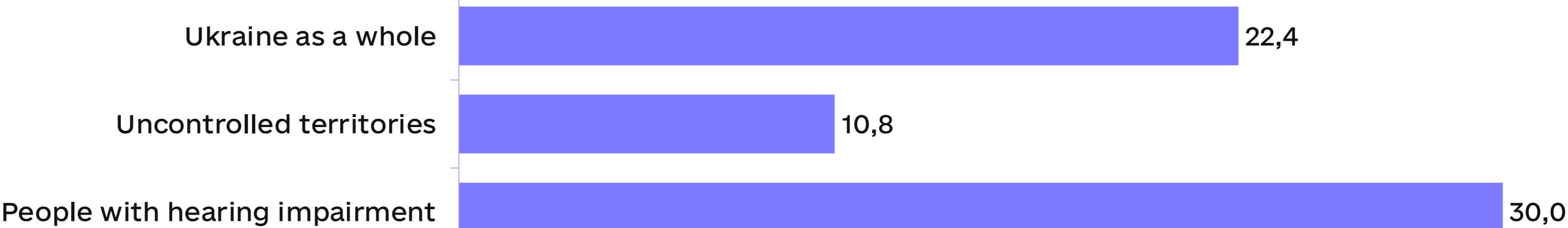
Internet use for the last 3 months

Youth aged 10–17 years 🧑

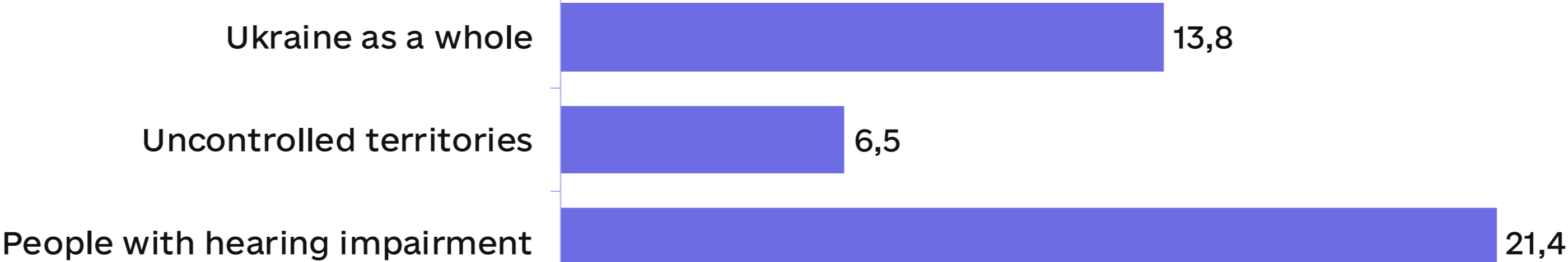


Contacting public authorities / state services via the Internet for the last 12 months

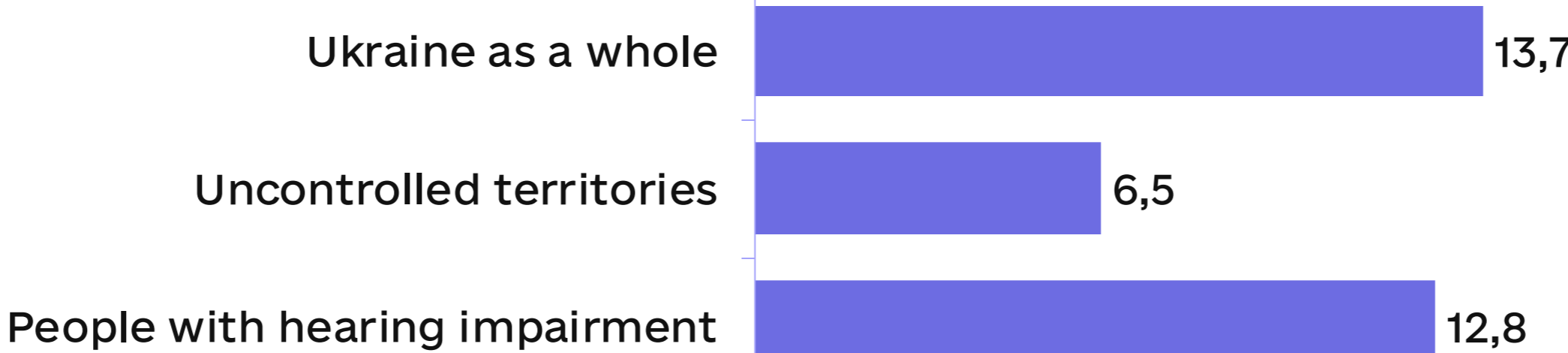
Getting information from the websites or apps



Online submission of completed forms



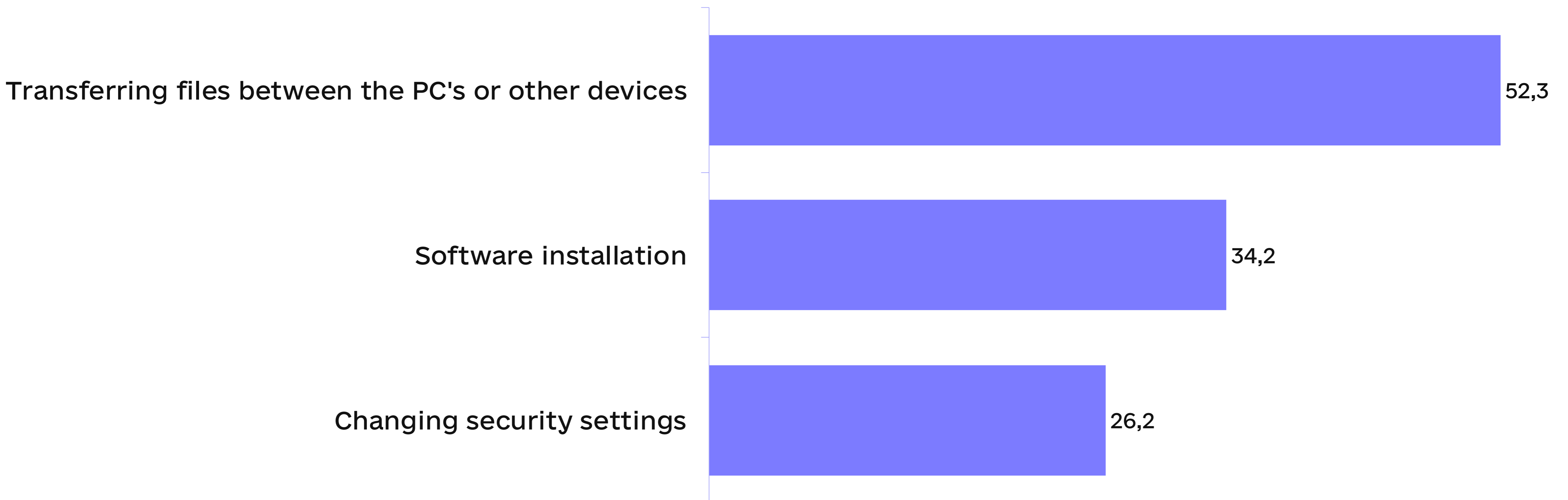
Downloading or printing official forms



Which of the following have you done for the last 12 months?

 **Ukraine as a whole**

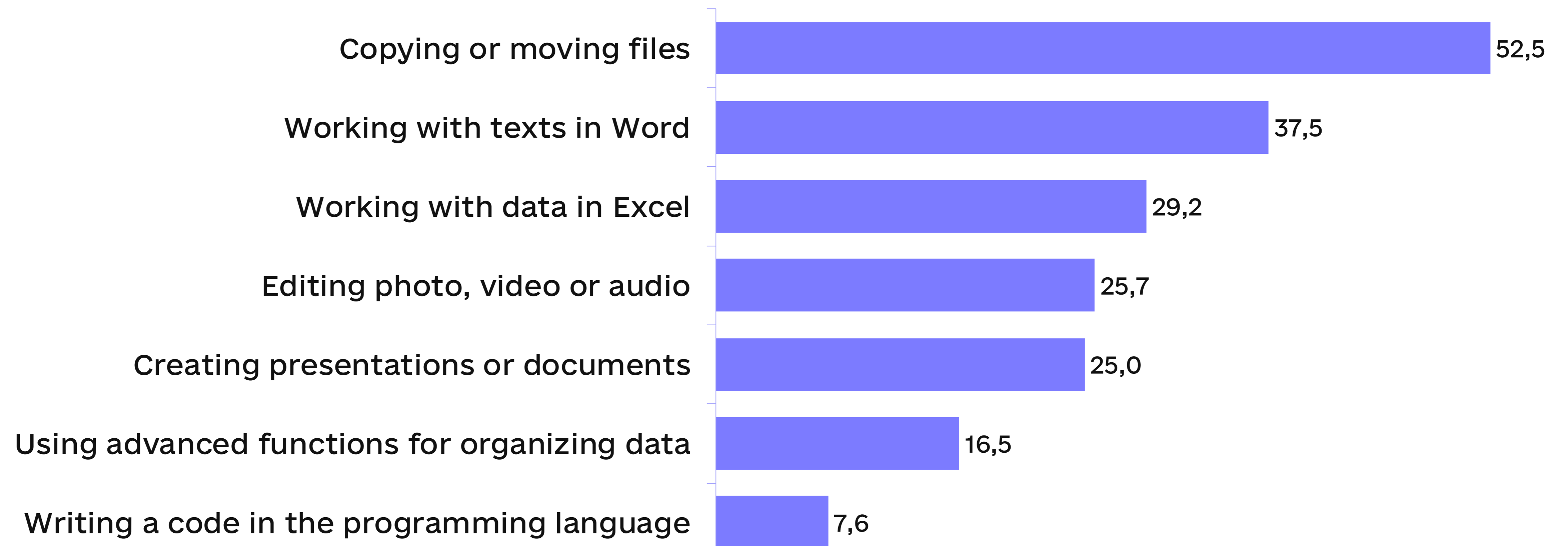
Related to the PC or mobile phone



Which of the following have you done for the last 12 months?

 **Ukraine as a whole**

Related to software

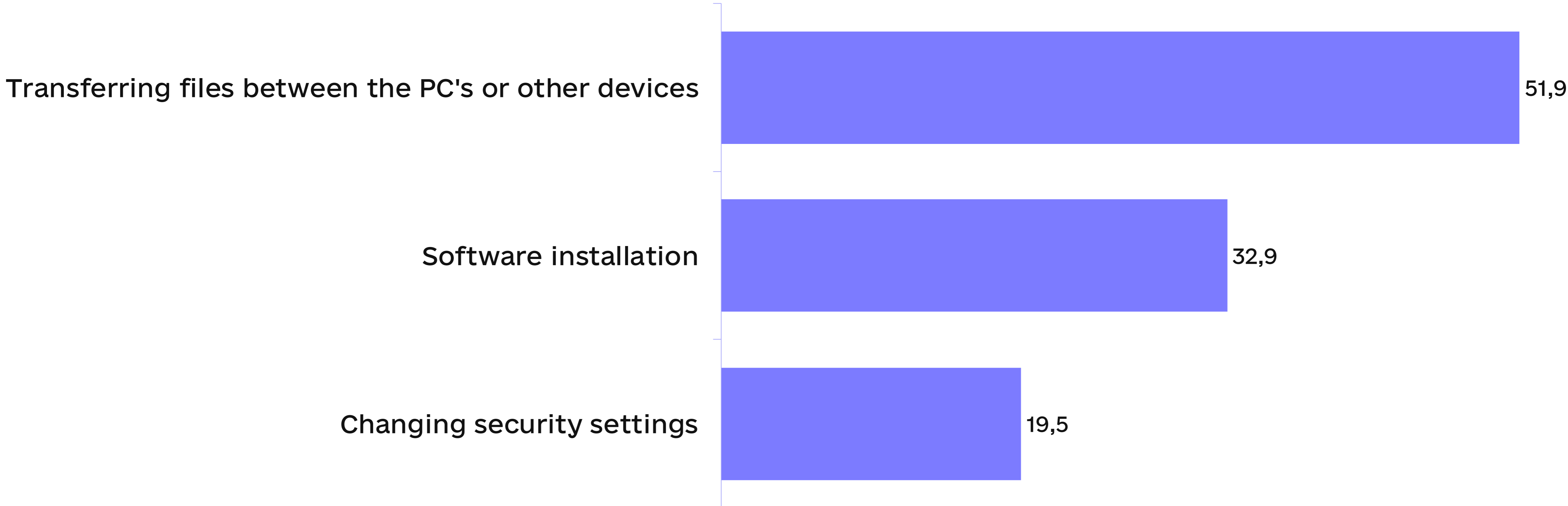


Which of the following have you done for the last 12 months?



Uncontrolled territories

Related to the PC or mobile phone



Which of the following have you done for the last 12 months?



Uncontrolled territories

Related to software

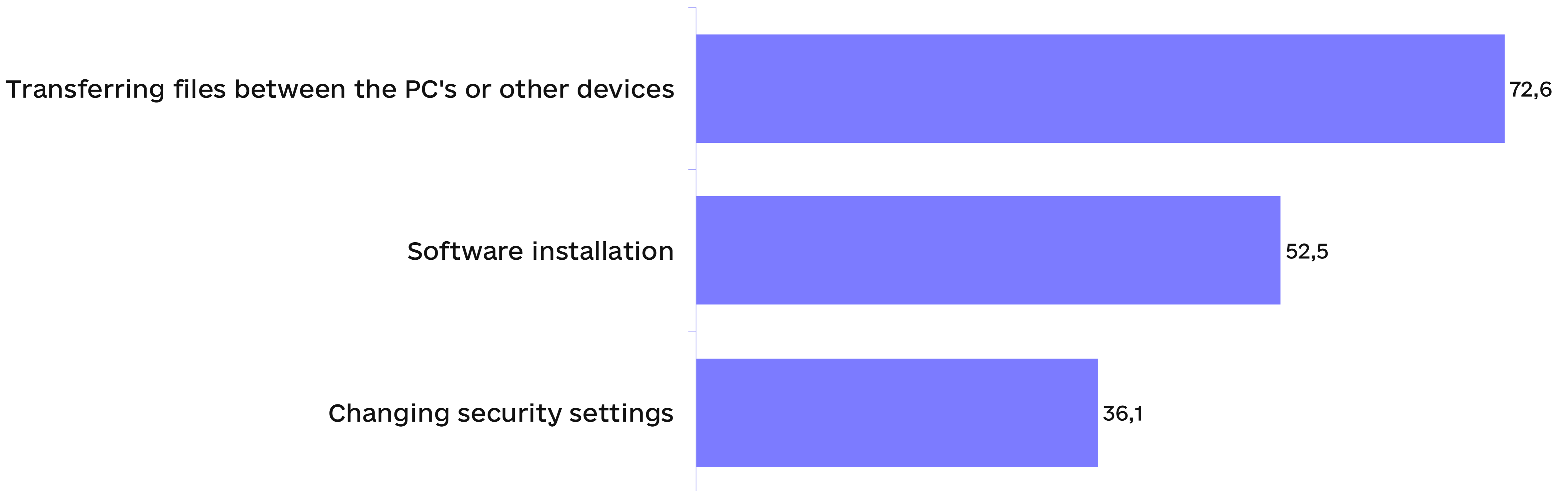


Which of the following have you done for the last 12 months?



People with hearing impairment

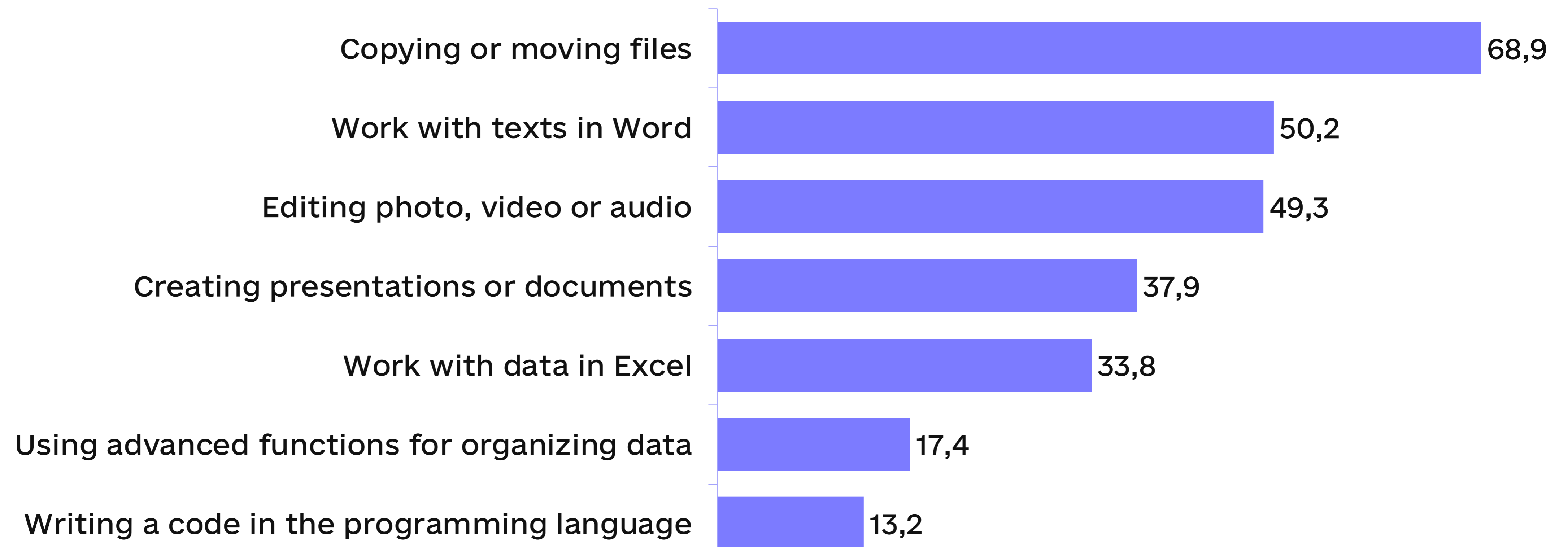
Related to the PC or mobile phone



Which of the following have you done for the last 12 months?

 **People with hearing impairment**

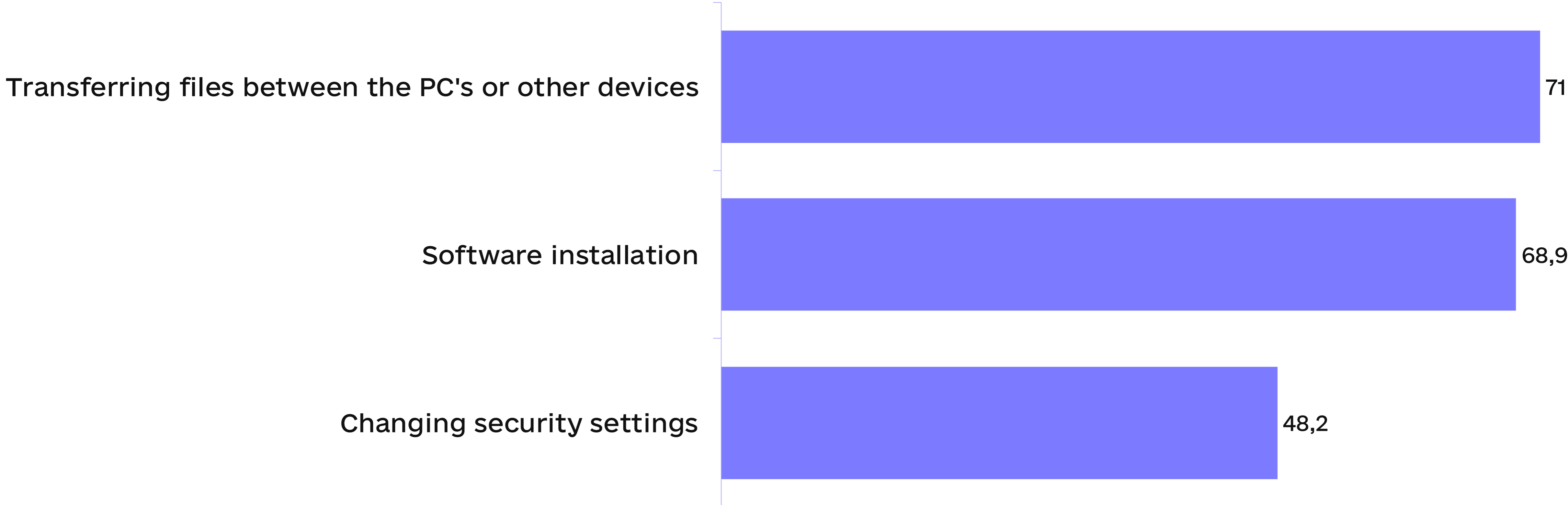
Related to software



Which of the following have you done for the last 12 months?

 Youth aged 10–17 years

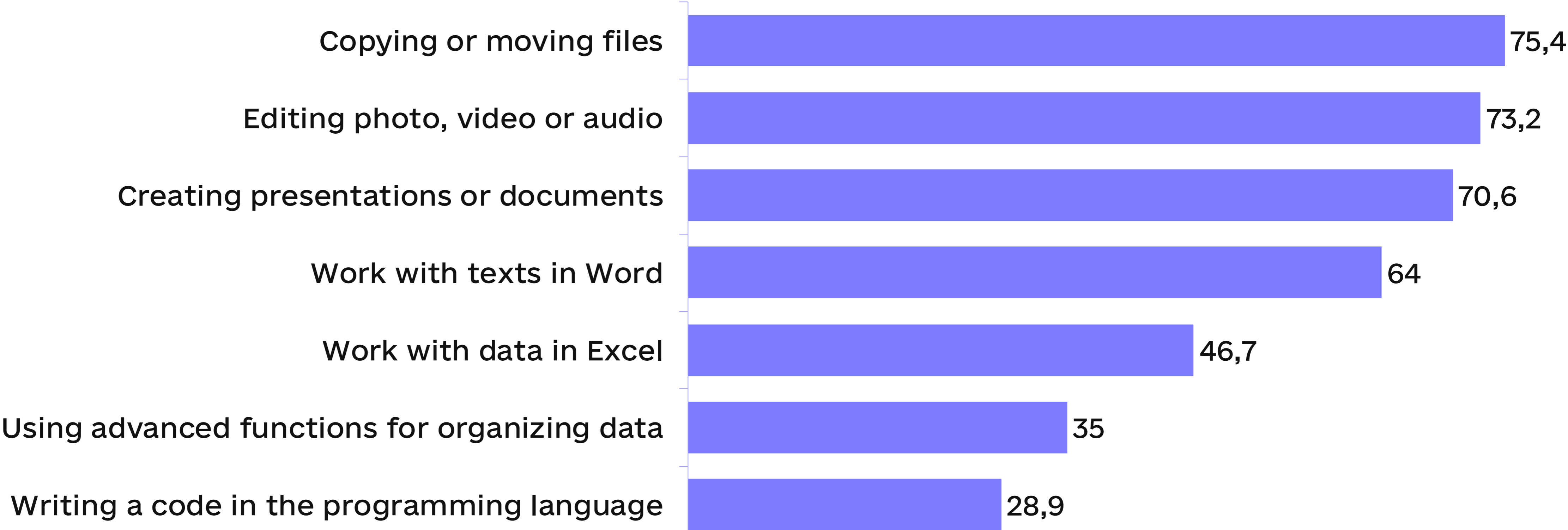
Related to the PC or mobile phone



Which of the following have you done for the last 12 months?

 Youth aged 10–17 years

Related to software

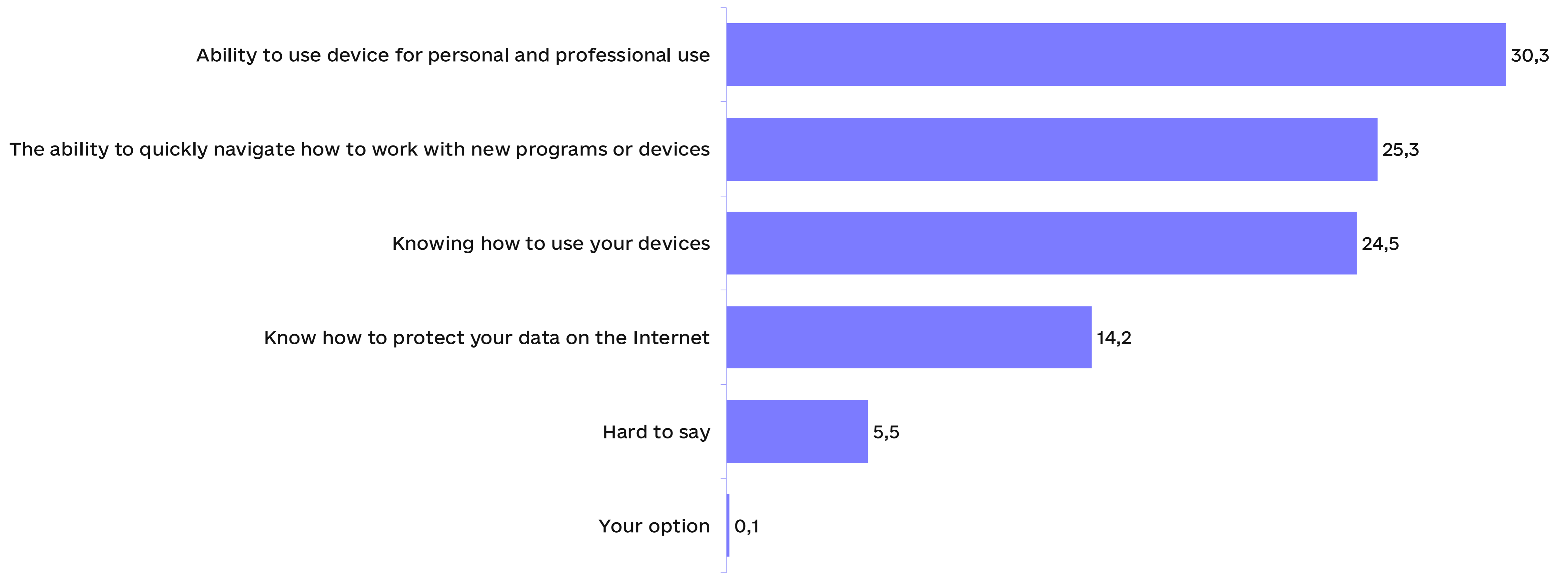


Section 2

Access to the Internet

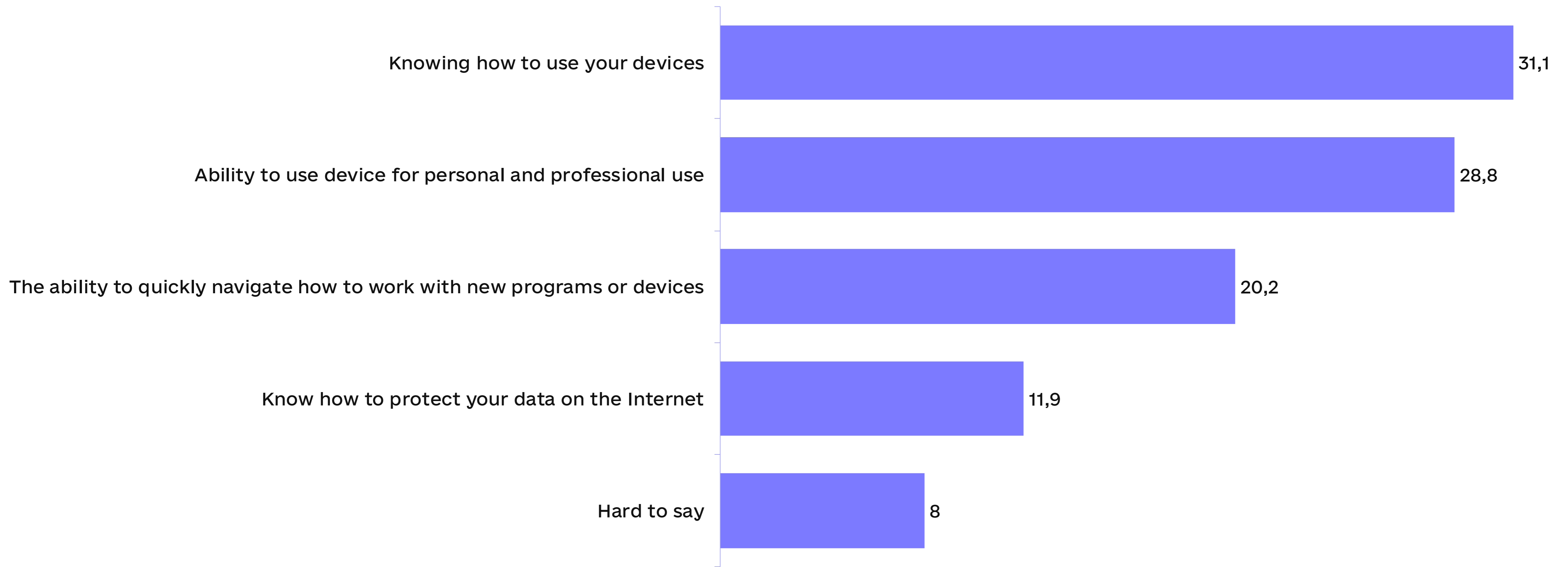
What do you think includes the concept of digital literacy?

Ukraine as a whole 🇺🇦



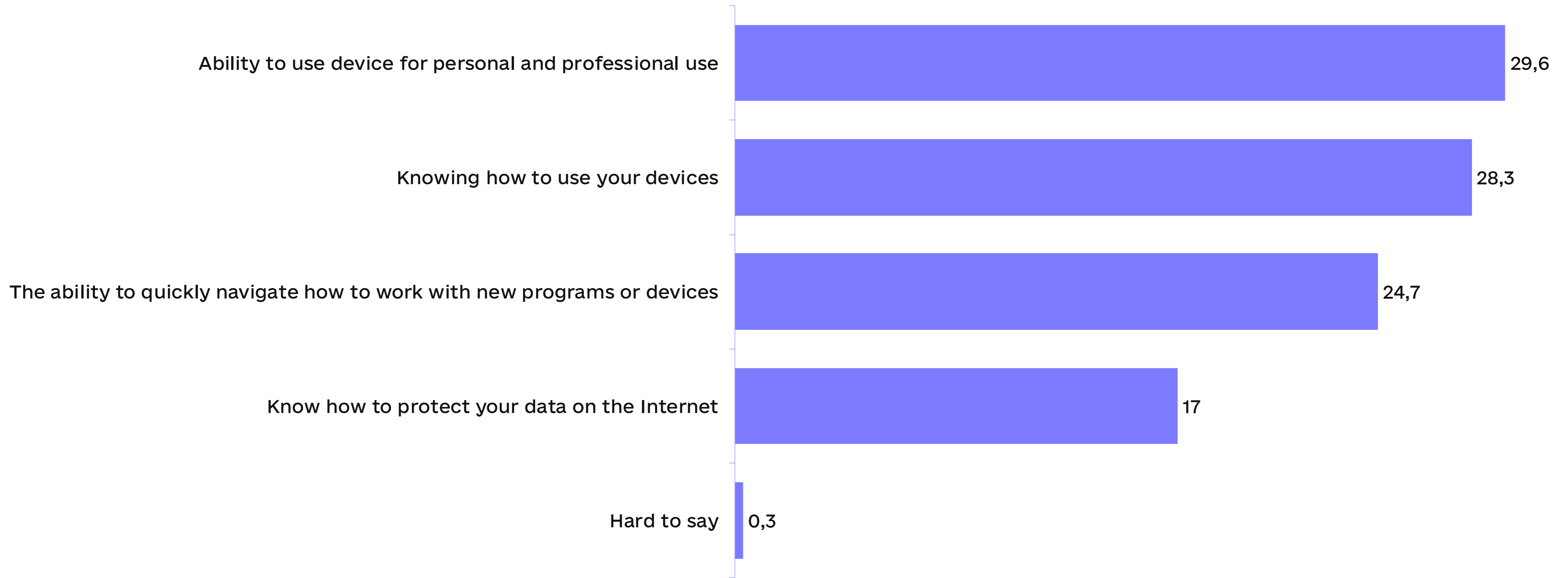
What do you think includes the concept of digital literacy?

People with hearing impairment

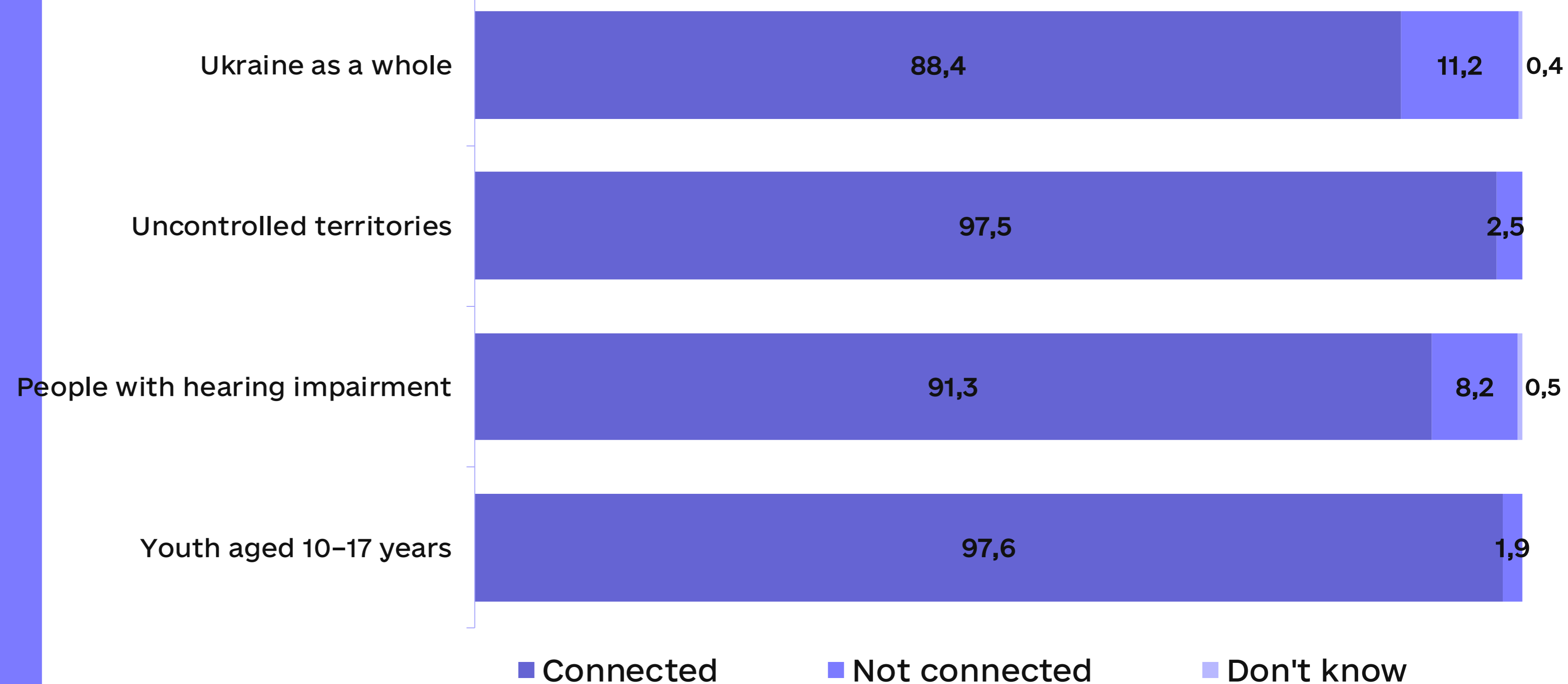


What do you think includes the concept of digital literacy?

Uncontrolled territories 🚧



Internet access at home



Portrait of people with no internet connection at home



people aged 60-70 years



with educational level: secondary professional



living outside regional centers (in towns and villages of the region)



employment status: not employed people



with income: Below average

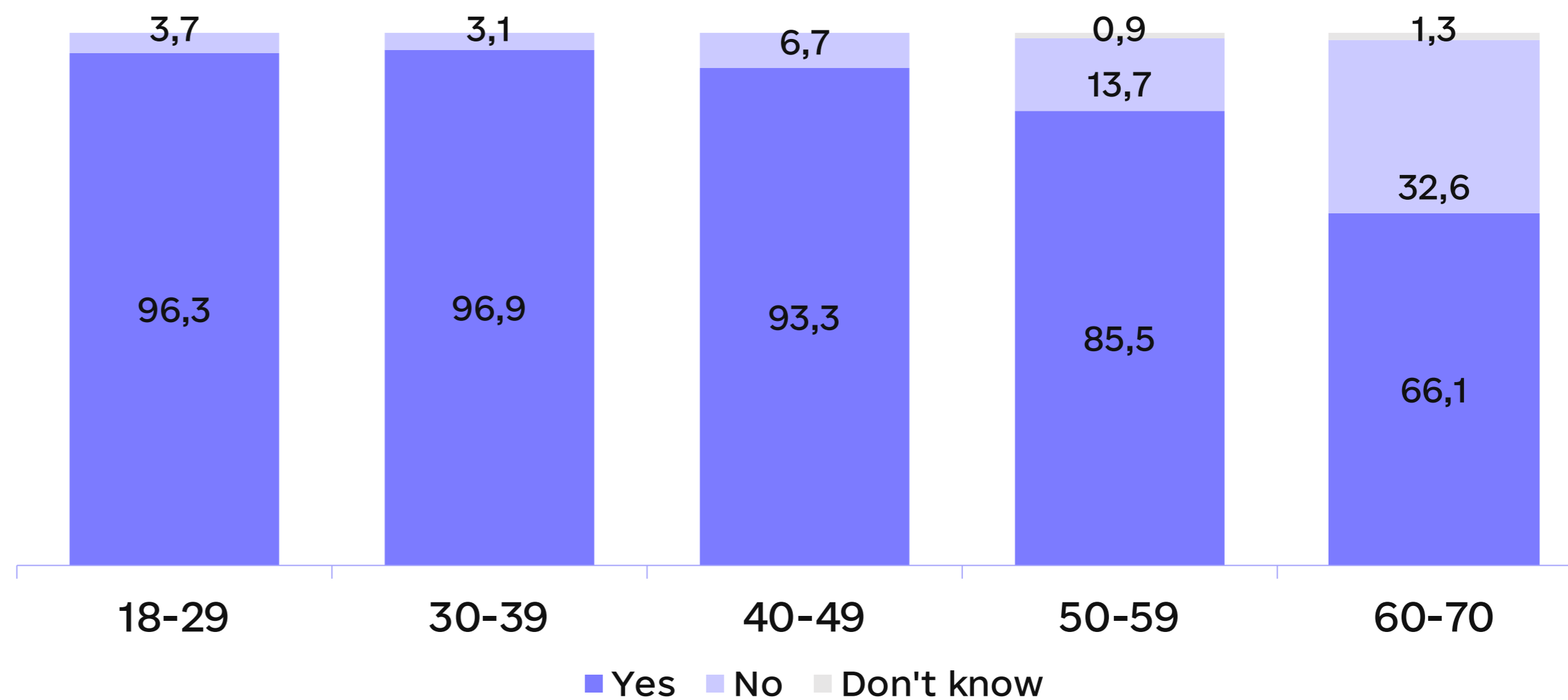


digital skills learning is irrelevant for them

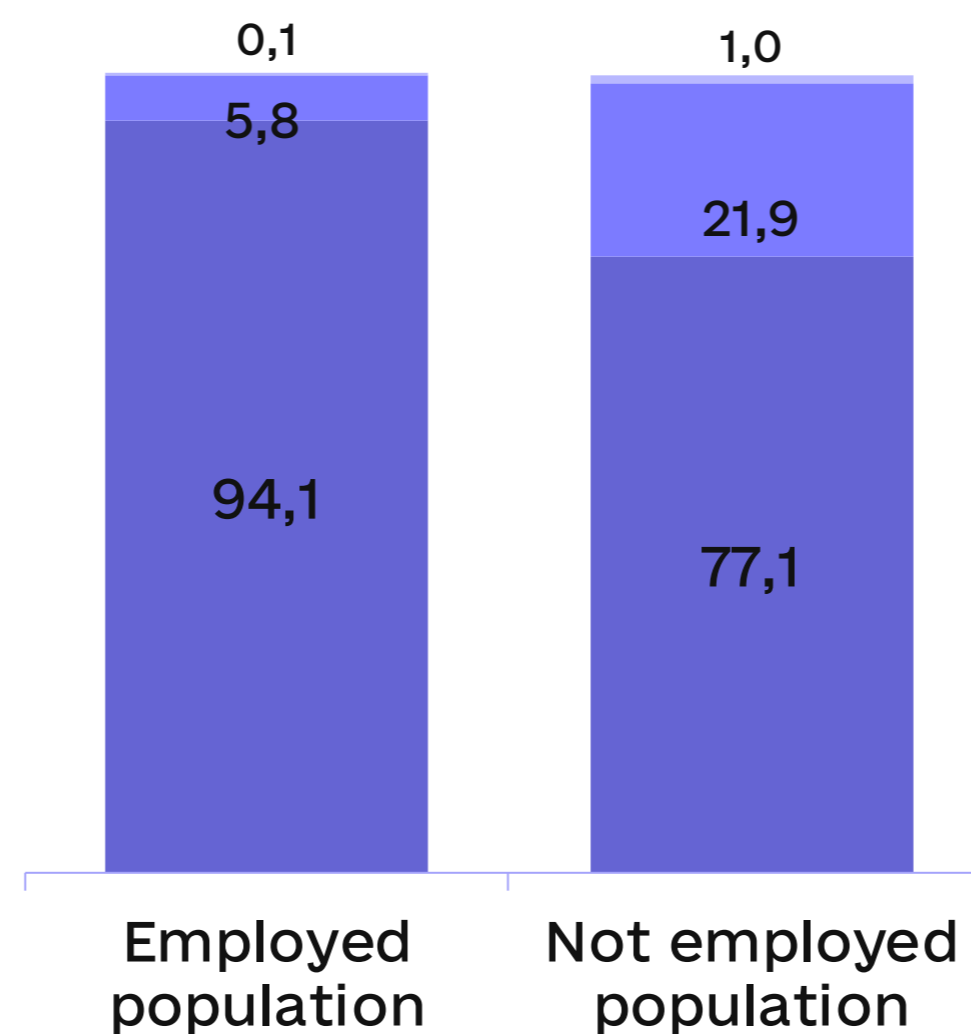
Internet access at home

Ukraine in a whole 🇺🇦

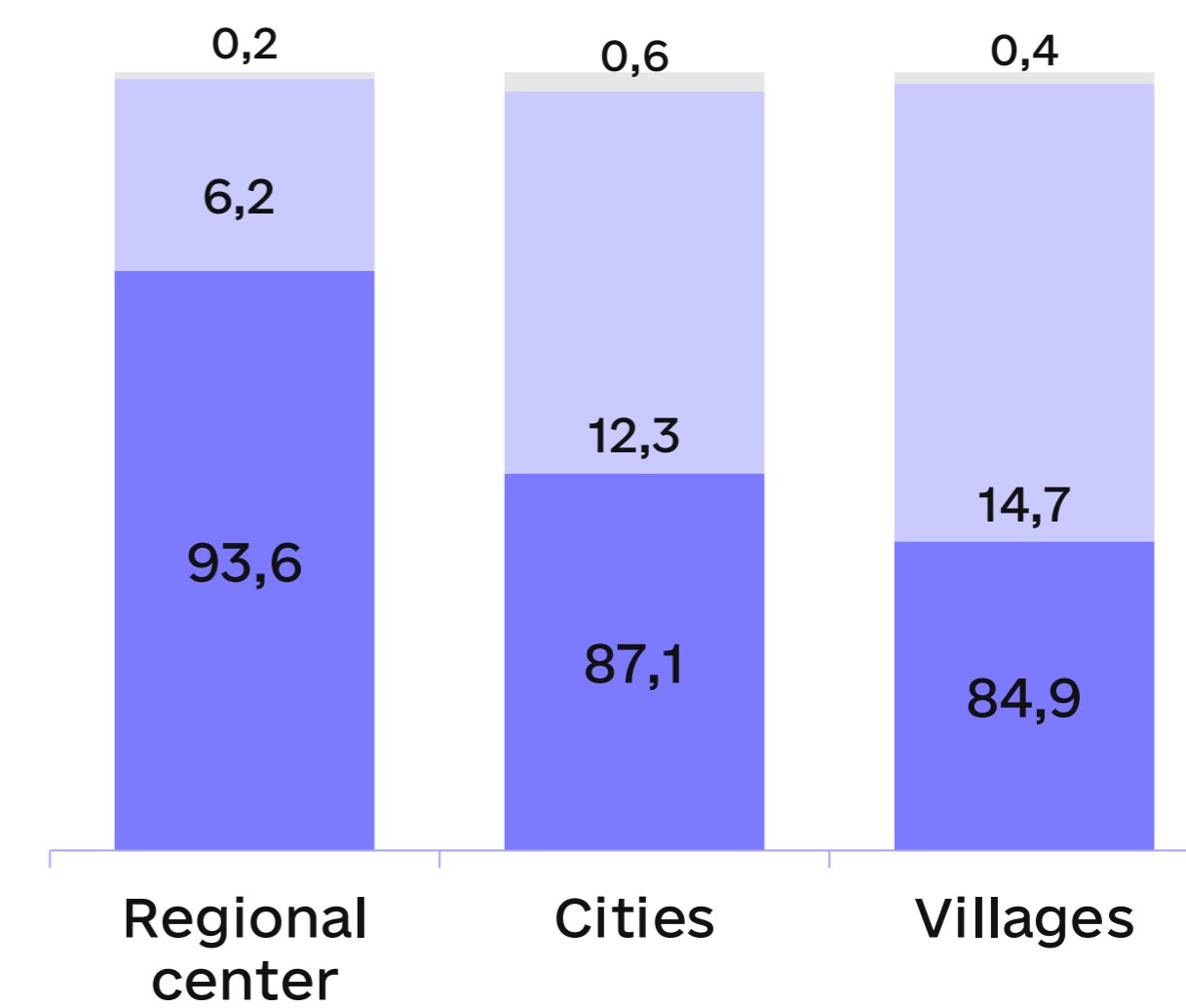
By age



By employment status



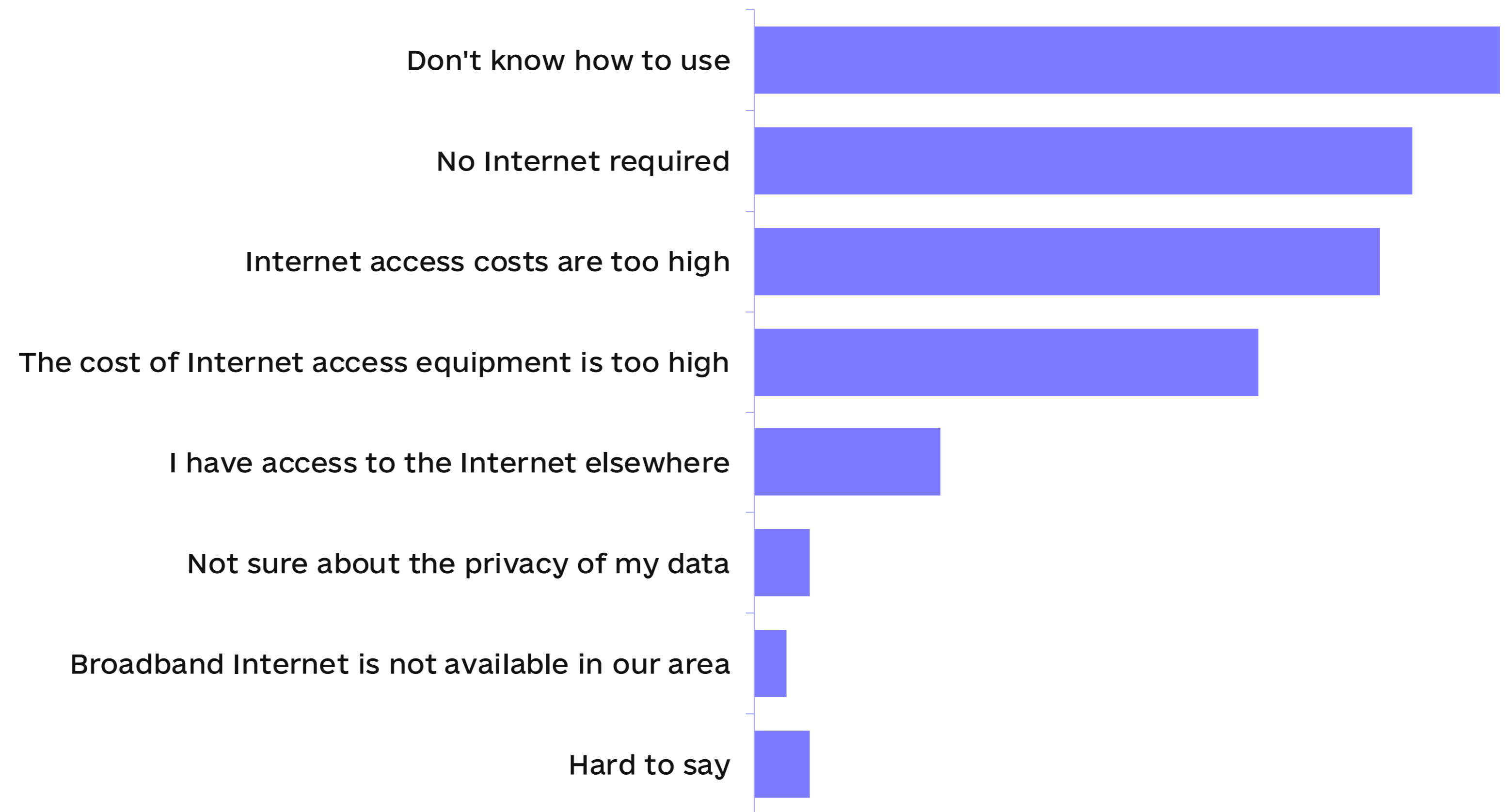
By type of area



Internet access at home

Ukraine in a whole 🇺🇦

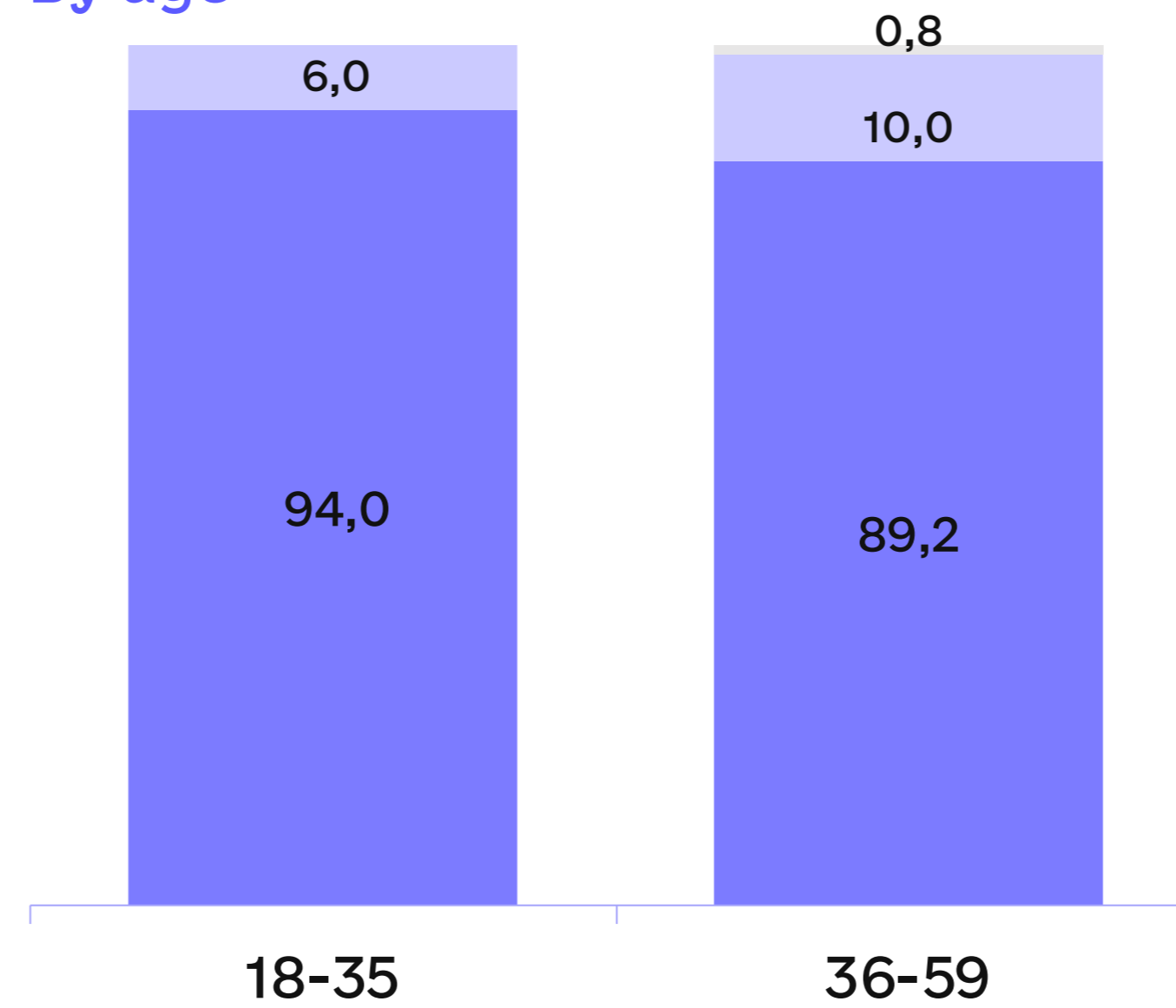
Reasons for not having Internet access at home



Internet access at home

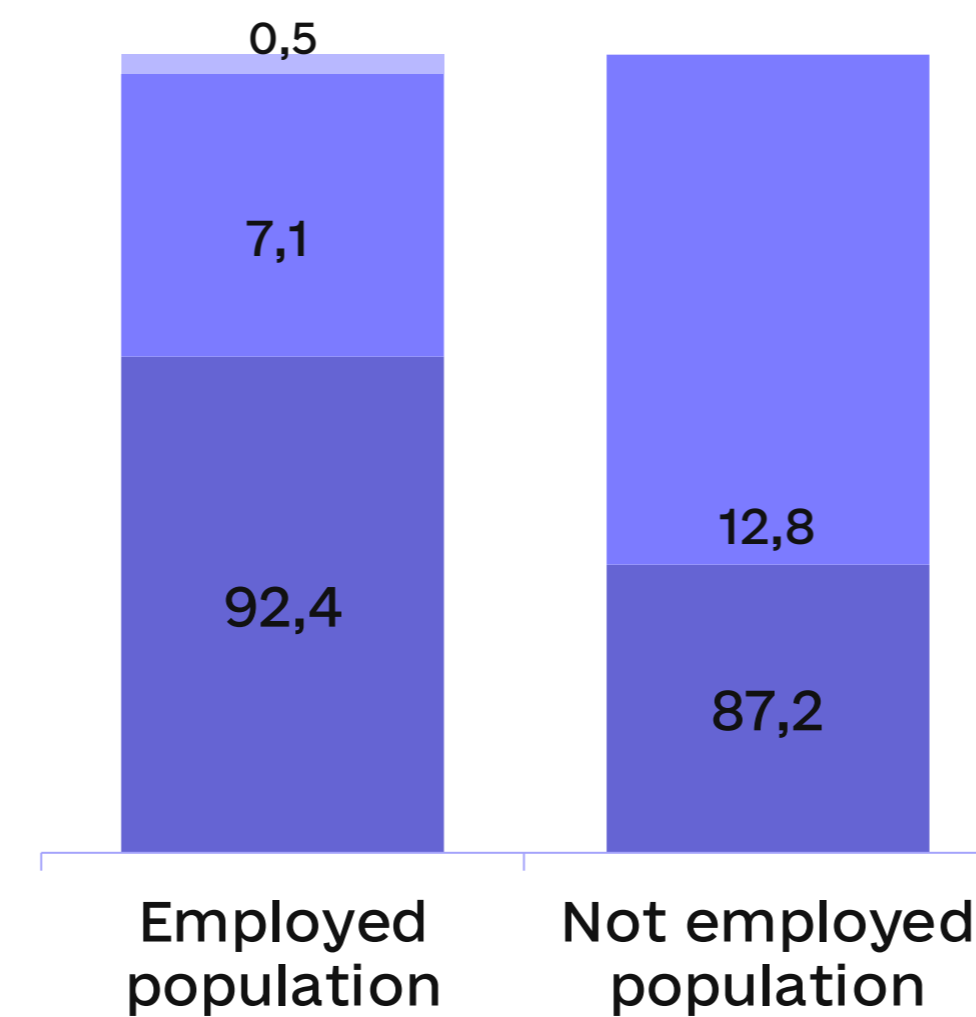
People with hearing impairment

By age

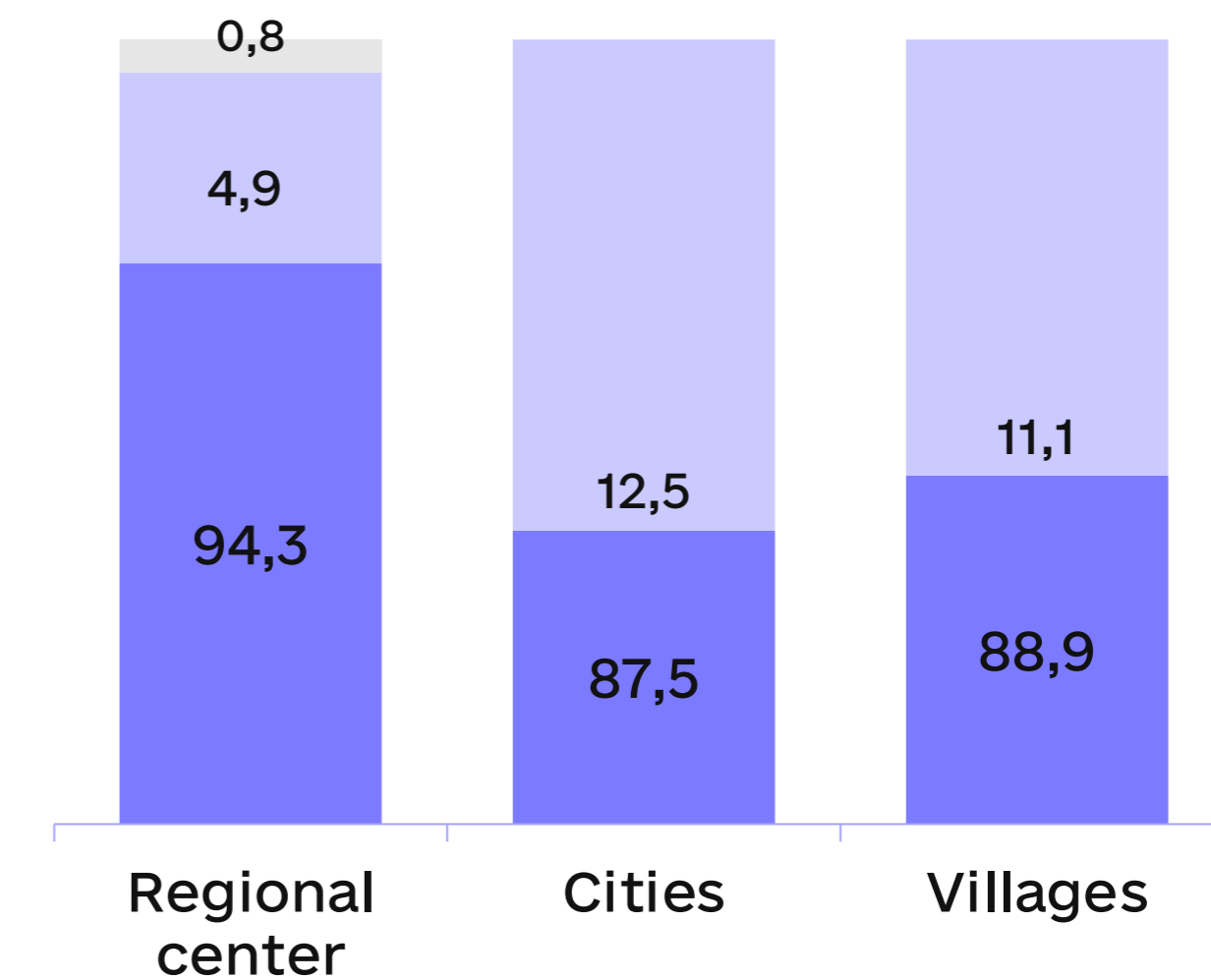


■ Yes ■ No ■ Don't know

By employment status



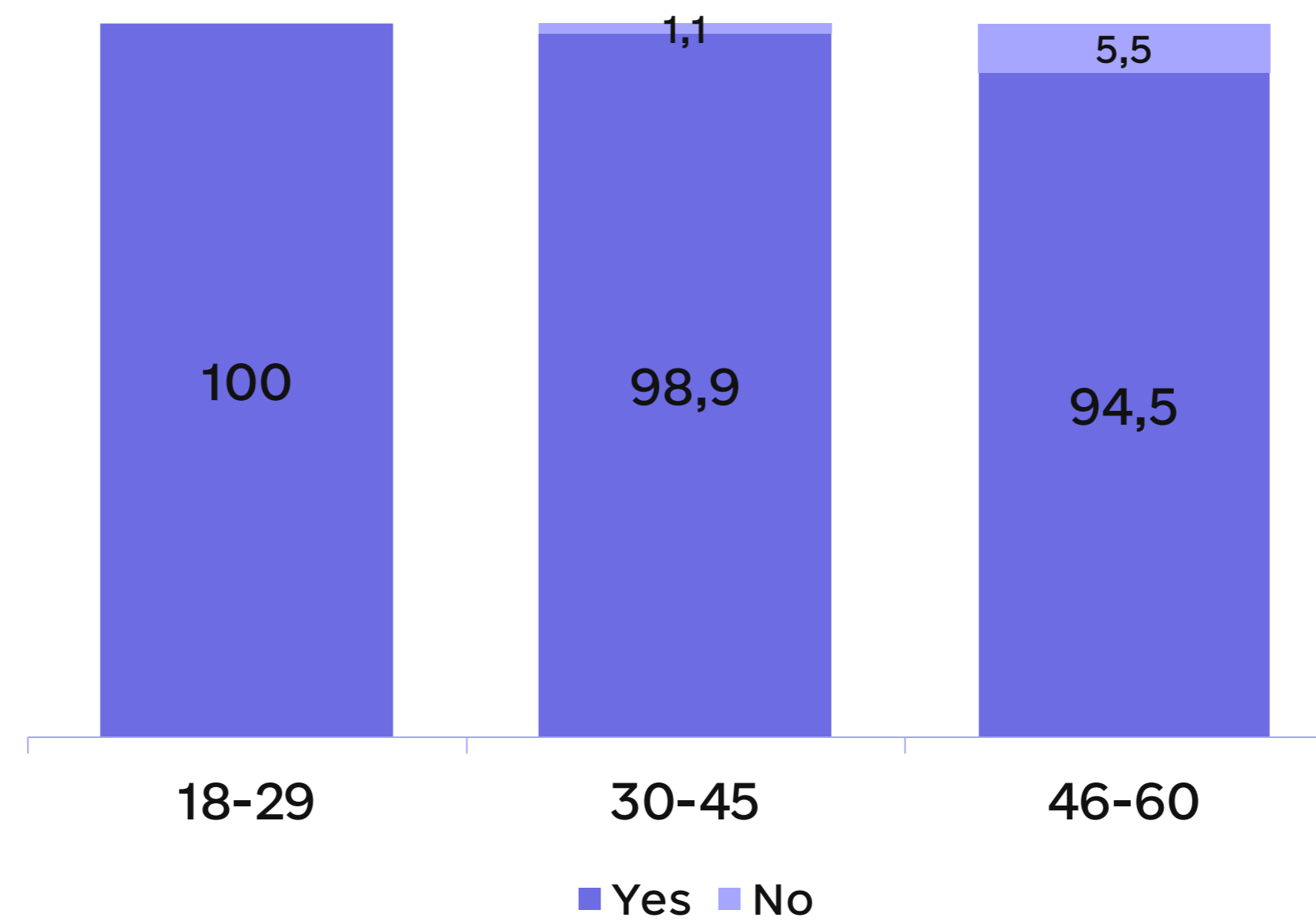
By type of area



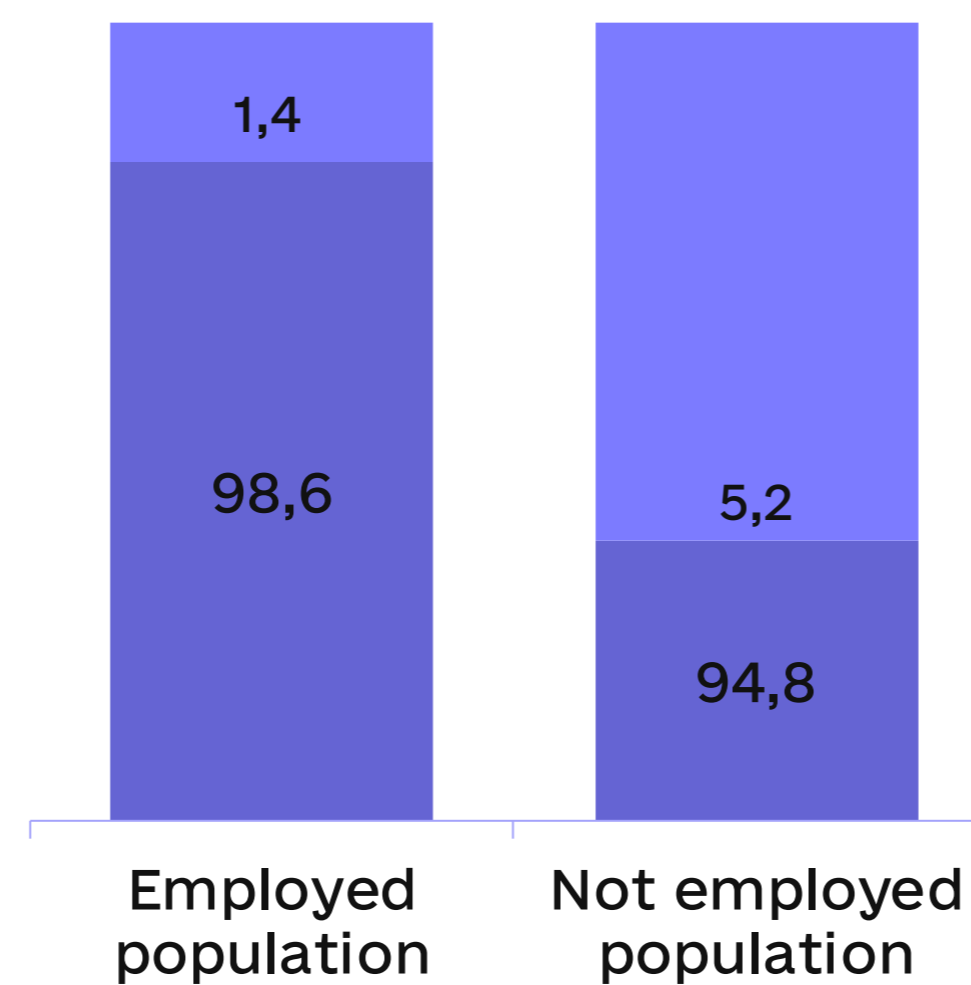
Internet access at home

Uncontrolled territories 🚧

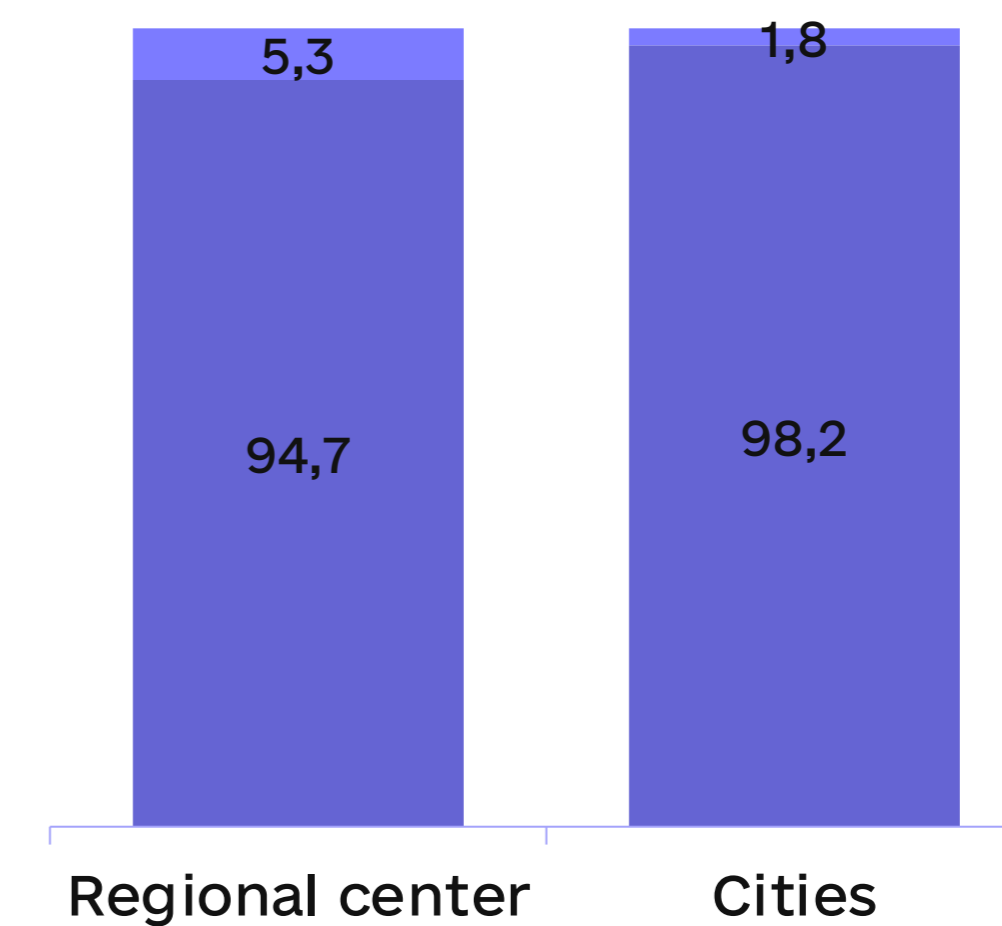
By age



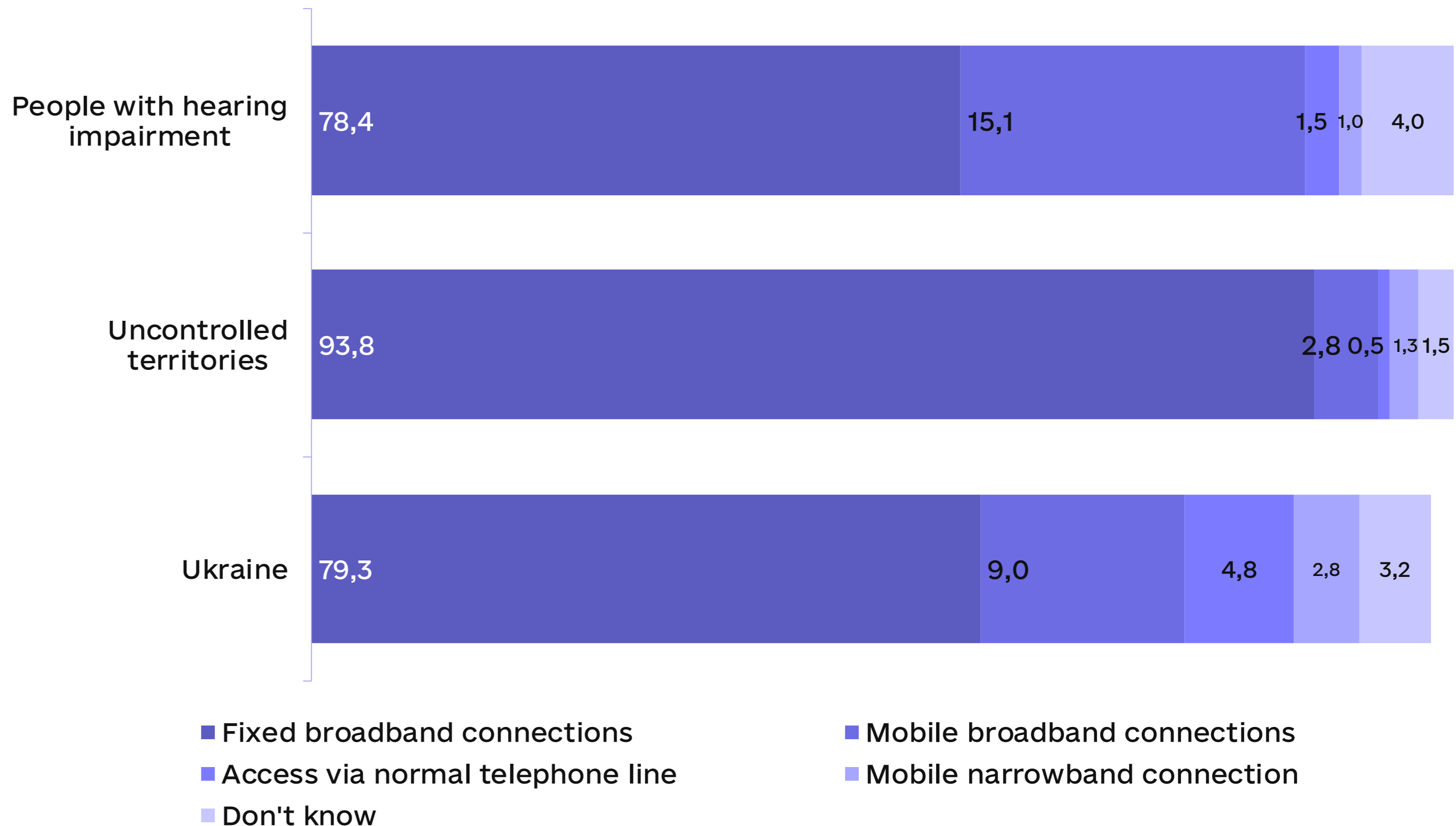
By employment status



By type of area



Types of home Internet connections



Types of connections

Fixed broadband connections, such as DSL, ADSL, cable, optical fiber, satellite, public Wi-Fi connections

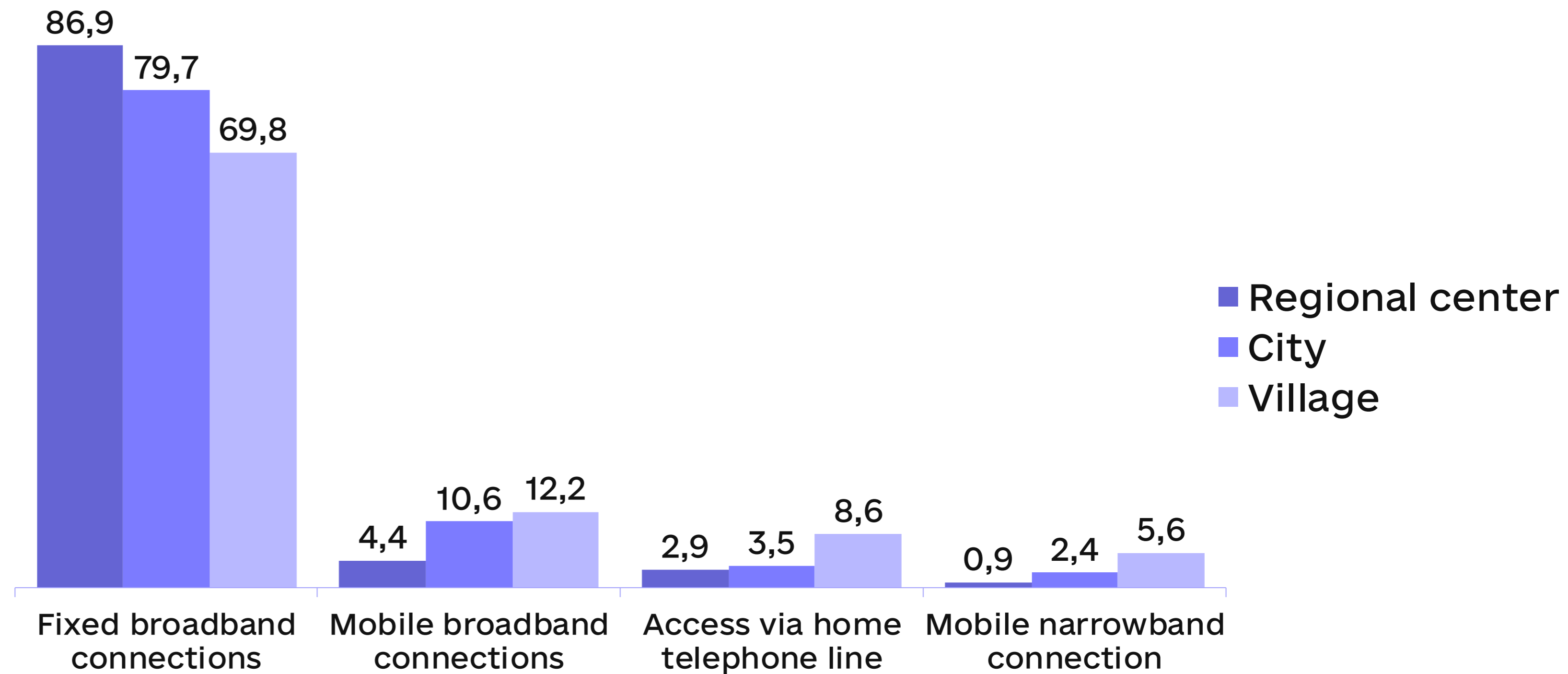
Access via a home telephone line

Mobile broadband connections (via a cellular network, at least 3G, use of a sim-card or USB key of a mobile phone or smartphone as a modem)

Mobile narrowband connections (via mobile phone network less than 3G such as 2G + / GP)

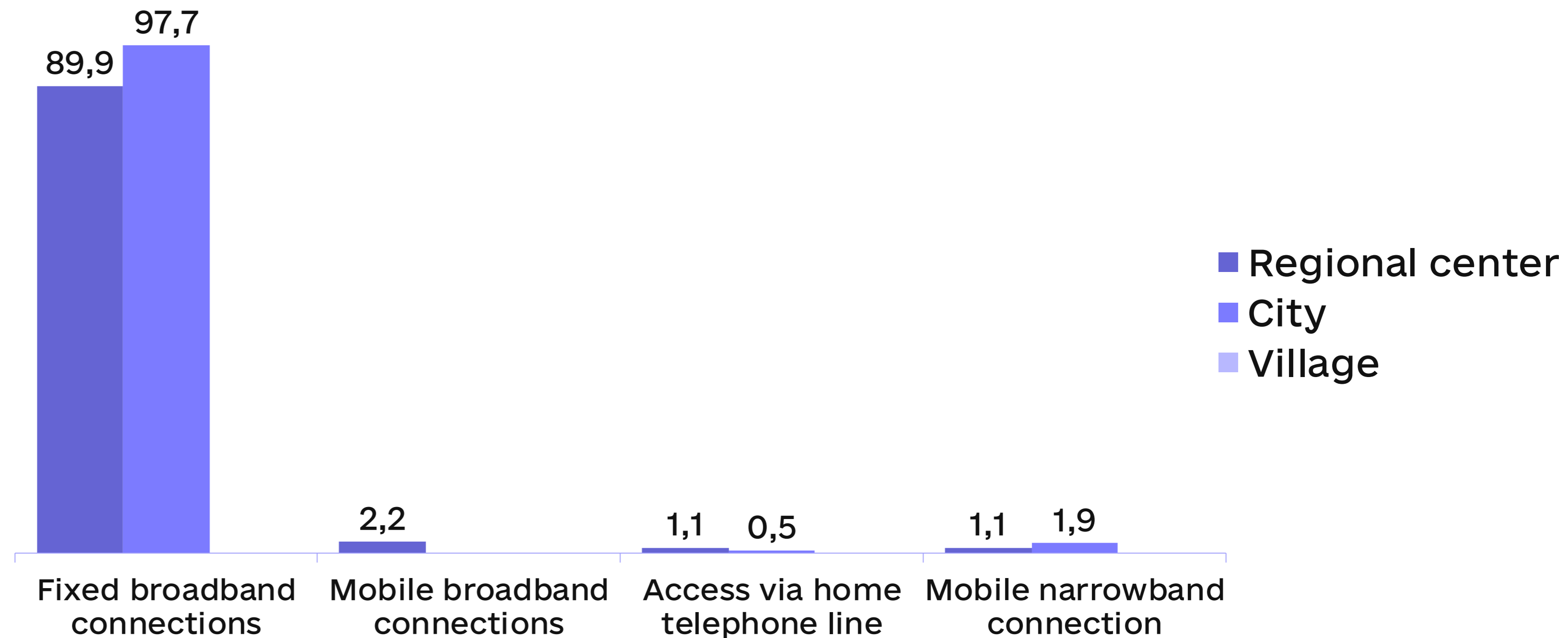
Types of home Internet connections

Ukraine in a whole 🇺🇦



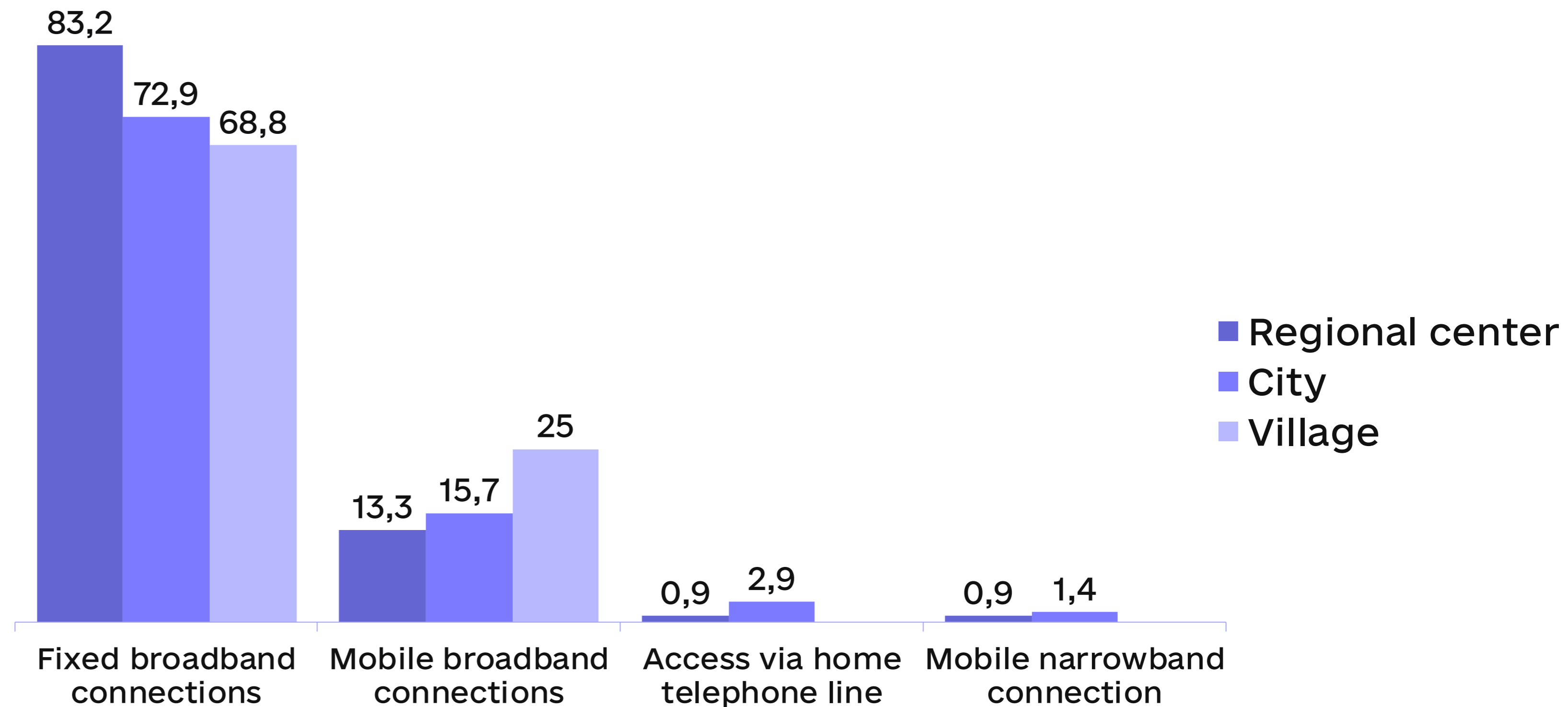
Types of home Internet connections

People with hearing impairment



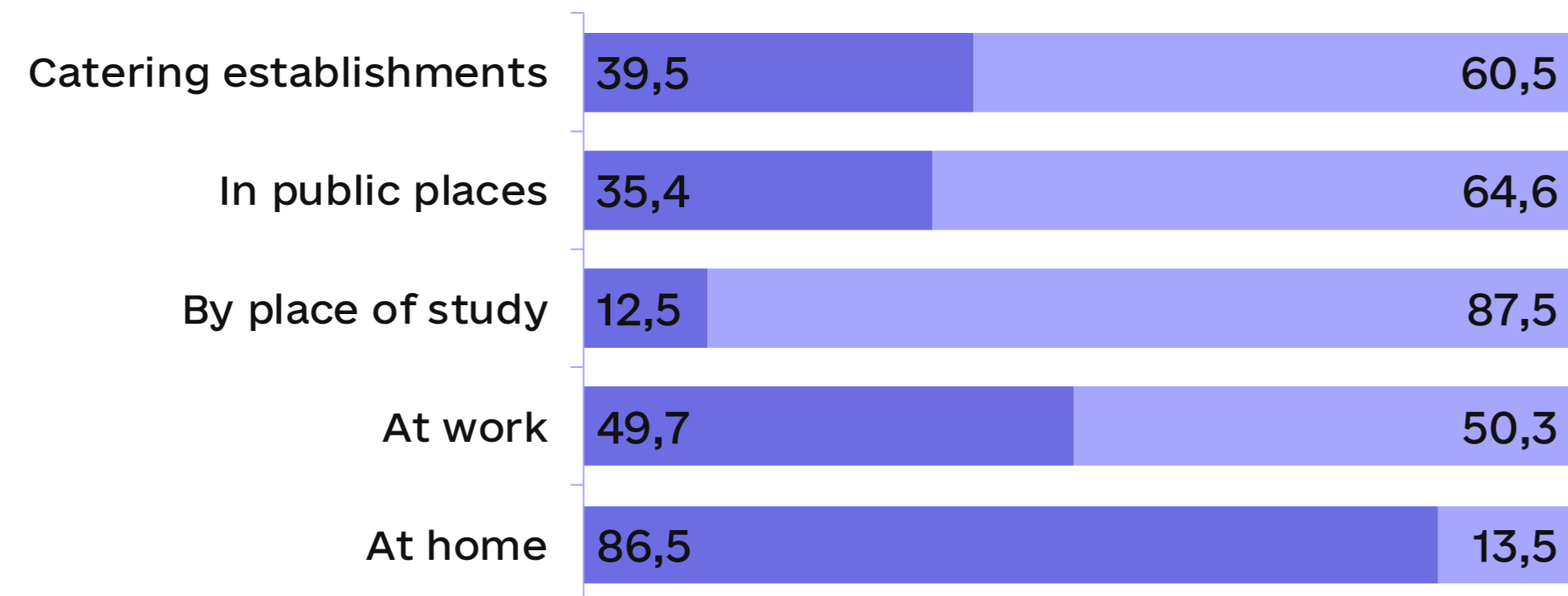
Types of home Internet connections

Uncontrolled territories 🚧

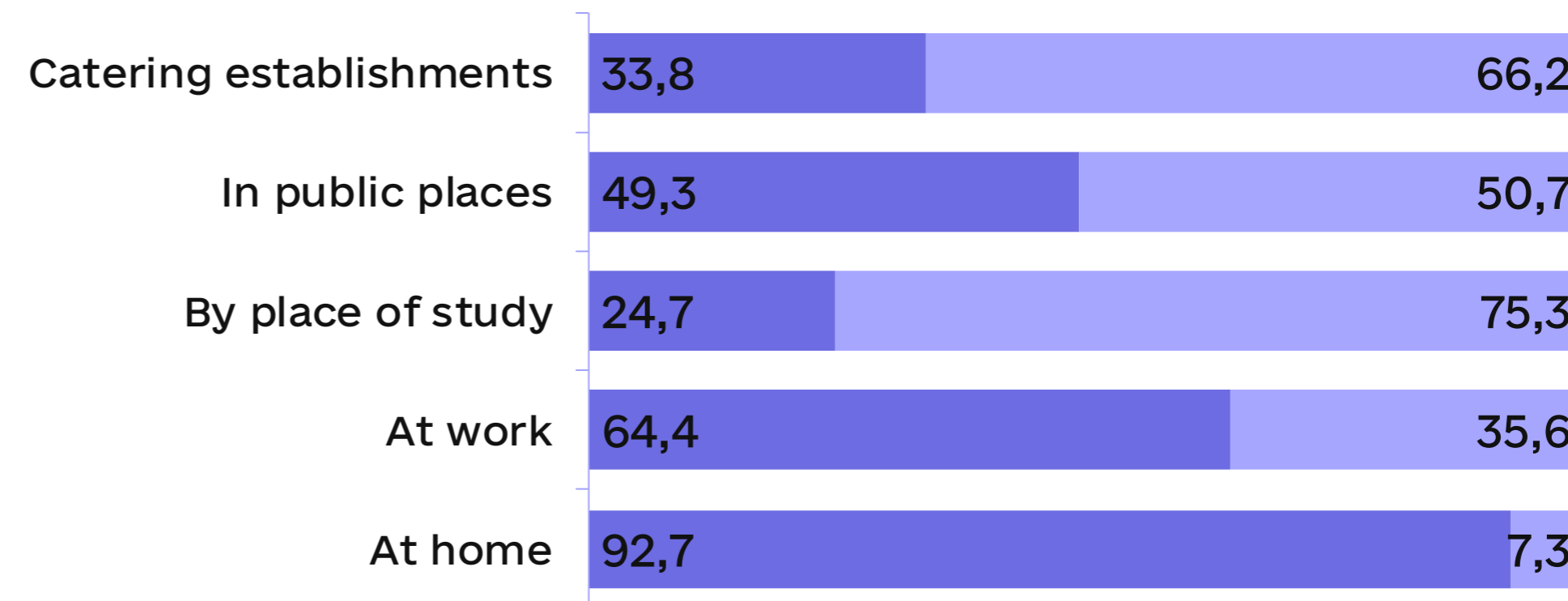


Places of Internet use for the last 6 months

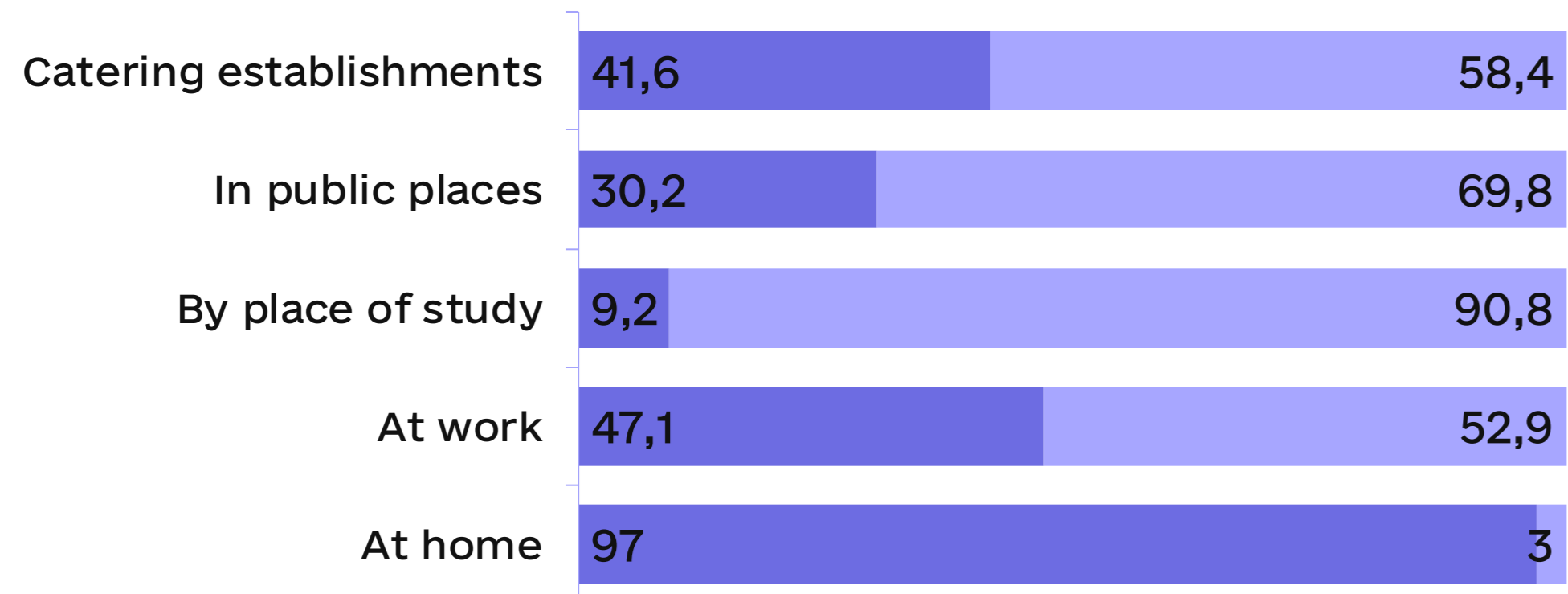
Ukraine in a whole



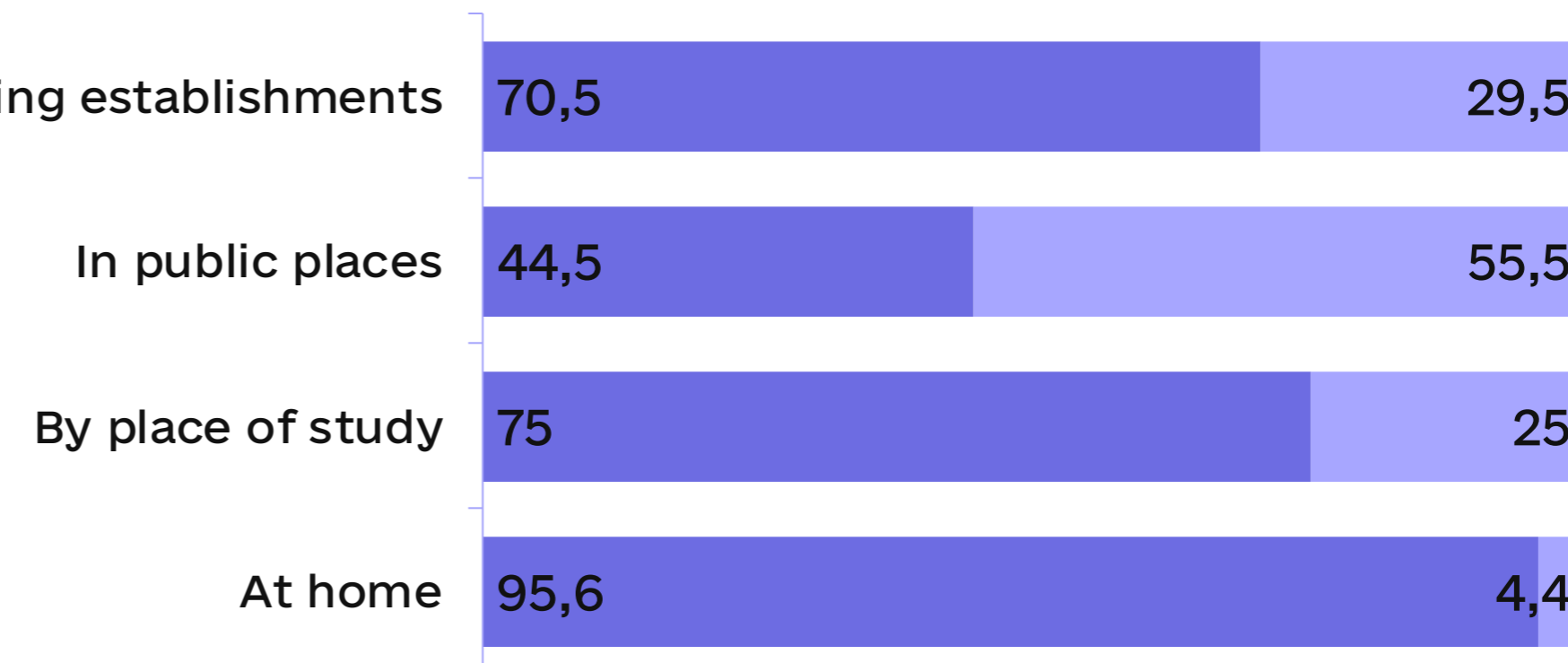
People with hearing impairment



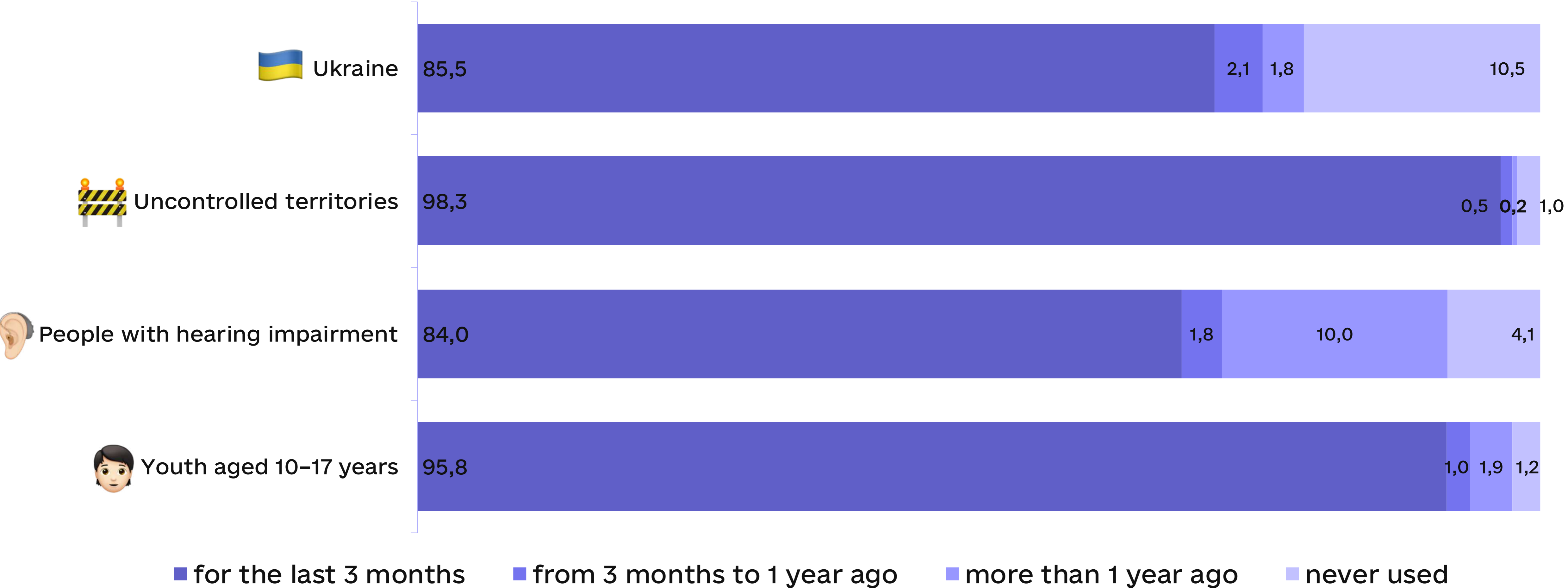
Uncontrolled territories



Youth aged 10–17 years

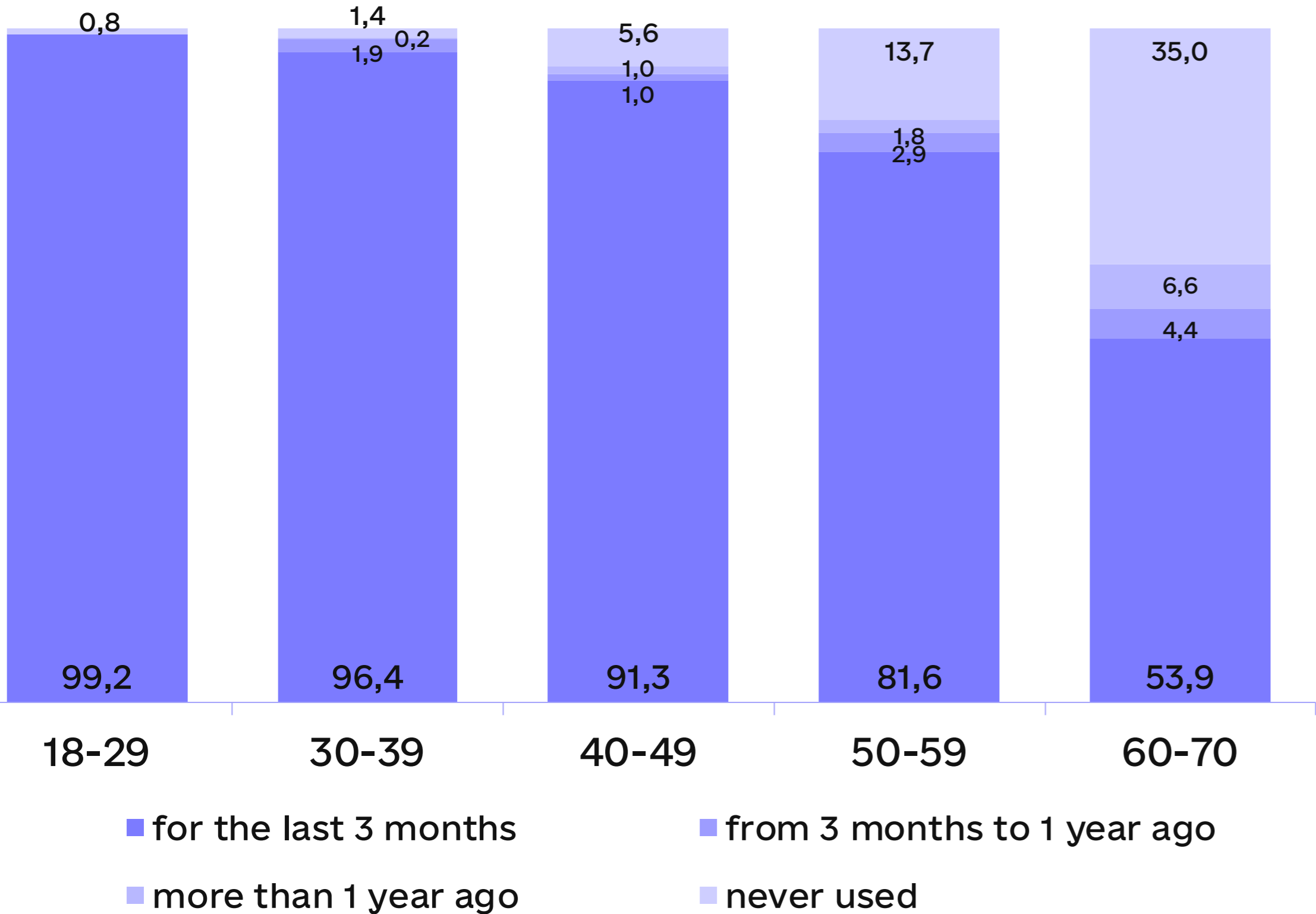


When was the last time you used the Internet?

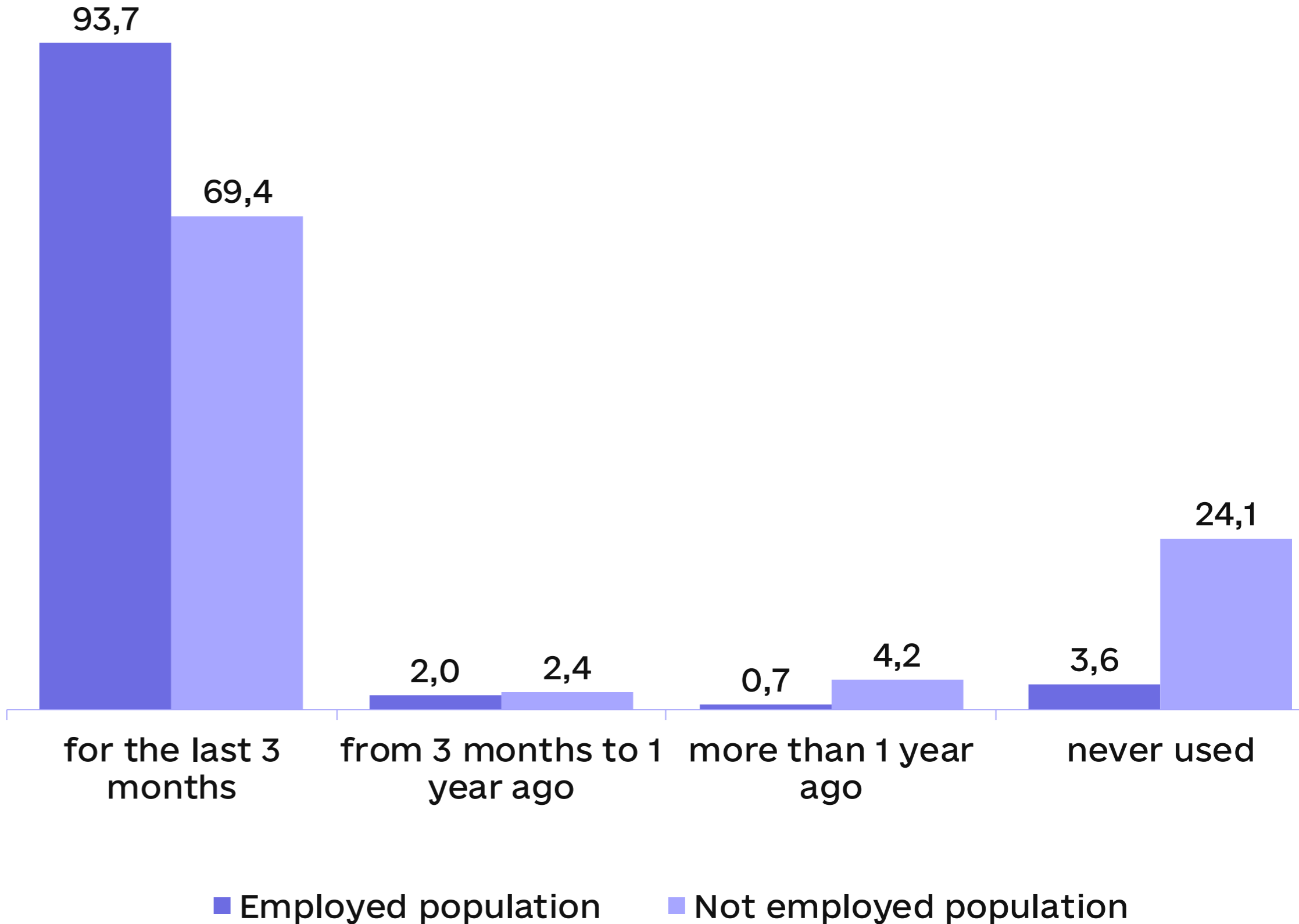


When was the last time you personally used the Internet? Ukraine in a whole 🇺🇦

By age

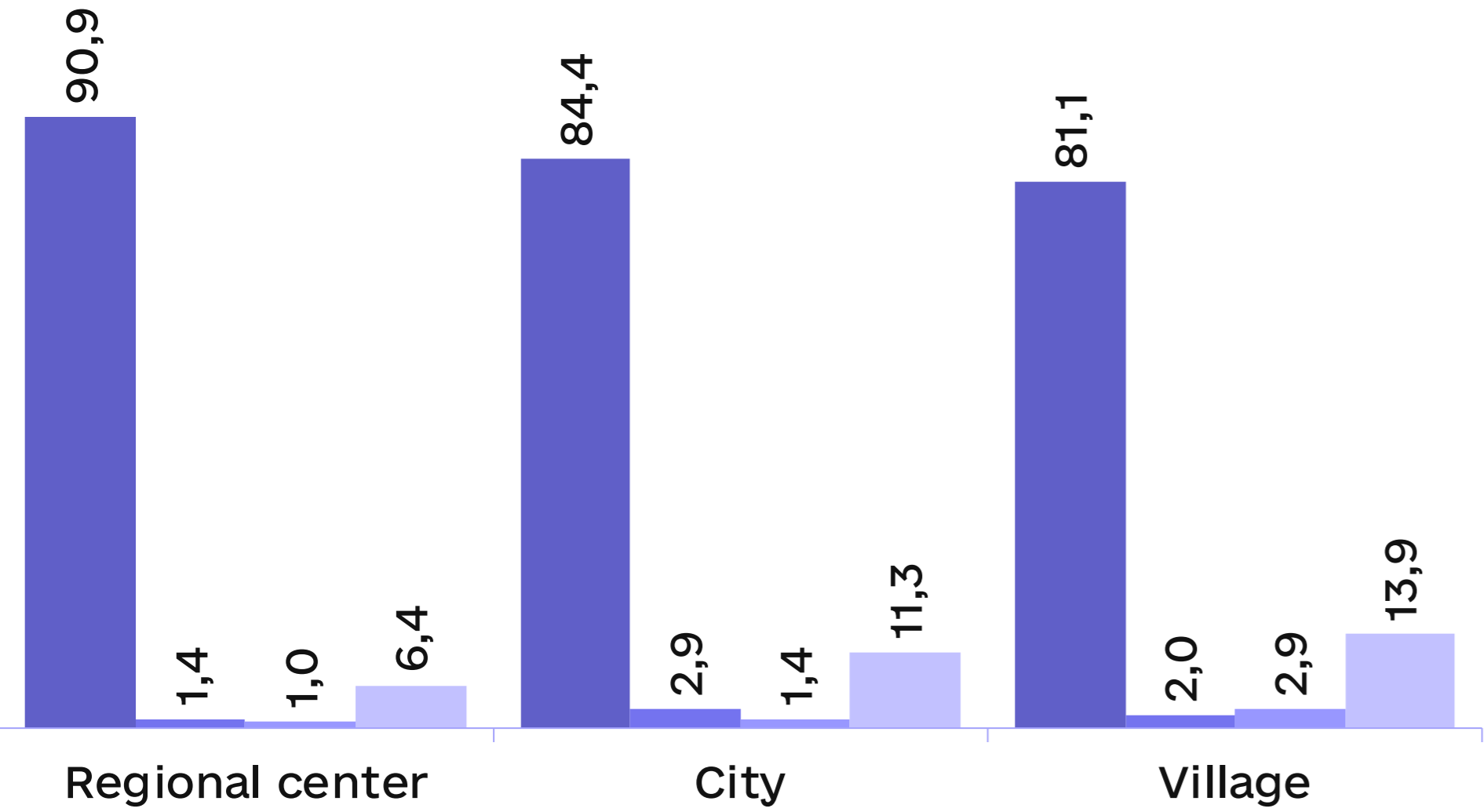


By employment status

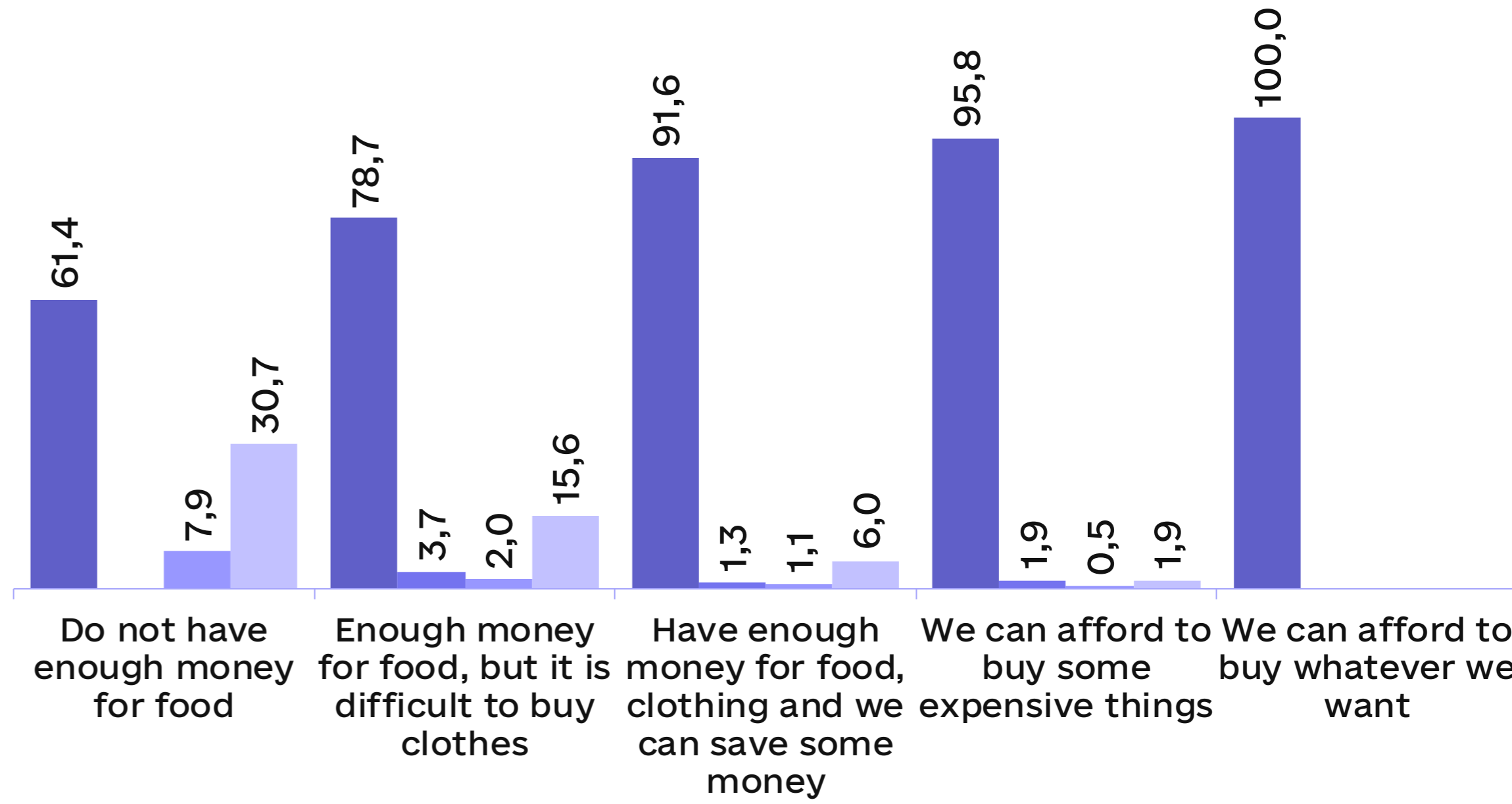


When was the last time you personally used the Internet? Ukraine in a whole 🇺🇦

By type of area



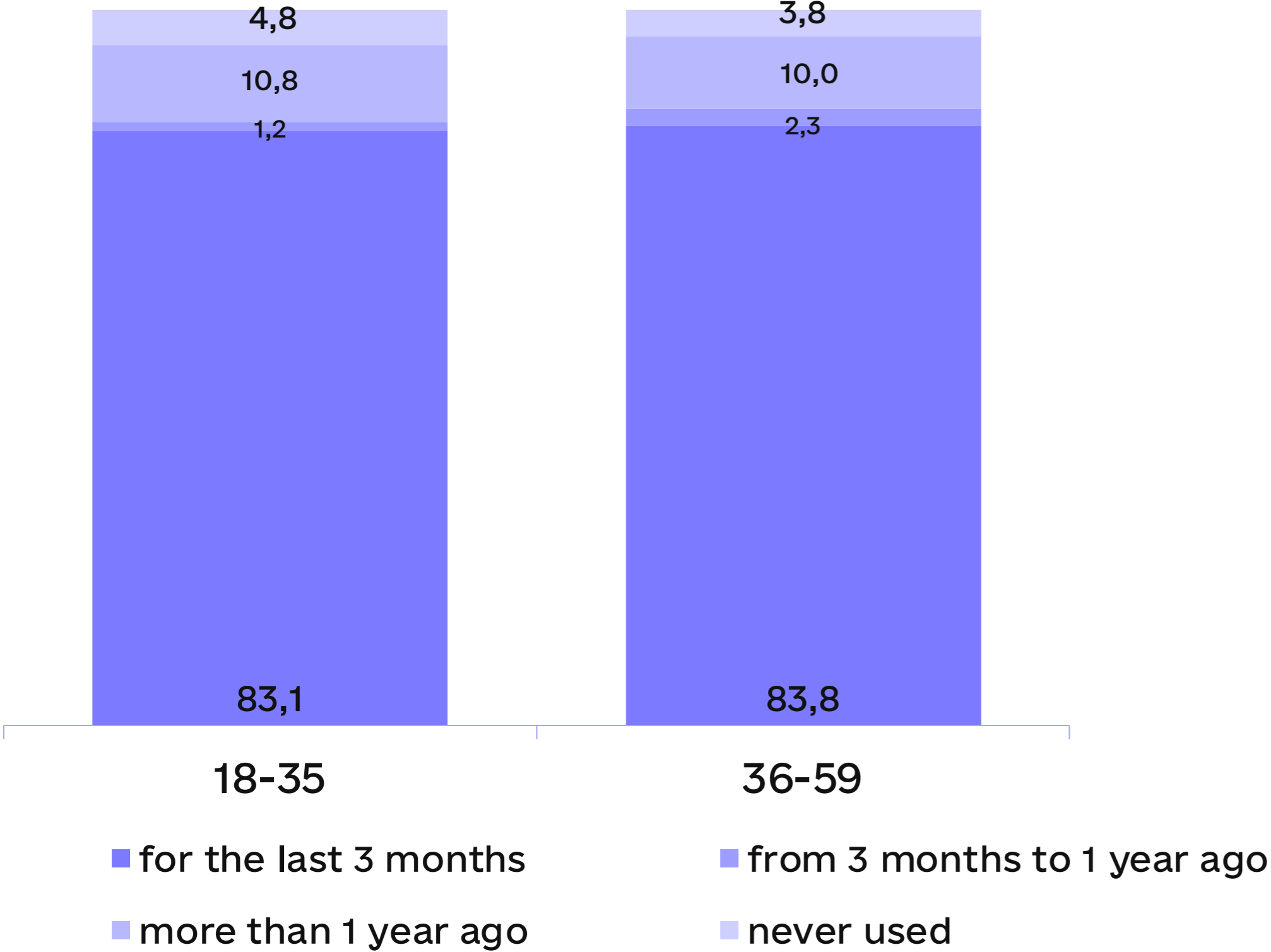
By financial status



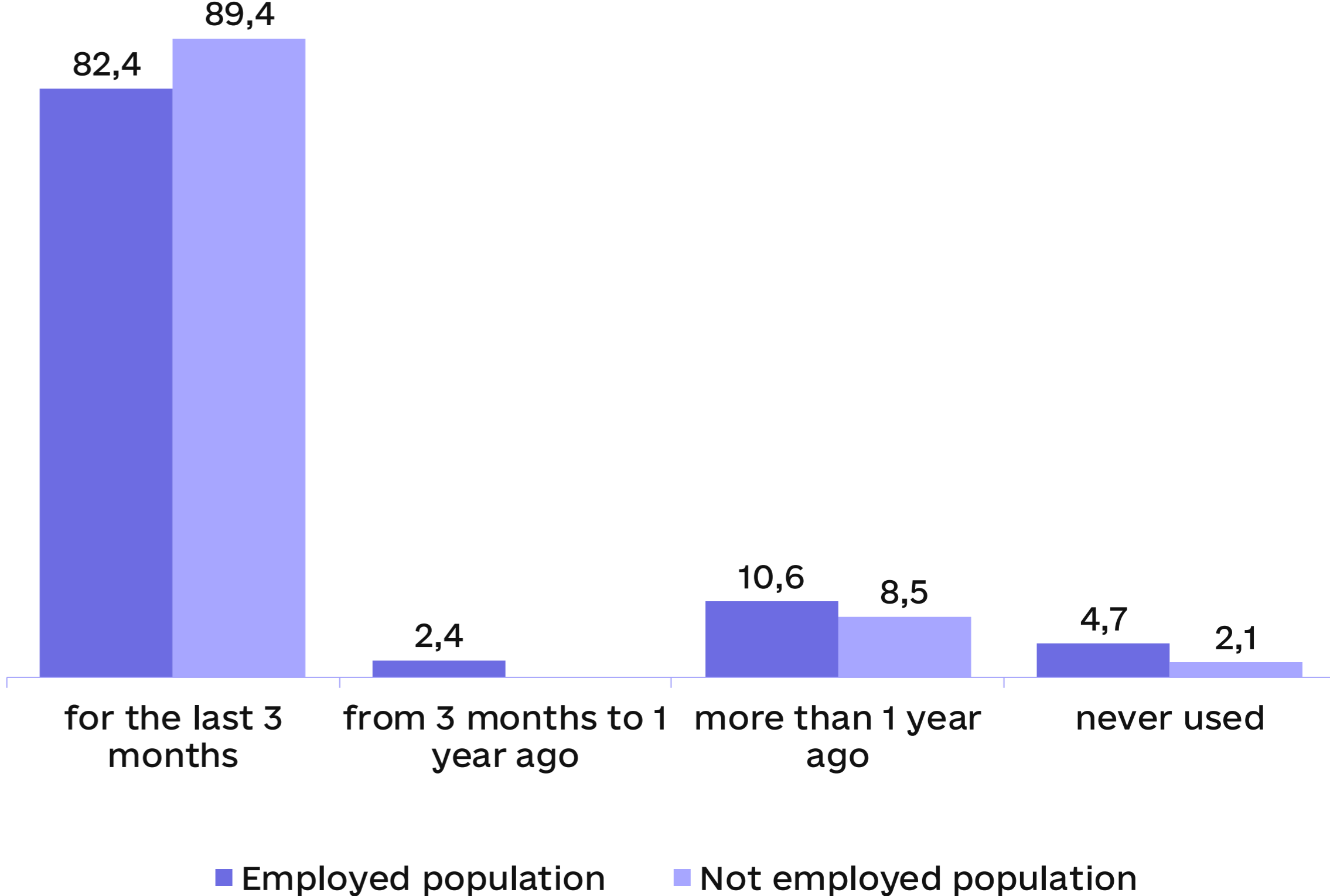
■ for the last 3 months
 ■ from 3 months to 1 year ago
 ■ more than 1 year ago
 ■ never used

When was the last time you personally used the Internet? People with hearing impairment 🧑🏻

By age

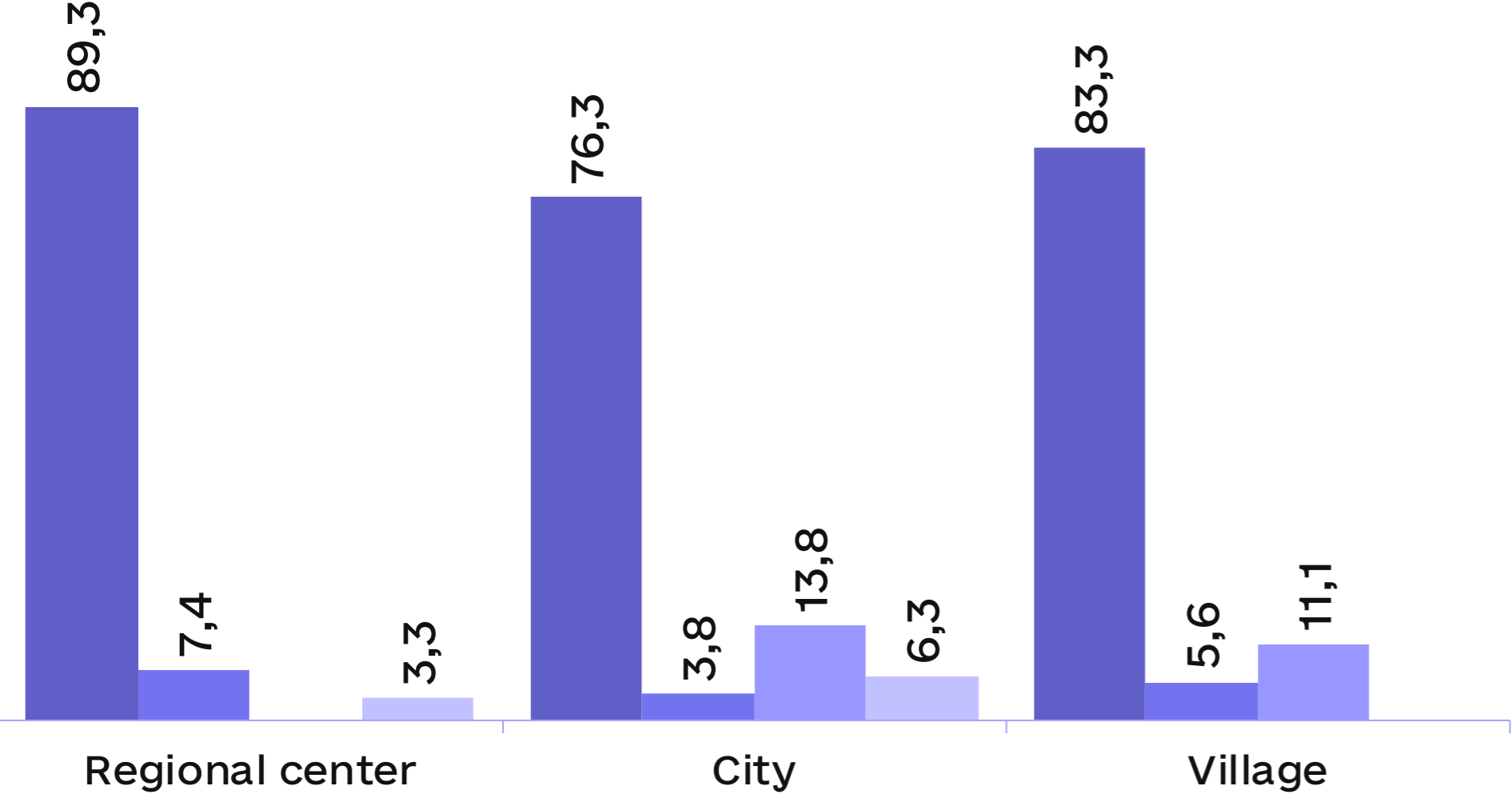


By employment status

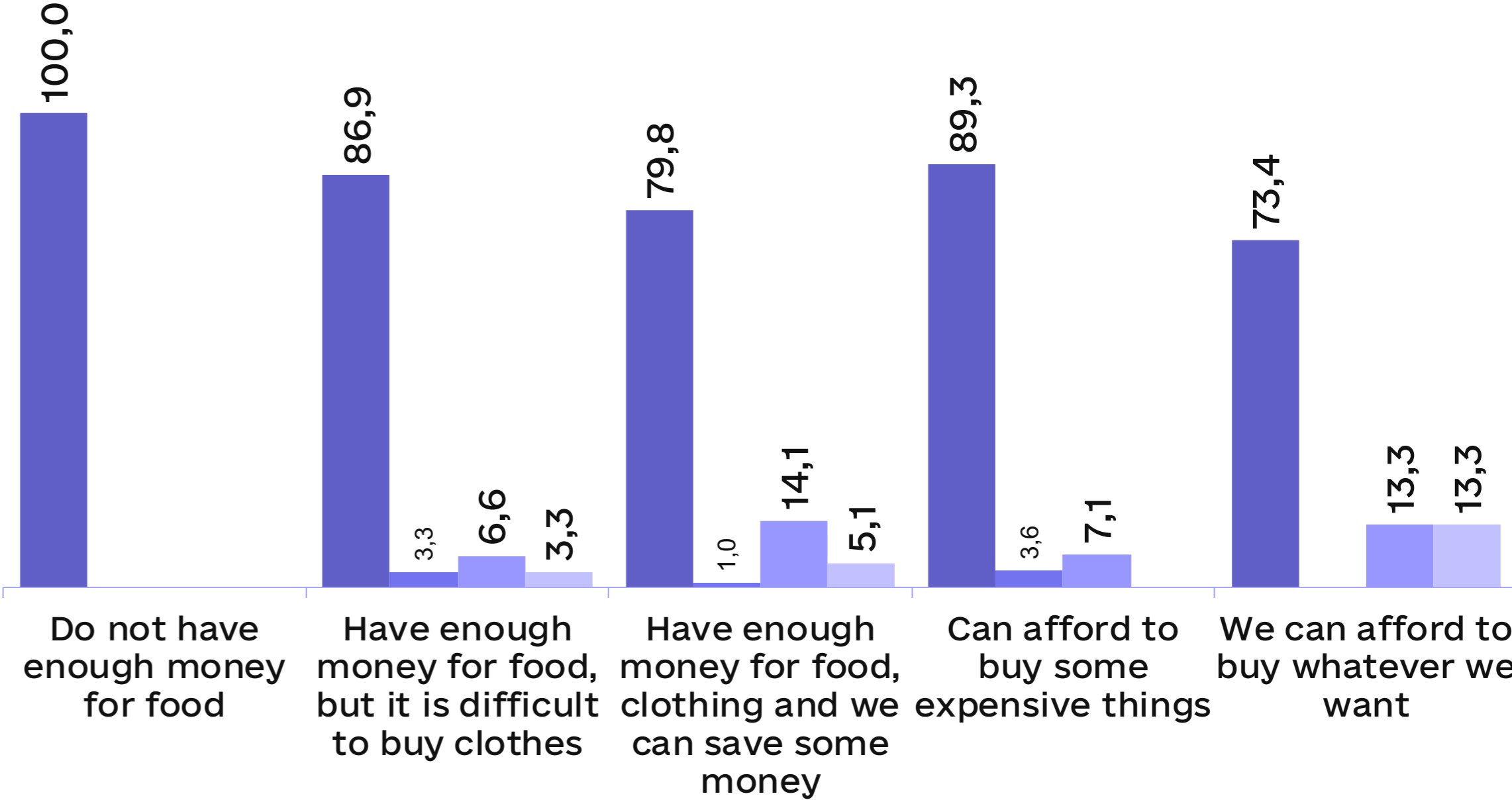


When was the last time you personally used the Internet? People with hearing impairment 🧑🏻‍🦻

By type of area

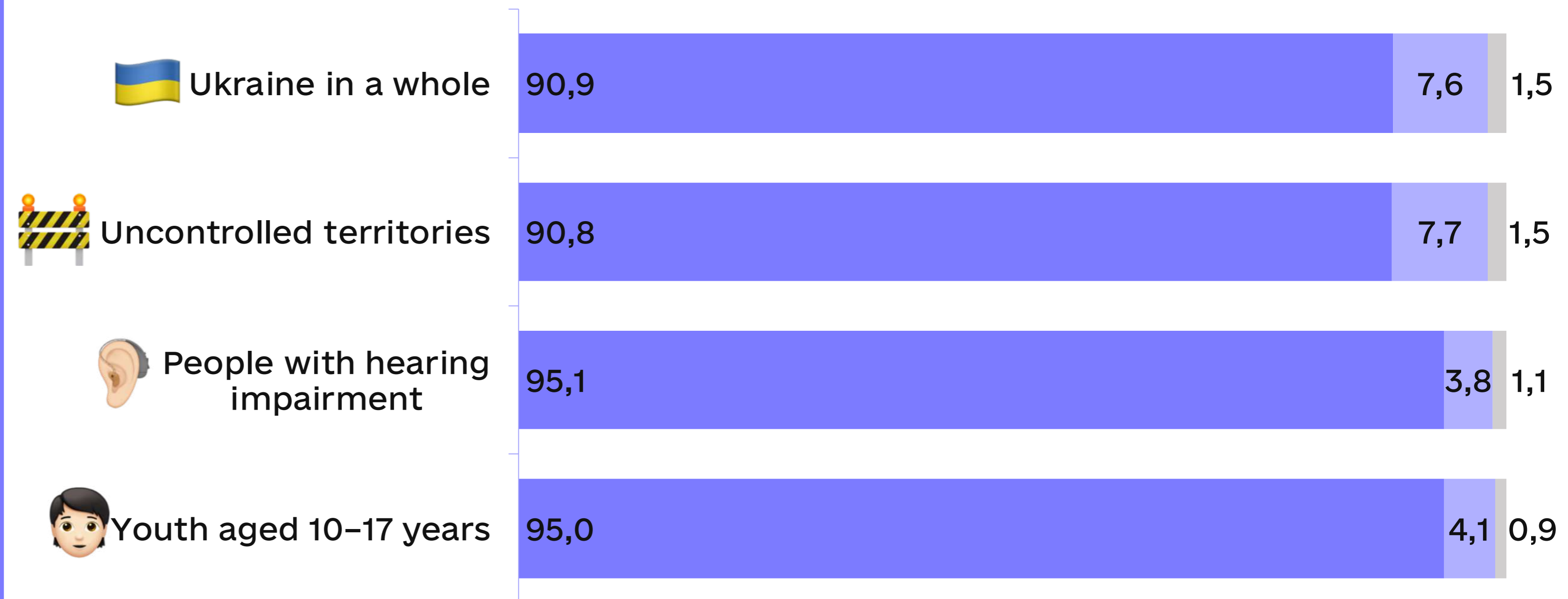


By financial status




■ for the last 3 months ■ from 3 months to 1 year ago ■ more than 1 year ago ■ never used

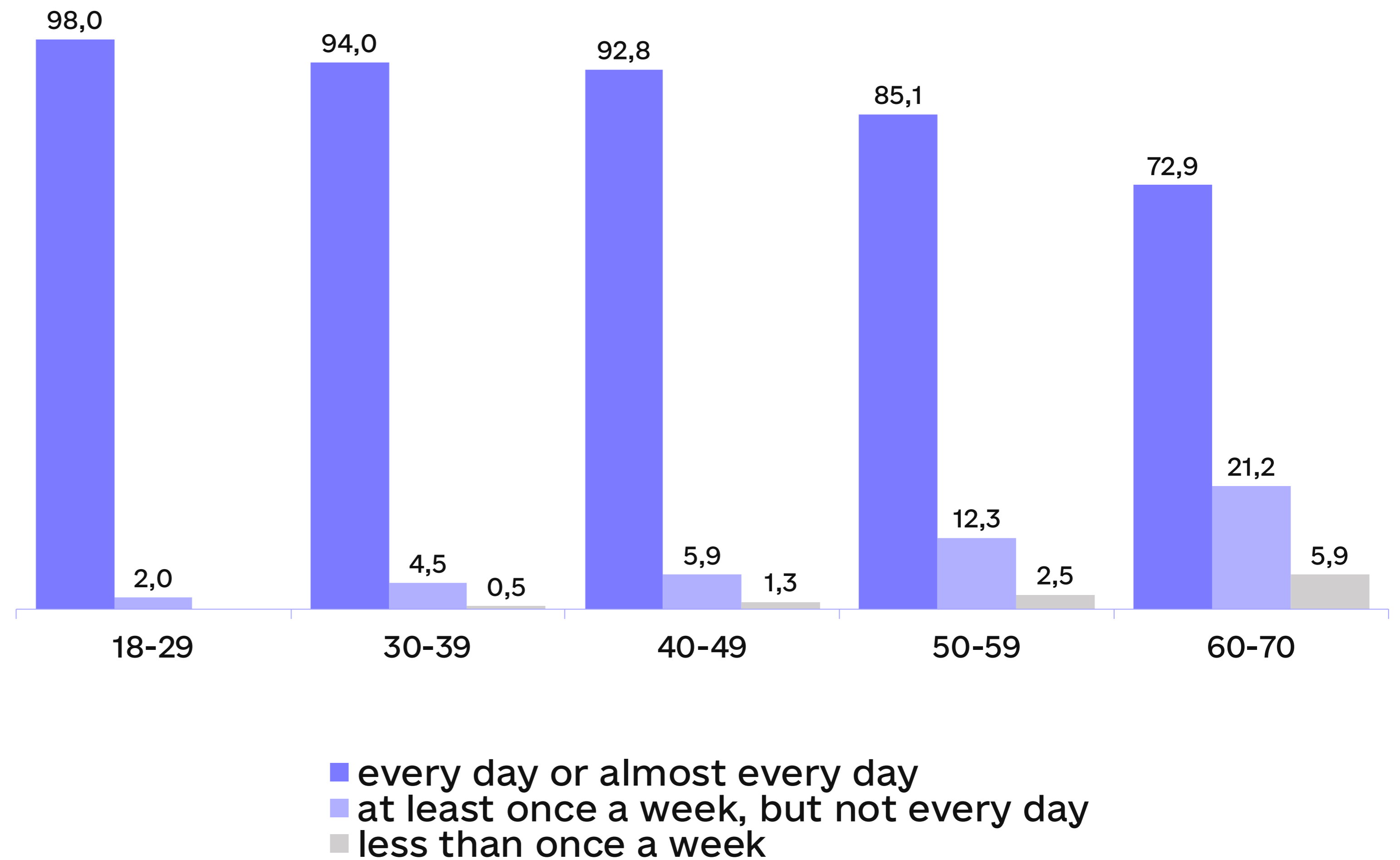
Frequency of the Internet Use for the last 3 months



- every day or almost every day
- at least once a week, but not every day
- less than once a week

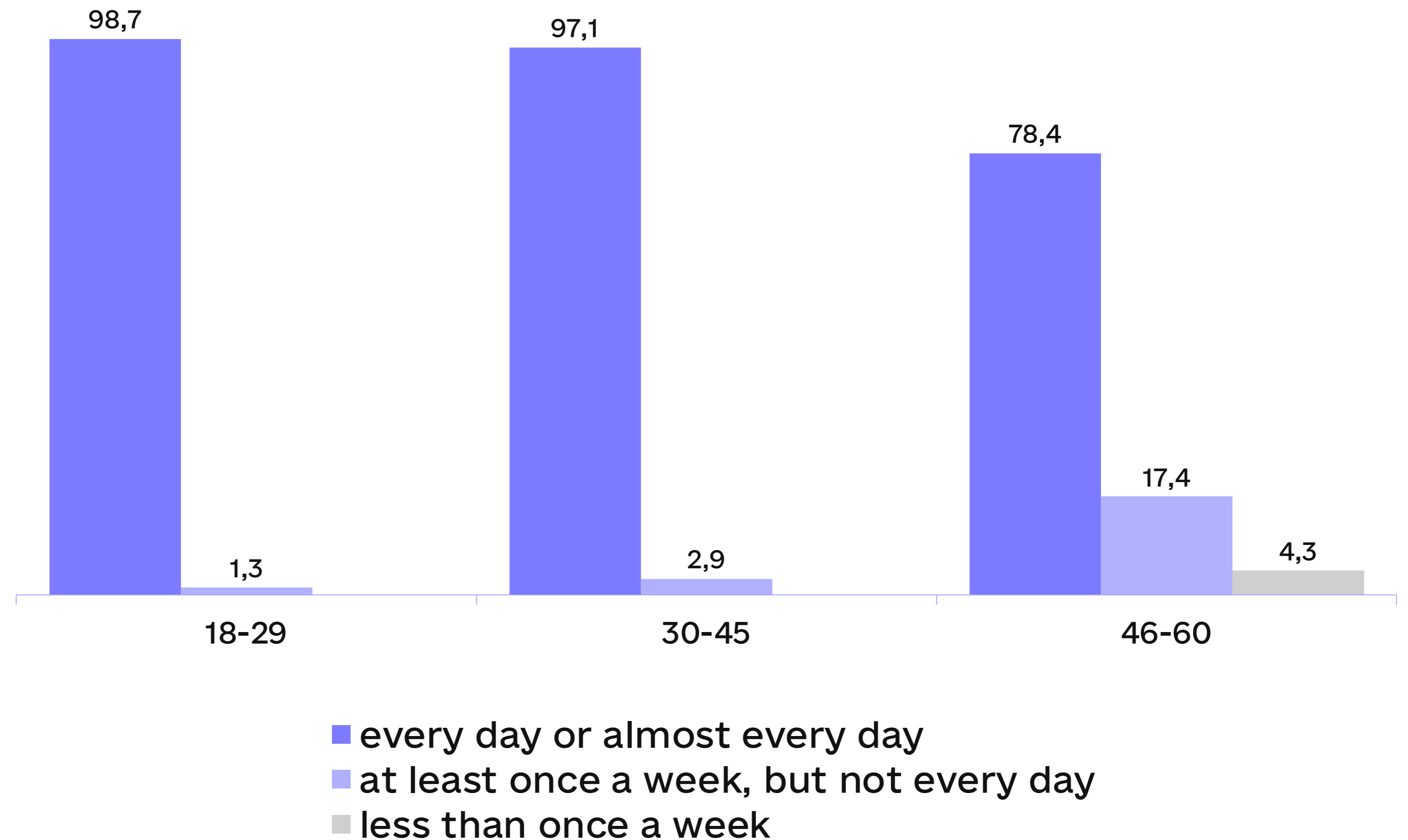
Frequency of the Internet Use for the last 3 months

Ukraine  in a whole



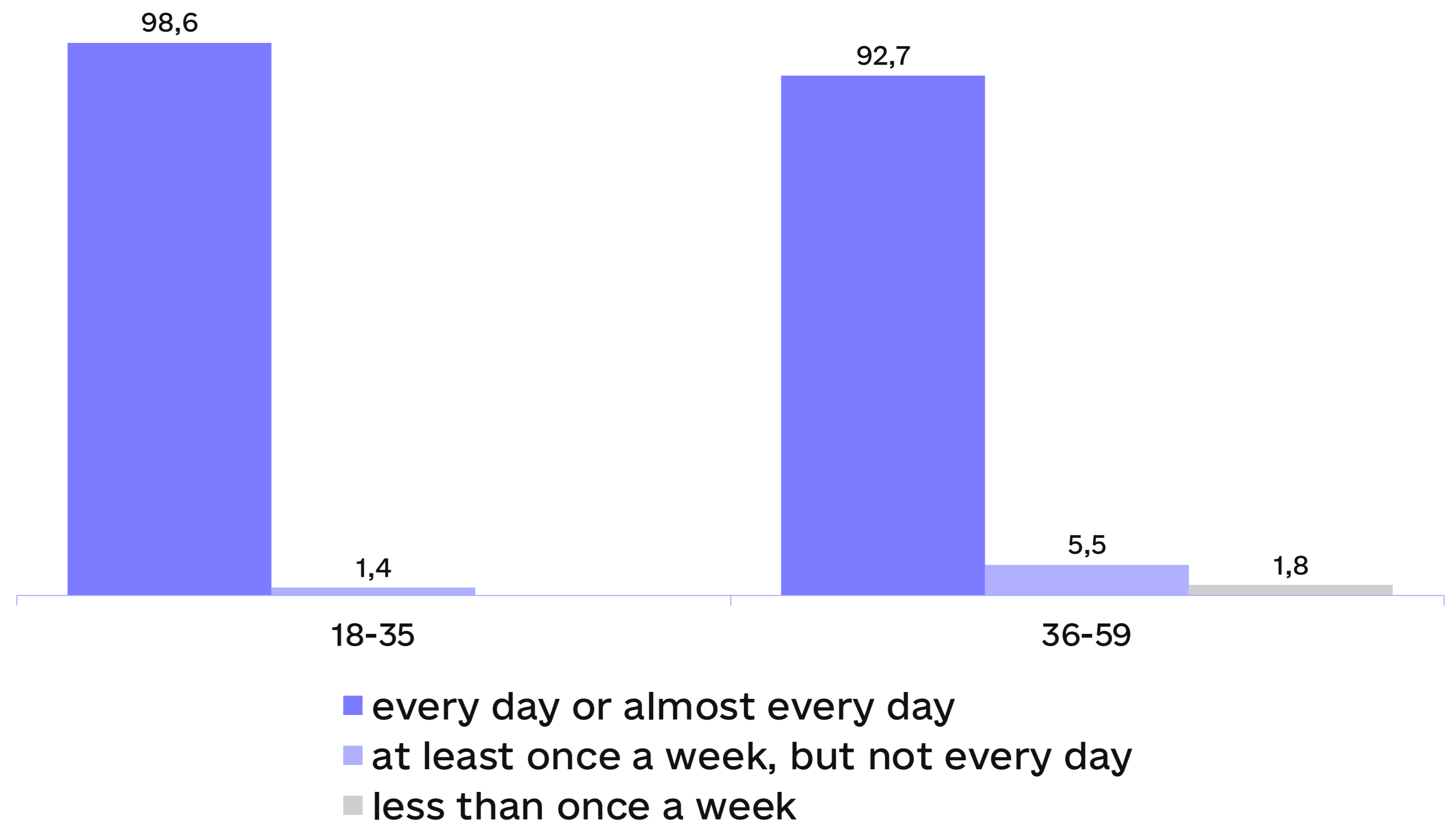
Frequency of the Internet Use for the last 3 months

Uncontrolled territories 🚧



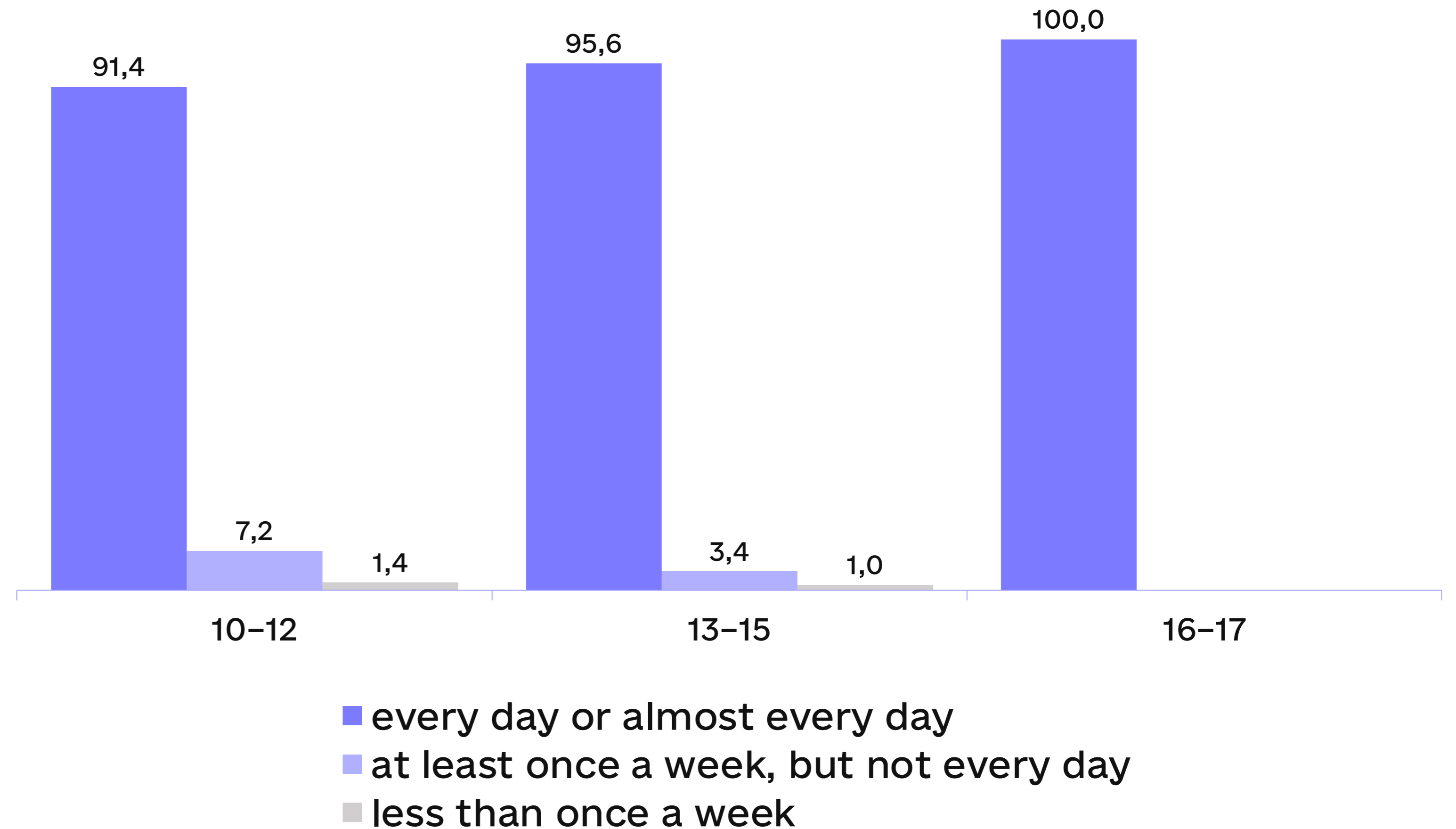
Frequency of the Internet Use for the last 3 months

People with hearing impairment 🦻



Frequency of the Internet Use for the last 3 months

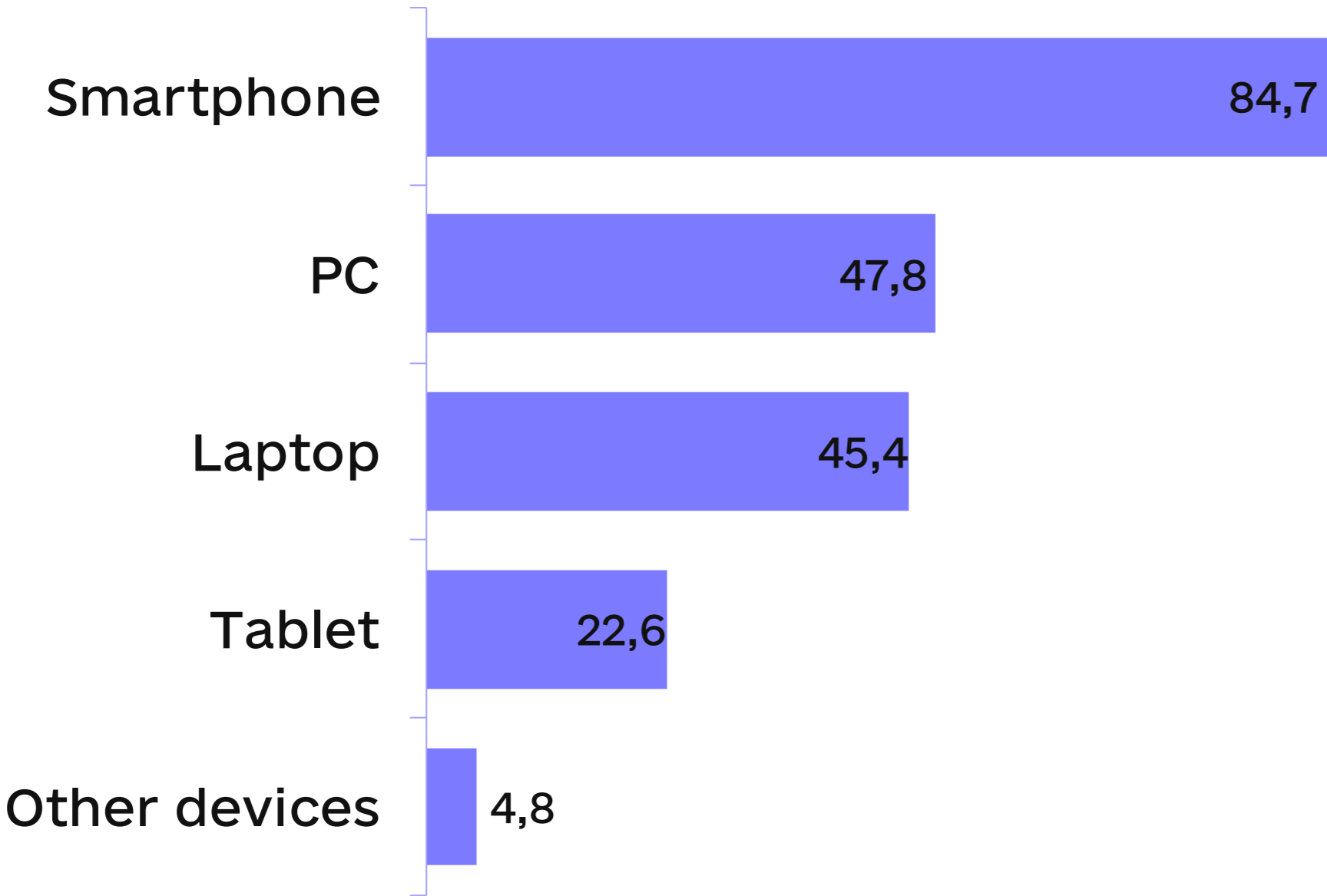
Youth aged 10–17 years 🧑



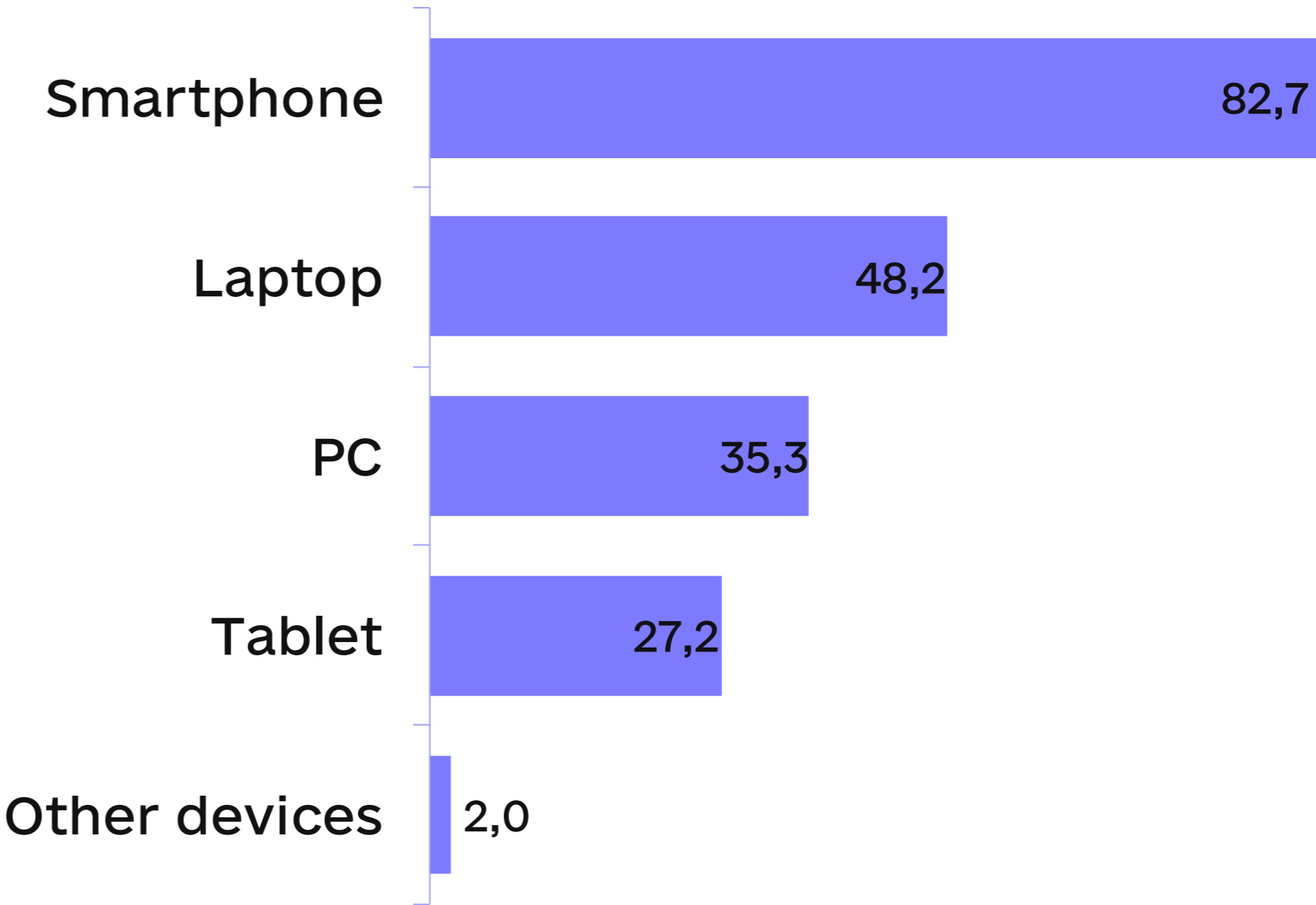
Devices to access the Internet at home 🏠



Ukraine in a whole 🇺🇦



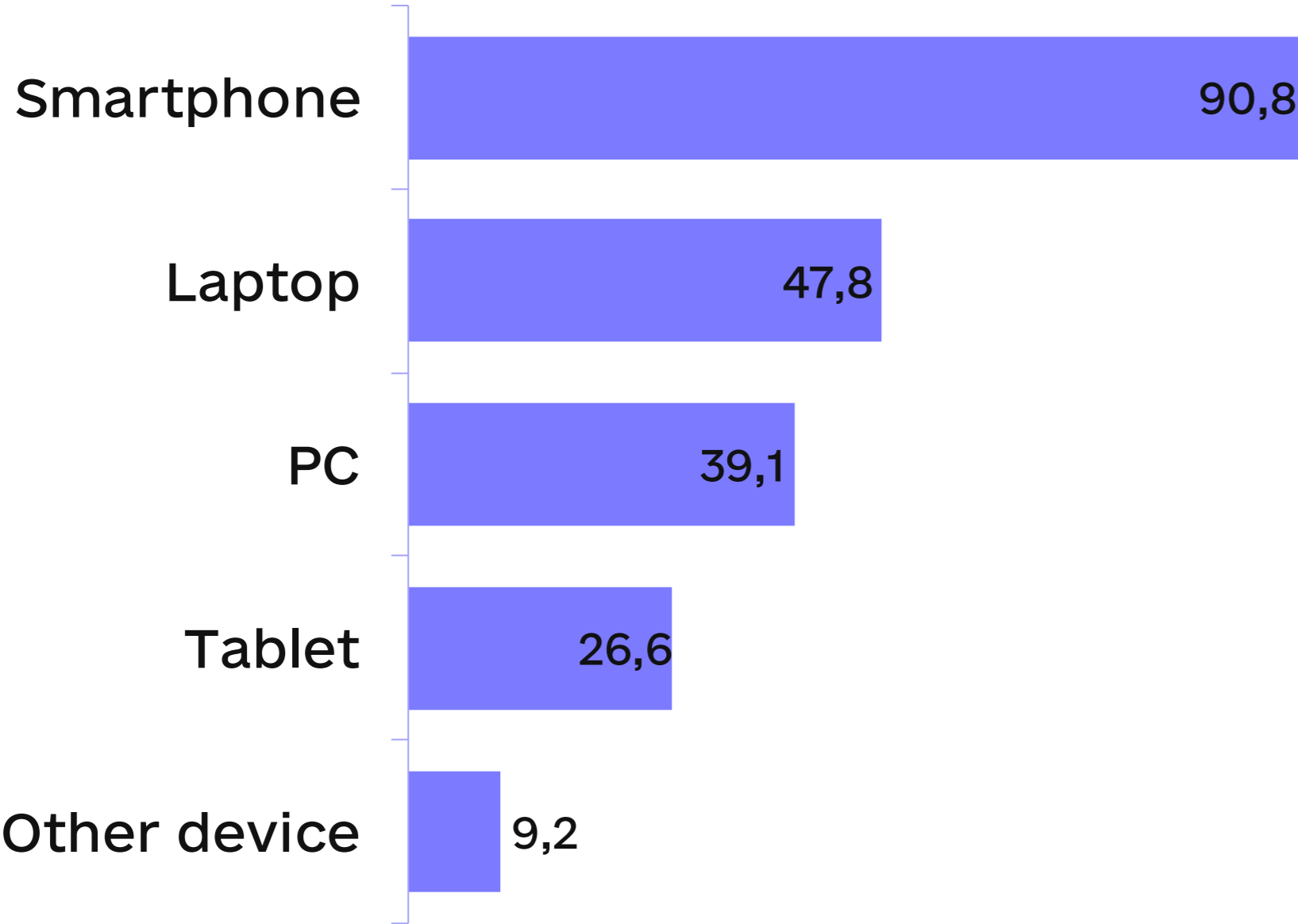
Uncontrolled territories 🚧



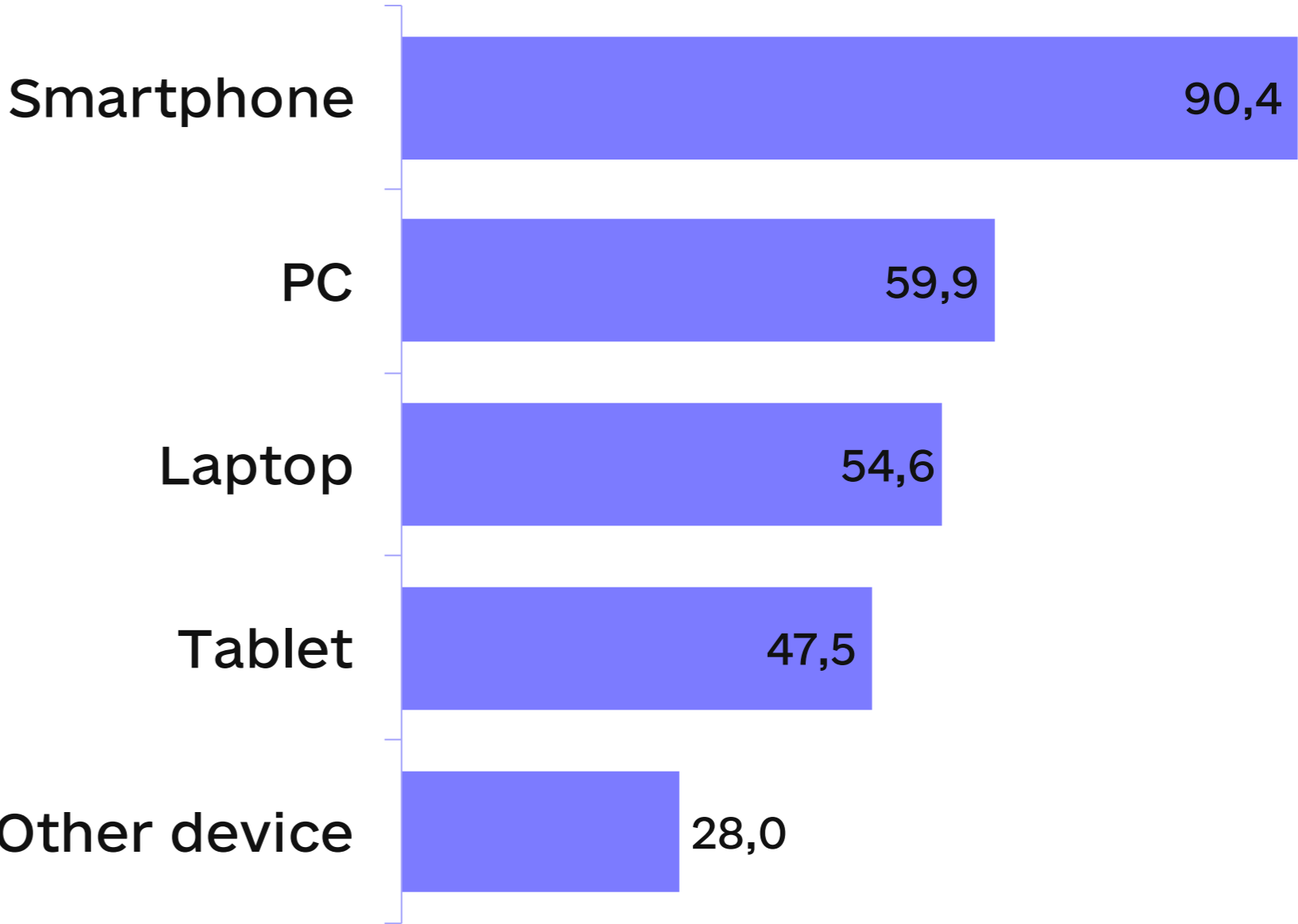
Devices to access the Internet at home 🏠



People with hearing impairment 🧑🏻🦻



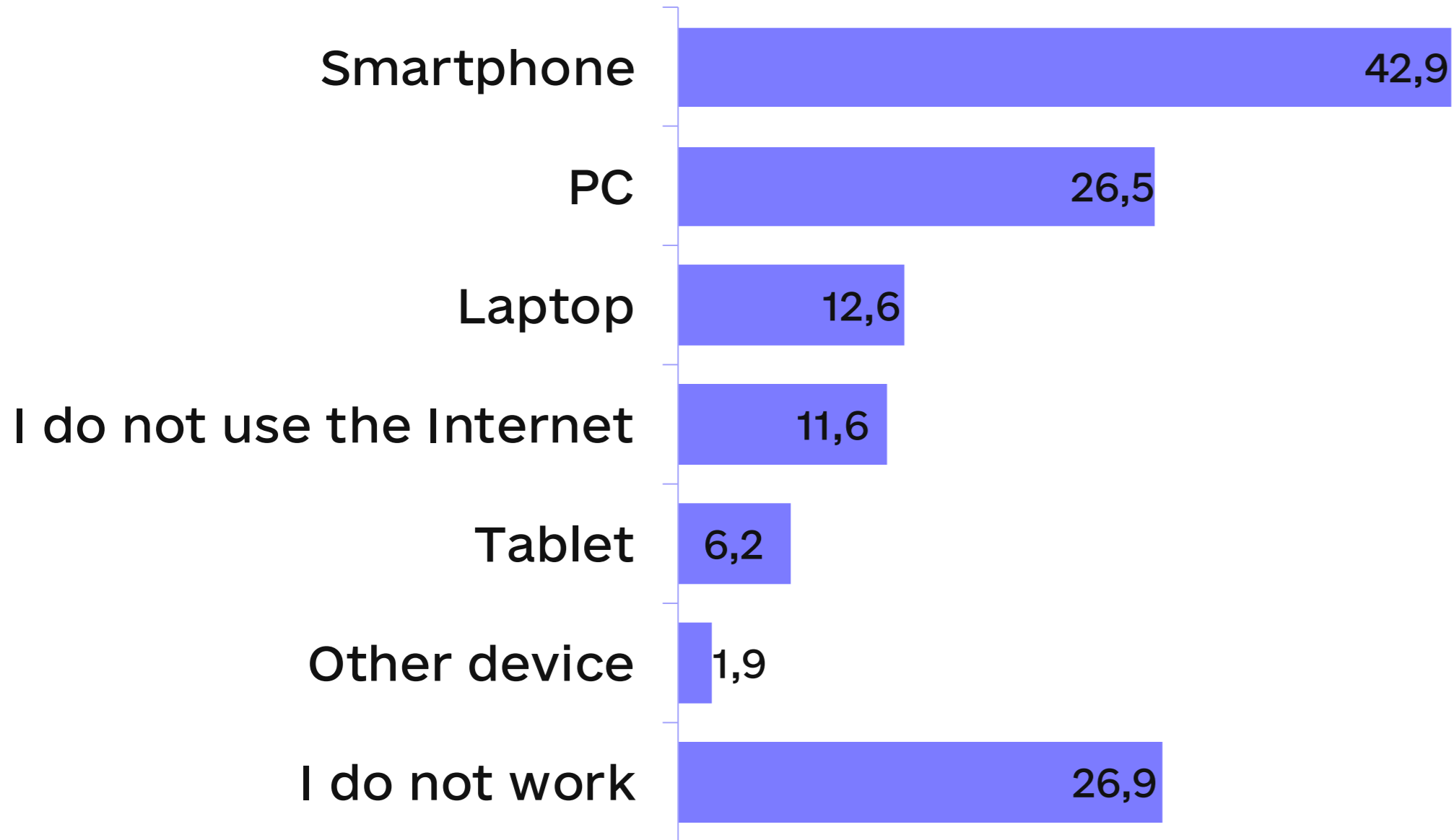
Youth aged 10–17 years 🧑🏻



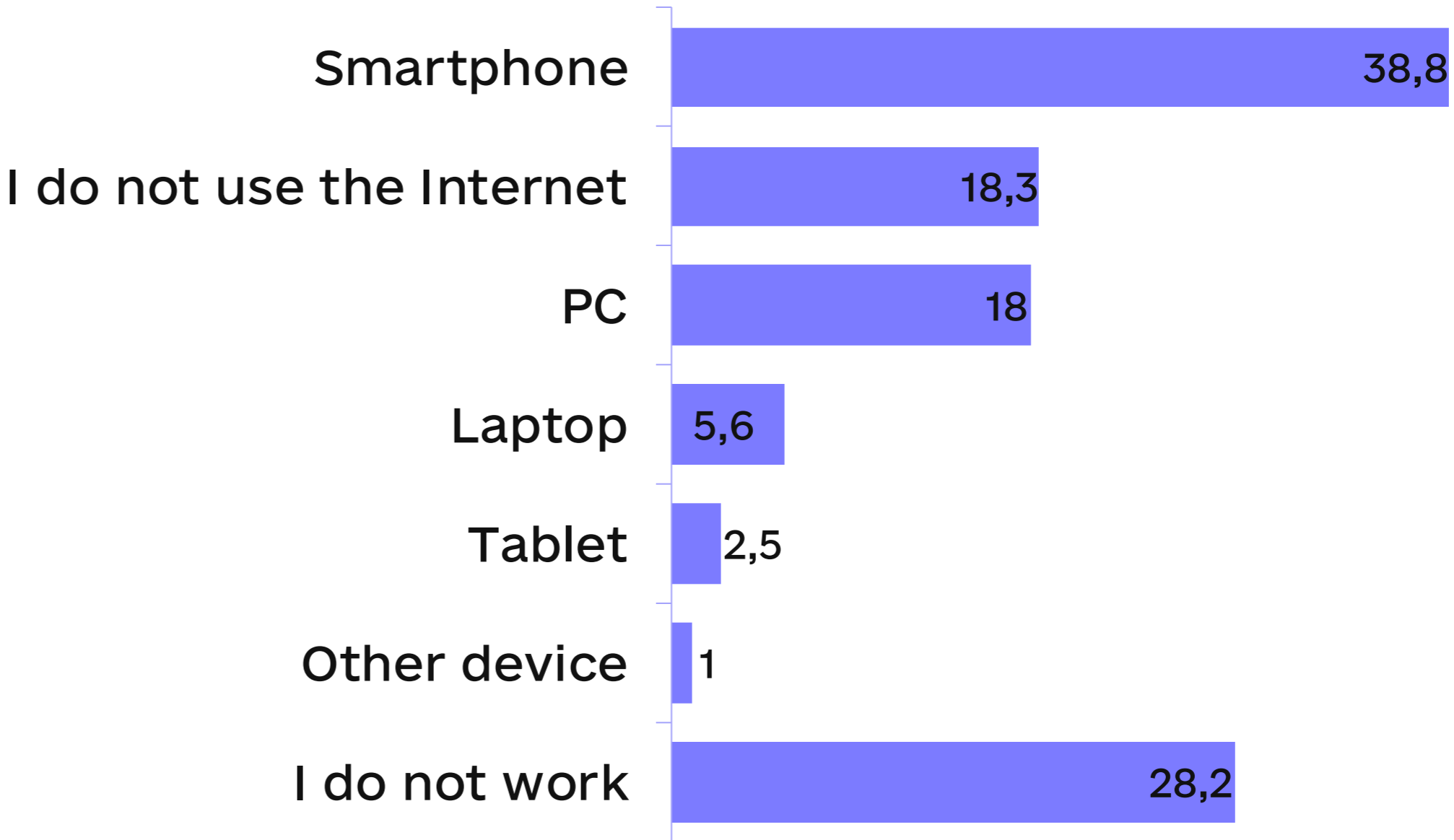
Devices to access the Internet at work



Ukraine in a whole

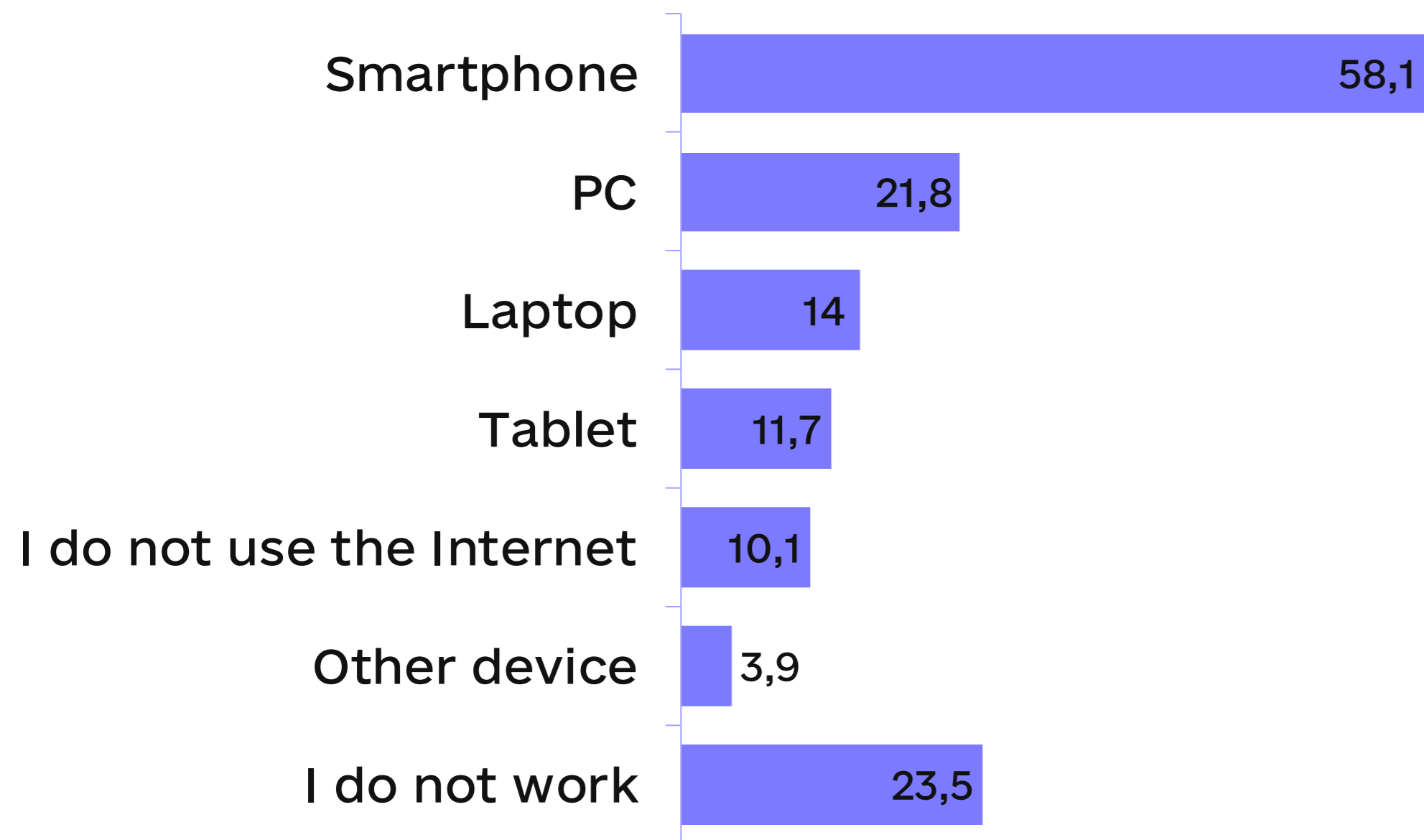


Uncontrolled territories

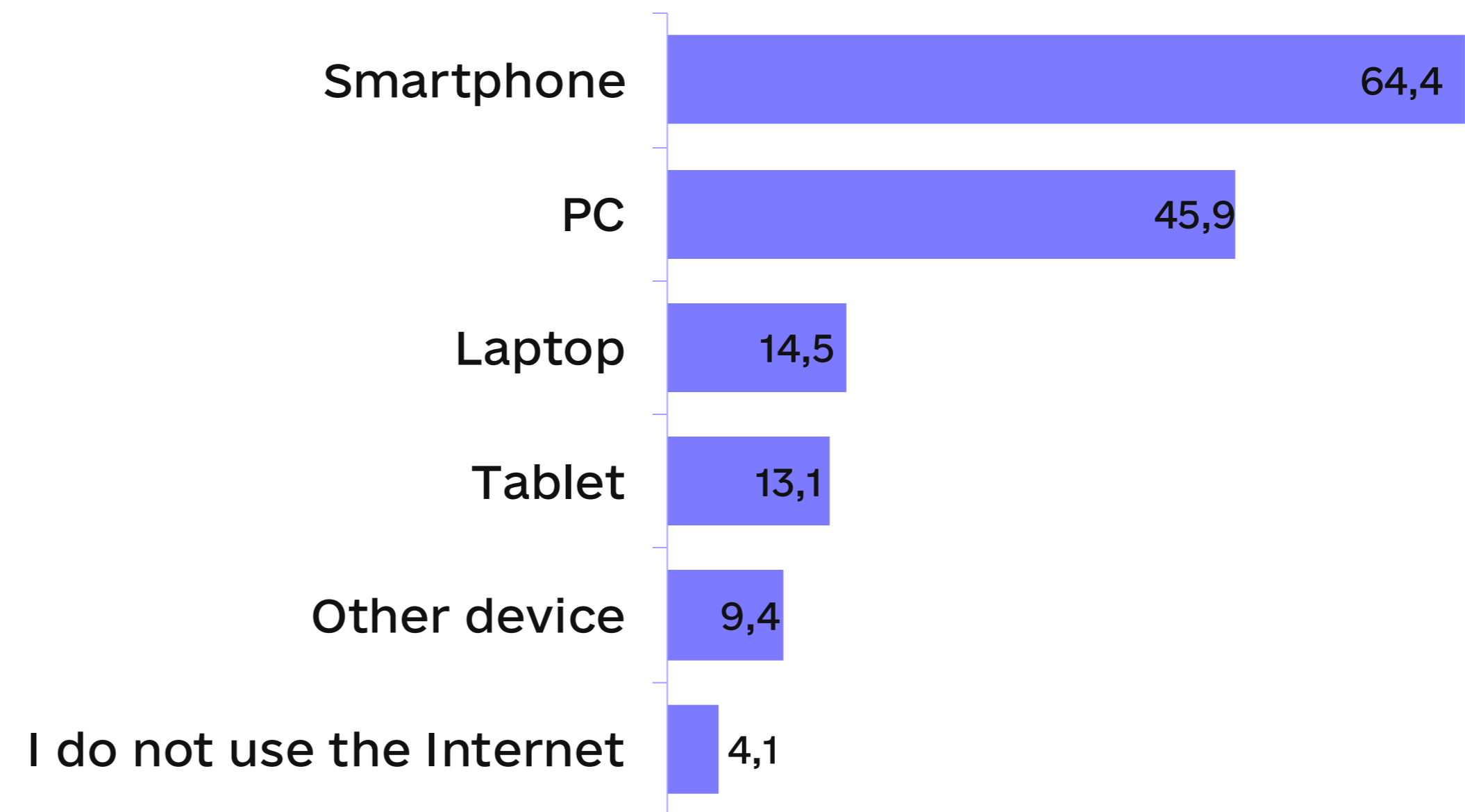


Devices to access the Internet at work

People with hearing impairment



Youth aged 10–17 years



Section 3

Electronic safety

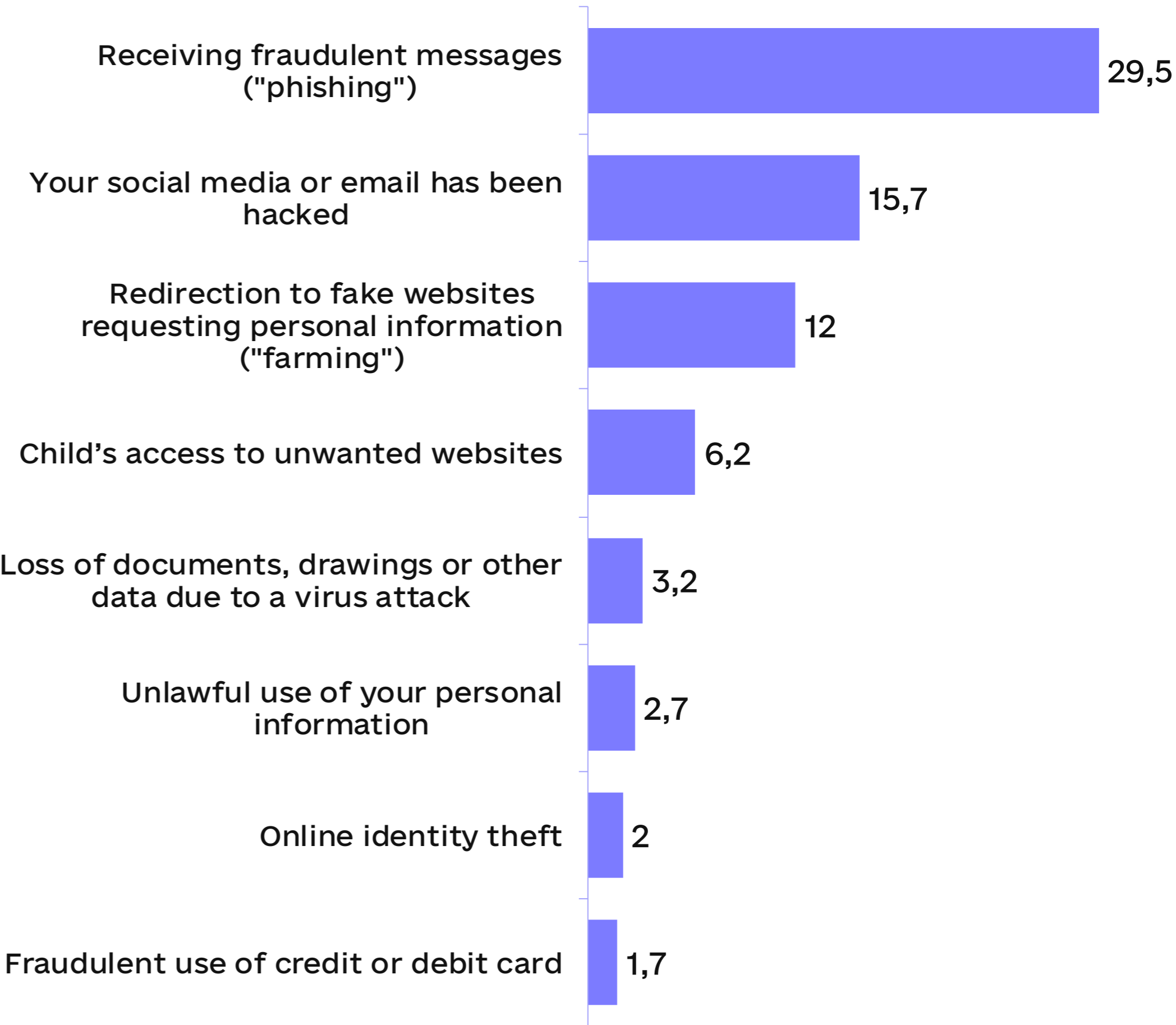
Did you face any of the following safety issues related to the personal Internet use for the last 12 months?

(percent of the population choosing "Yes" answer)

Ukraine in a whole



Uncontrolled territories



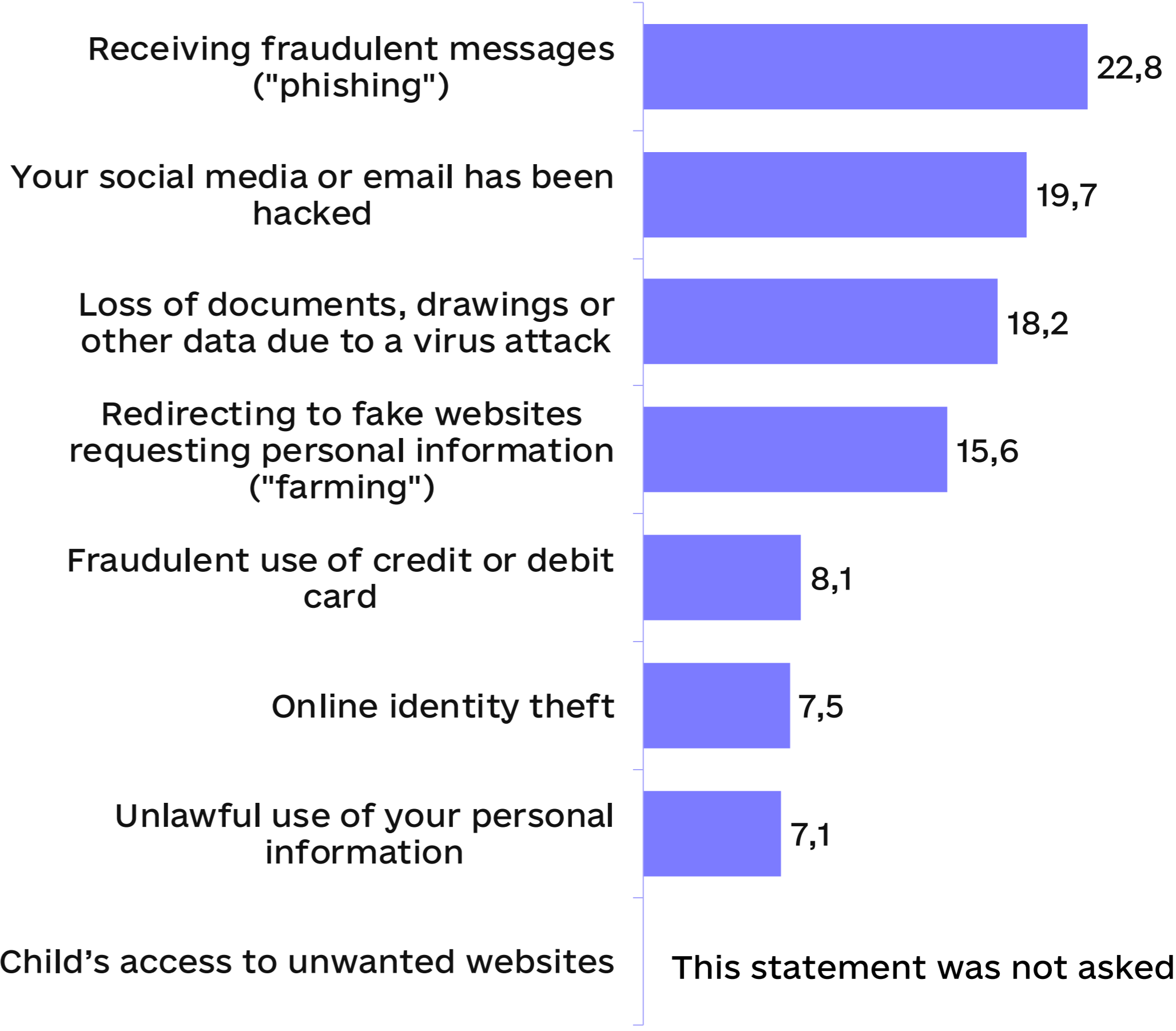
Did you face any of the following safety issues related to the personal Internet use for the last 12 months?

(percent of the population choosing "Yes" answer)

People with hearing impairment

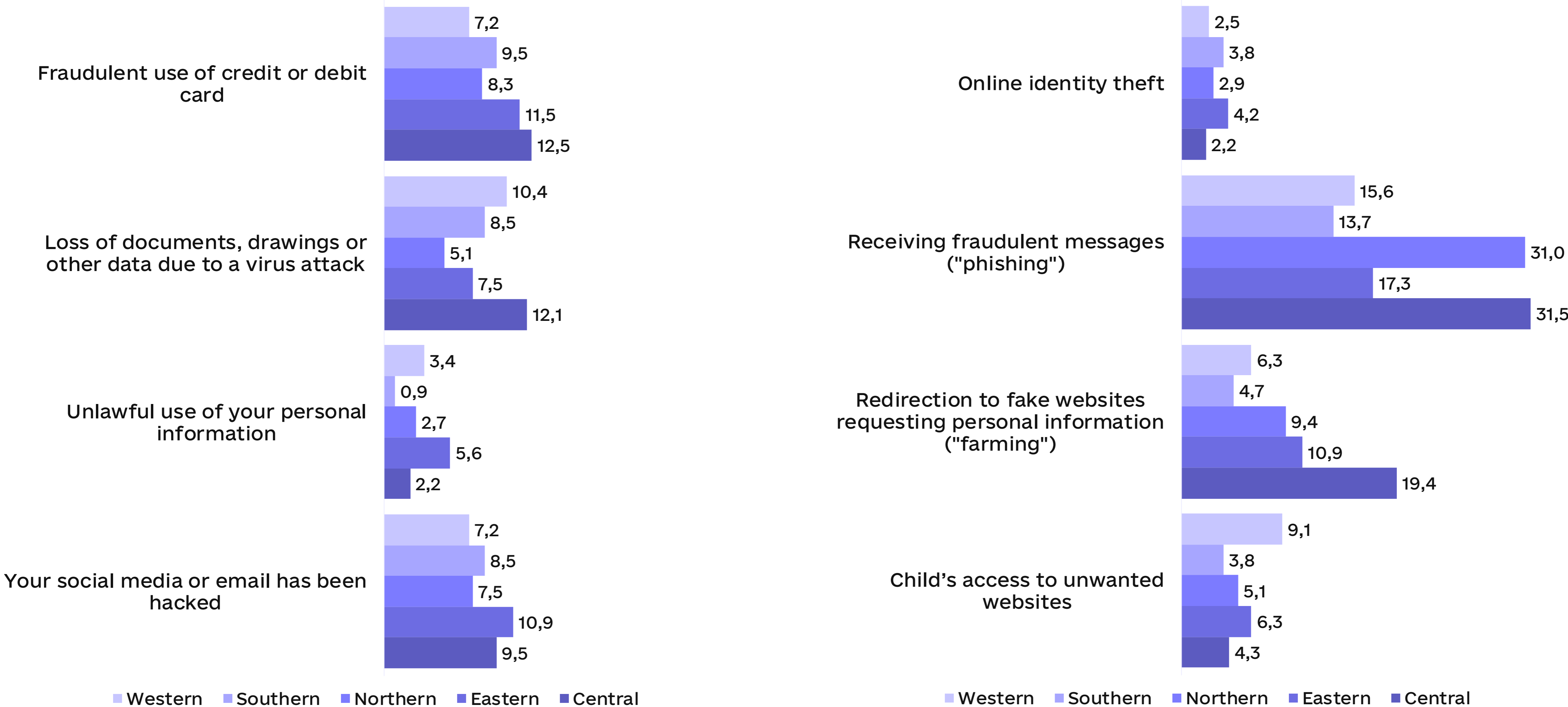


Youth aged 10–17 years



Did you face any of the following safety issues related to the personal Internet use for the last 12 months?

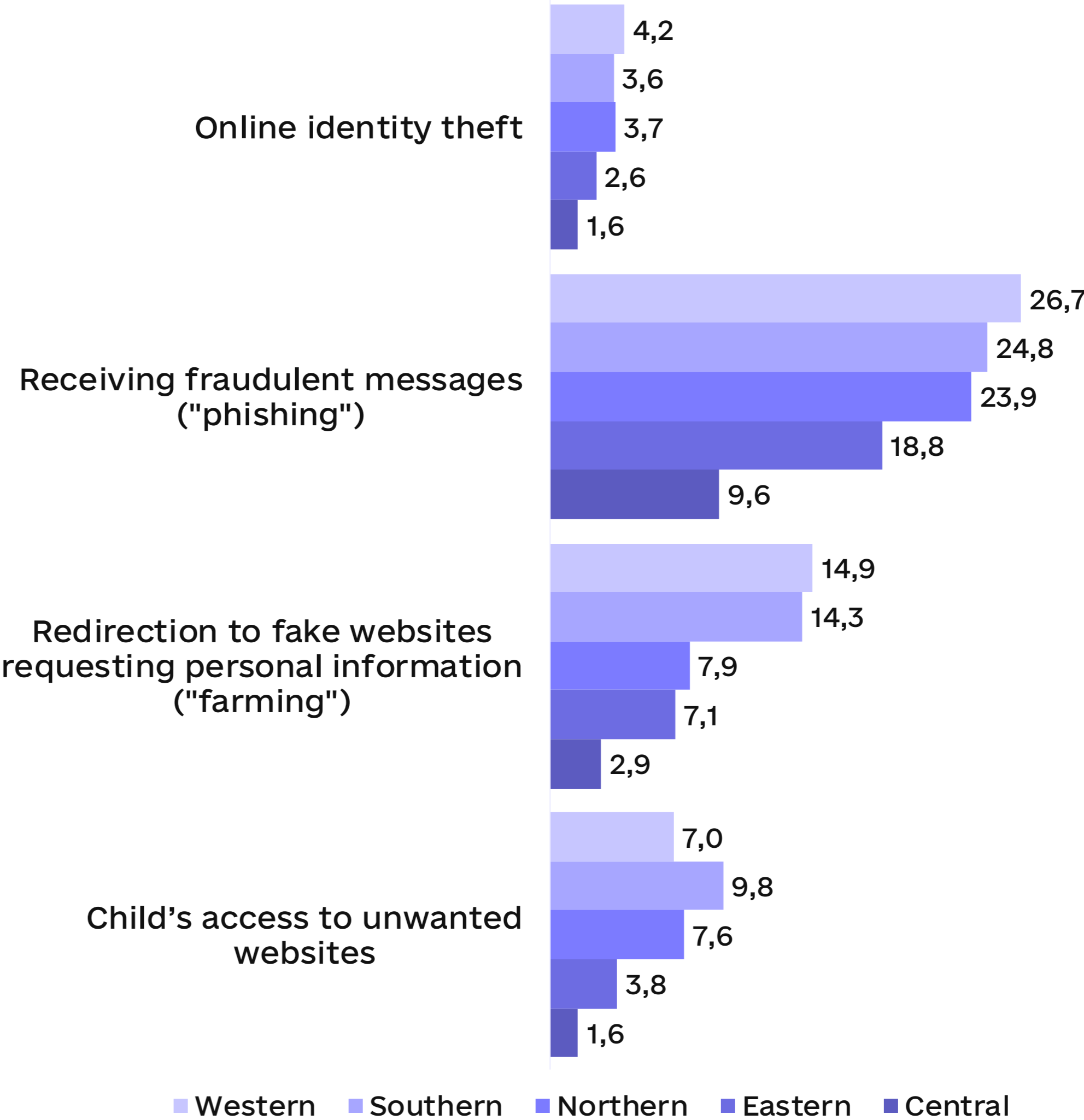
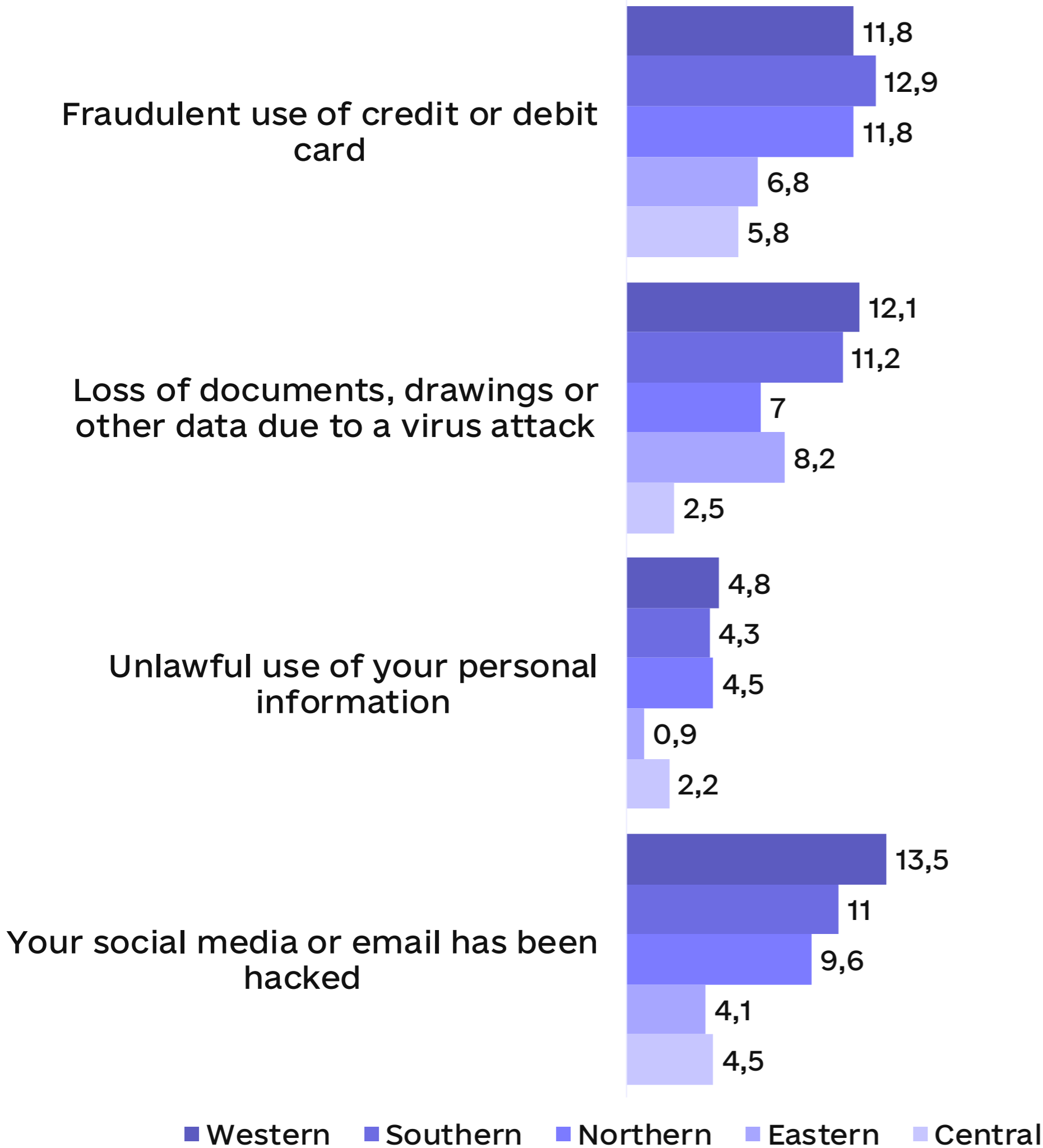
(in %, by region, by "Yes" answer)



Did you face any of the following safety issues related to the personal Internet use for the last 12 months?

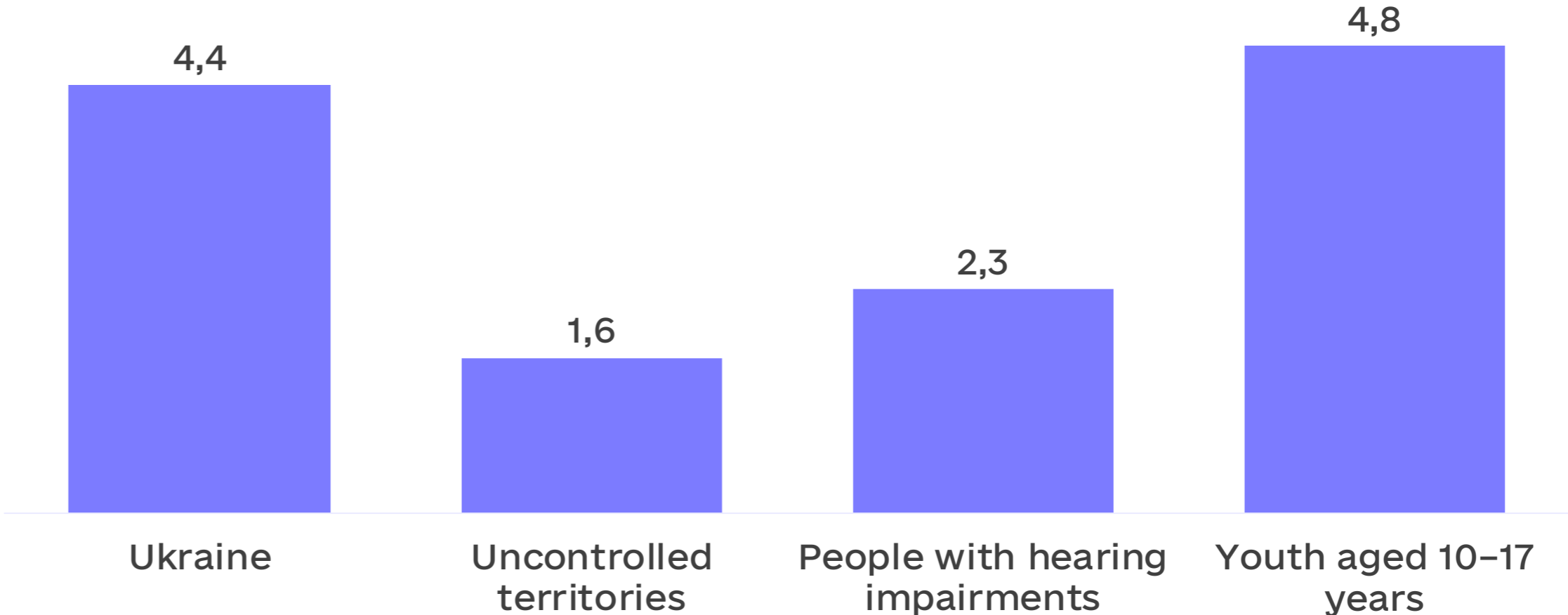
(by "Yes" answer)

Ukraine in a whole



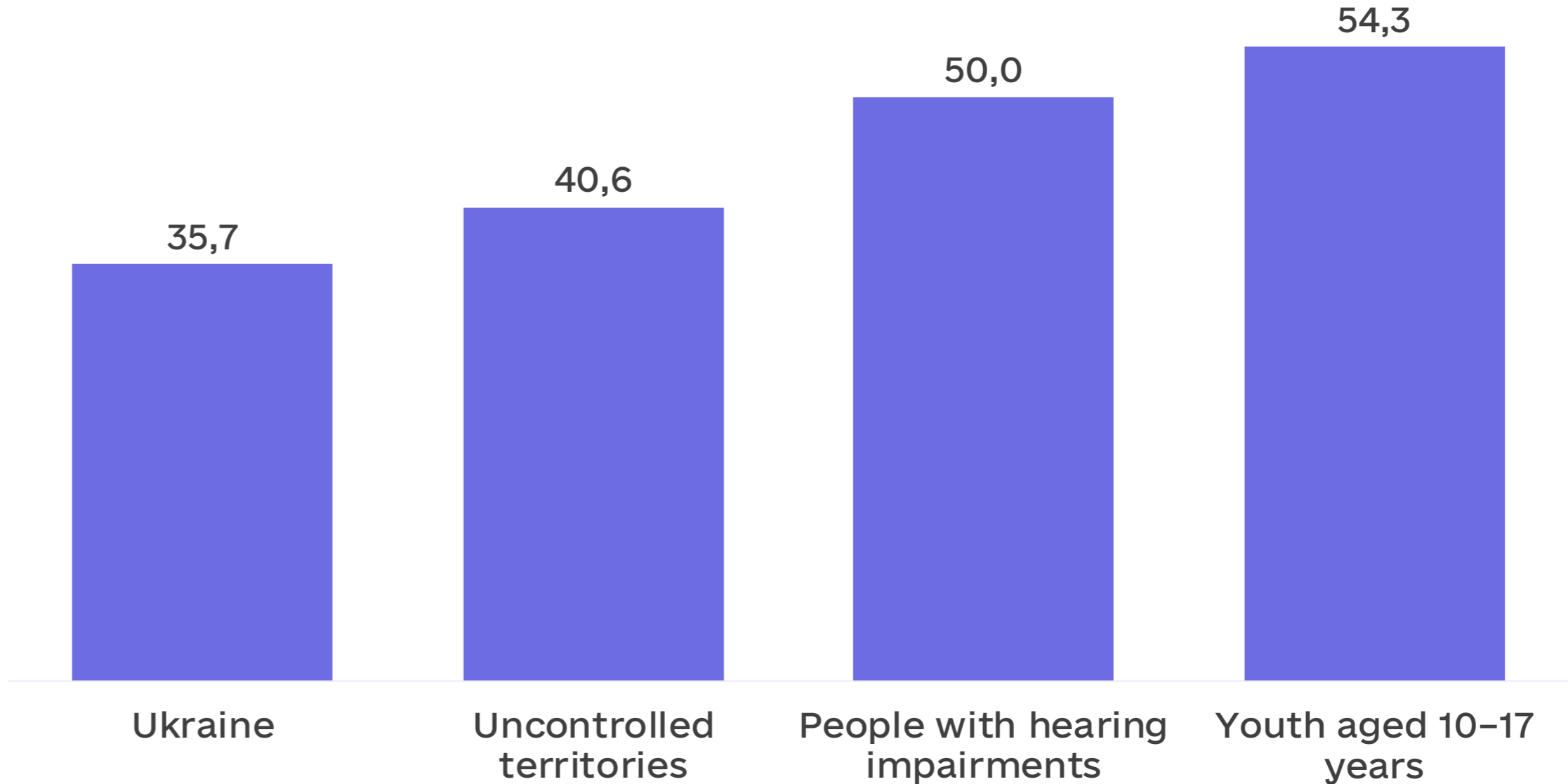
Did you experience any financial losses for the last 12 months as a result of theft, fraudulent messages, or redirection to fake websites?

(percent of the population choosing "Yes" answer)



Do you backup your files on any external storage devices or online storage?

(percent of the population choosing "Yes" answer)

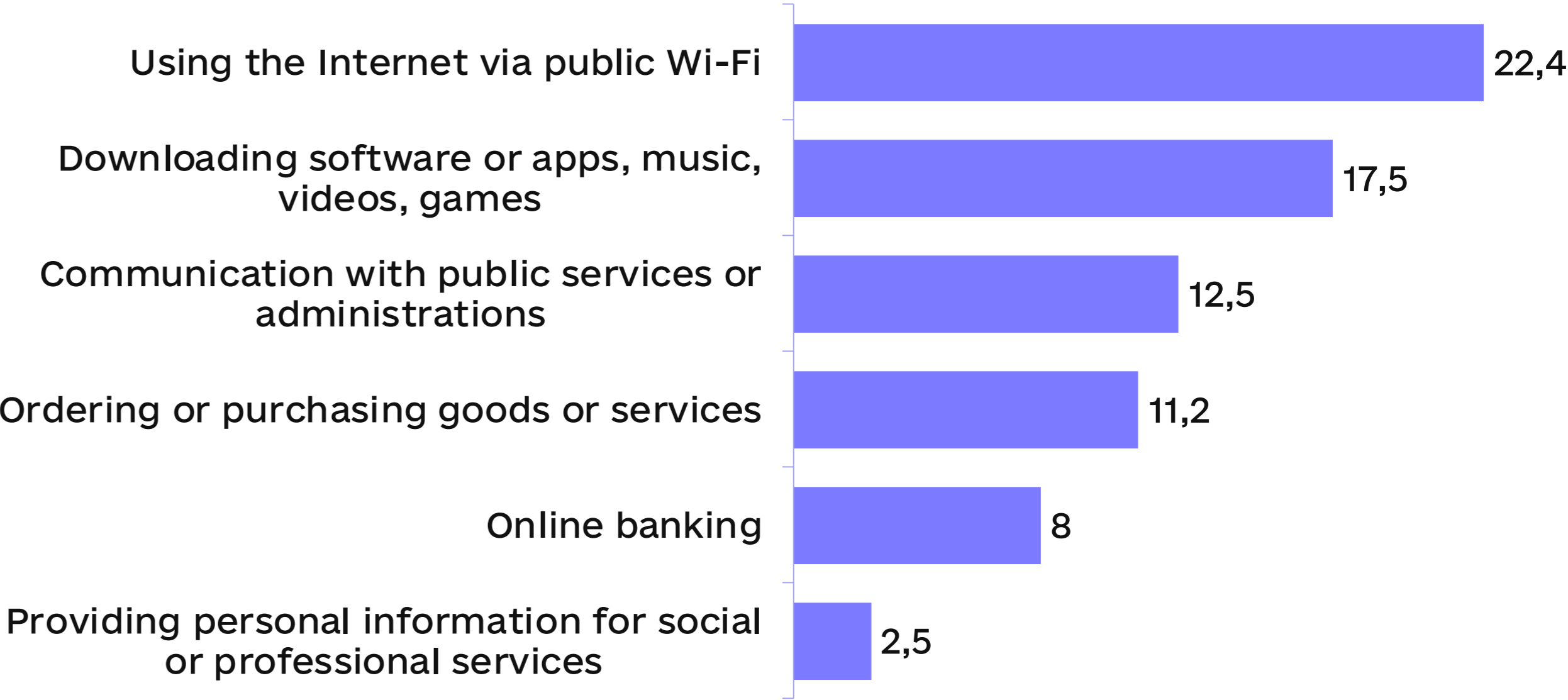
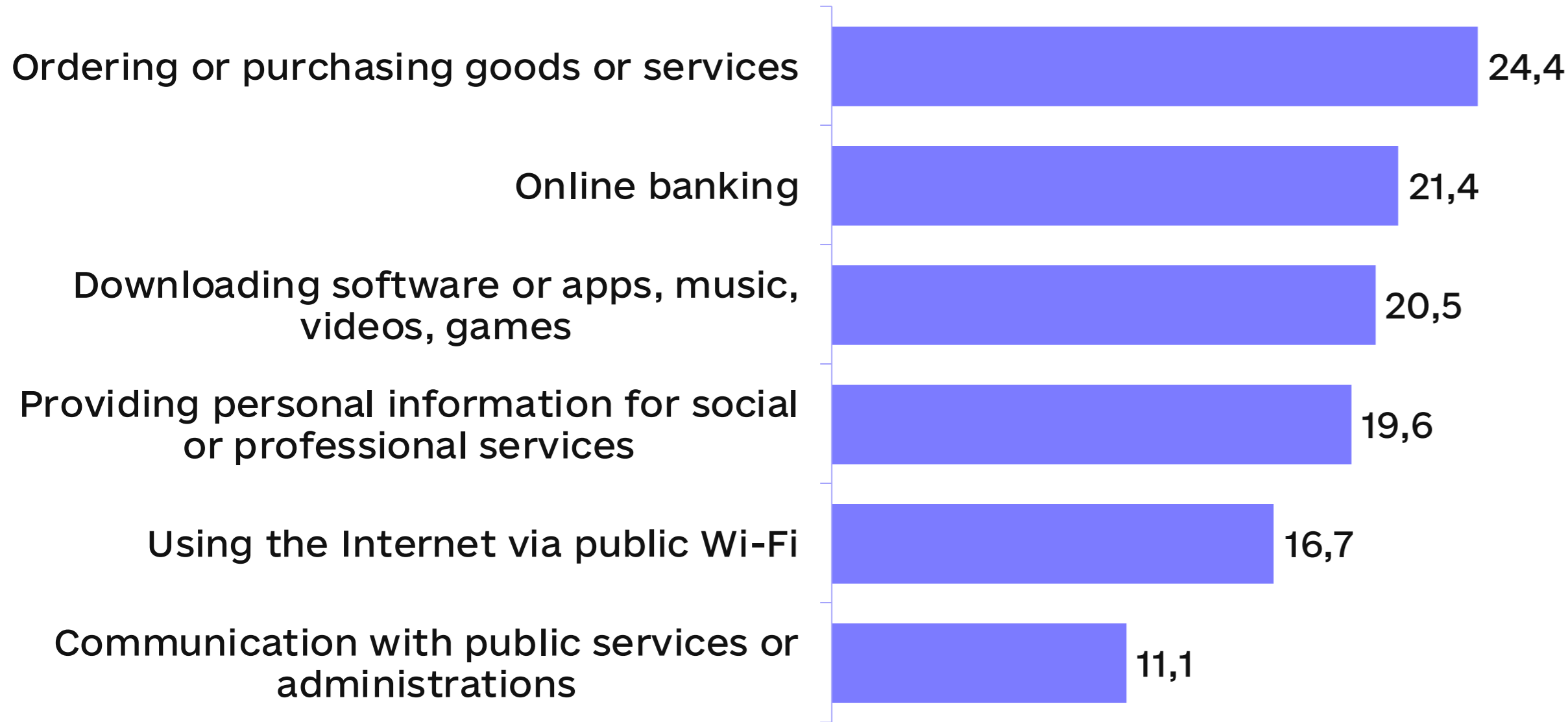


Were there moments when you had to give up these activities for safety reasons for the last 12 months?

(by "Yes" answer)

Ukraine in a whole

Uncontrolled territories

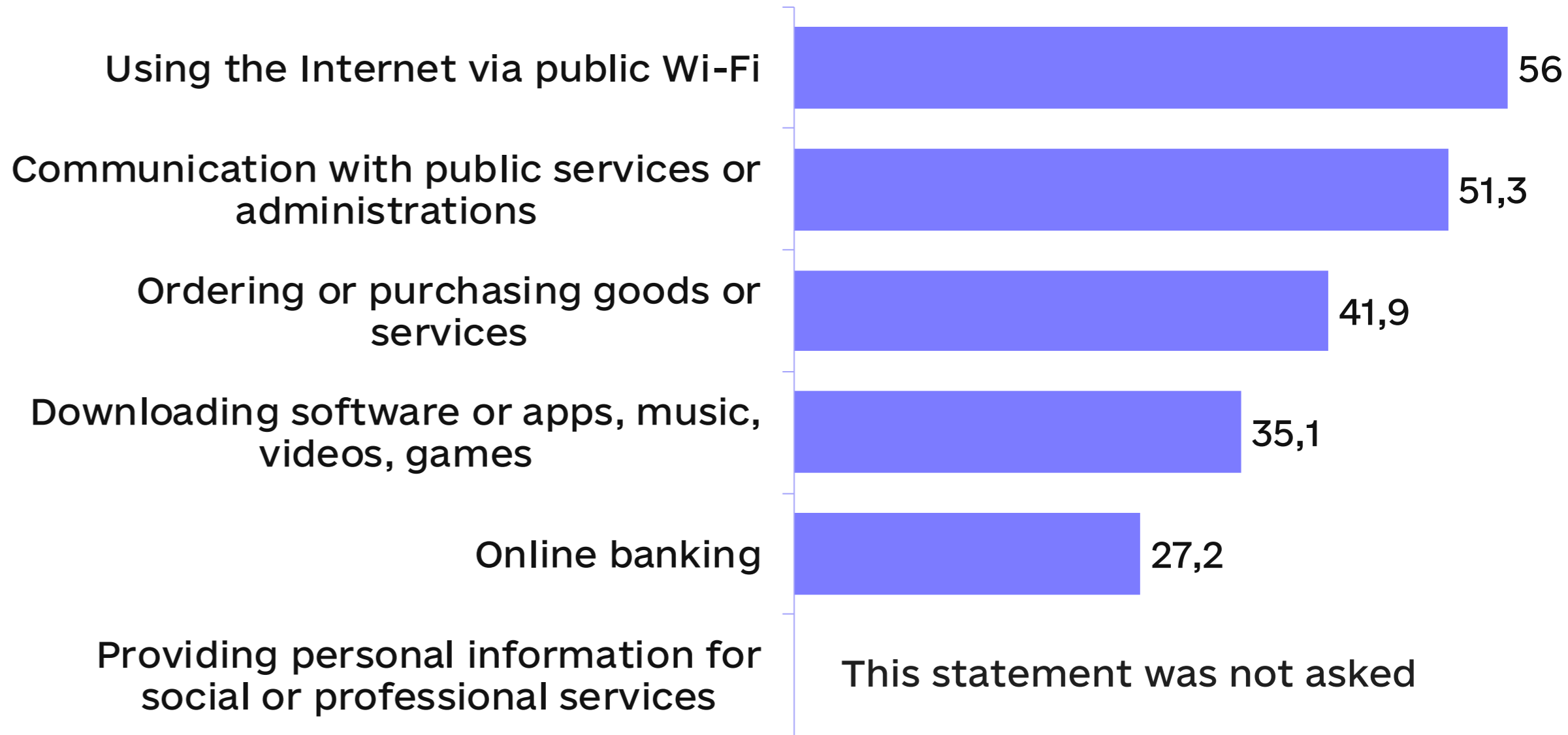
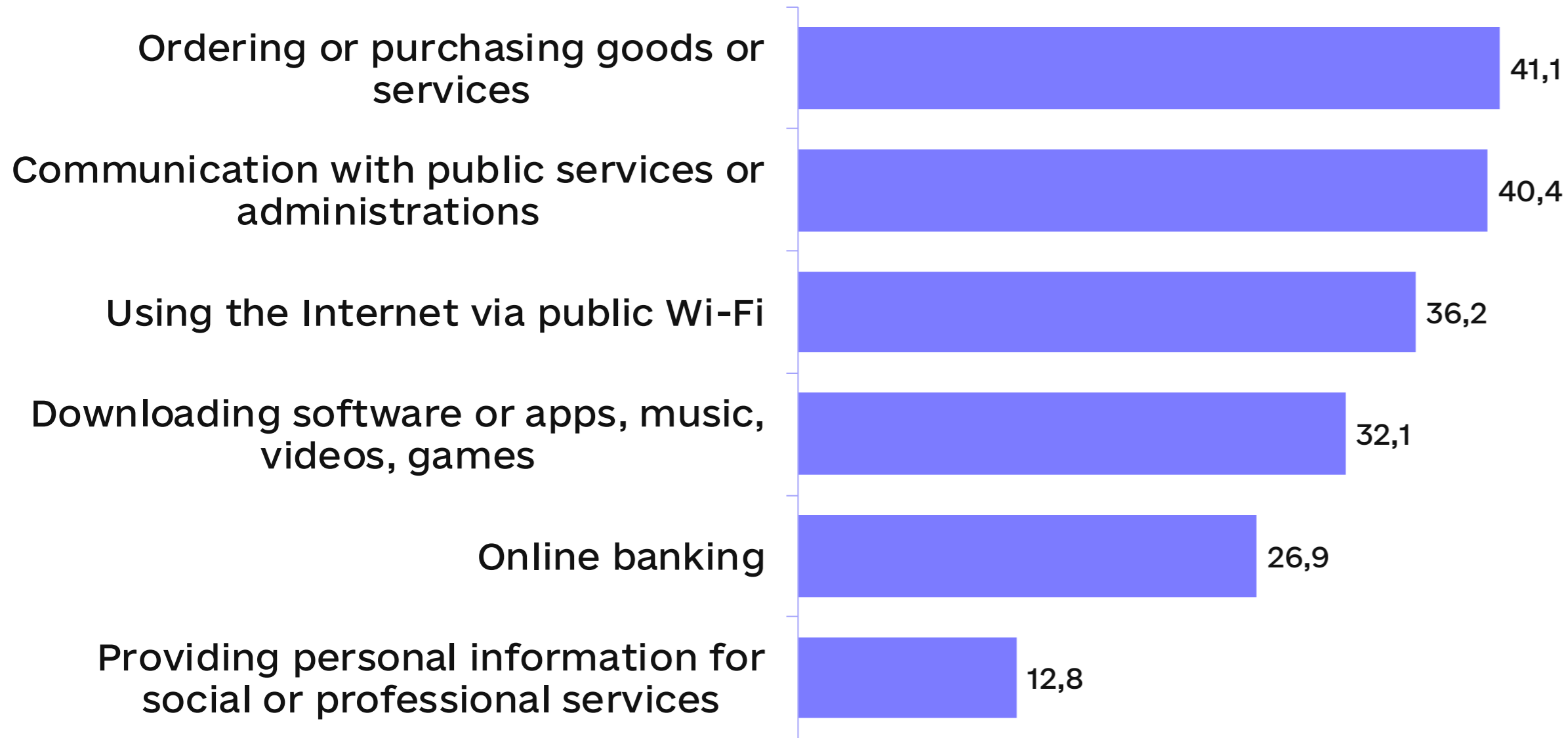


Were there moments when you had to give up these activities for safety reasons for the last 12 months?

(by "Yes" answer)

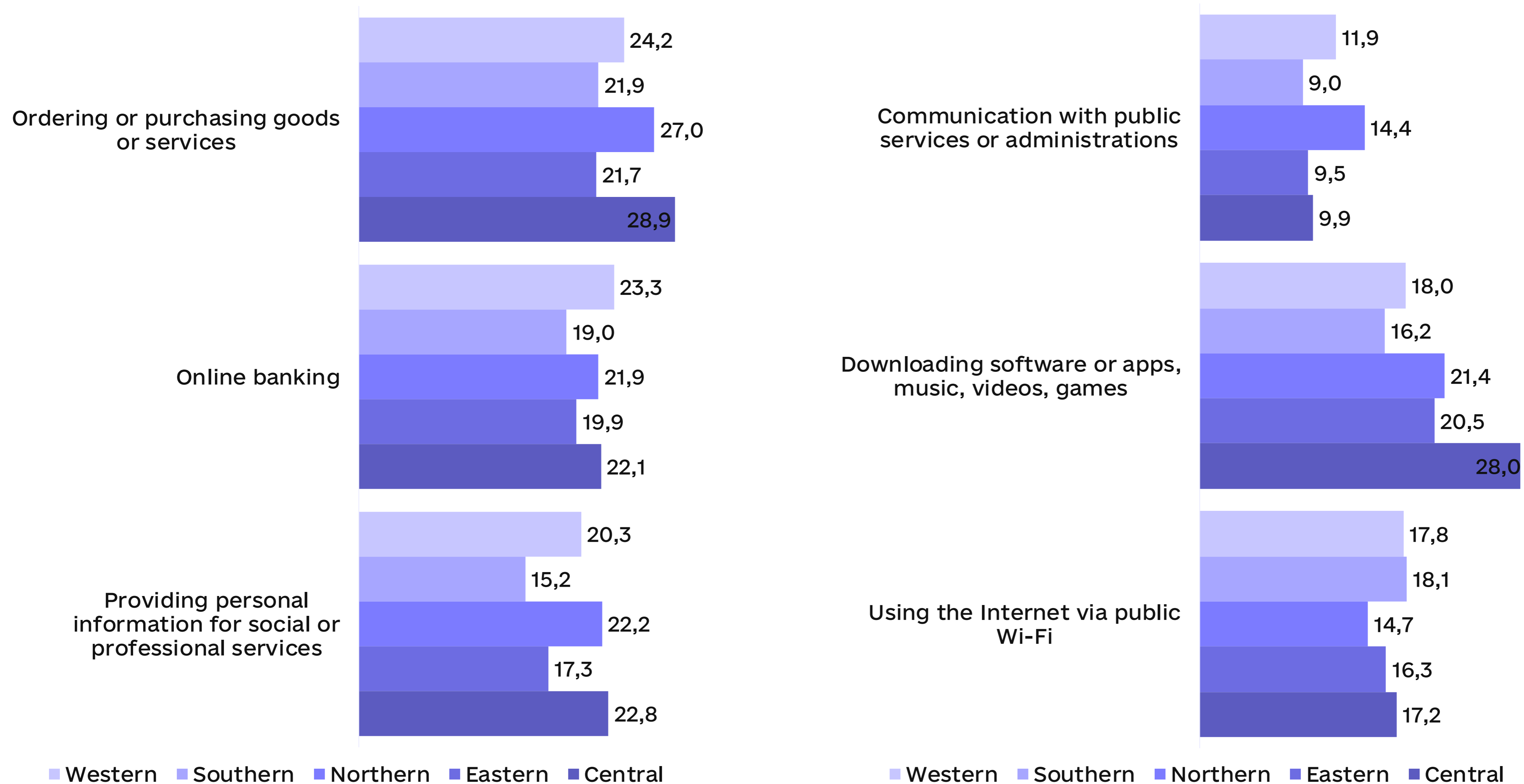
People with hearing impairment

Youth aged 10–17 years



Were there moments when you had to give up these activities for safety reasons for the last 12 months?

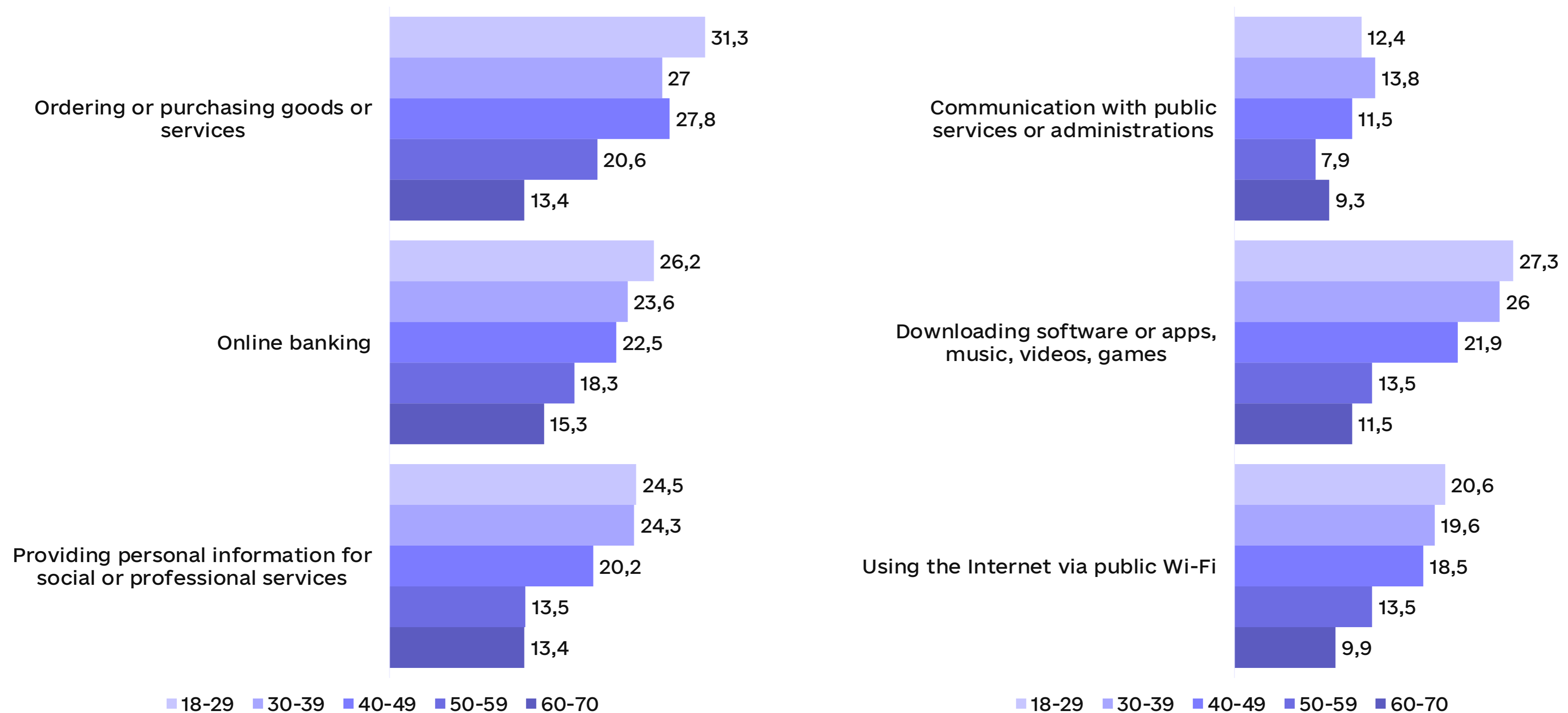
(in %, by region, by "Yes" answer)



Were there moments when you had to give up these activities for safety reasons for the last 12 months?

(By age, in %)

Ukraine in a whole 🇺🇦

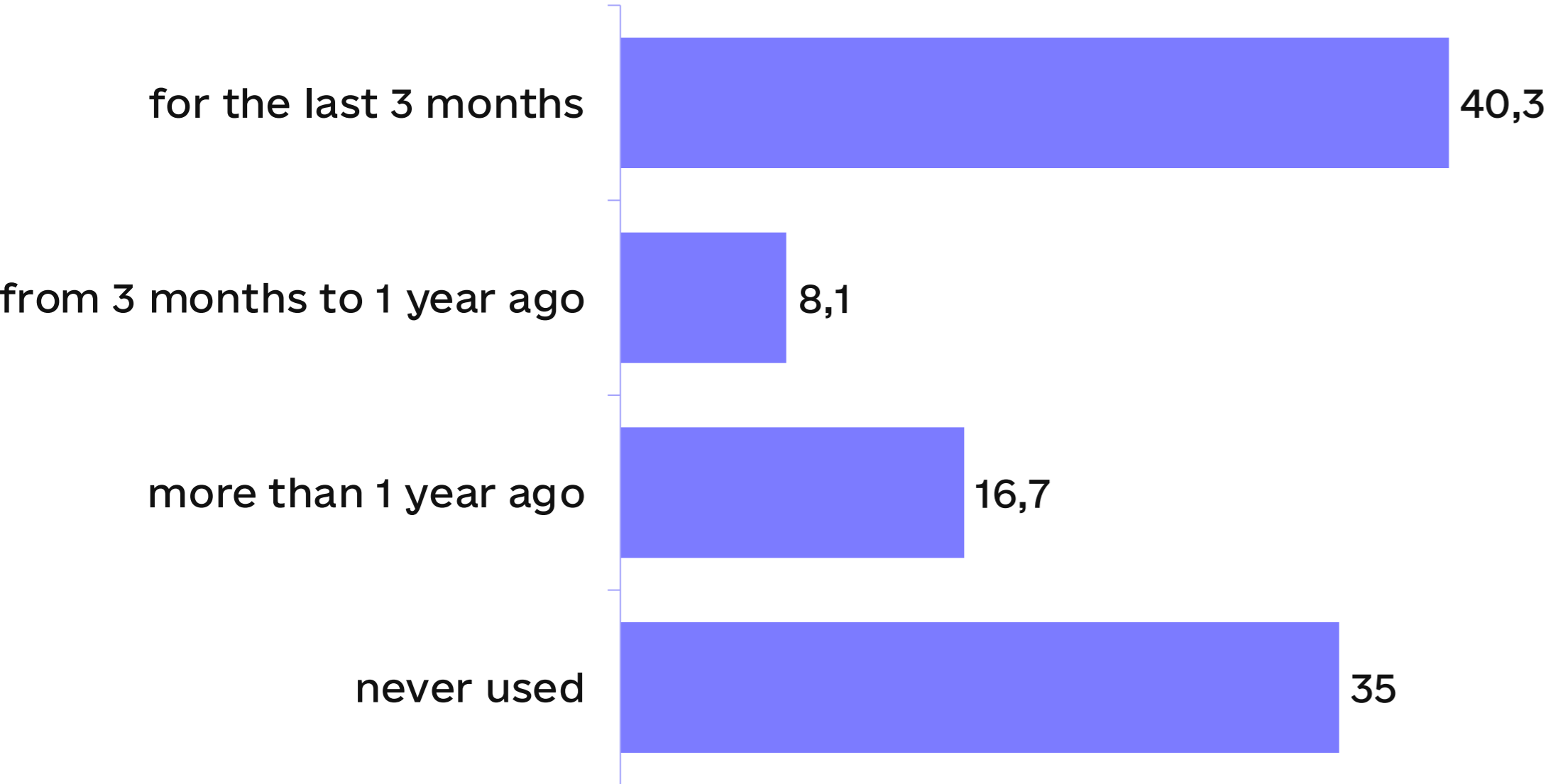


Section 4

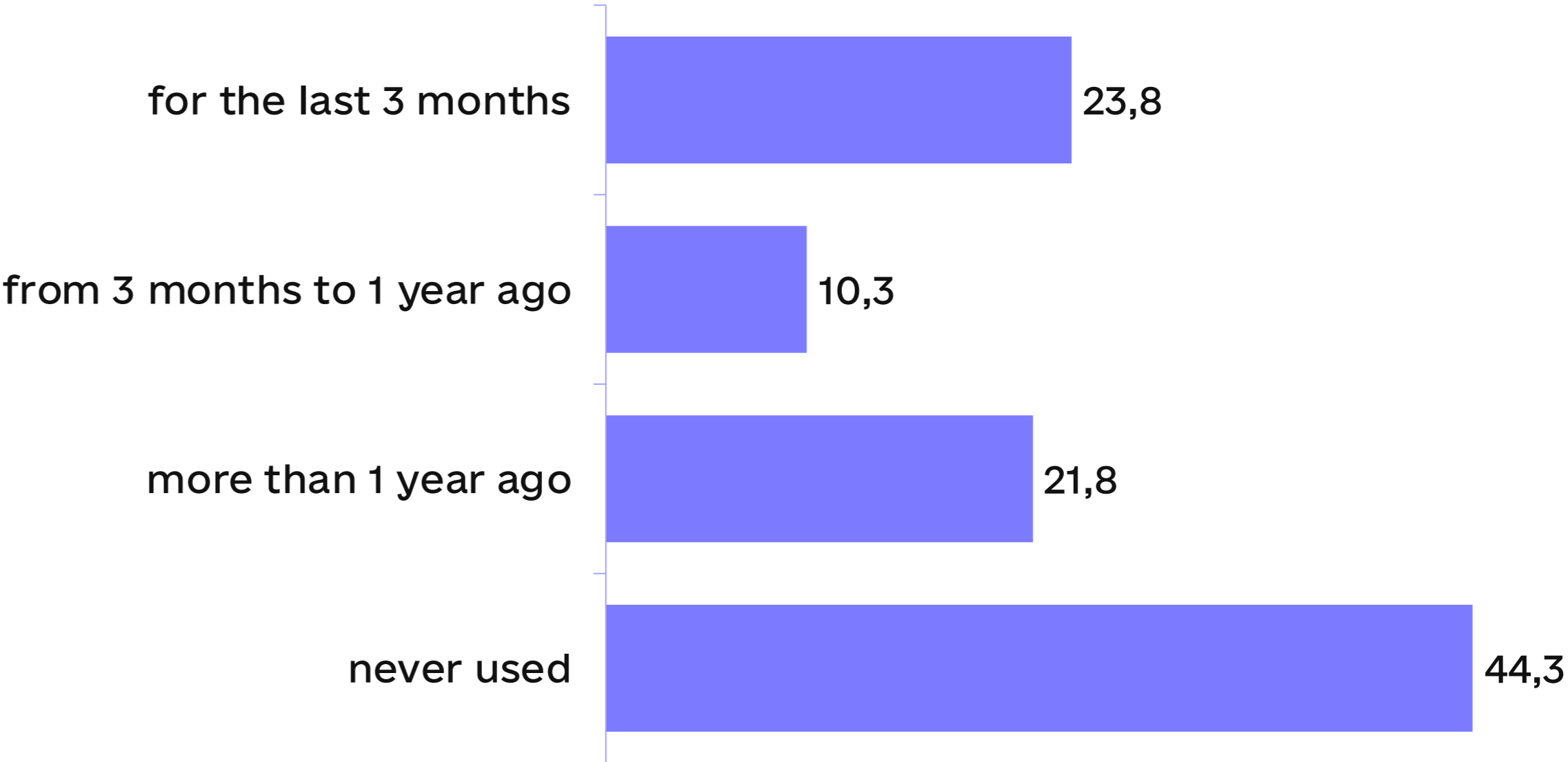
E-Commerce

When did you buy, order goods / services online for personal use for the last time?

Ukraine in a whole 🇺🇦

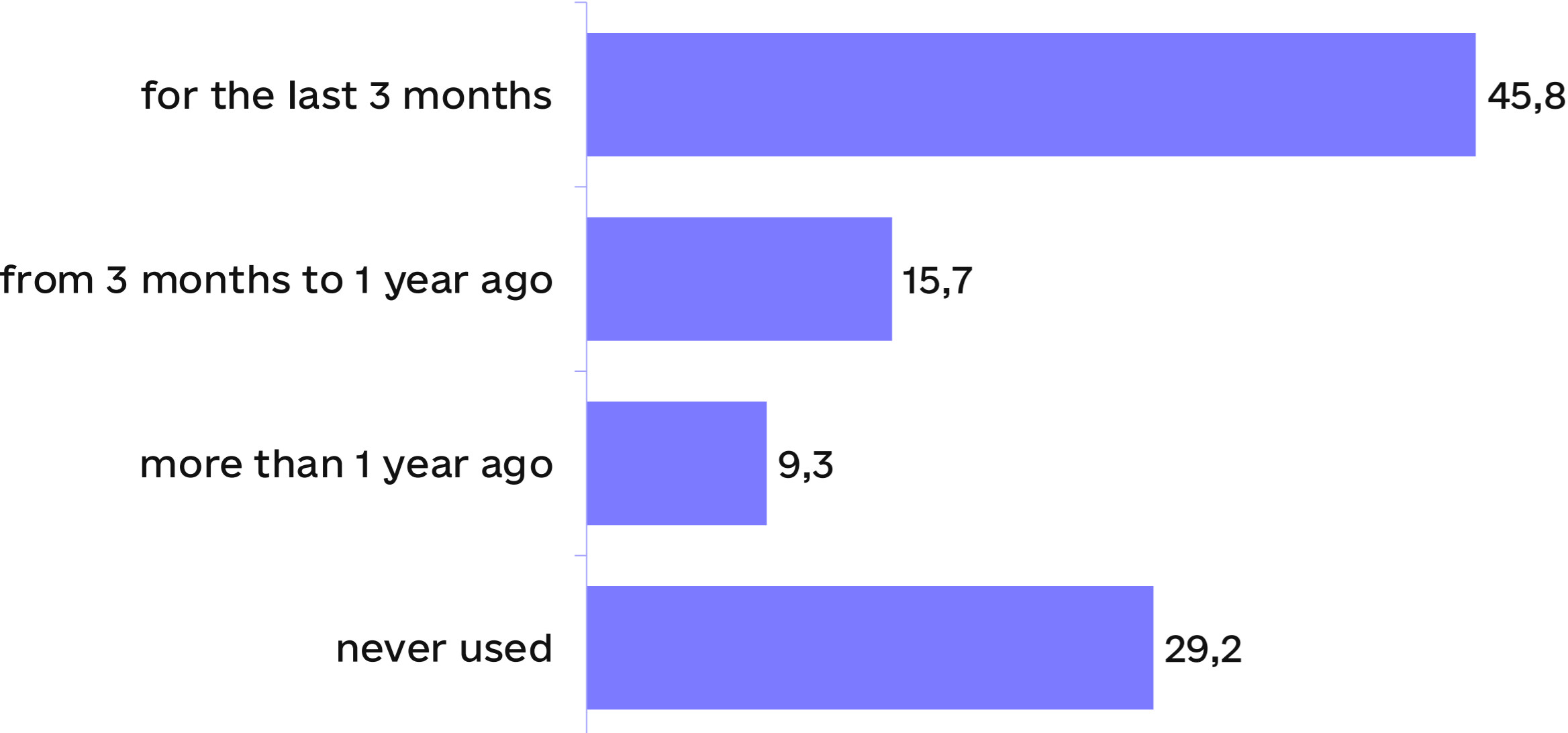


Uncontrolled territories 🚧

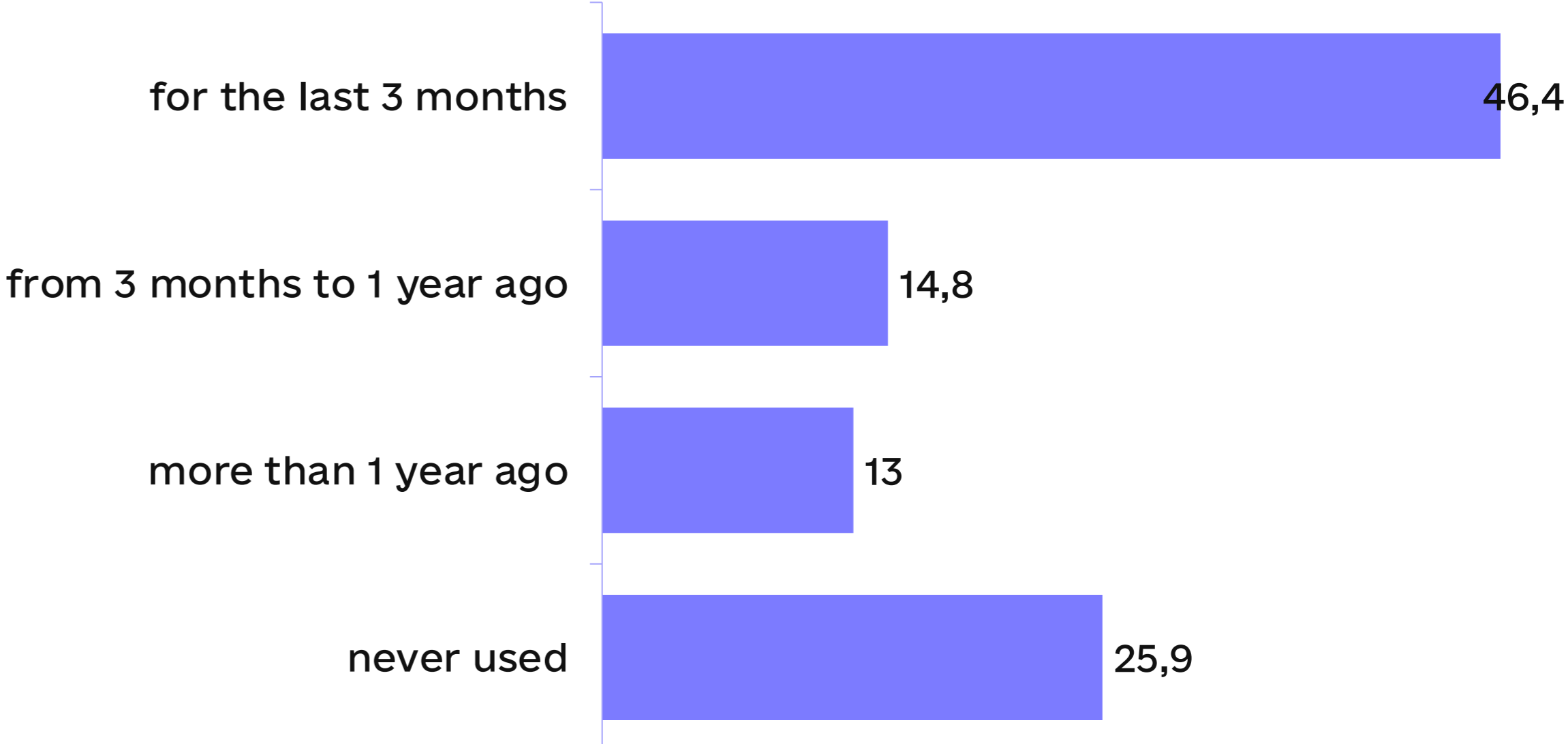


When did you buy, order goods / services online for personal use for the last time?

People with hearing impairment 🧑🏻‍🦻

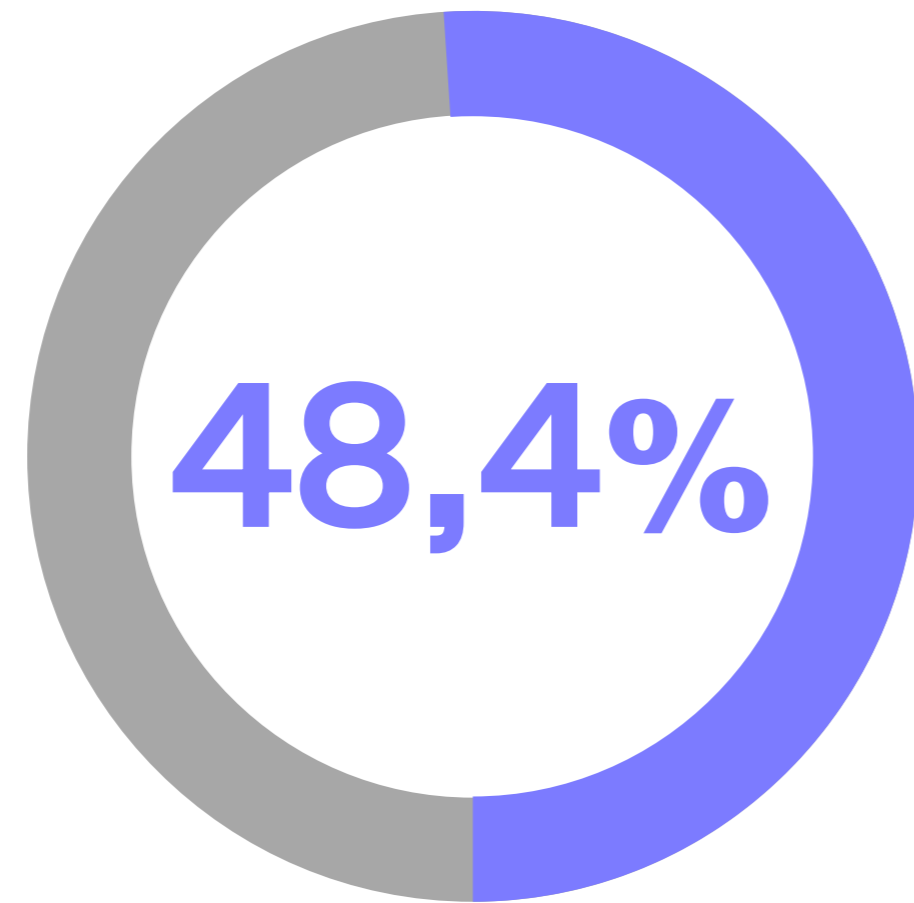


Youth aged 10–17 years 🧑🏻



E-commerce – national level 🇺🇦

General analysis

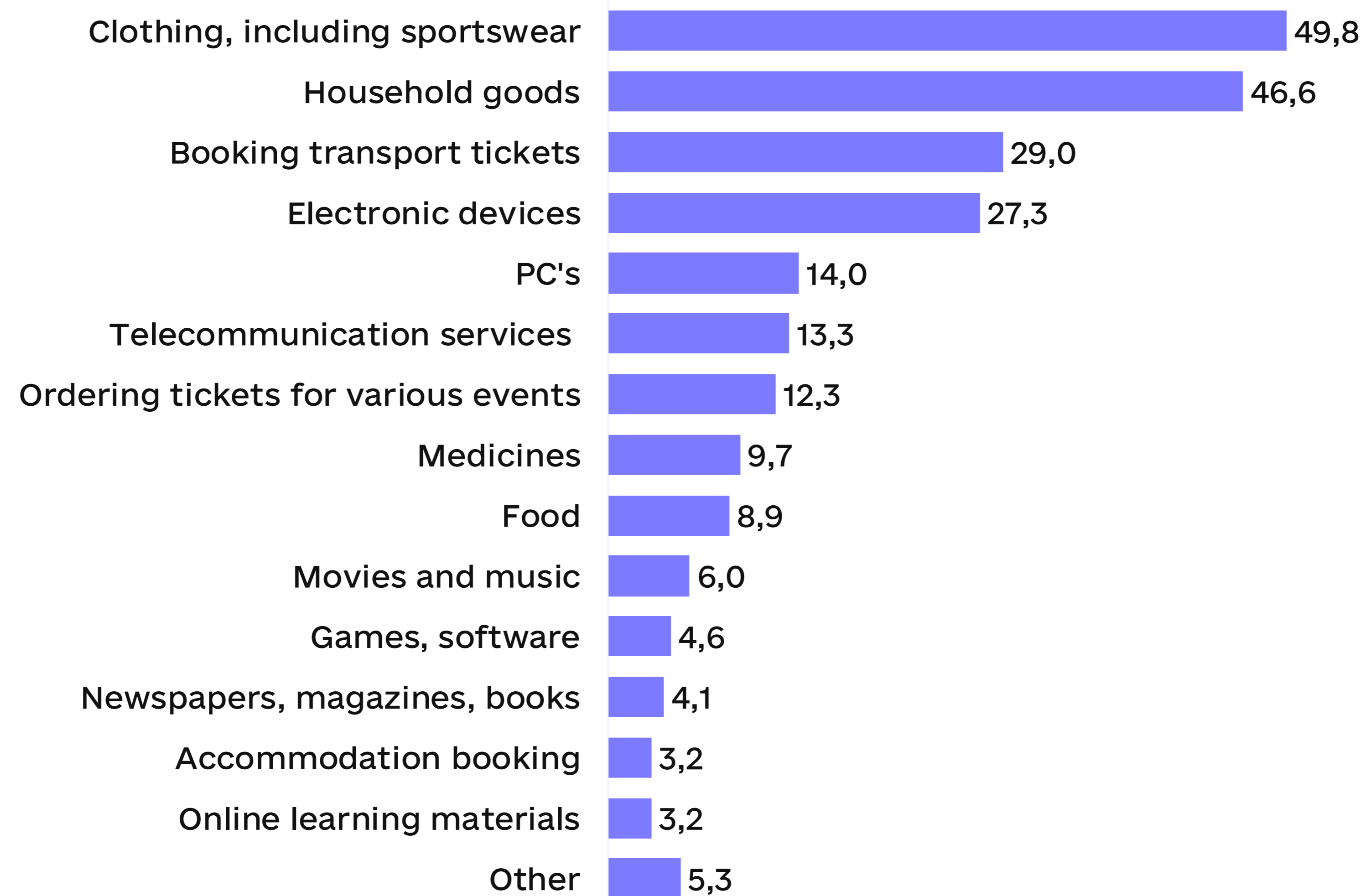


Percentage of the population who ordered goods and services online for the last year

- 54,3% of online shoppers made from 1 to 3 online purchases for the last 3 months.
- In general, the number of online purchases among the population of Ukraine varies from 1 to 150 purchases.
- More than 10 online orders were made by 7.2% of the population.

What goods and services did you buy, order online for personal use for the last 12 months?

(in %, several possible answers)

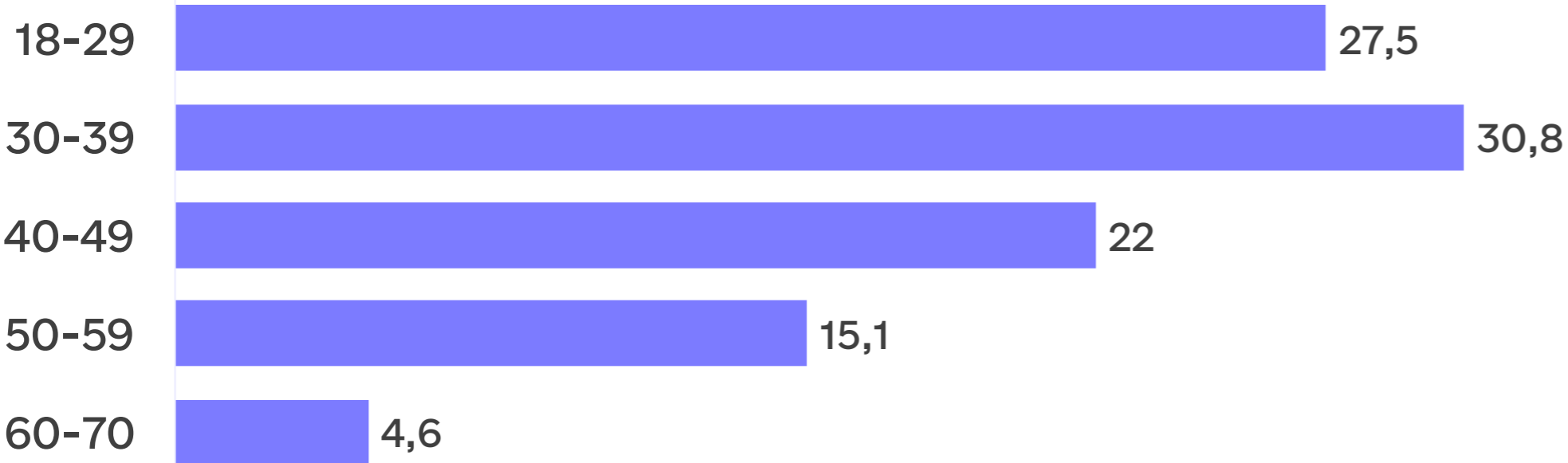


Ukraine in a whole

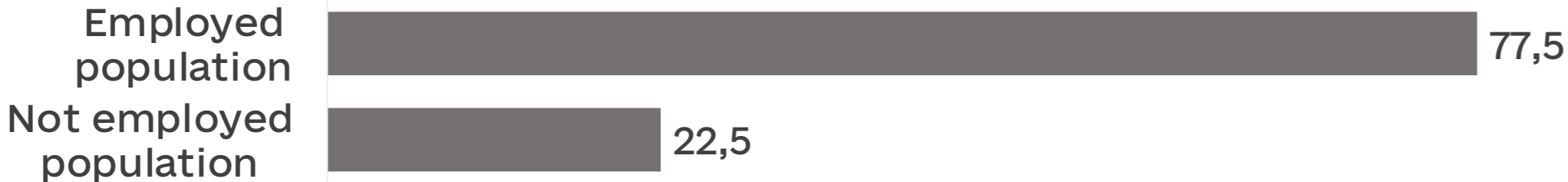


Bought goods or services online for the last 12 months

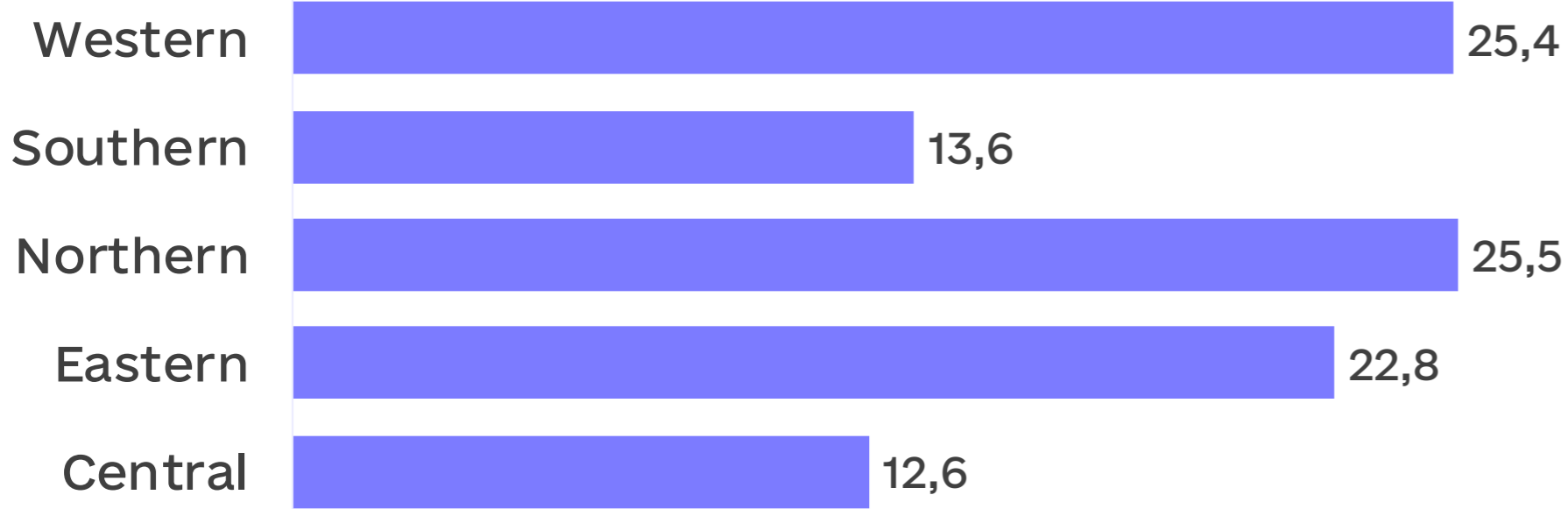
By age



By employment status

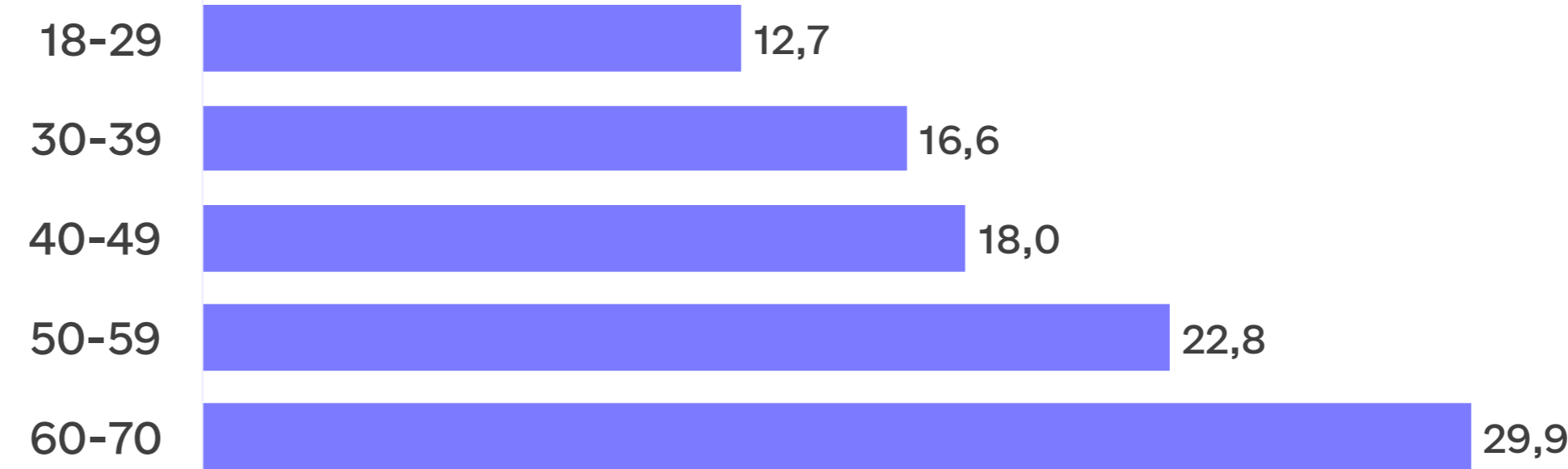


By region



Did not buy goods or services online for the last 12 months

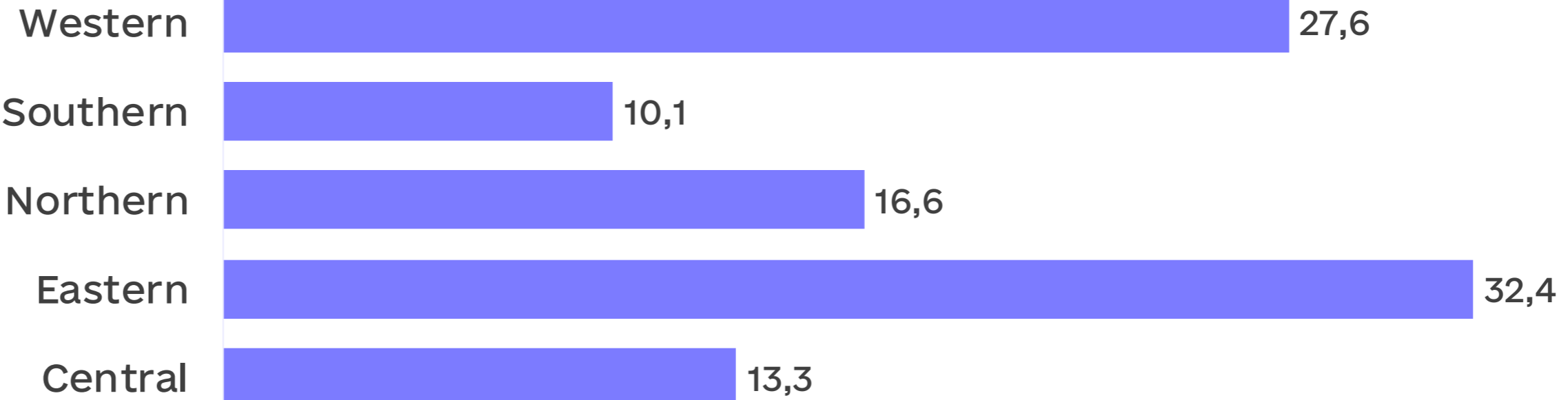
By age



By employment status

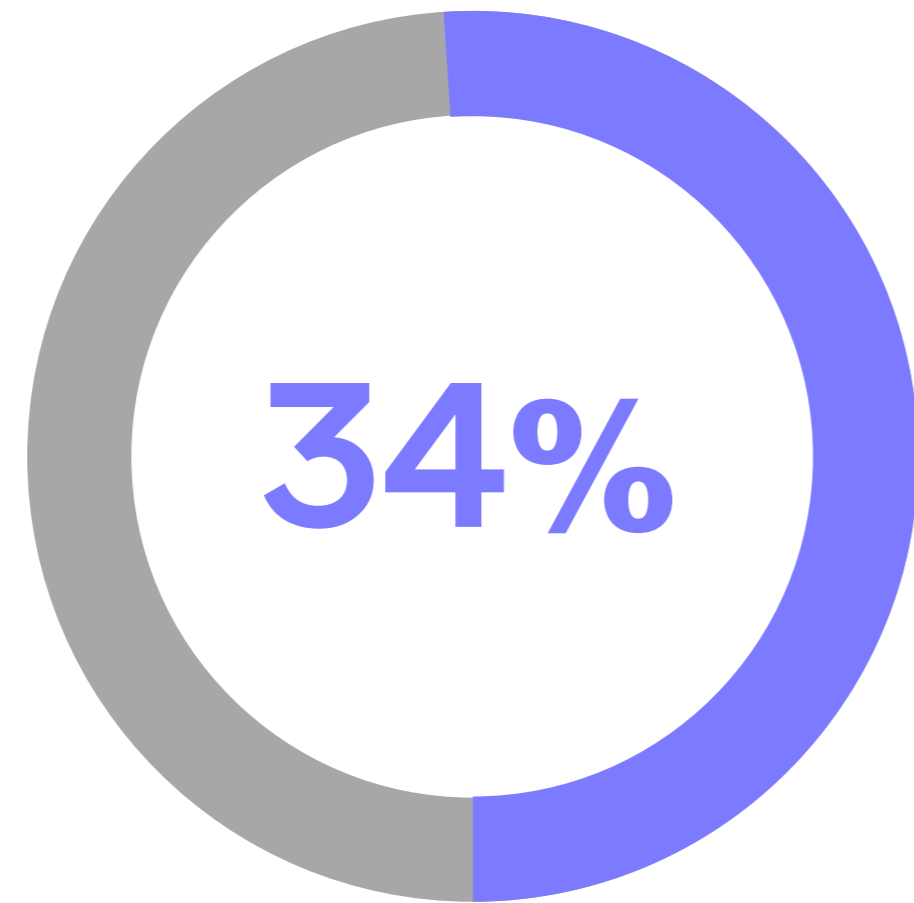


By region



E-commerce – uncontrolled territories 🚧

General analysis

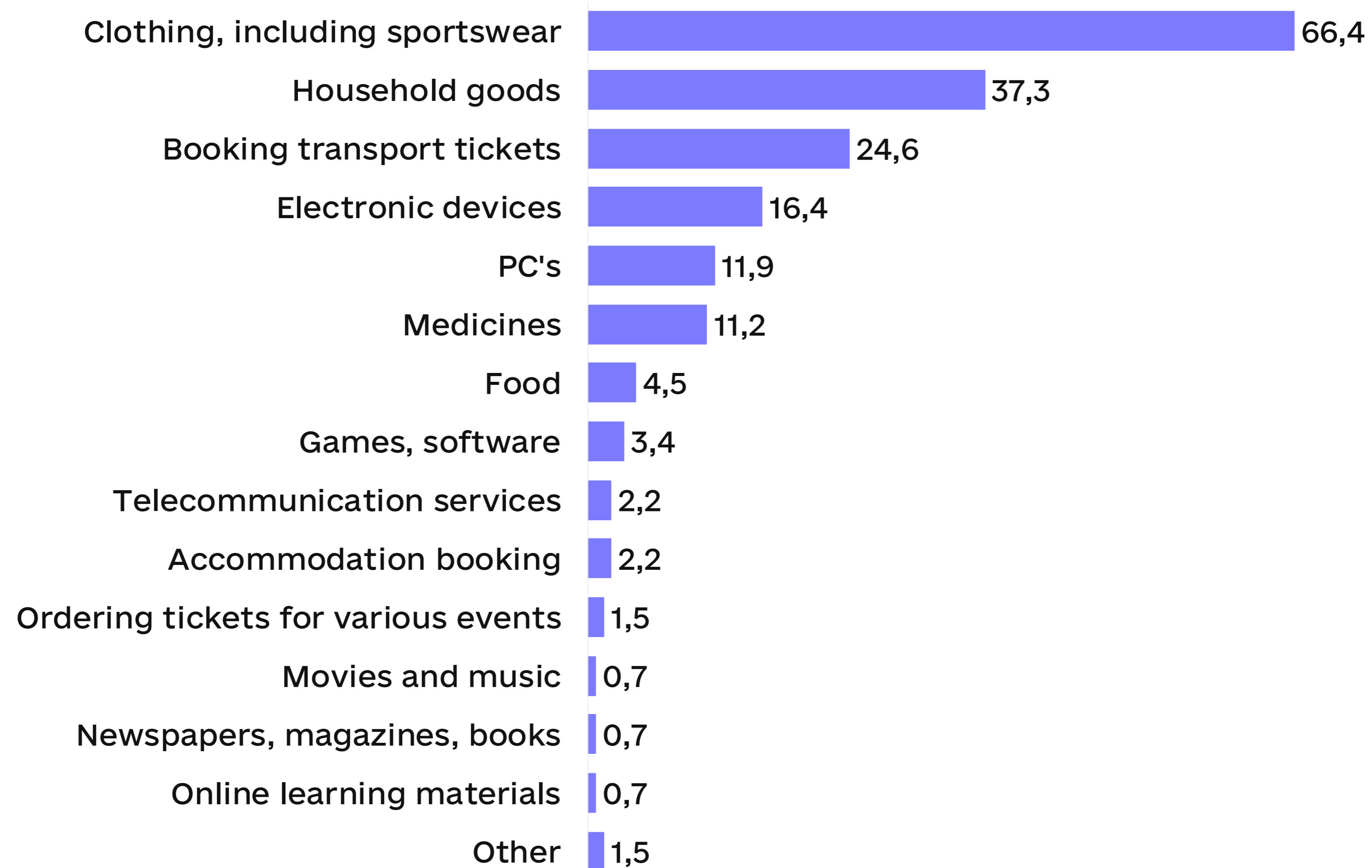


Percentage of the population who ordered goods and services online for the last year

- 70% of online shoppers made from 1 to 3 online purchases for the last 3 months.
- The number of online purchases in uncontrolled territories varies from 1 to max 12 purchases for the last 3 months.
- More than 5 online orders were made by 14.4% of the population.

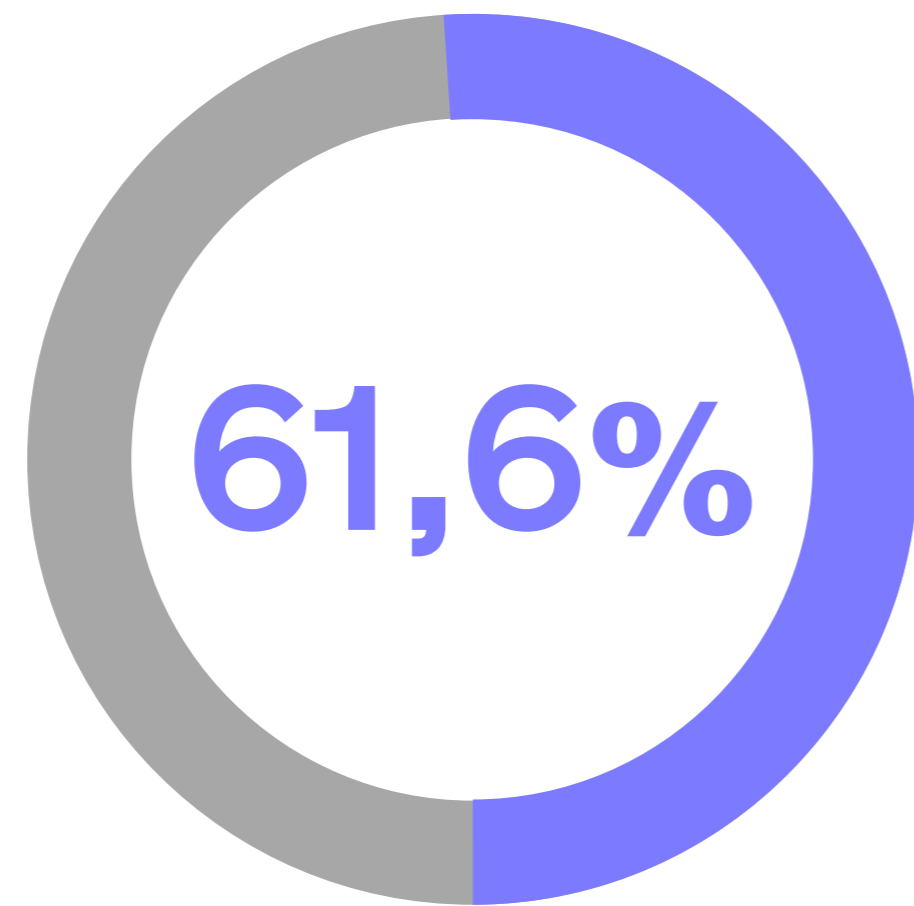
What goods and services did you buy, order online for personal use for the last 12 months?

(in %, several possible answers)



E-commerce – people with hearing impairment 🧑🏻‍🦏

General analysis

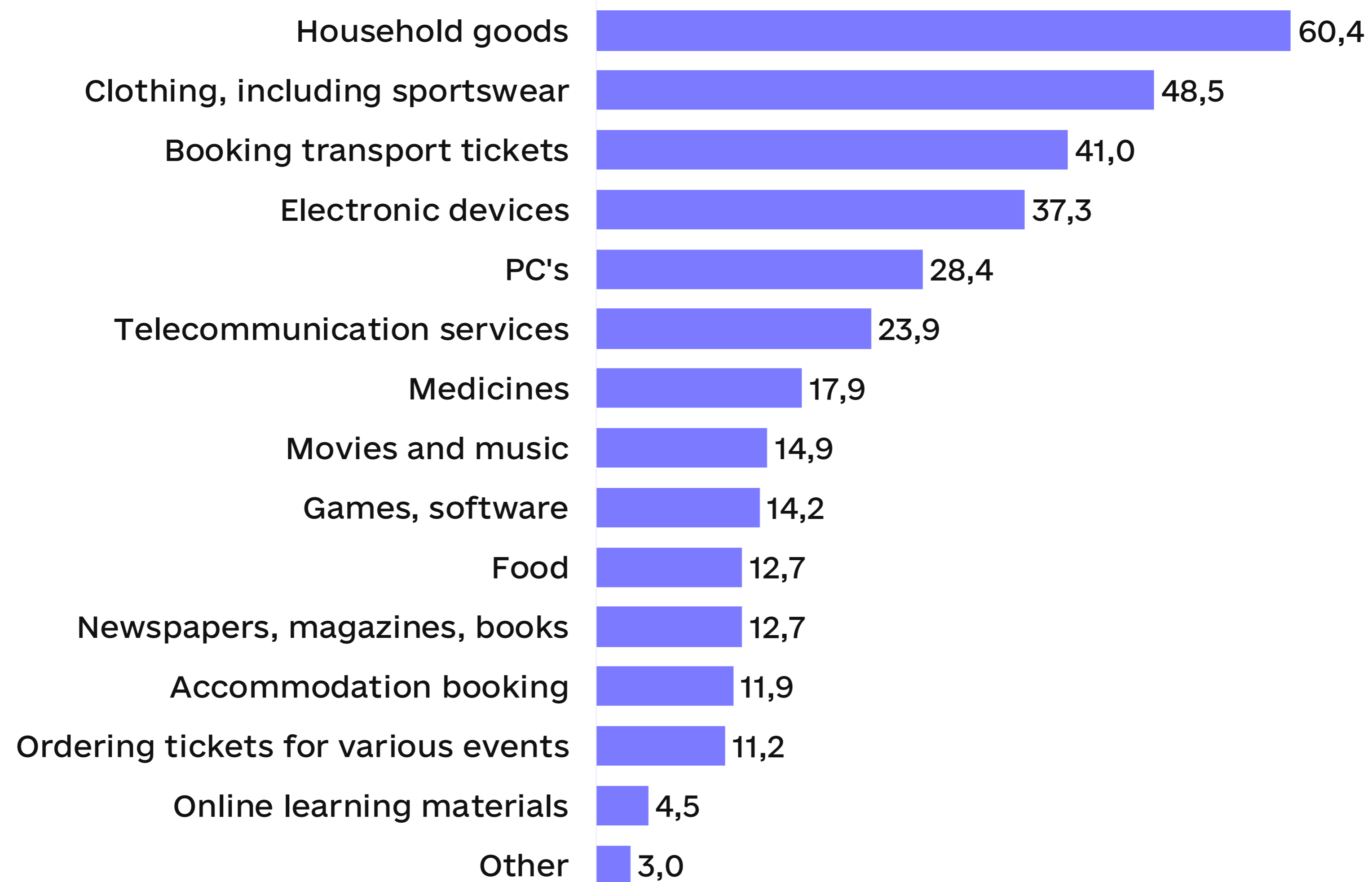


Percentage of the population who ordered goods and services online for the last year

- 47% of population made from 1 to 3 online purchases for the last 3 months.
- In general, the number of online purchases among the people with hearing impairment varies from 1 to 27 purchases.
- **More than 10** online orders were made by 11.8% of the people with hearing impairment.

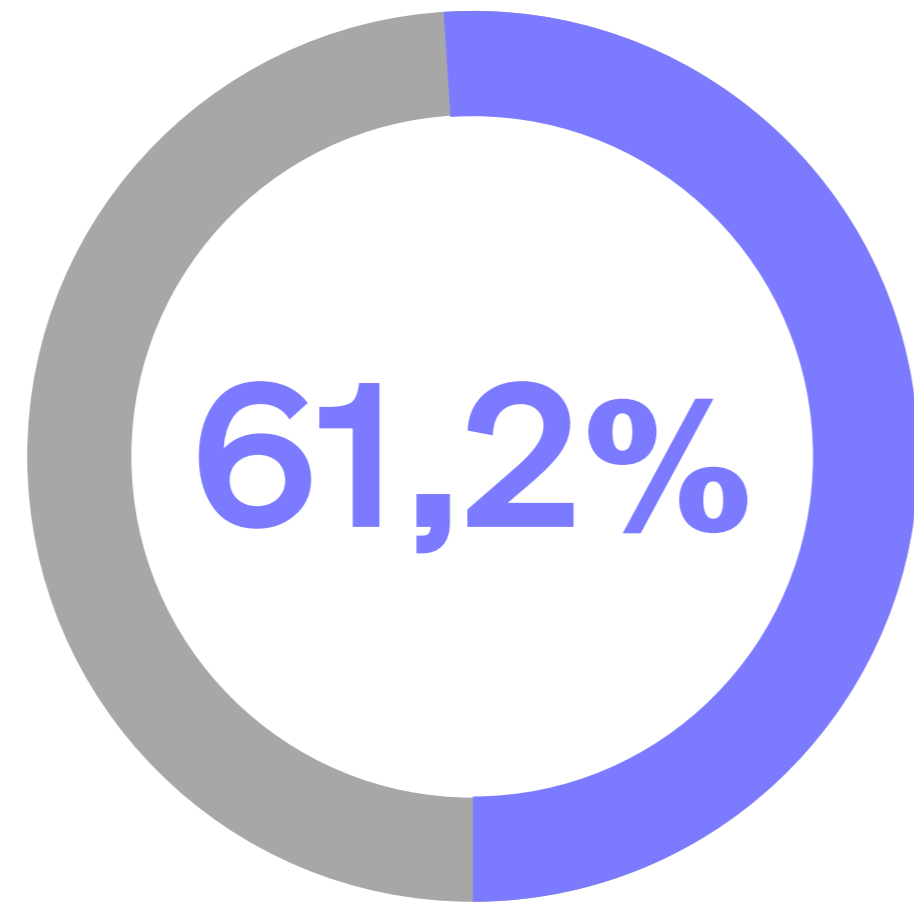
What goods and services did you buy, order online for personal use for the last 12 months?

(in %, several possible answers)



E-commerce – youth aged 10–17 years 🧑

General analysis

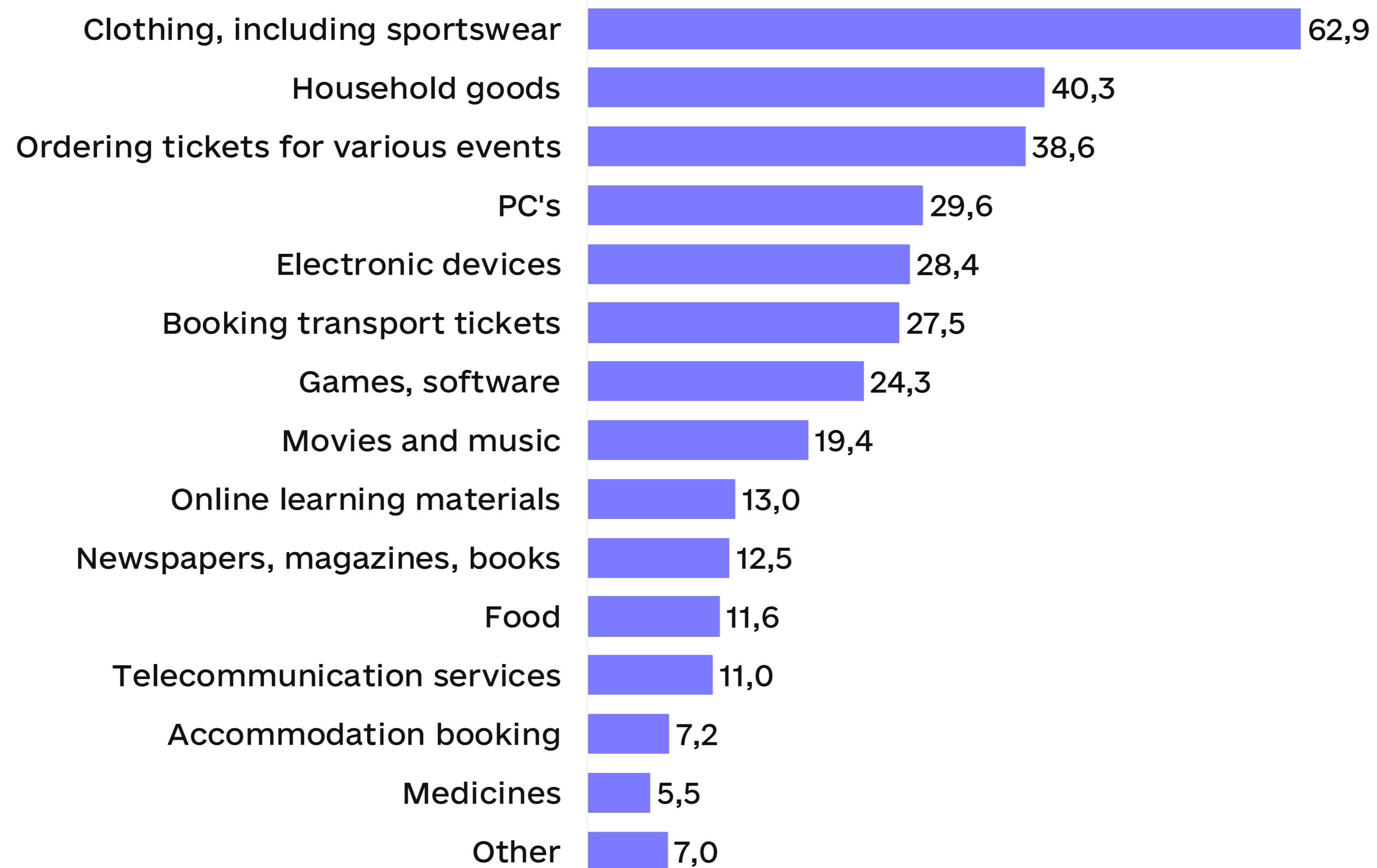


Percentage of the population who ordered goods and services online for the last year

- 38,9% of youth aged 10-17 years made from 1 to 3 online purchases for the last 3 months.
- The number of purchases among the youth varies from 1 to 50 purchases for the last 3 months.
- More than 10 online orders were made by 11.7% of the population.

What goods and services did you buy, order online for personal use for the last 12 months?

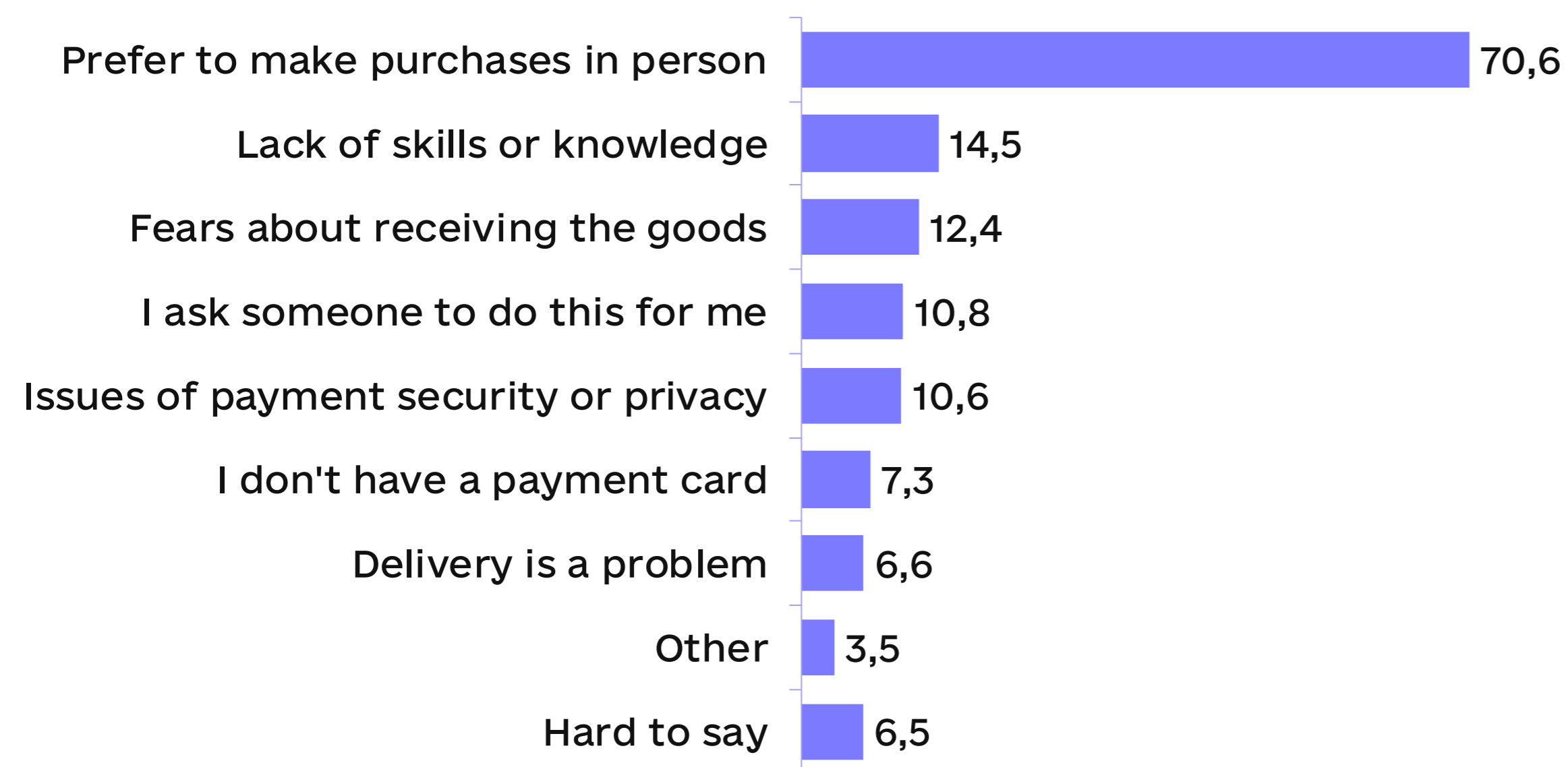
(in %, several possible answers)



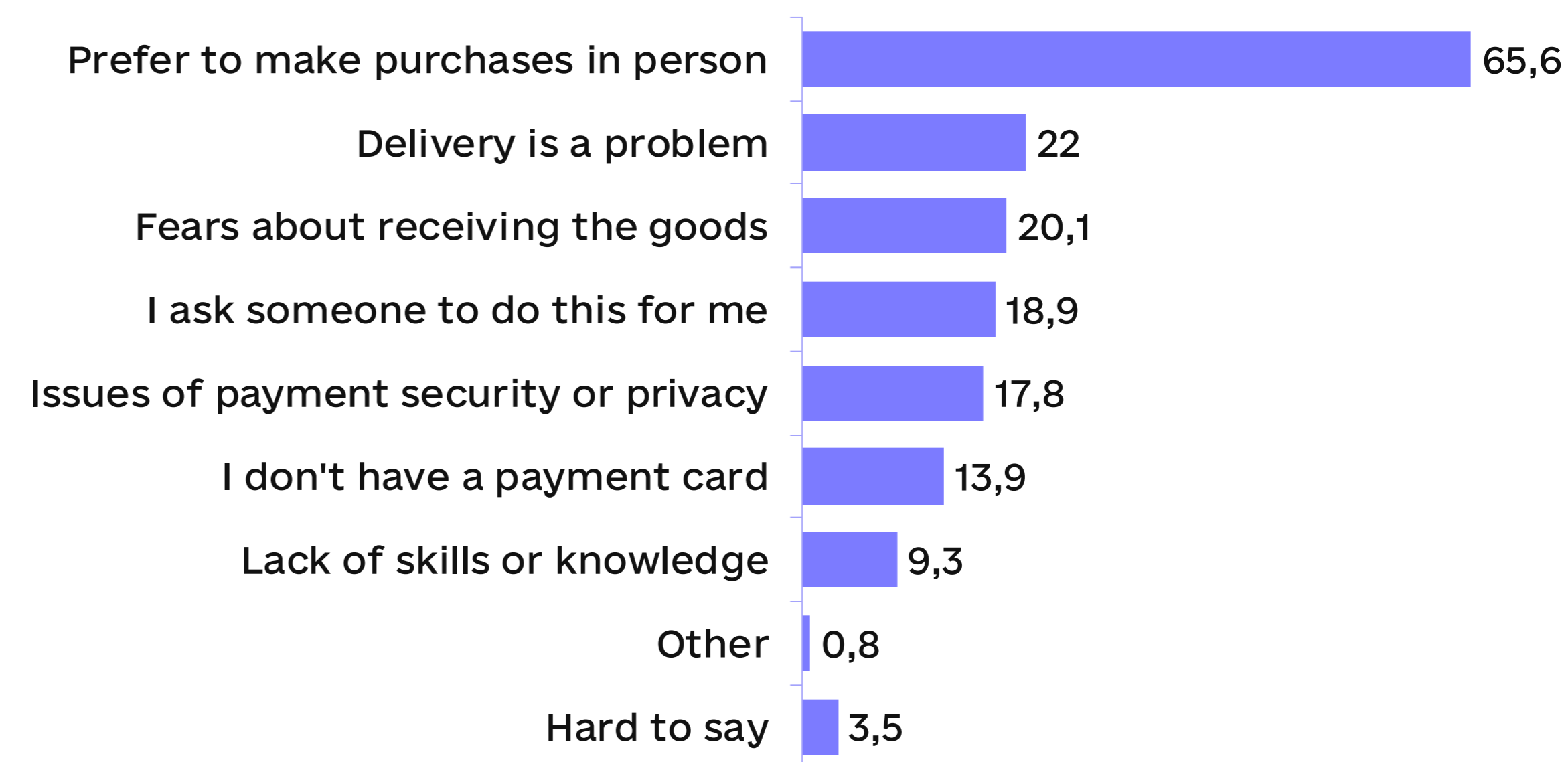
What were the reasons not to order goods or services online for personal use for the last 12 months?

(in %, several possible answers)

Ukraine in a whole 🇺🇦



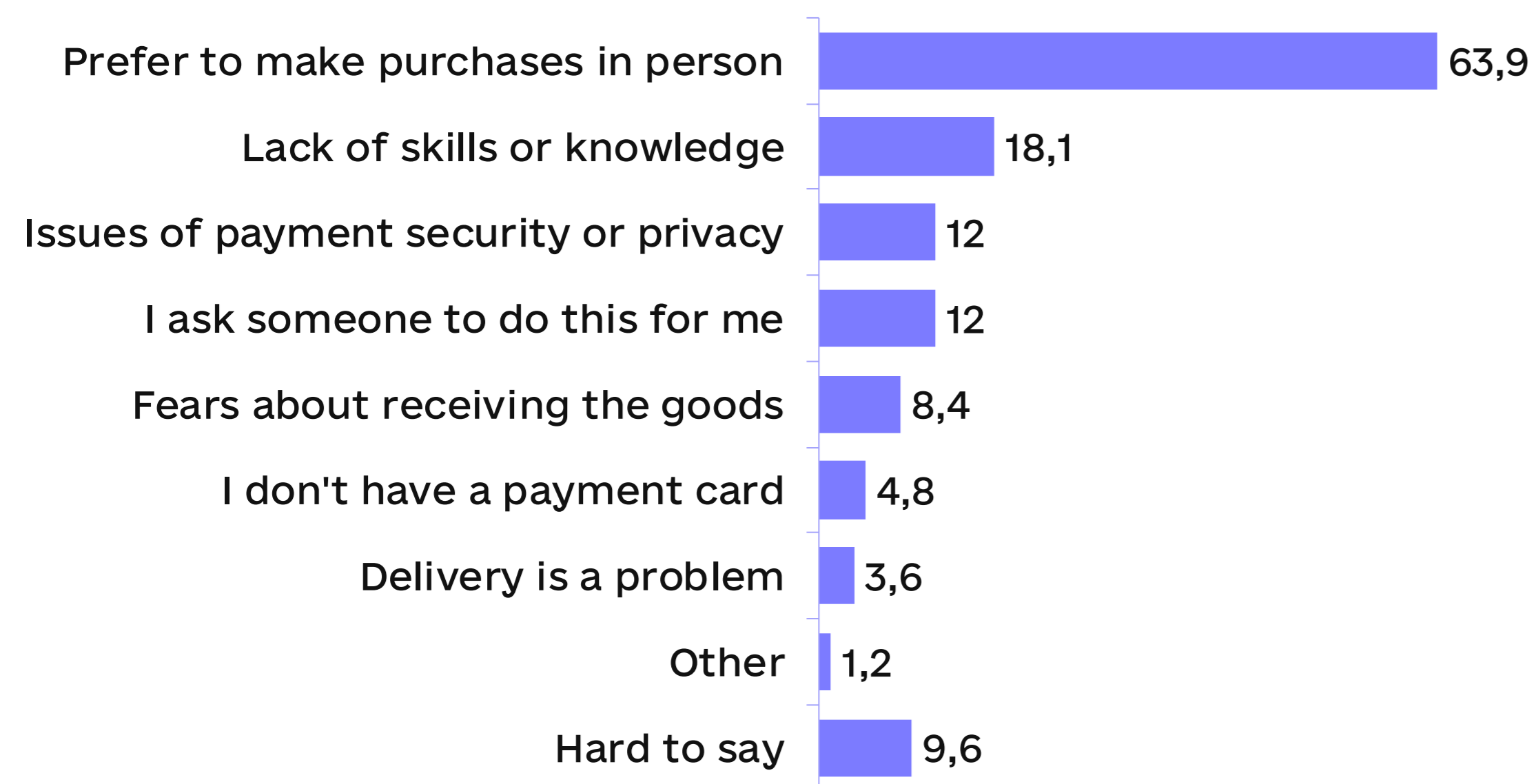
Uncontrolled territories 🚧



What were the reasons not to order goods or services online for personal use for the last 12 months?

(in %, several possible answers)

People with hearing impairment 🧑🏻‍🦻



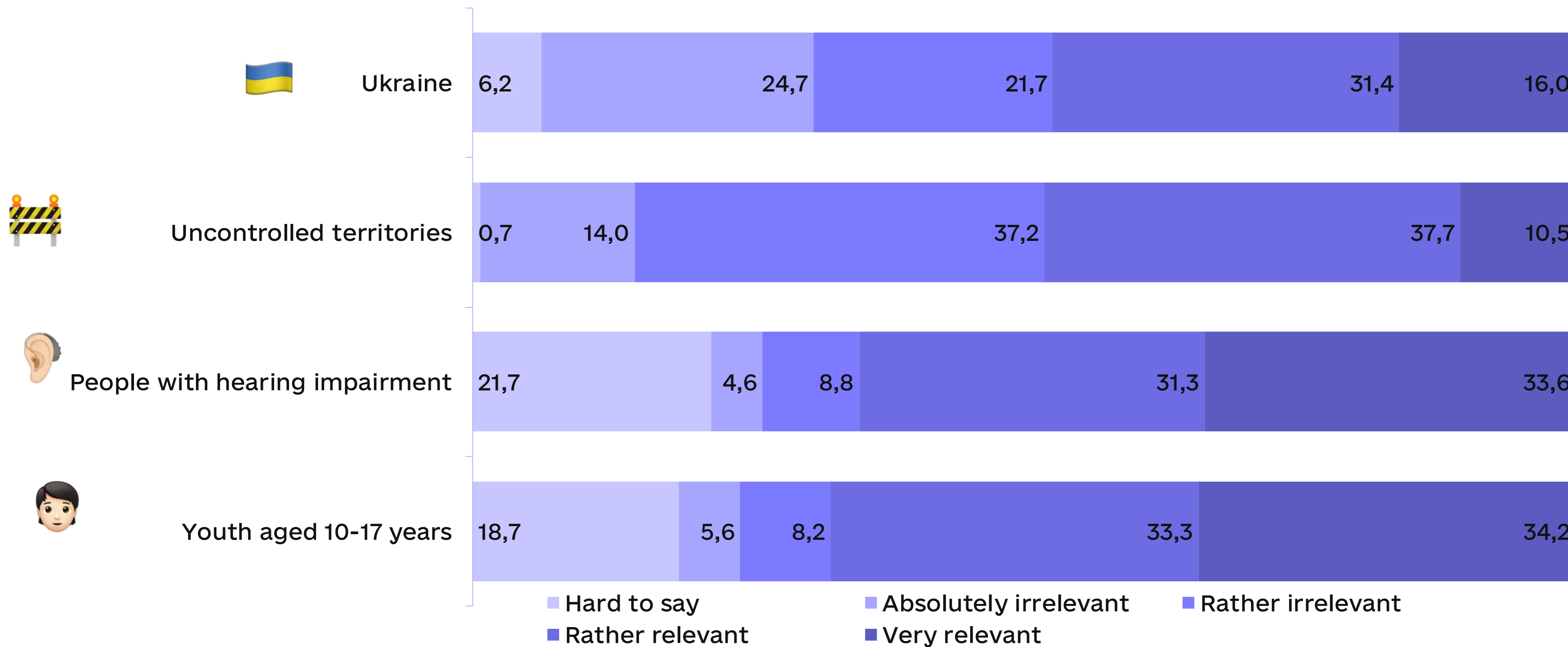
Youth aged 10–17 years 🧑🏻



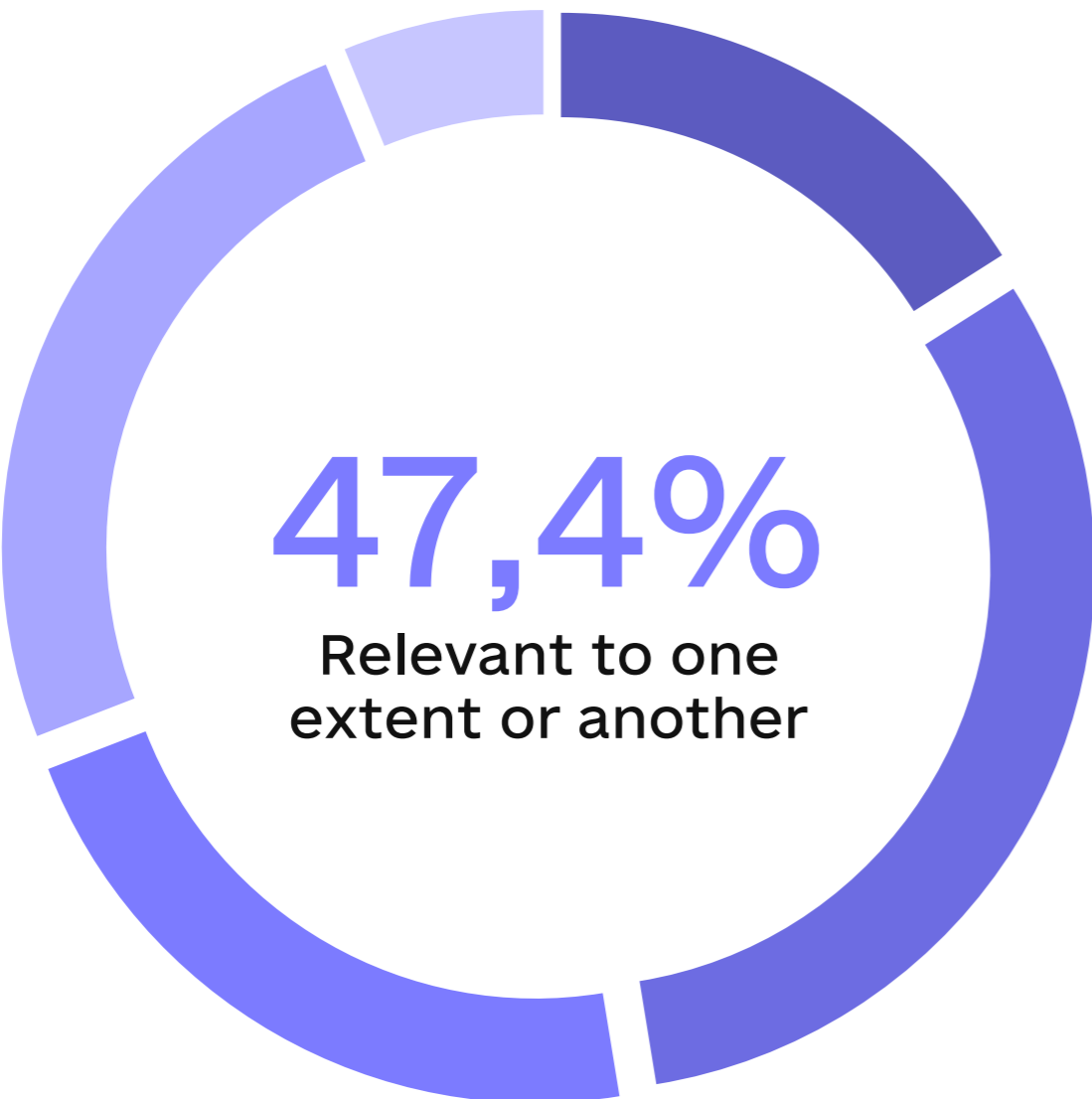
Section 5

Digital skills learning

Relevance of digital skills learning

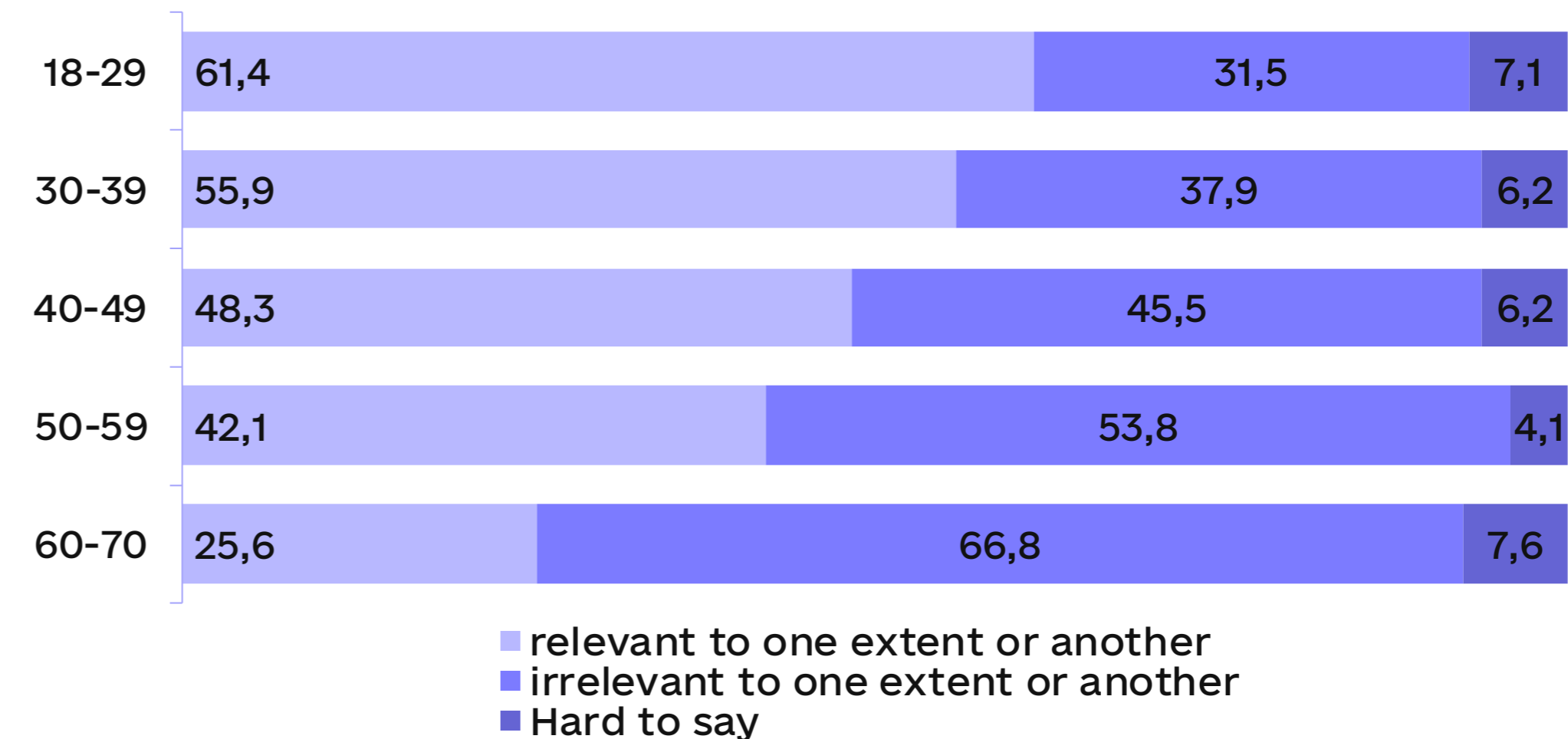


Relevance of digital skills learning Ukraine in a whole 🇺🇦

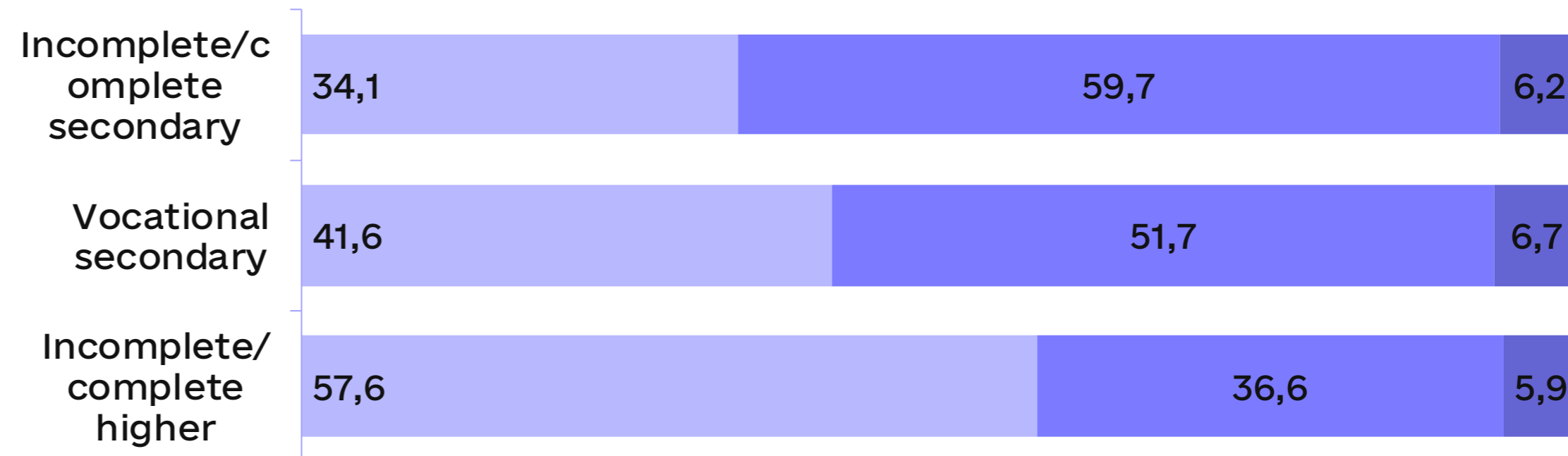


- Very relevant
- Rather relevant
- Rather irrelevant
- Absolutely irrelevant
- Hard to say

By age

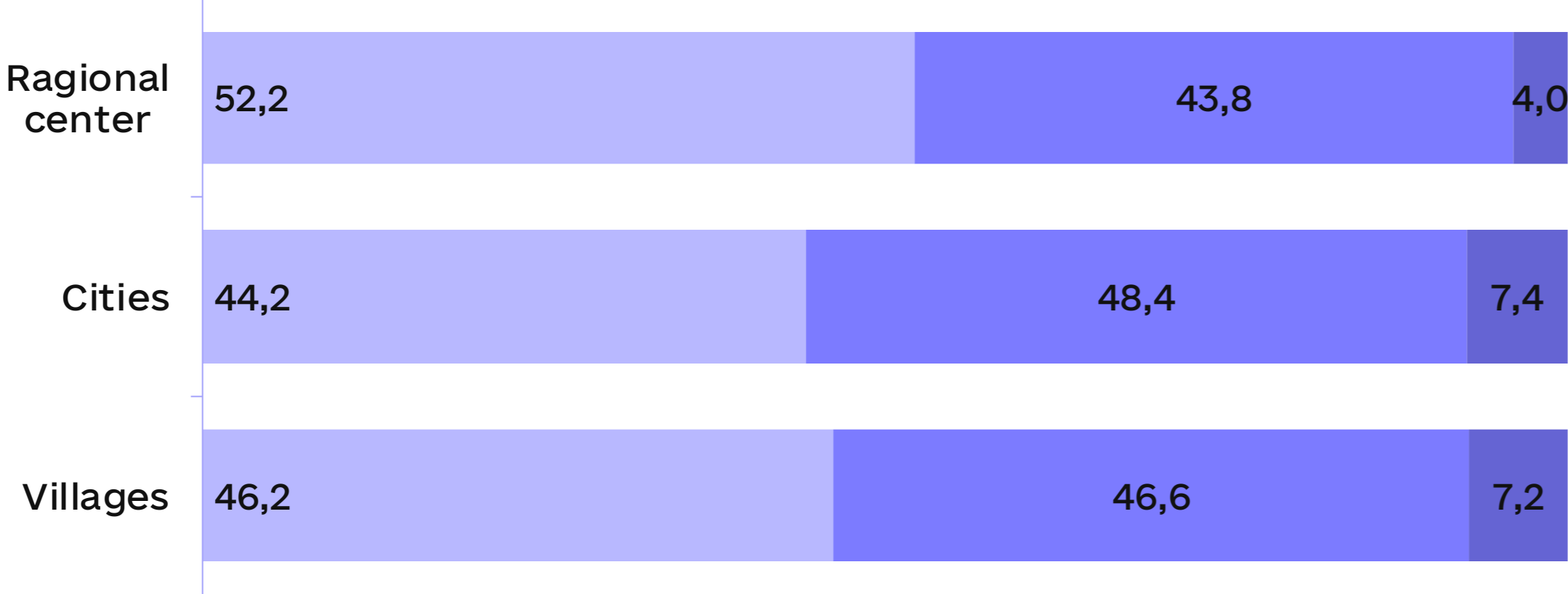


By education

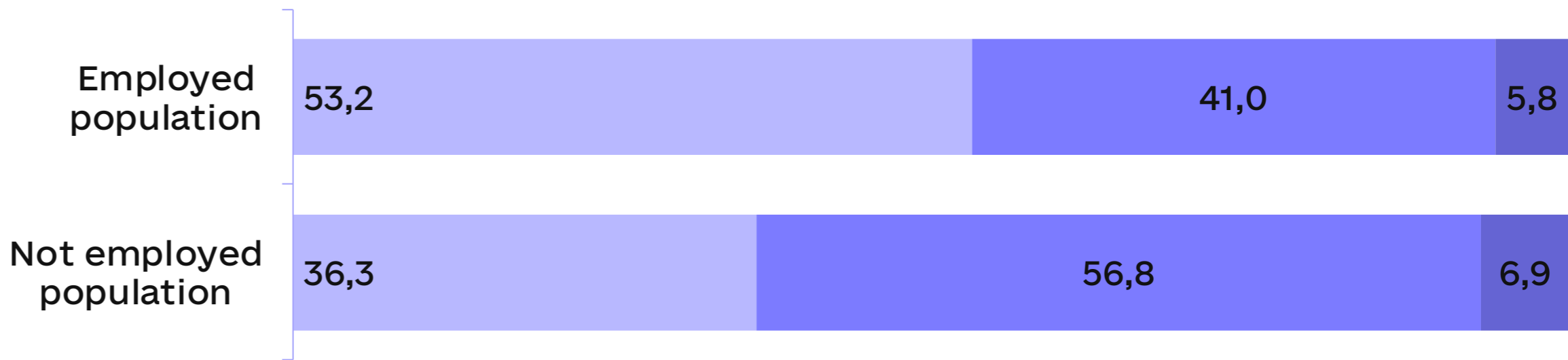


Relevance of digital skills learning Ukraine in a whole 🇺🇦

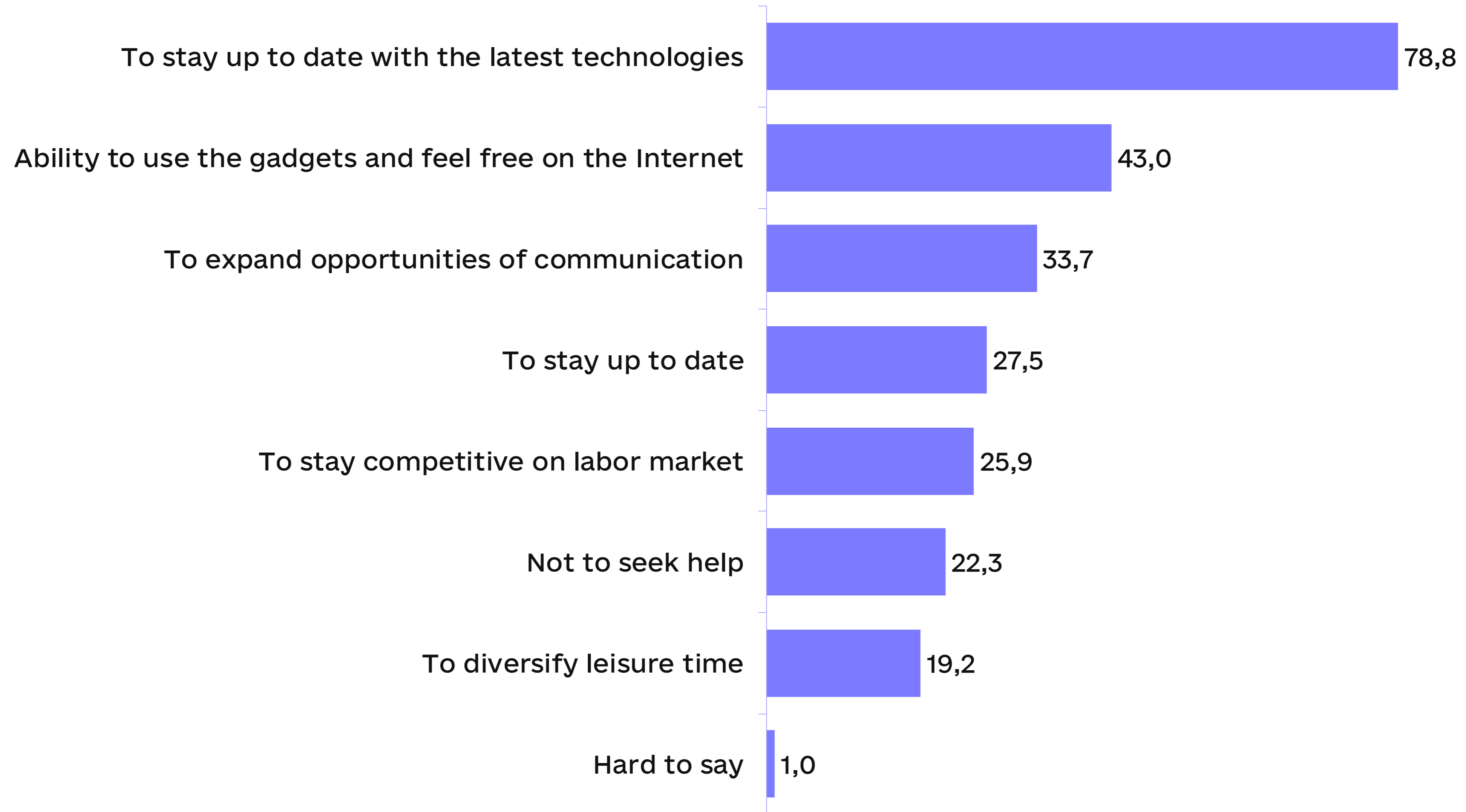
By type of area



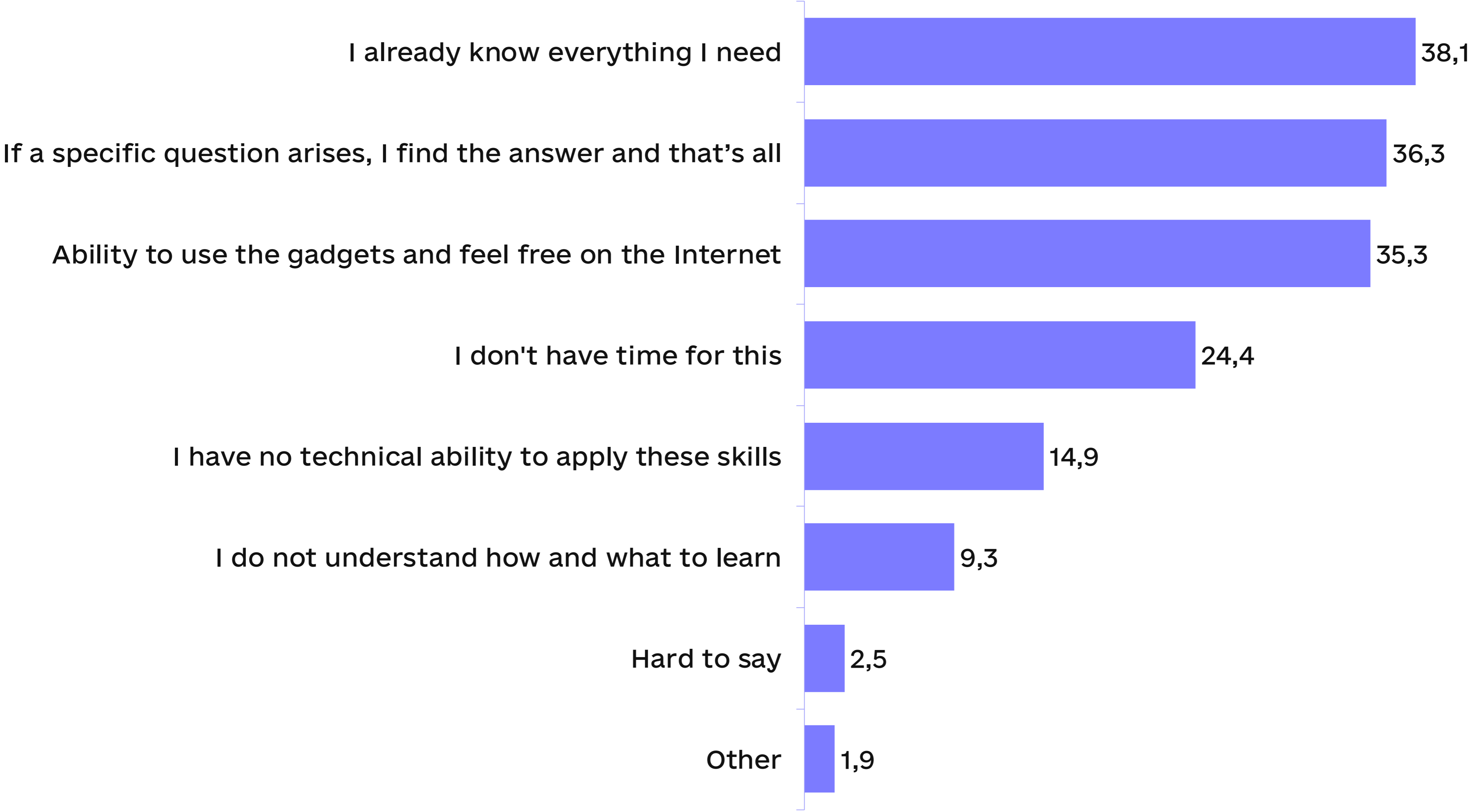
By employment status



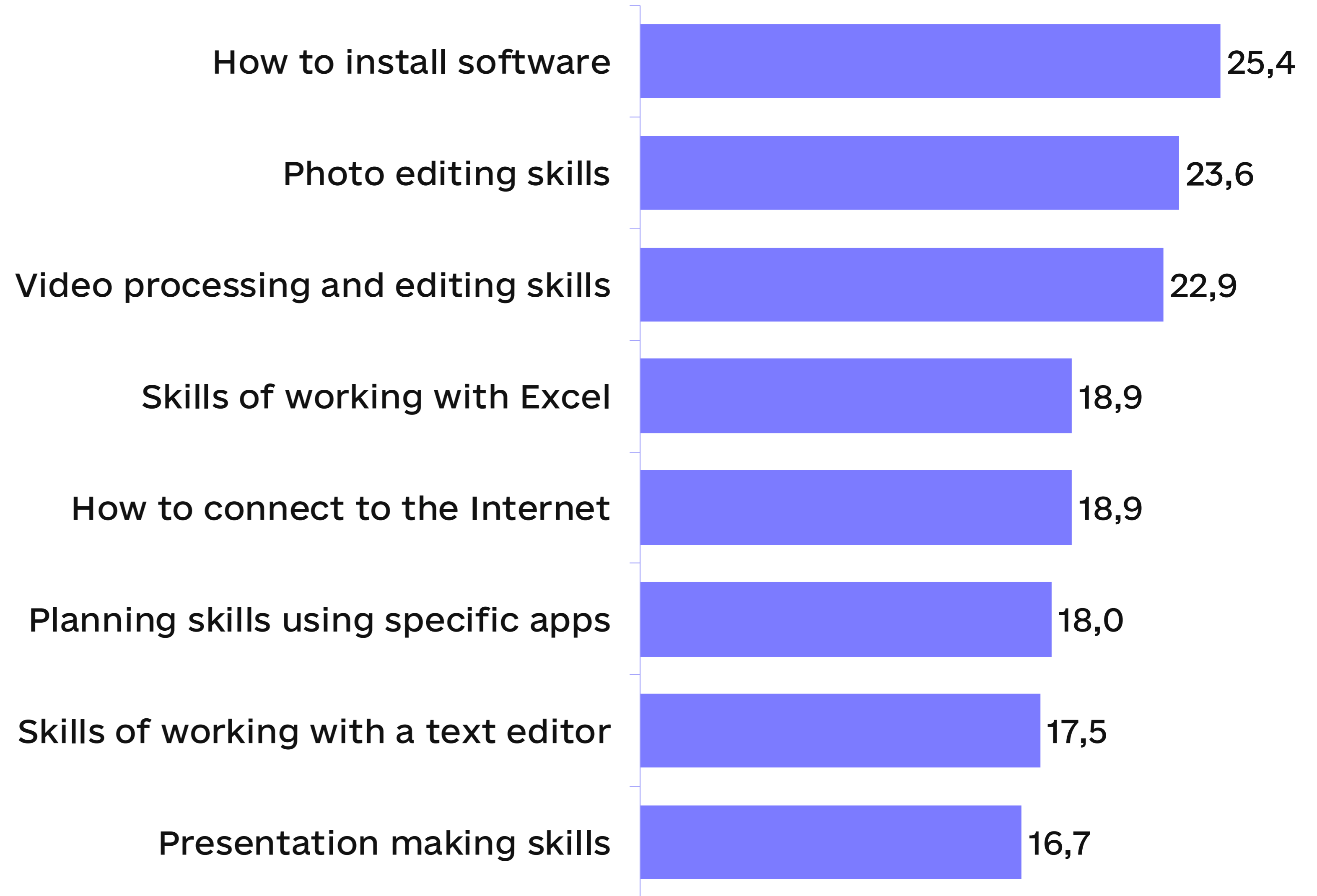
Reasons for relevance of digital skills learning



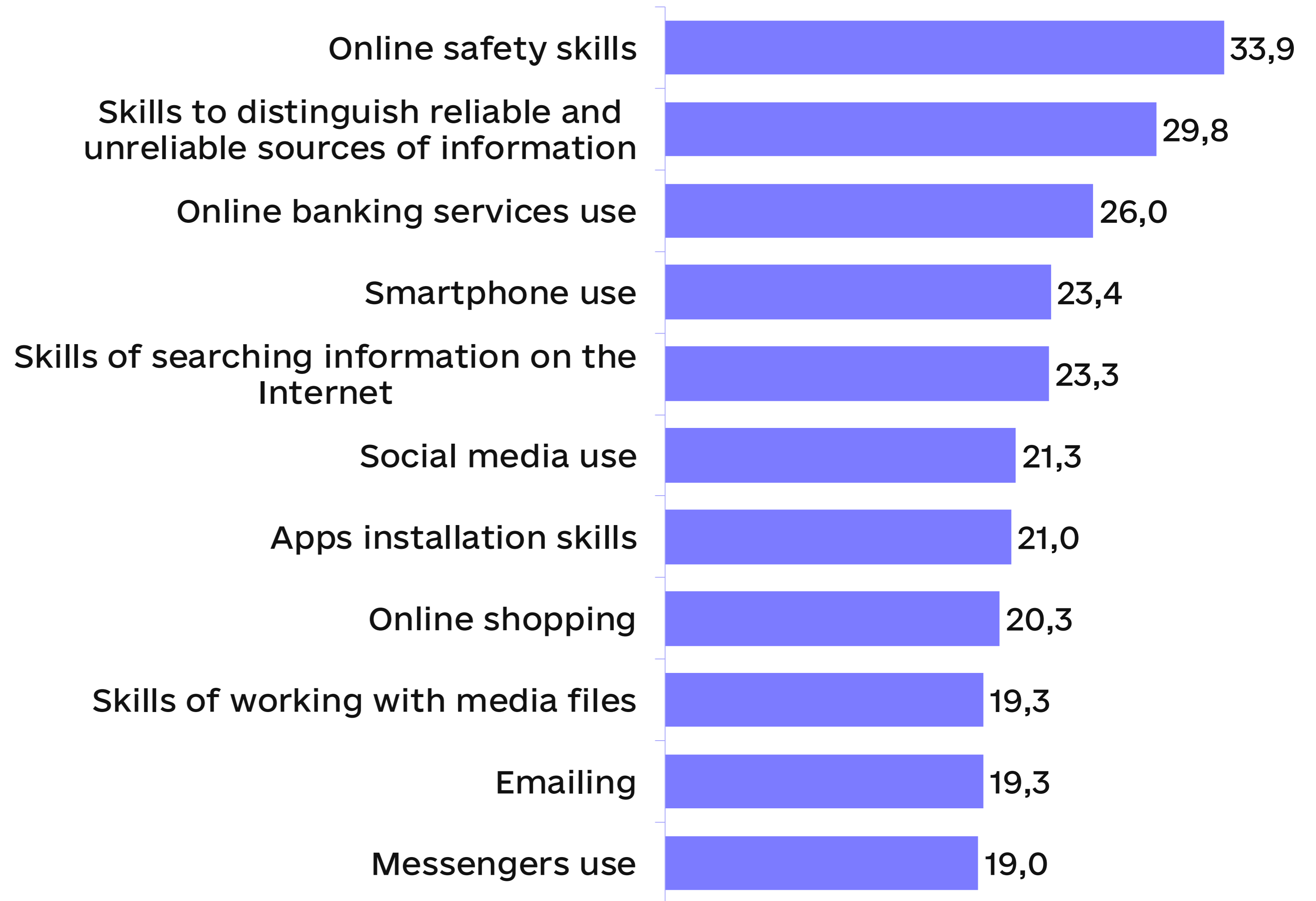
Reasons for irrelevance of digital skills learning



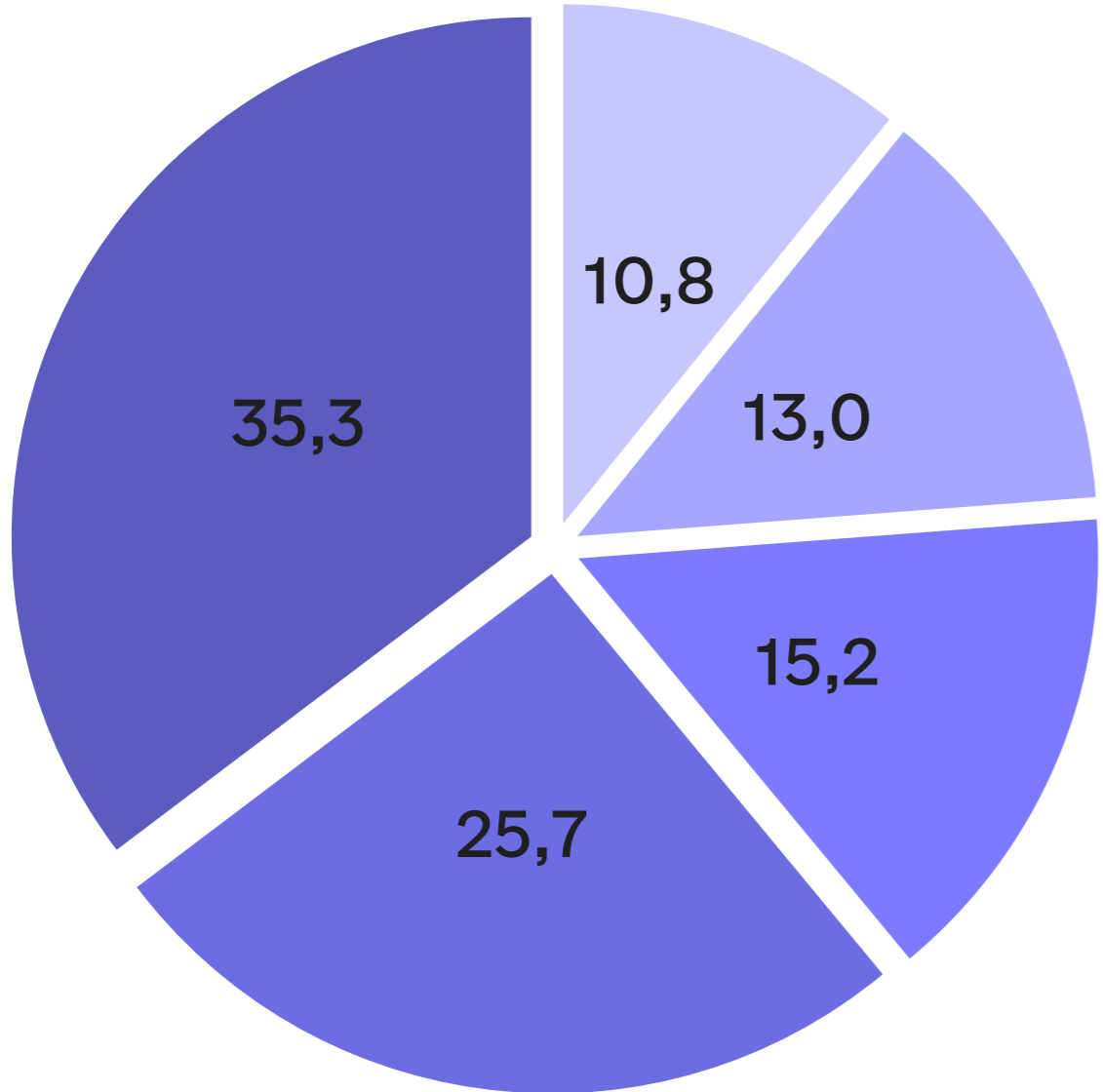
Advanced skills



Basic skills

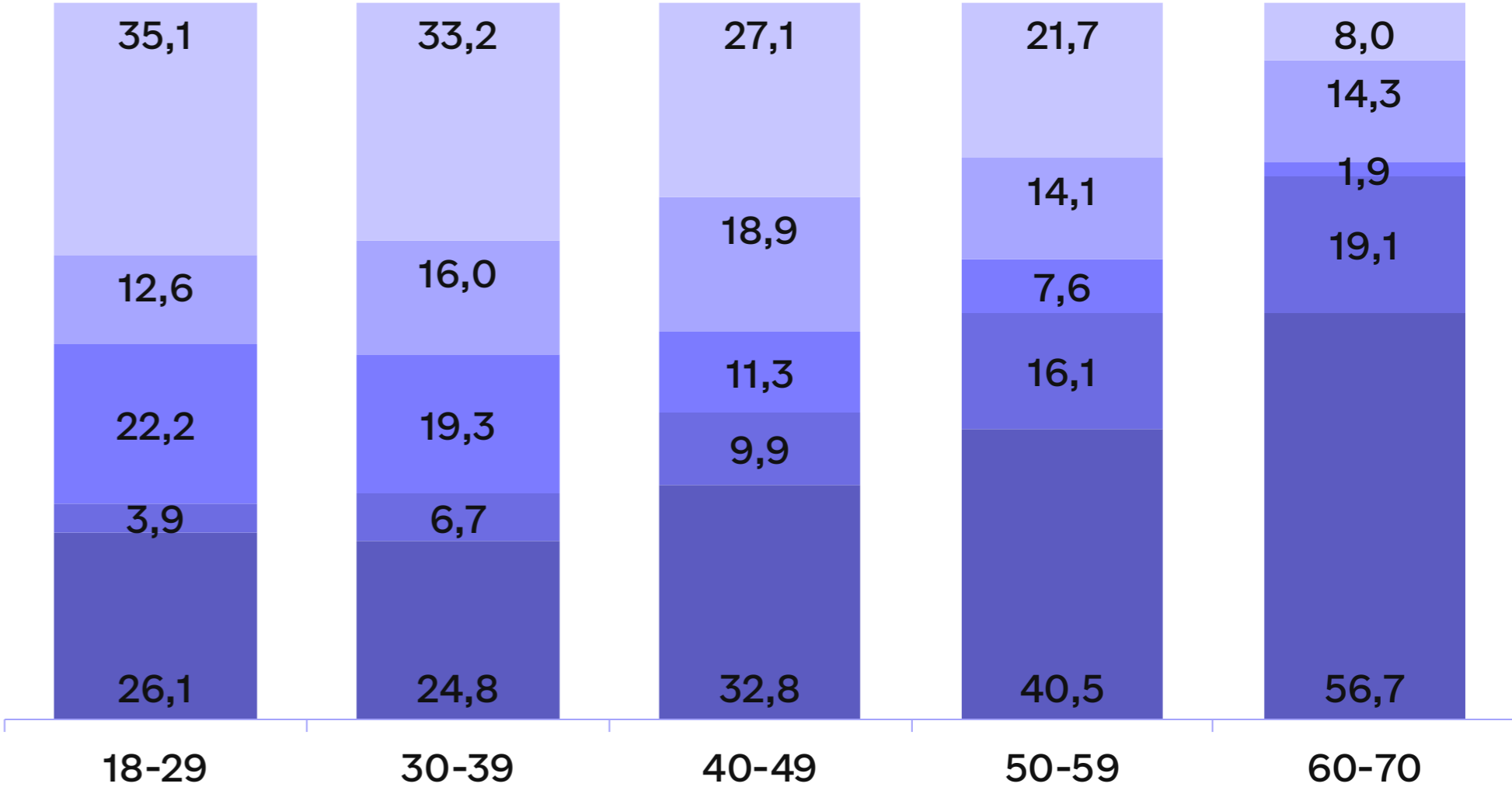


Digital skills one would like to develop

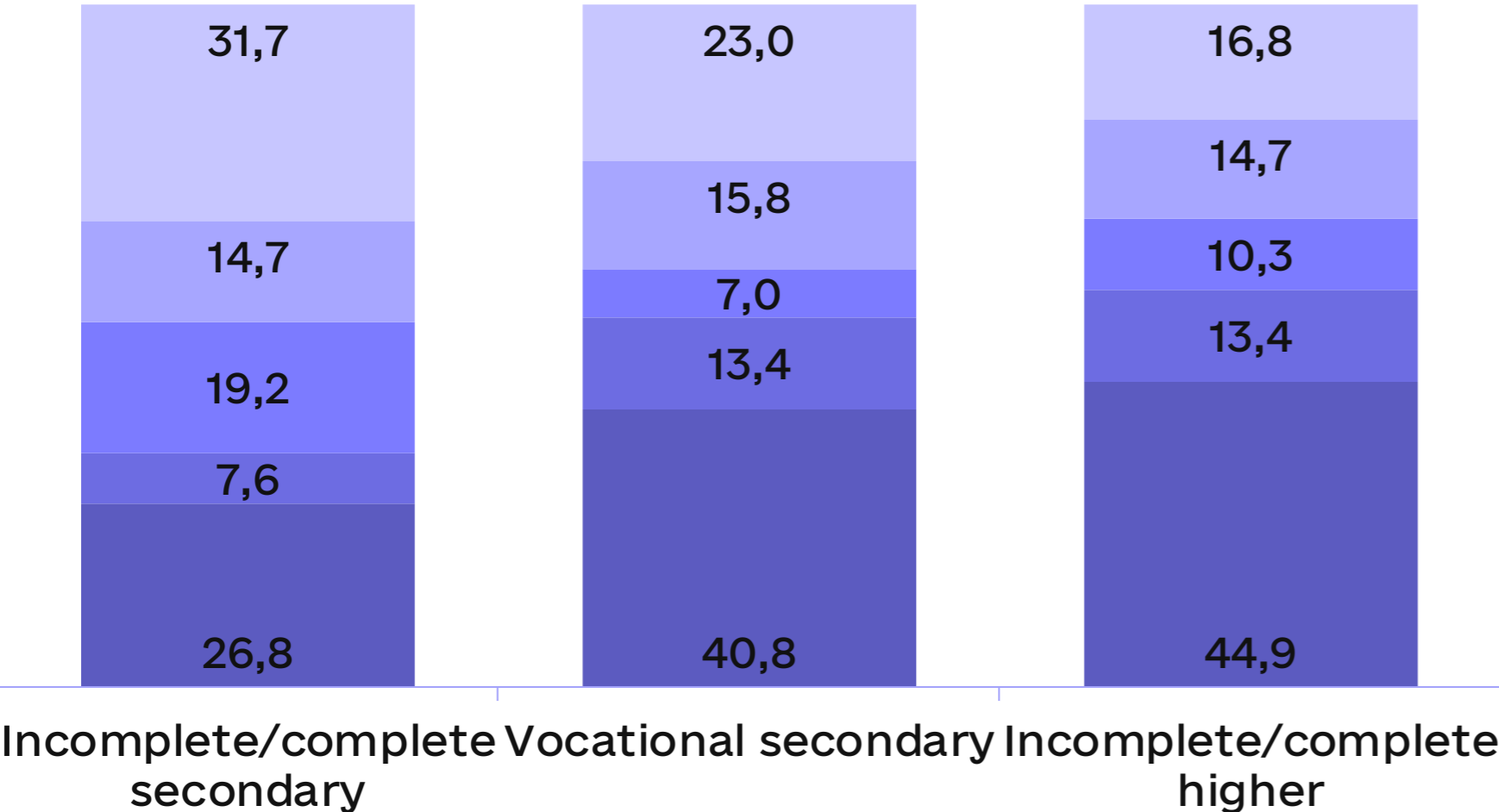


- Basic courses
- Advanced and / or basic professional courses
- Basic and / or advanced and / or basic professional courses
- Basic and advanced and basic professional courses
- None of the courses

By age



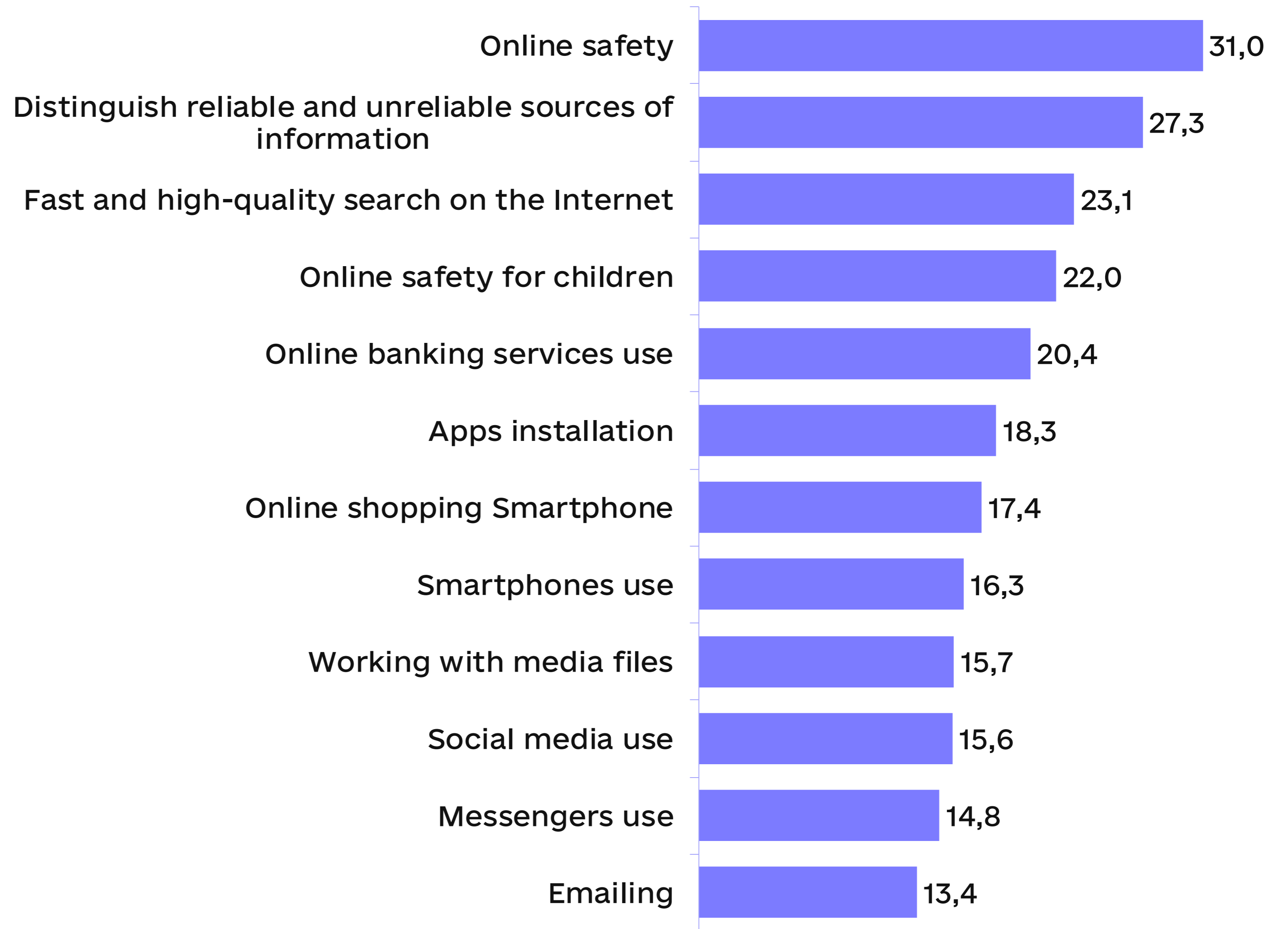
By educational level



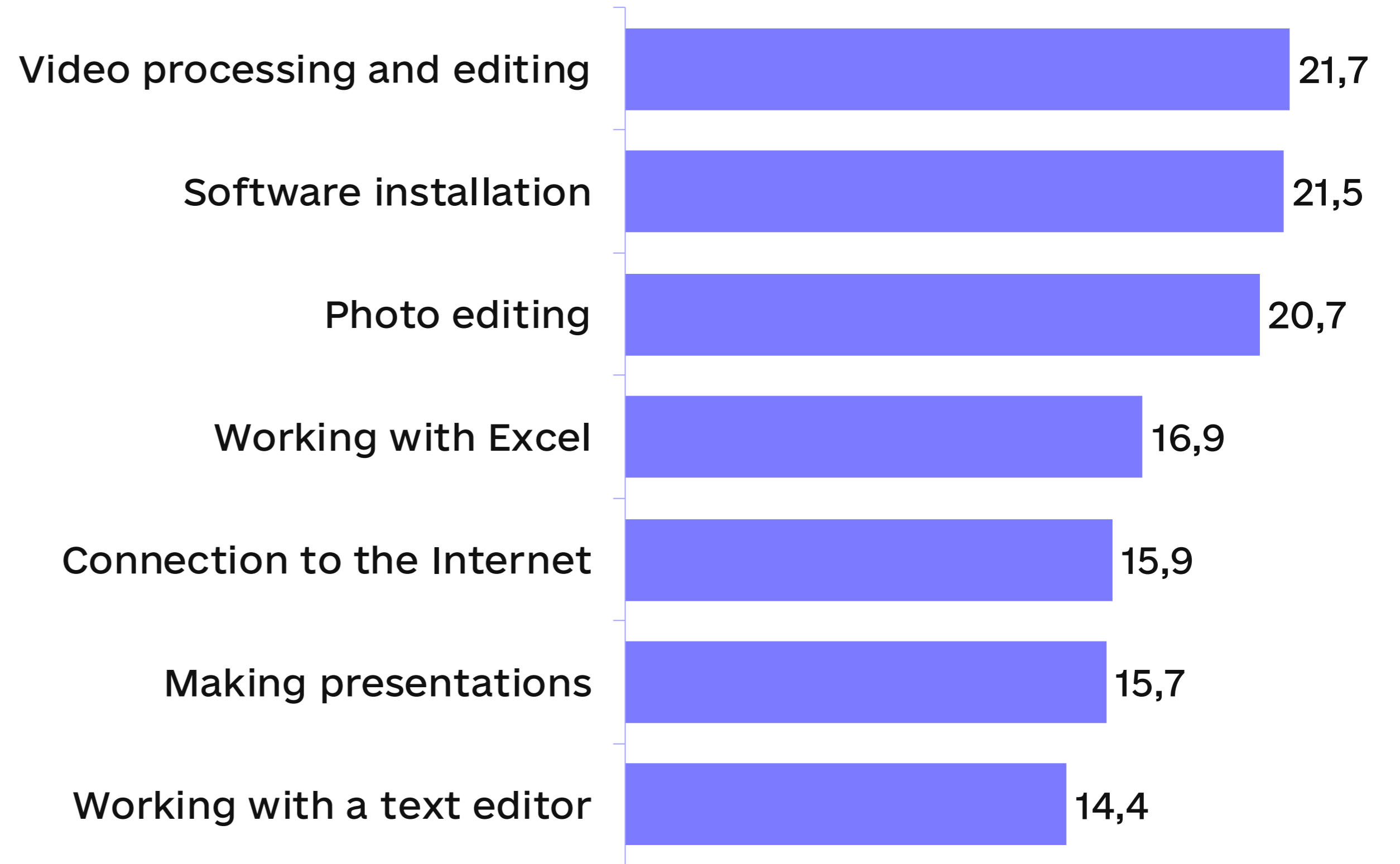
By employment status



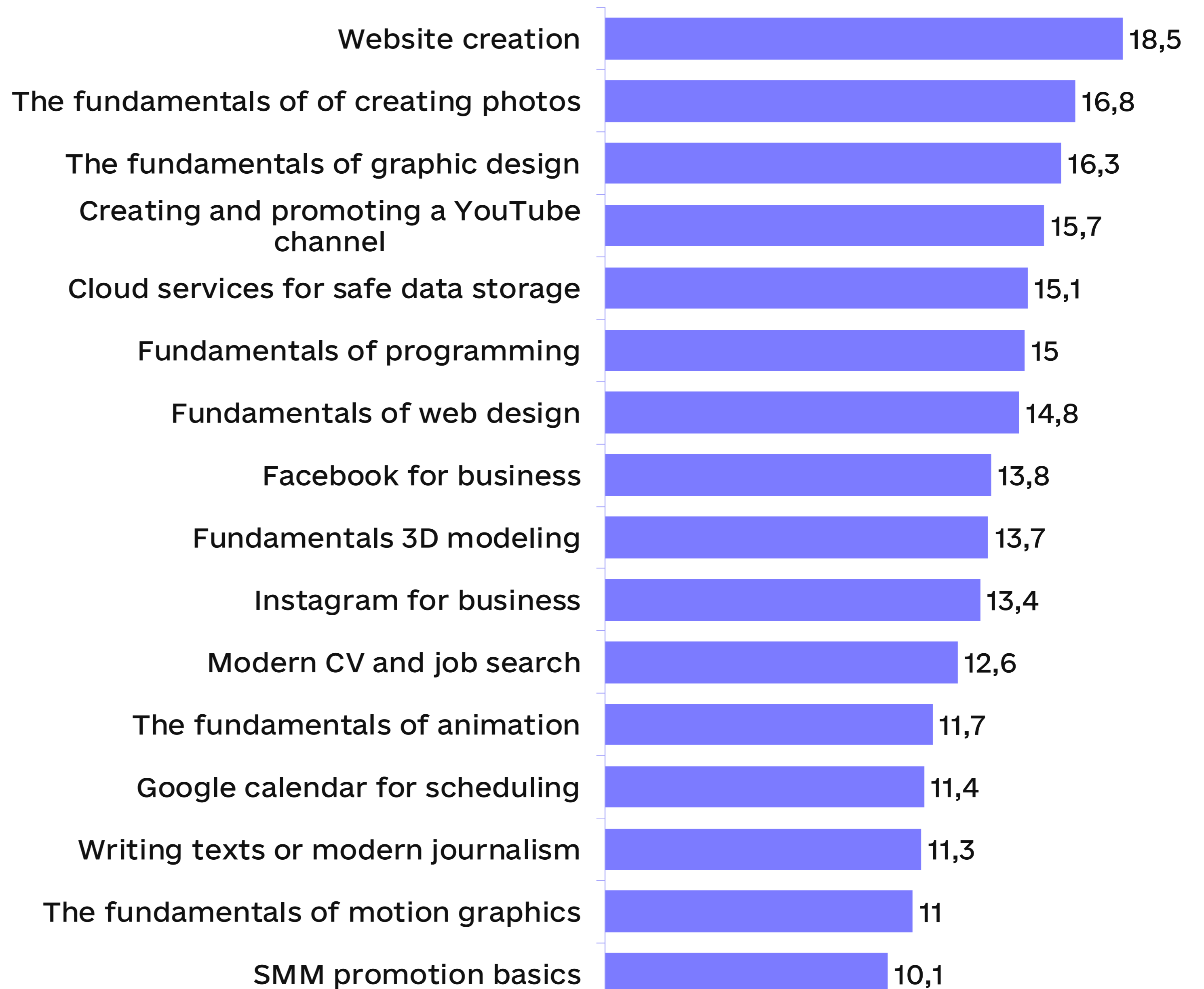
Basic courses



Advanced courses

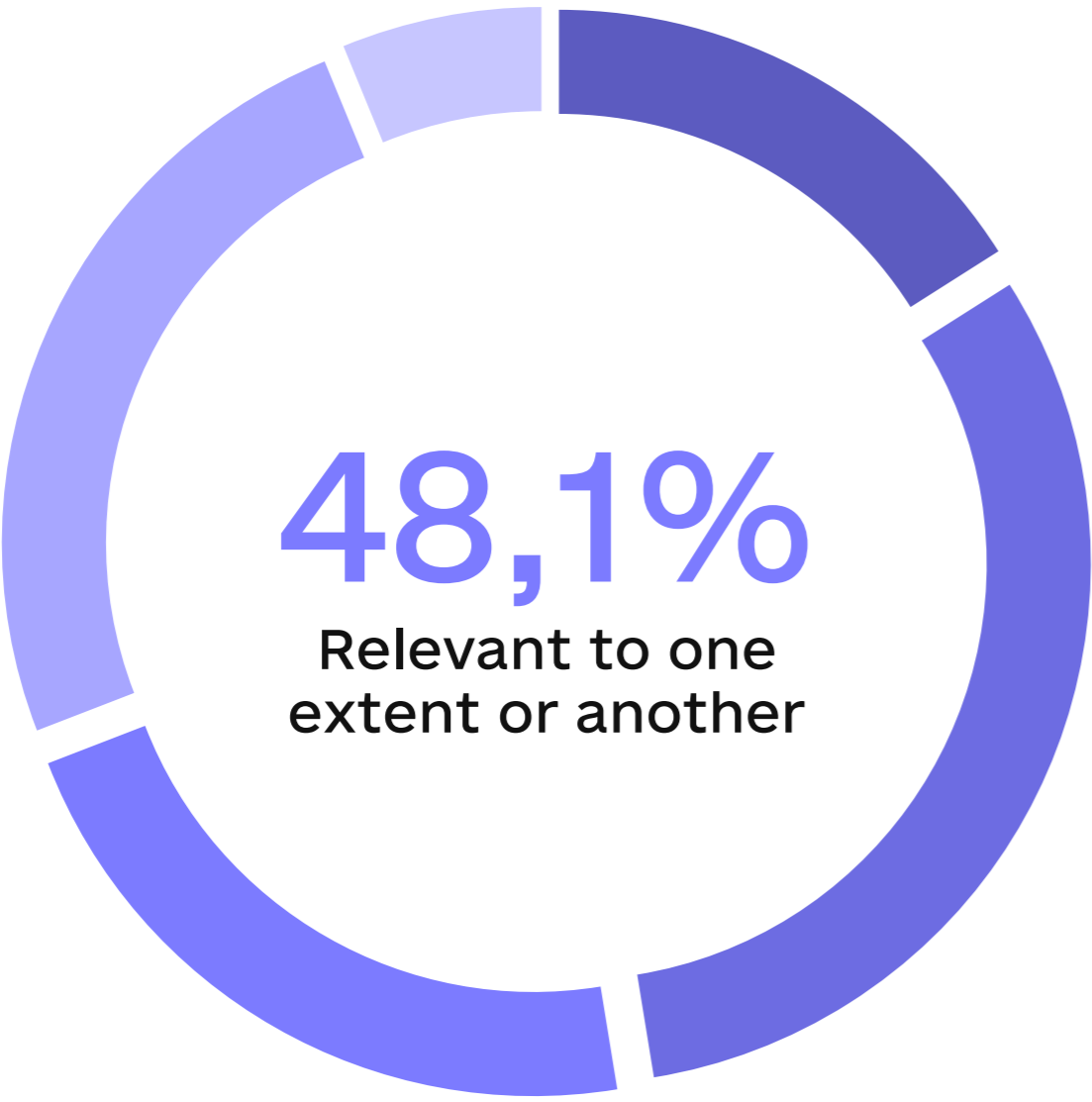


Basic professional courses



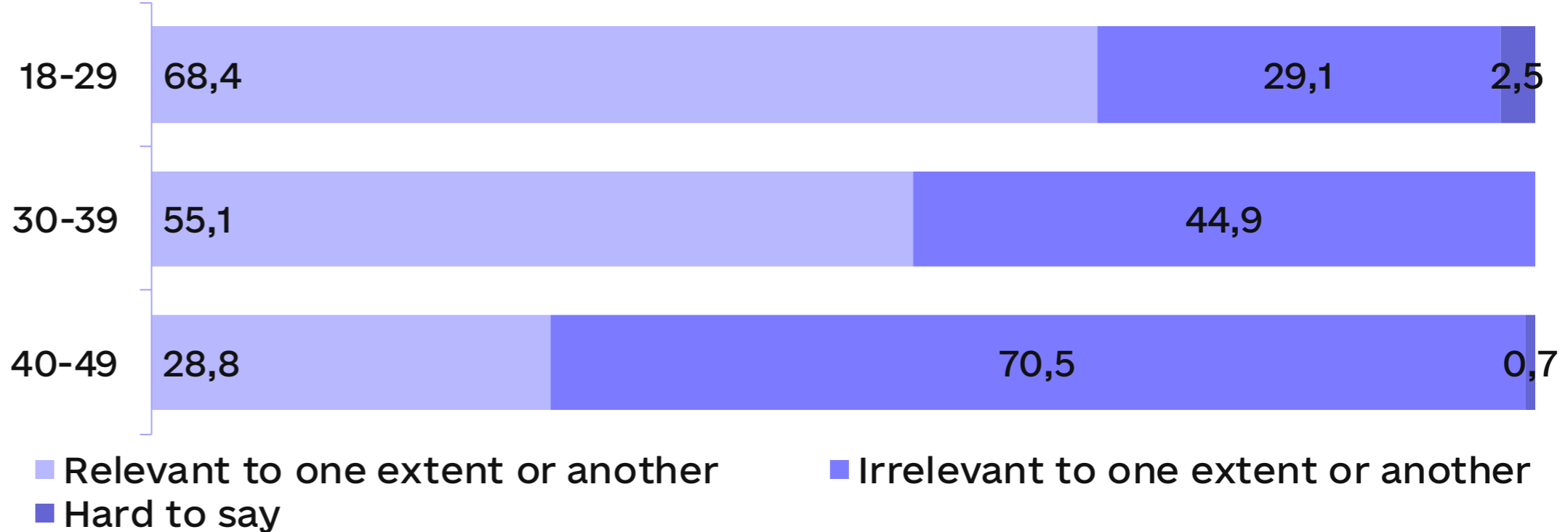
Relevance of digital skills learning

Uncontrolled territories 🚧

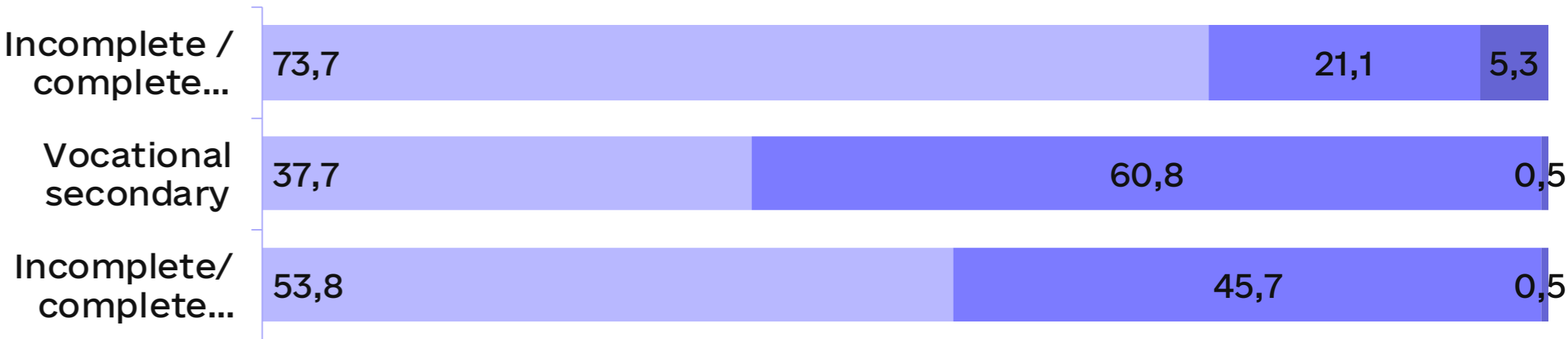


- Very relevant
- Rather relevant
- Rather irrelevant
- Absolutely irrelevant
- Hard to say

By age



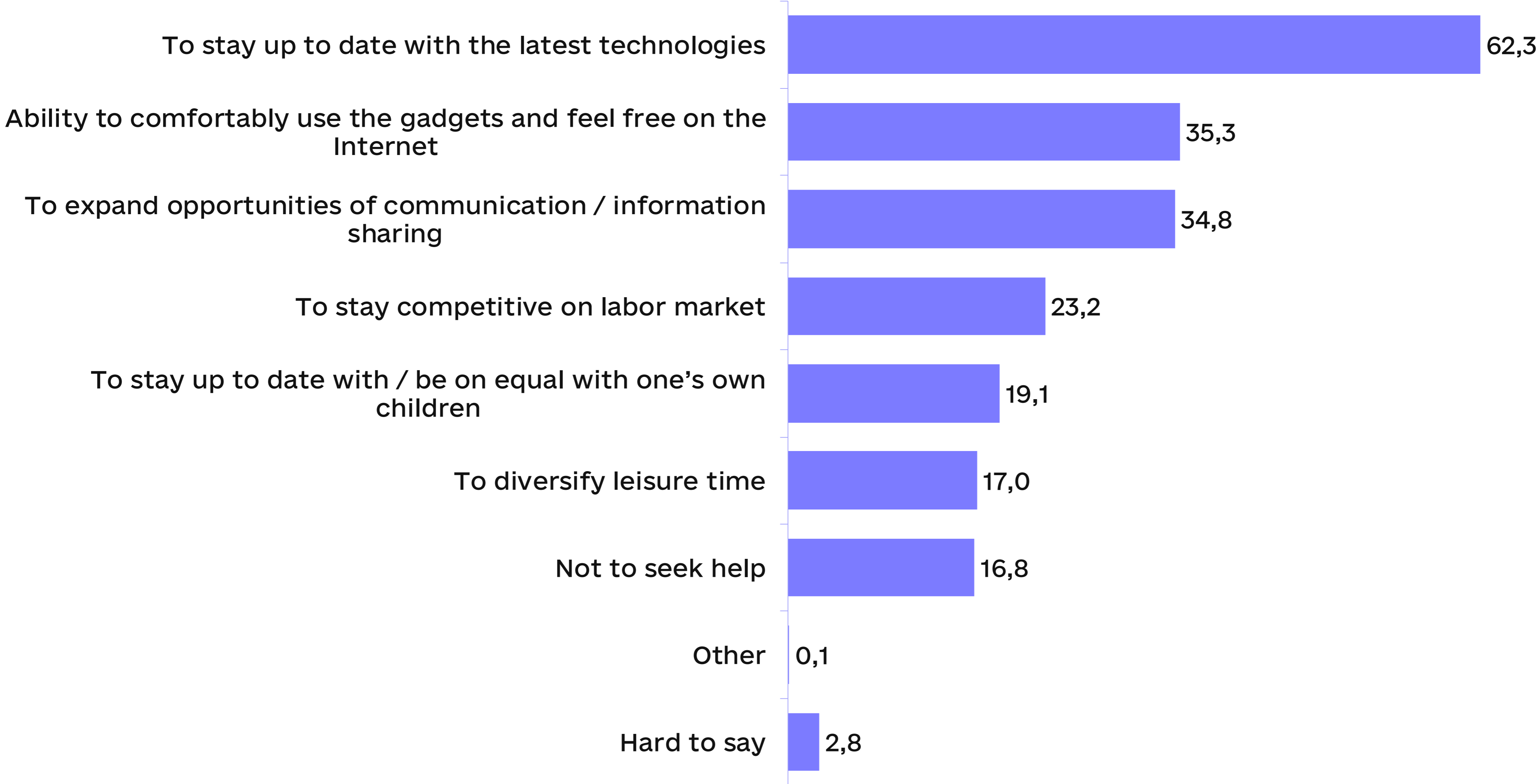
By education



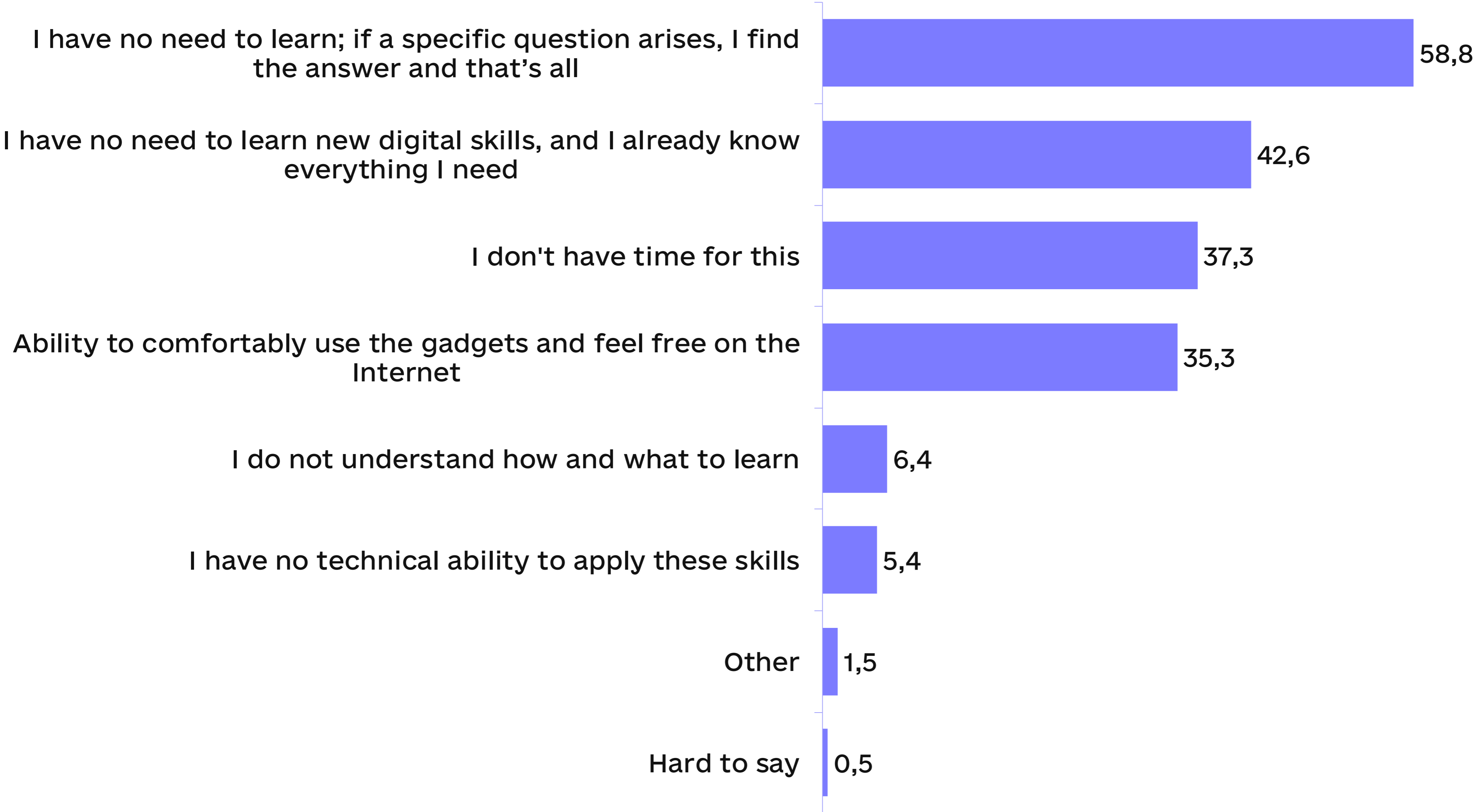
By employment status



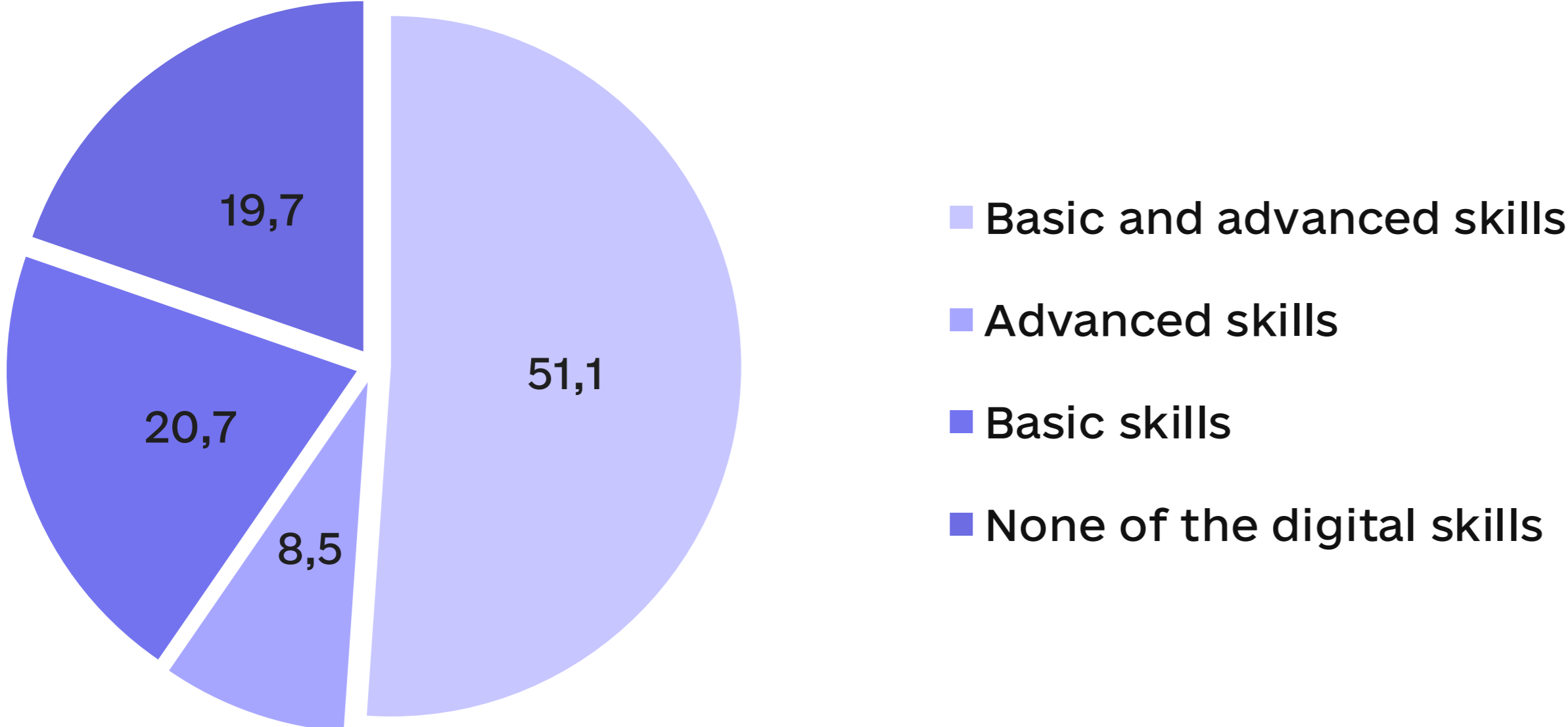
Reasons for relevance of digital skills learning



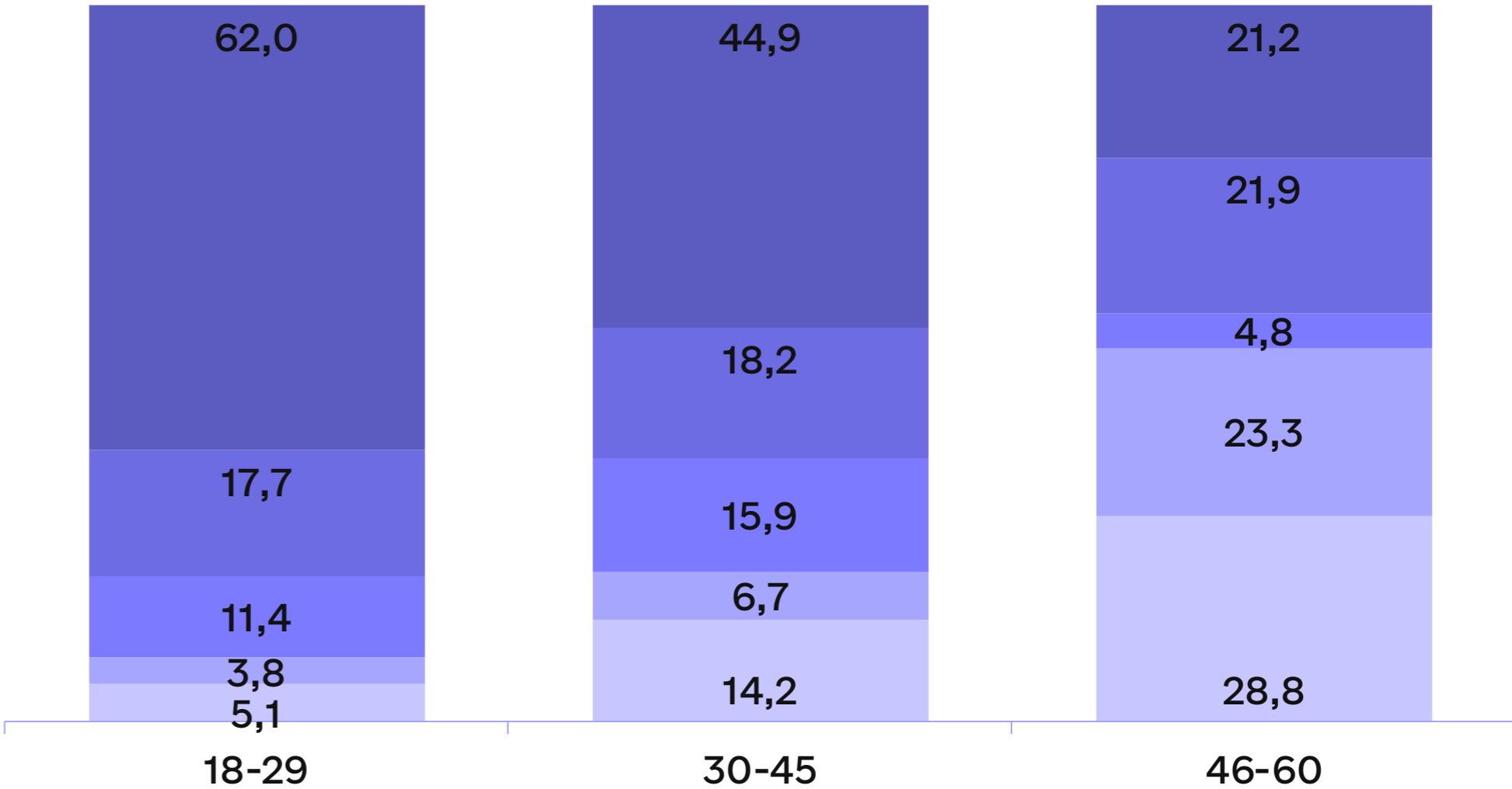
Reasons for irrelevance of digital skills learning



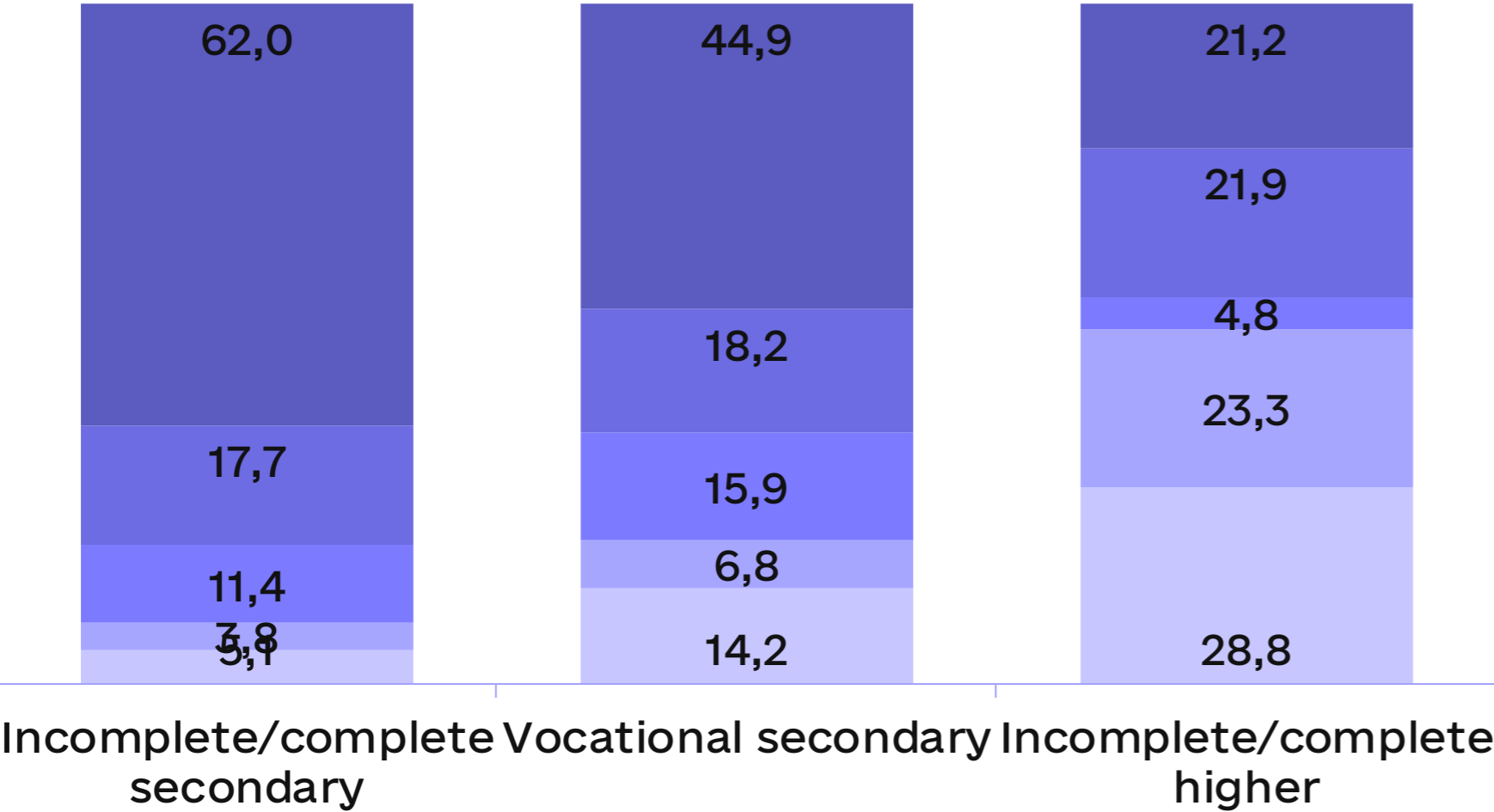
Digital skills one would like to develop



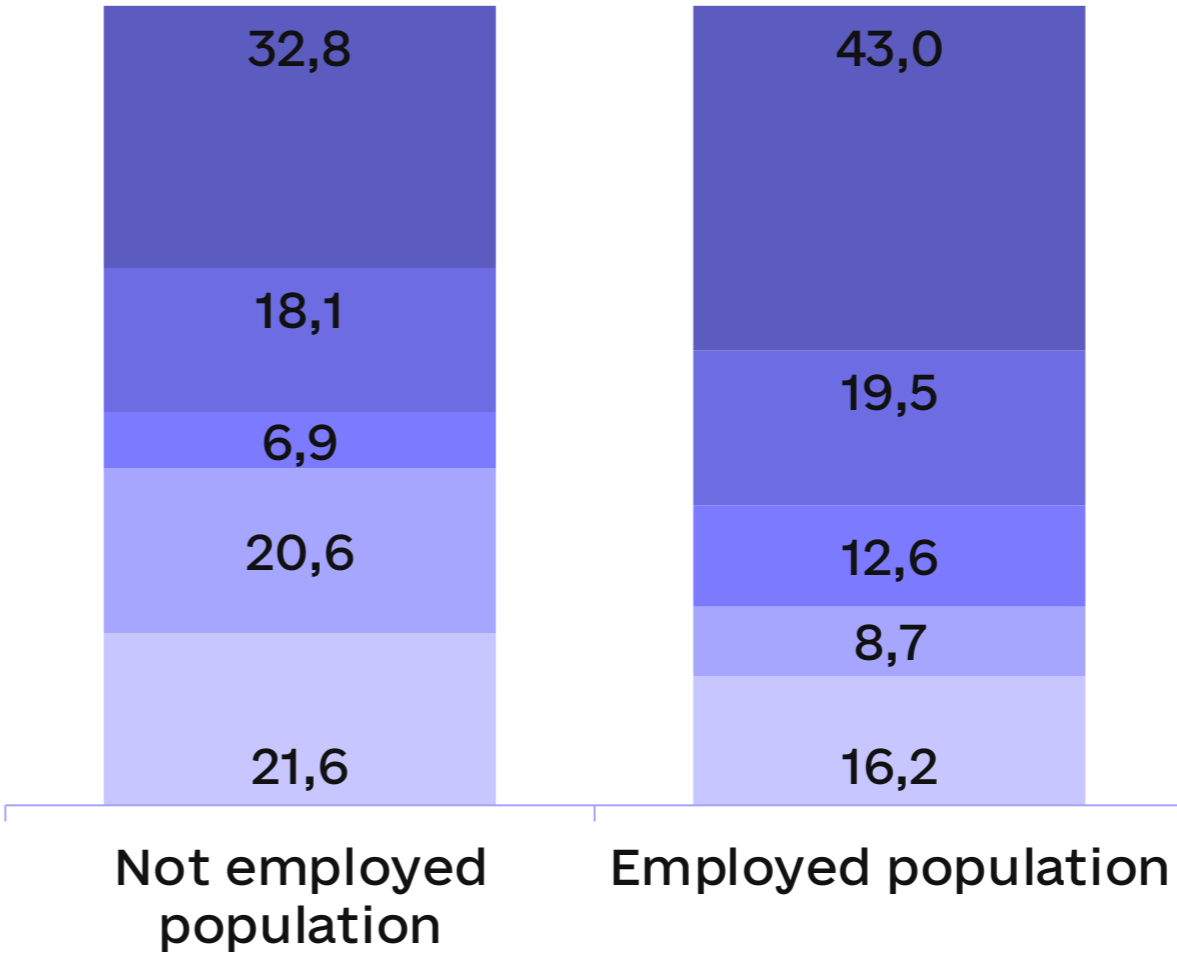
By age



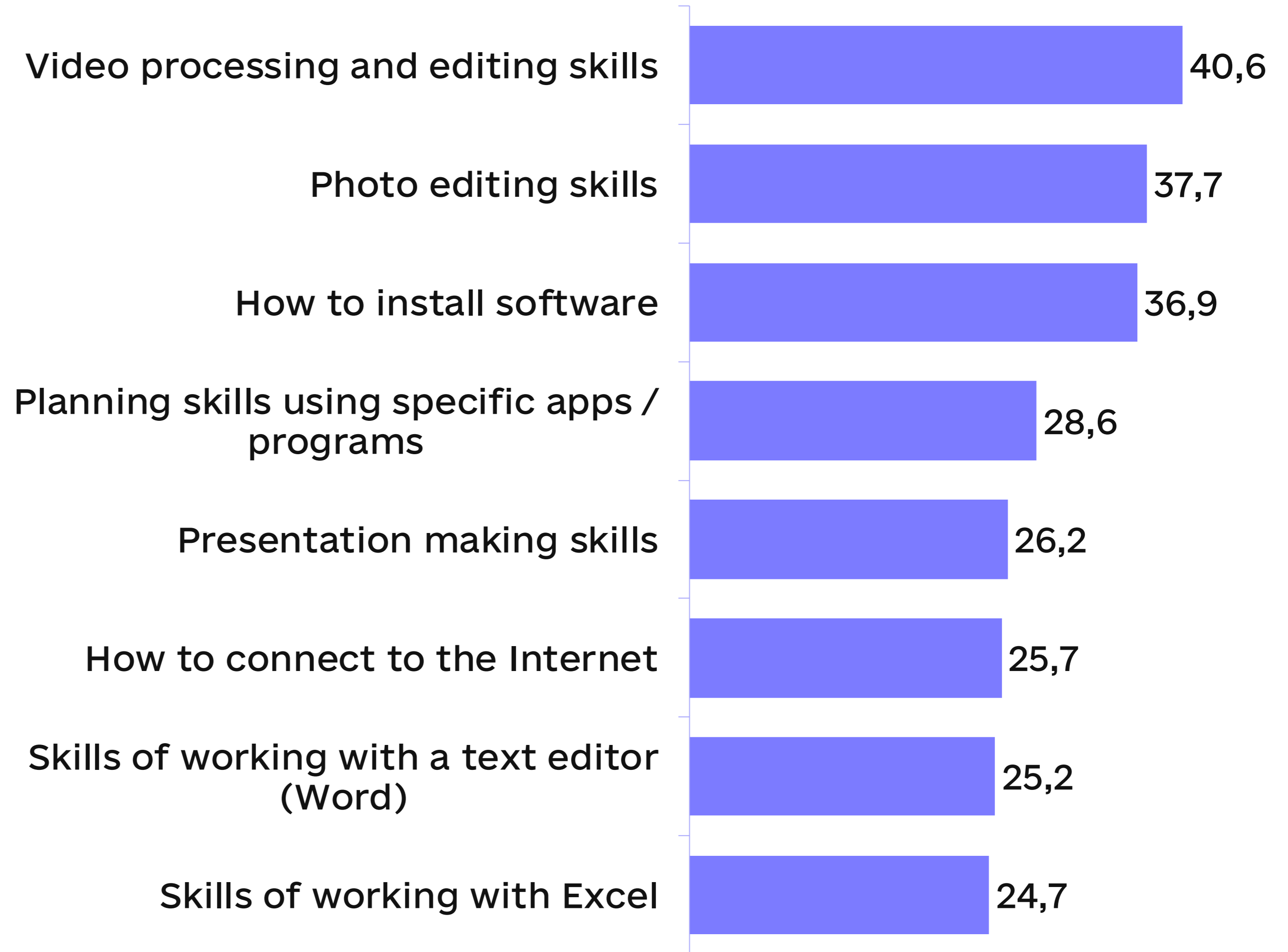
By educational level



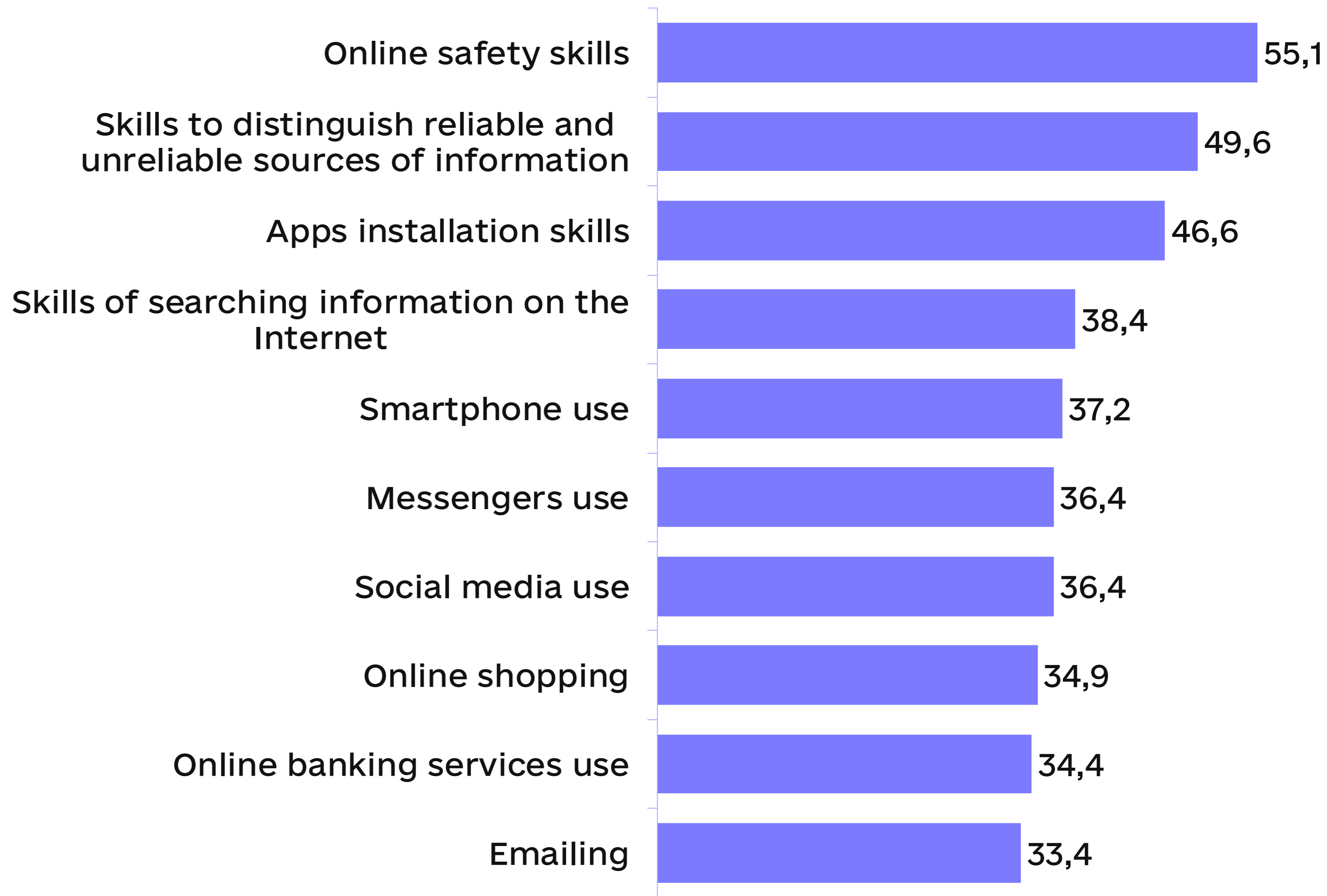
By employment status



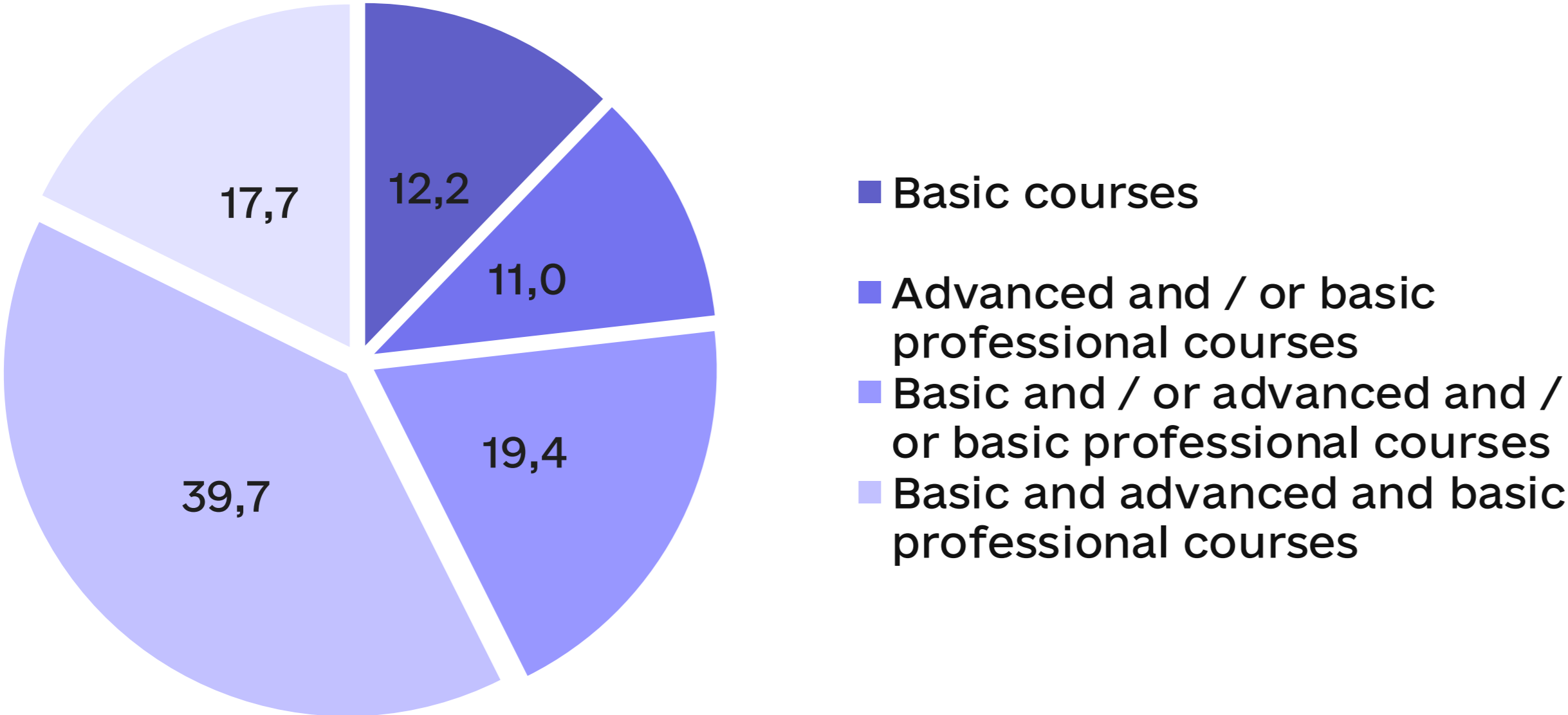
Advanced skills



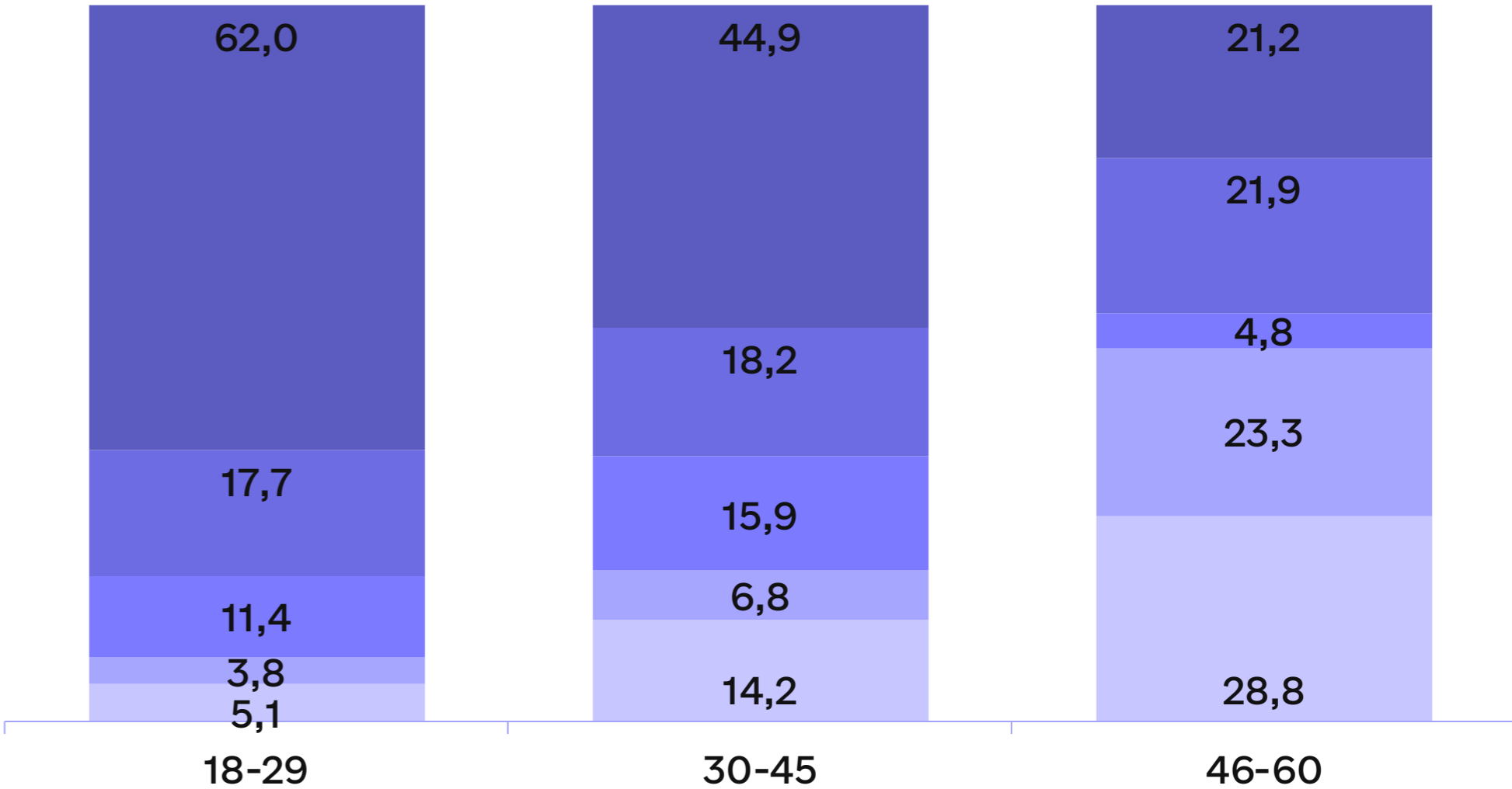
Basic skills



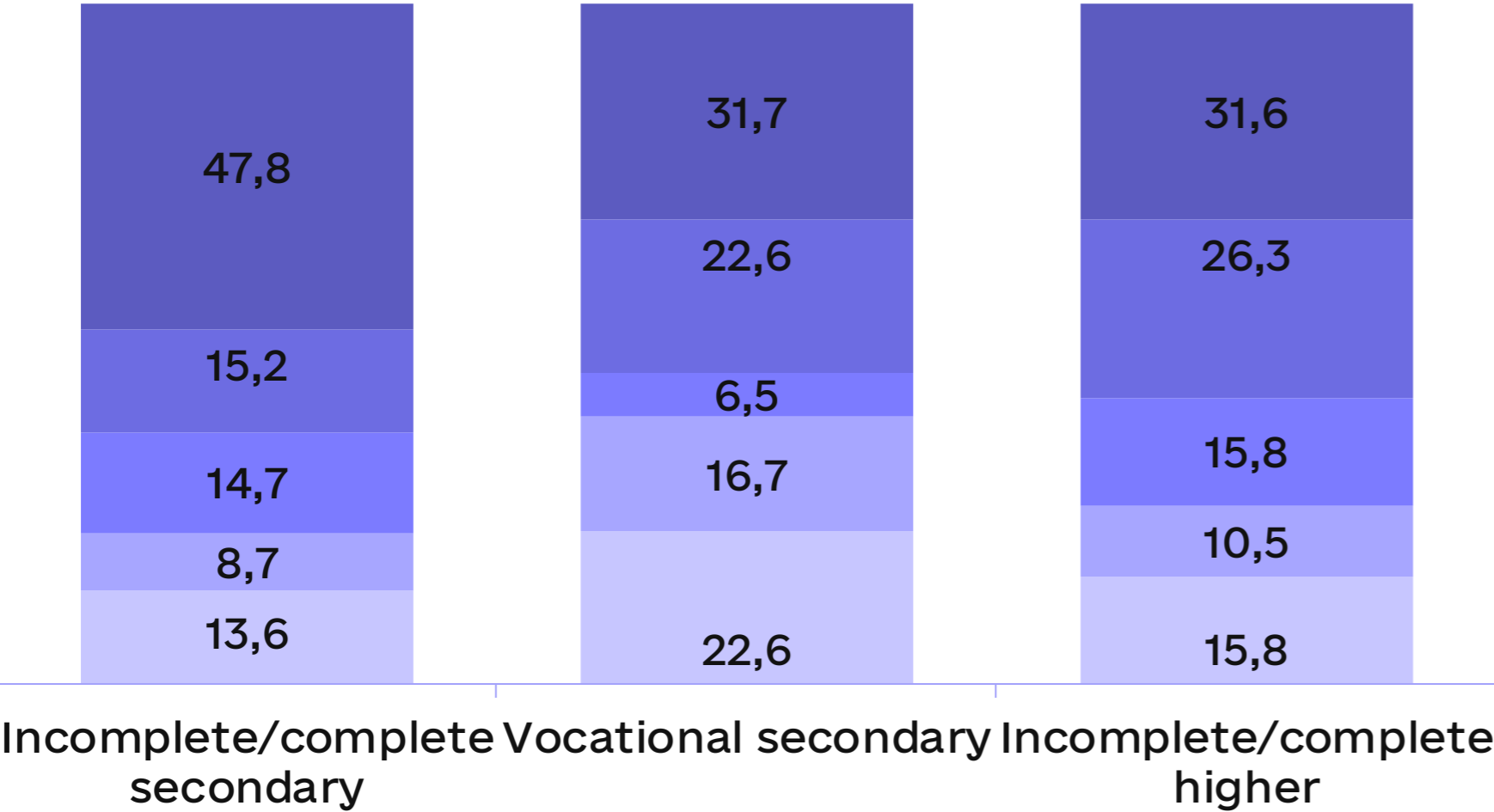
Courses one would like to complete



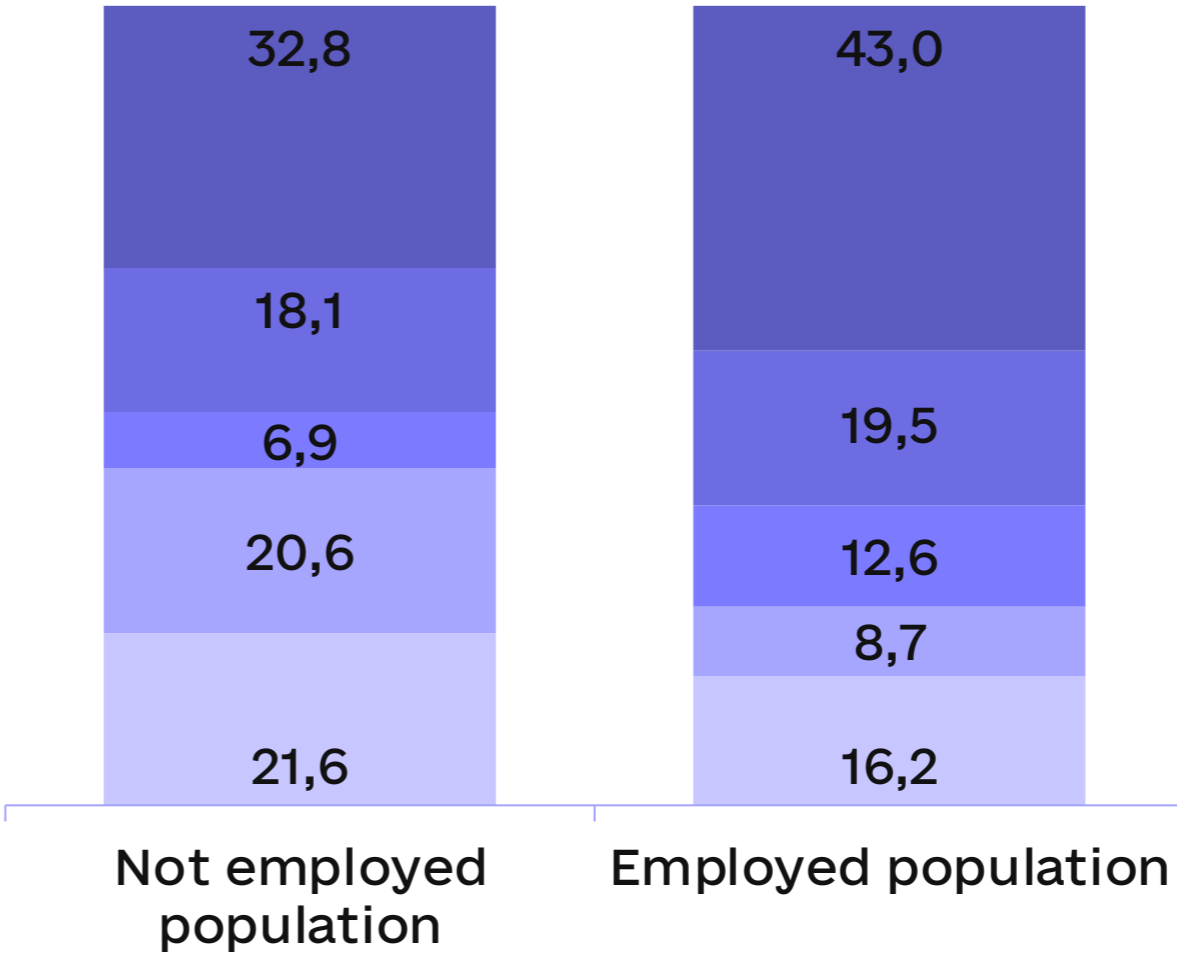
By age



By educational level



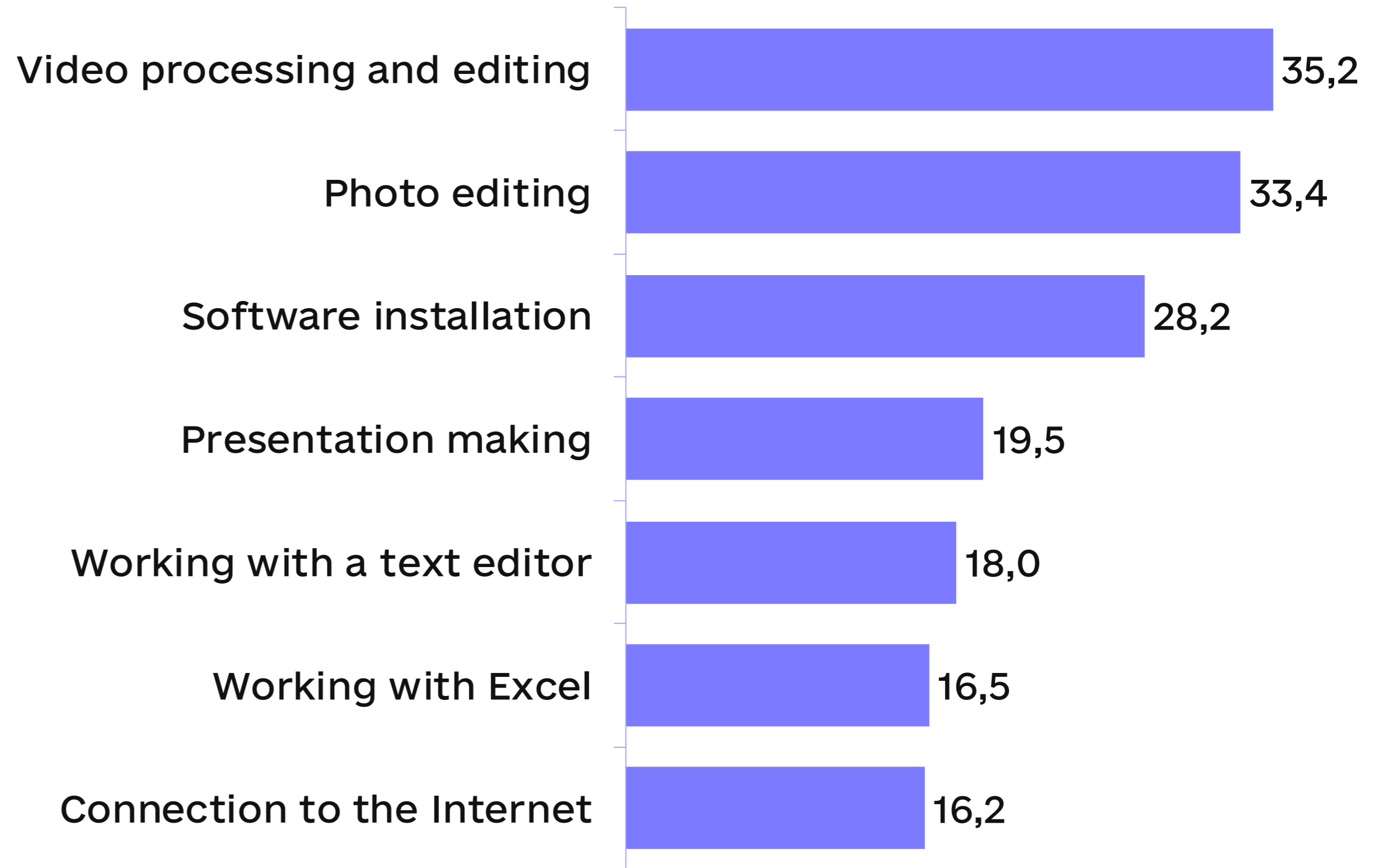
By employment status



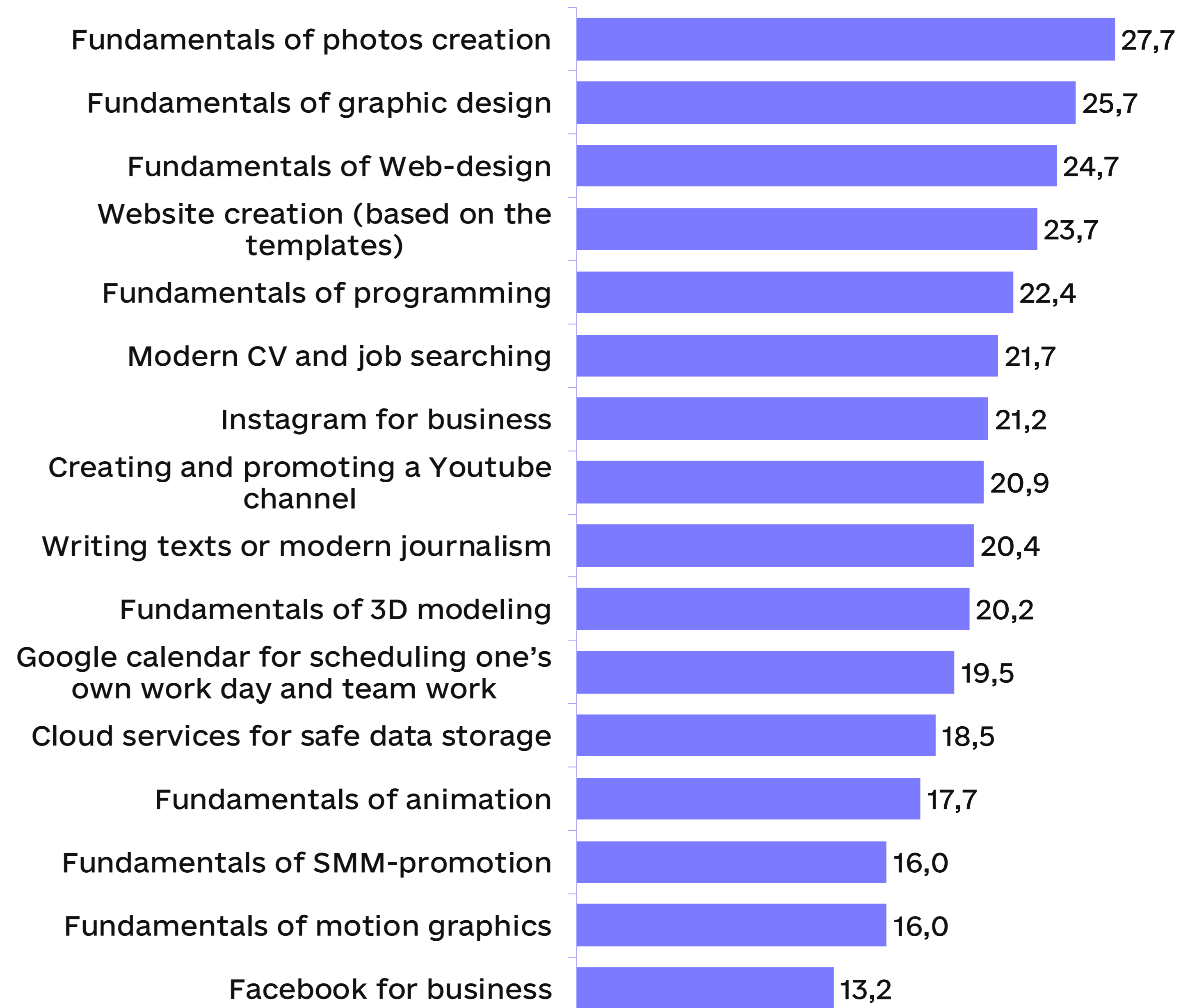
Basic courses



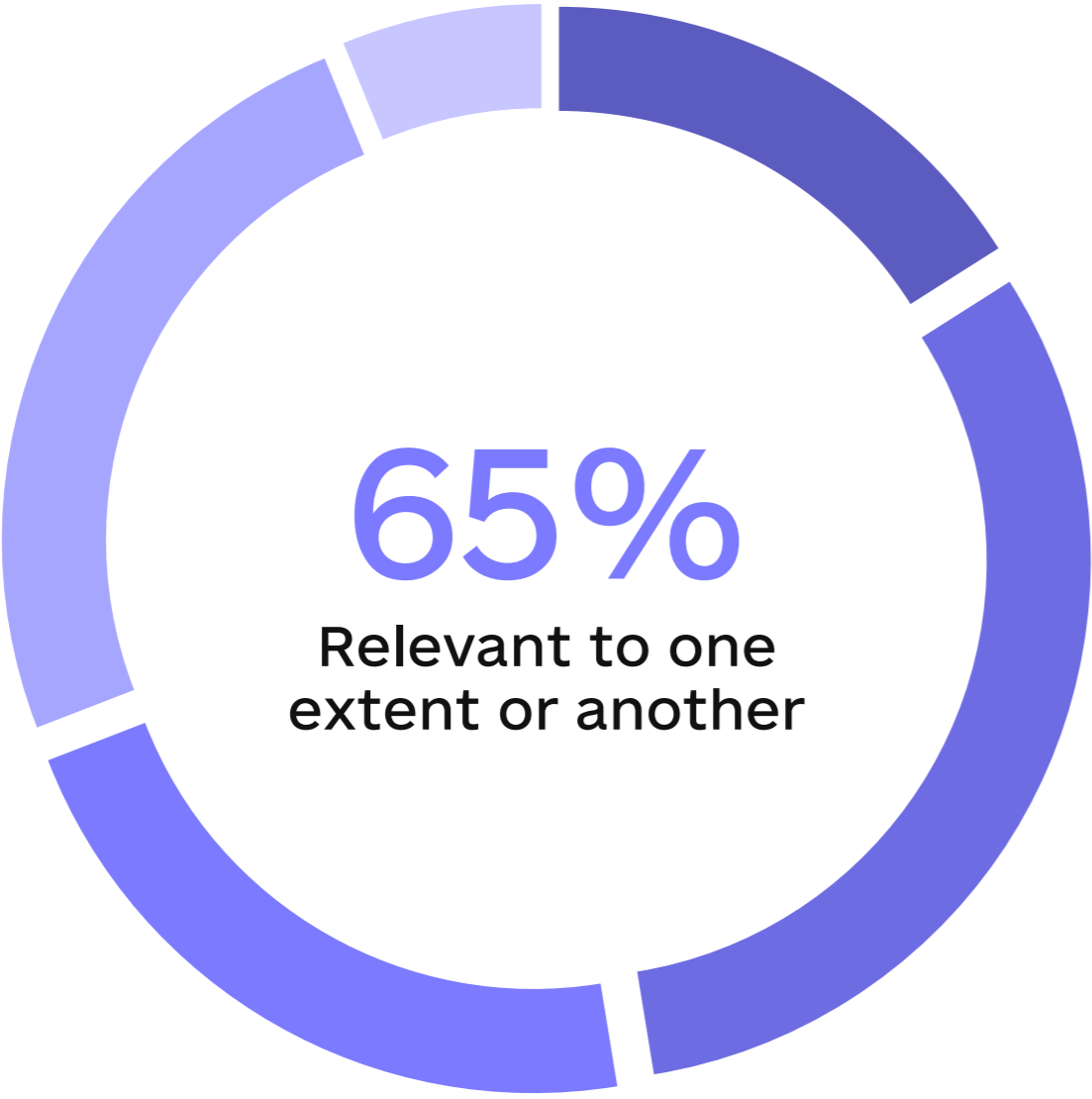
Advanced courses



Basic professional courses

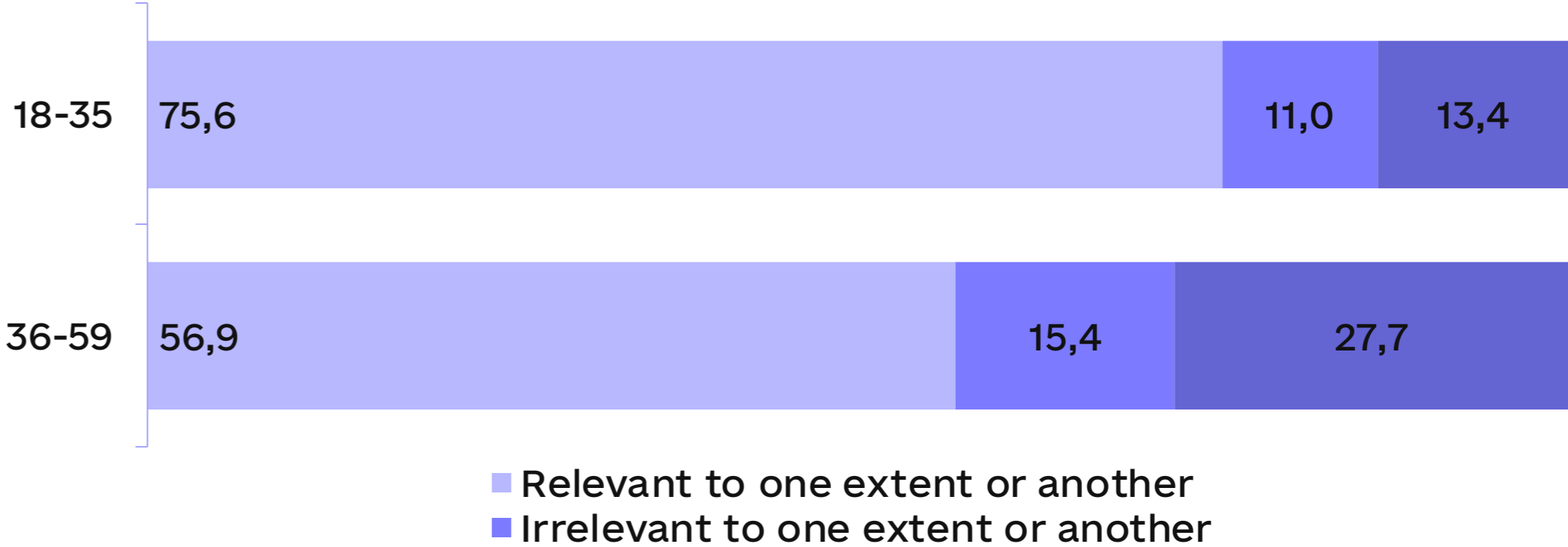


Relevance of digital skills learning People with hearing impairment



- Very relevant
- Rather relevant
- Rather irrelevant
- Absolutely irrelevant
- Hard to say

By age



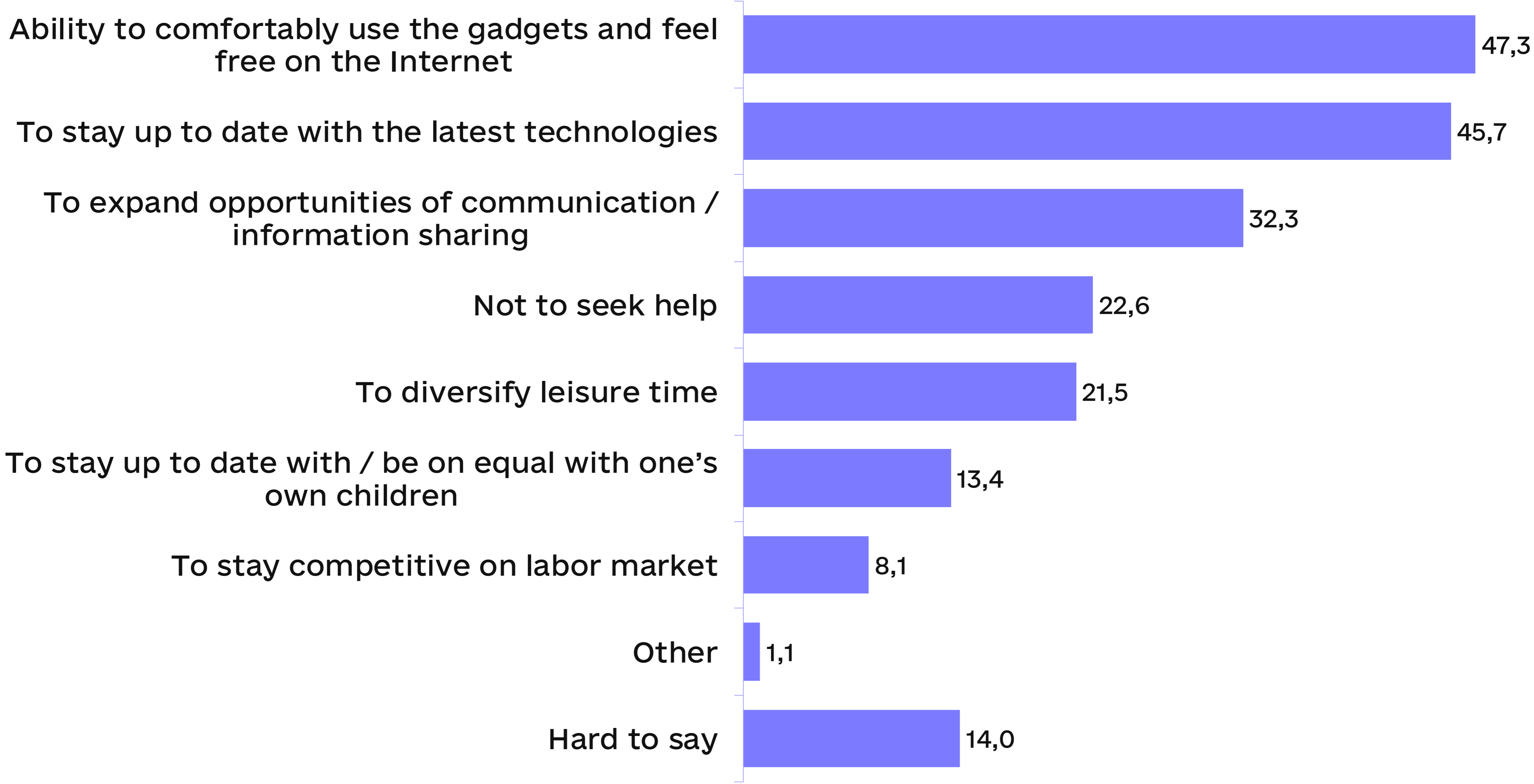
By education



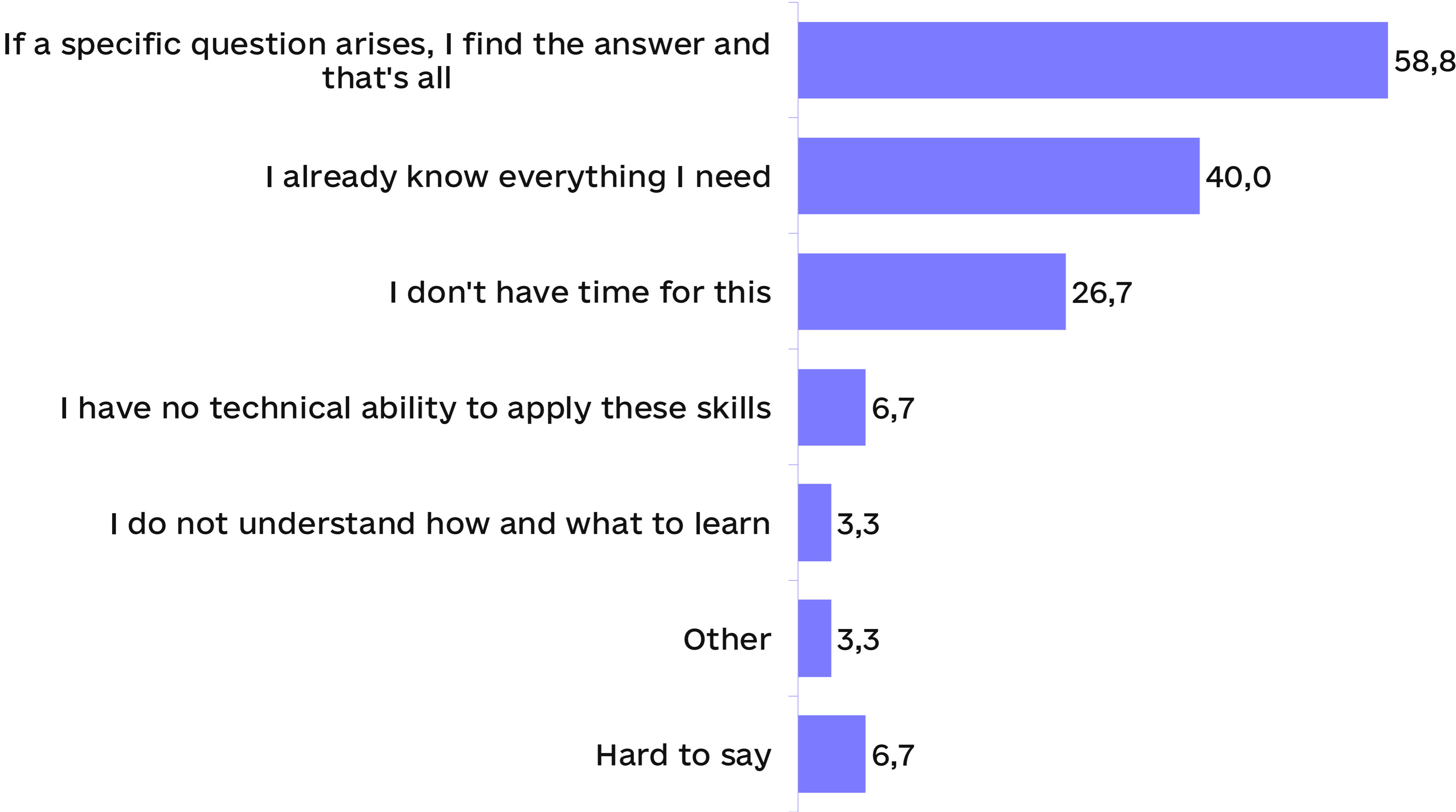
By employment status



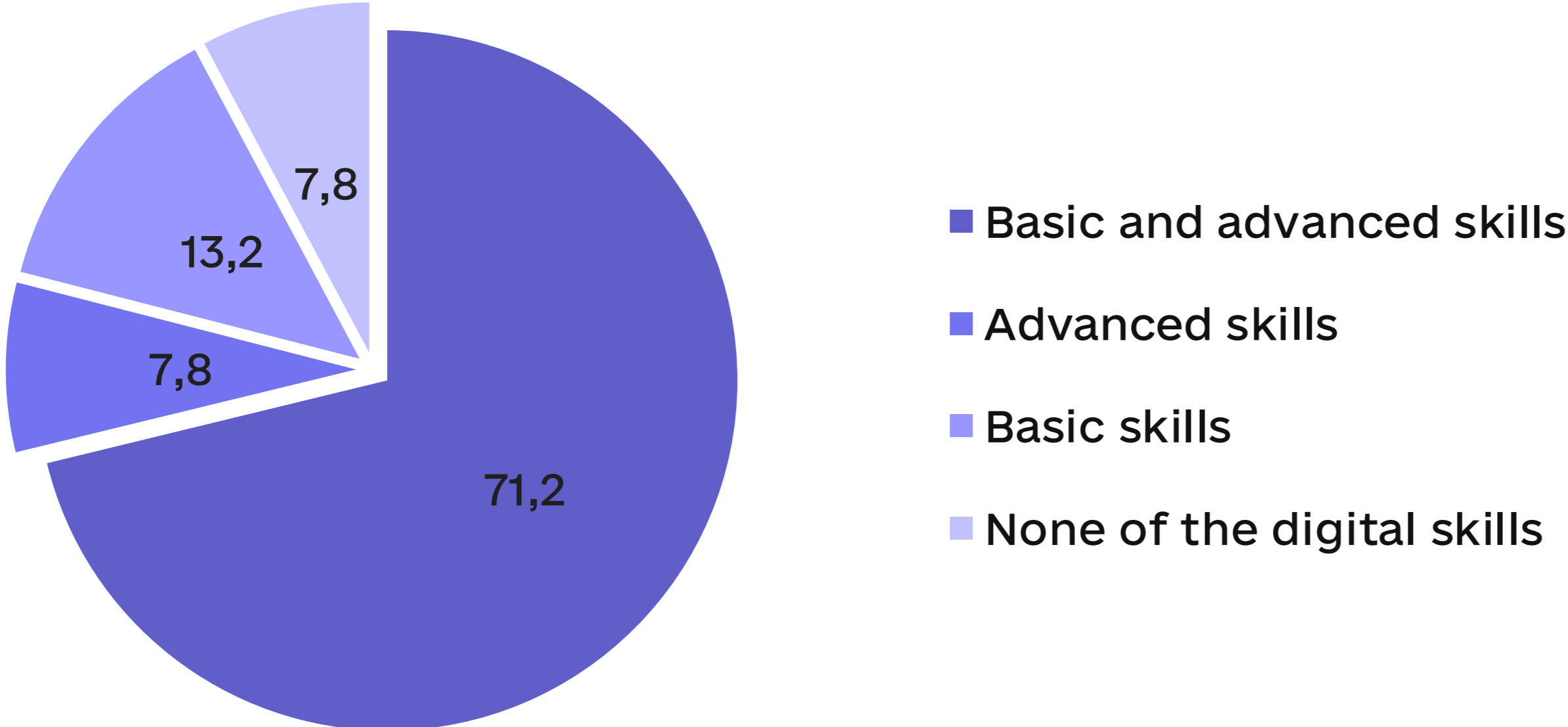
Reasons for relevance of digital skills learning



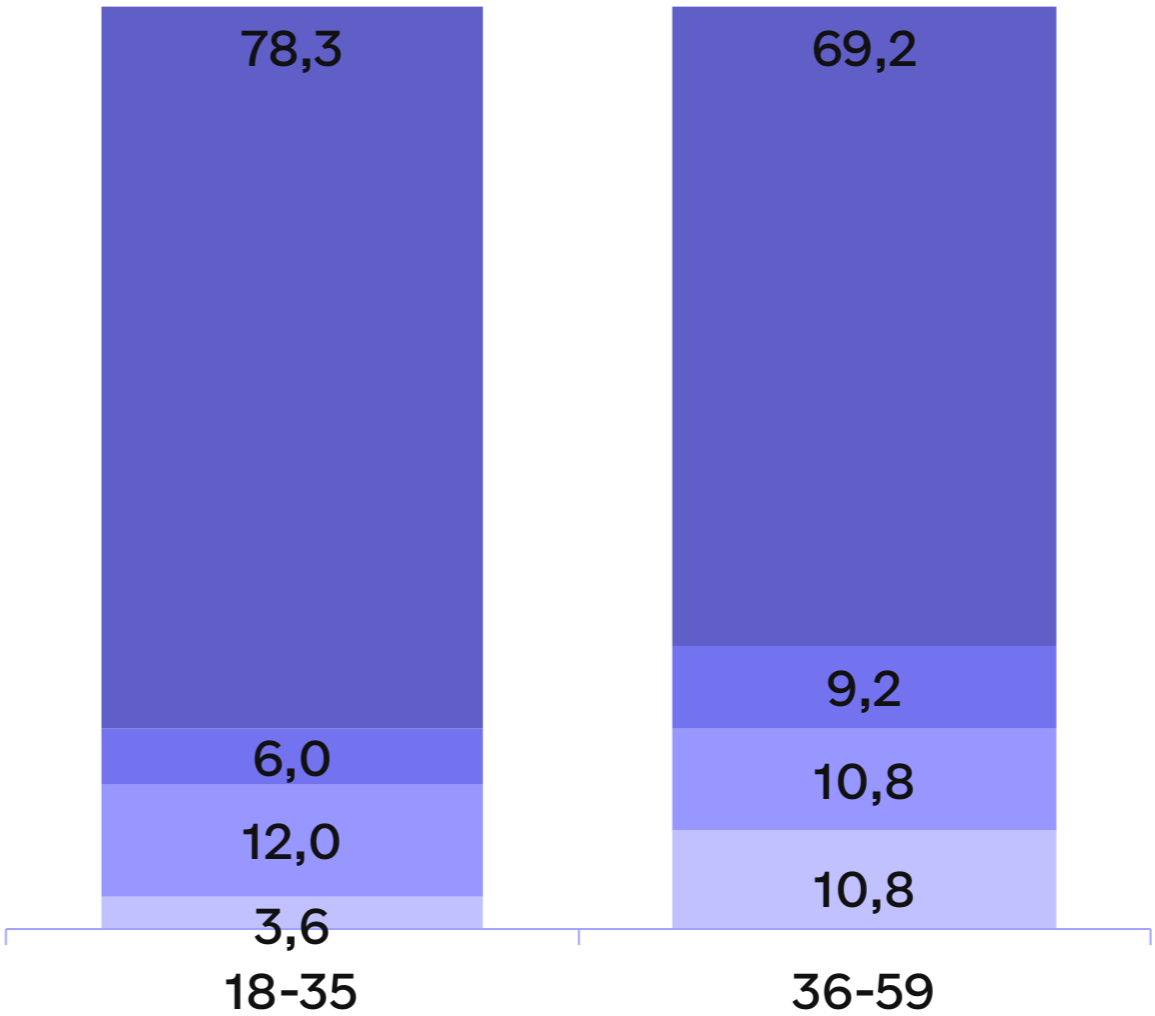
Reasons for irrelevance of digital skills learning



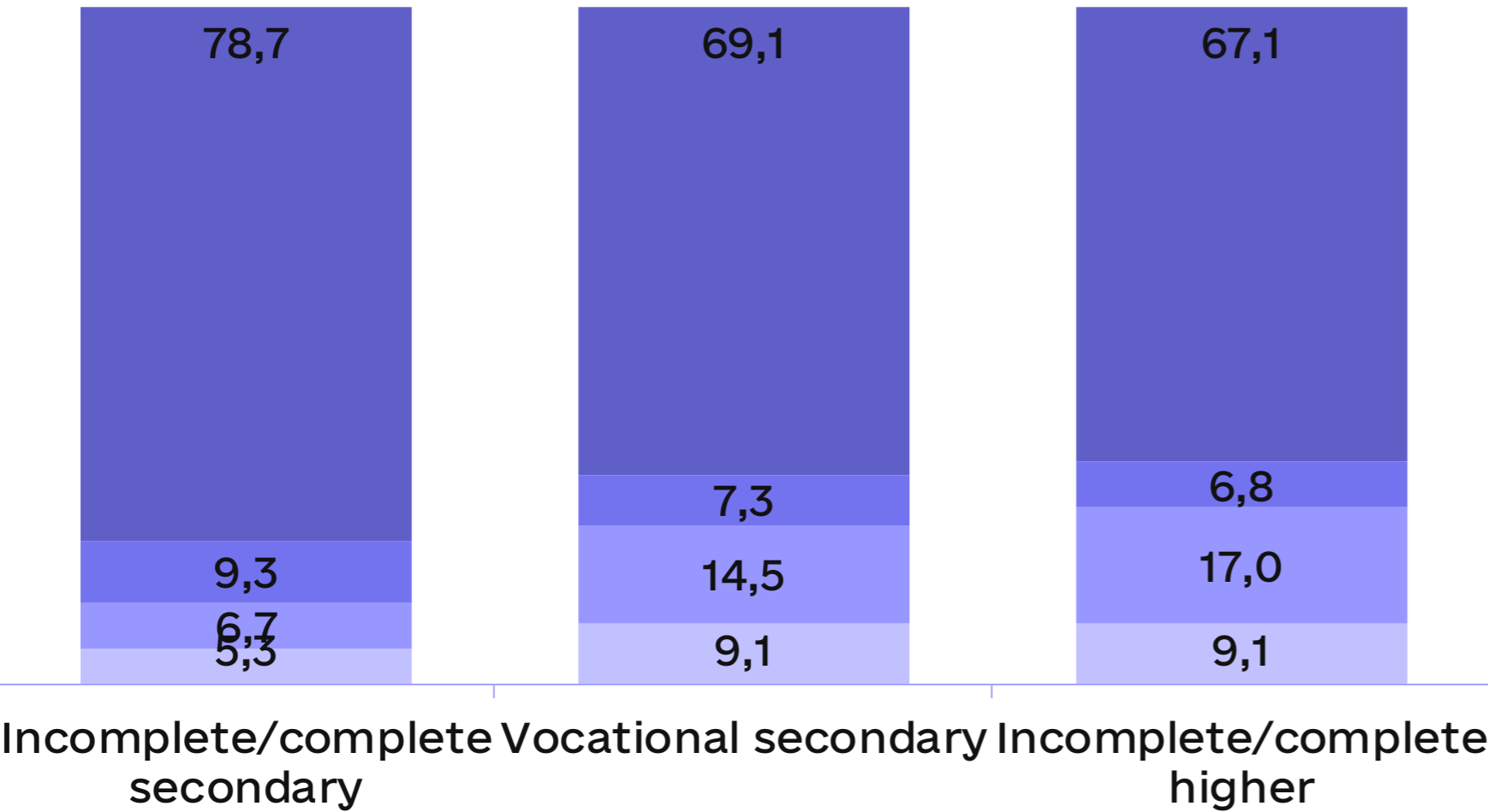
Digital skills one would like to develop



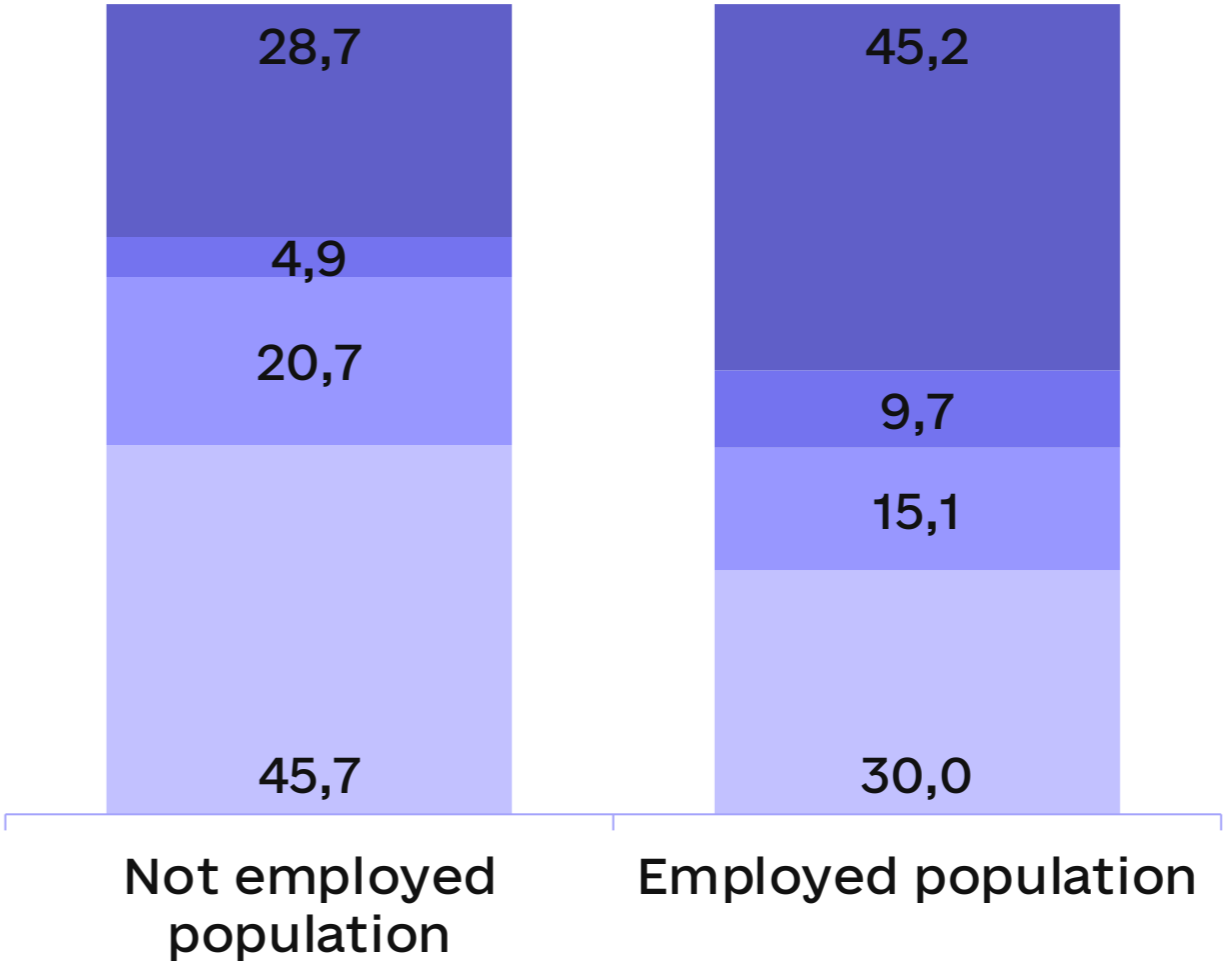
By age



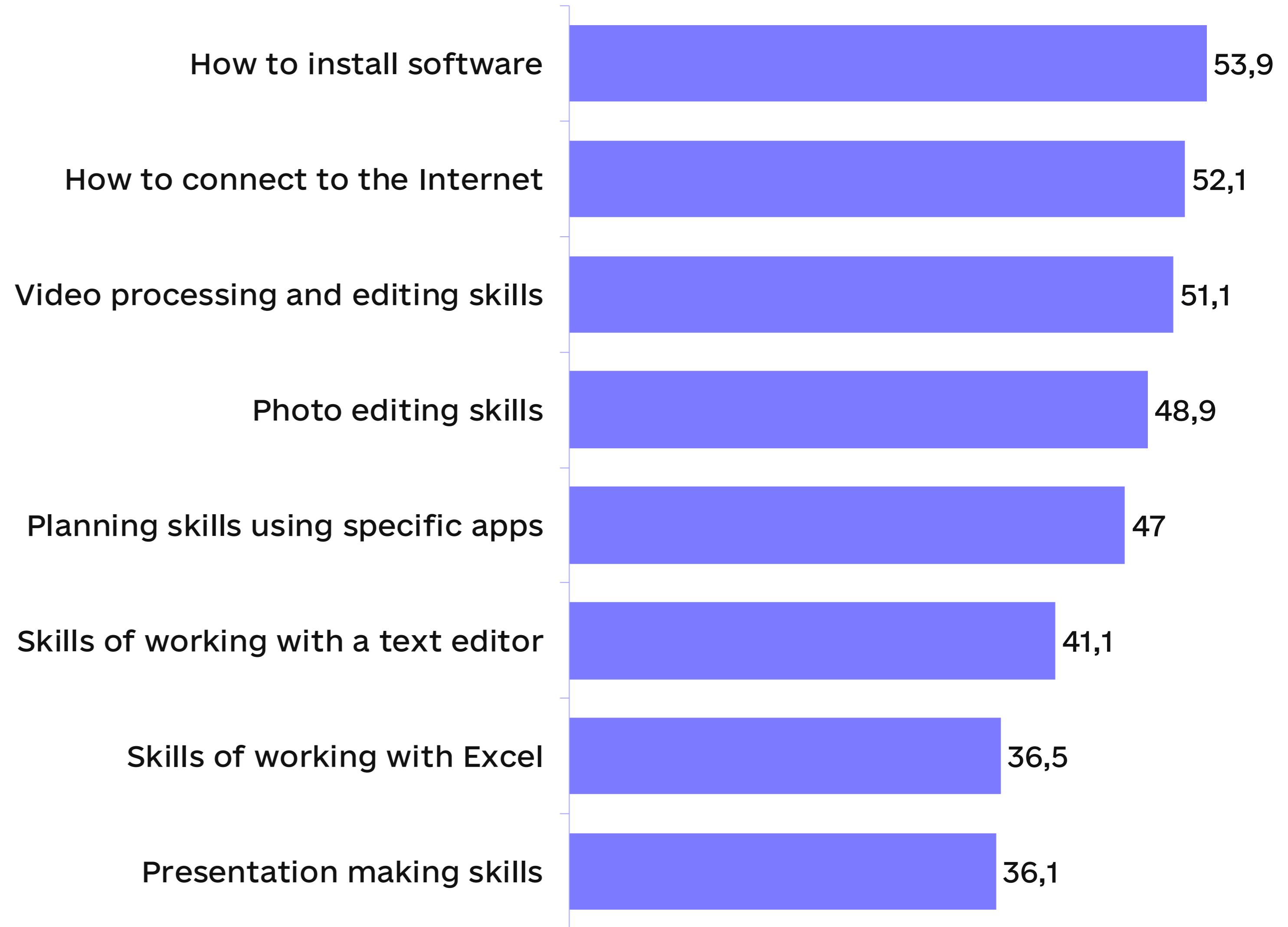
By educational level



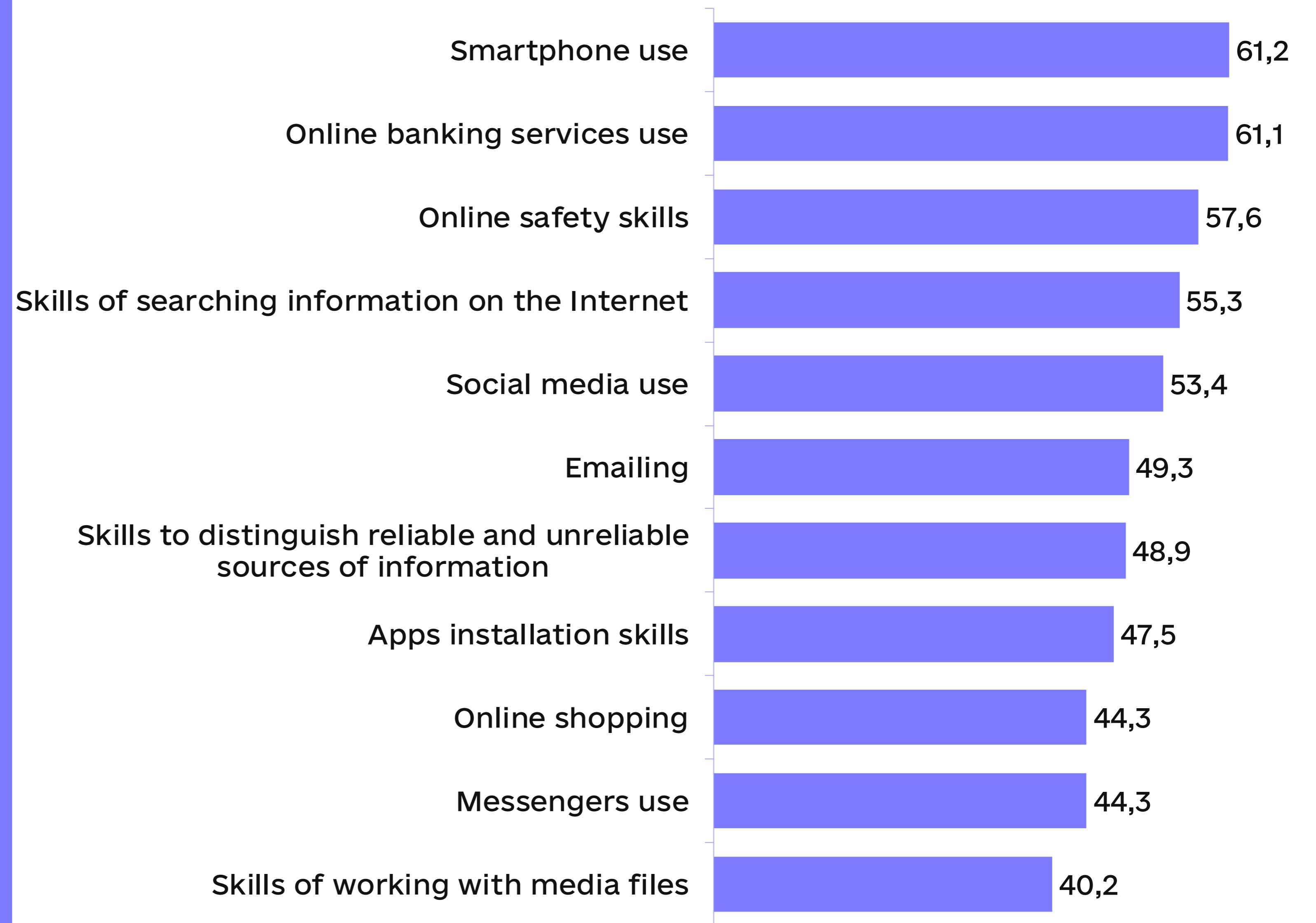
By employment status



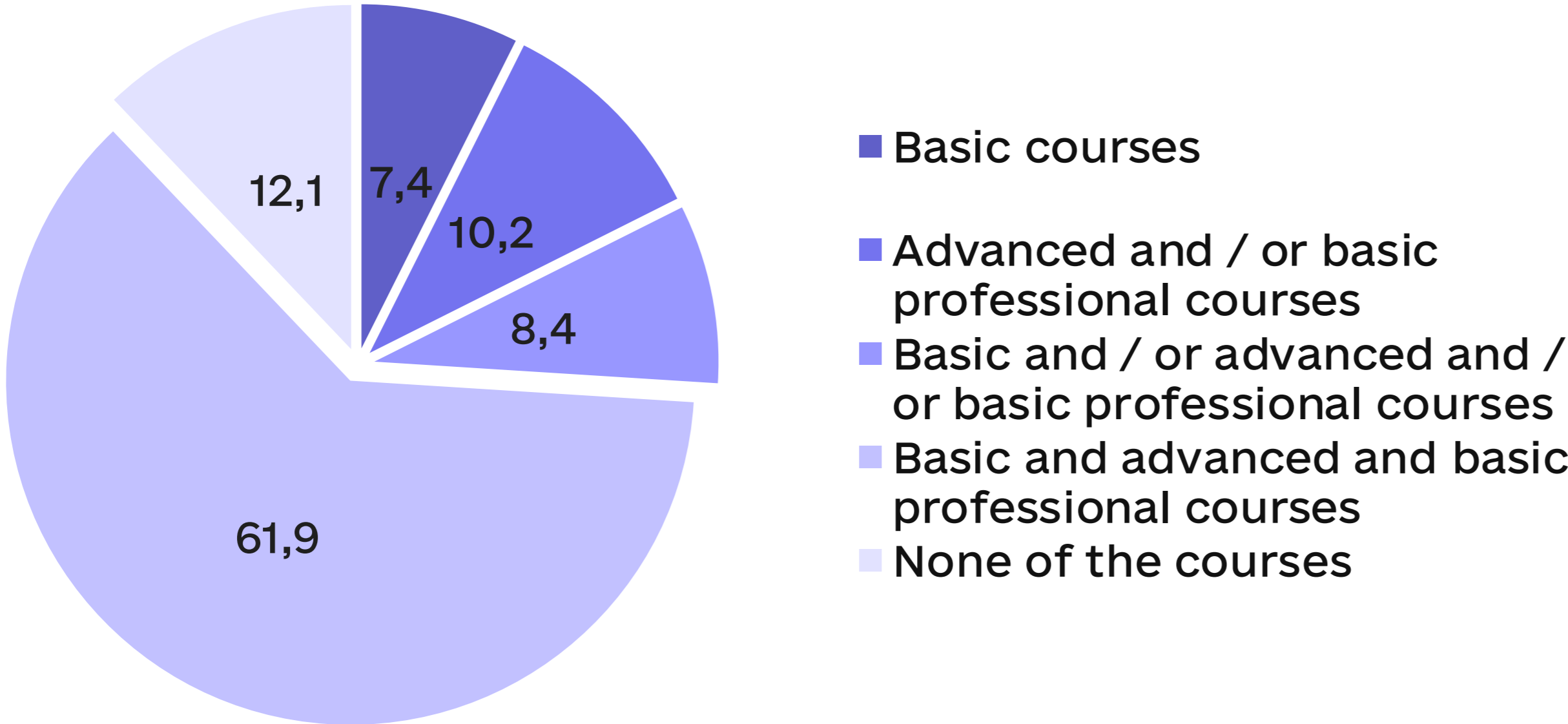
Advanced skills



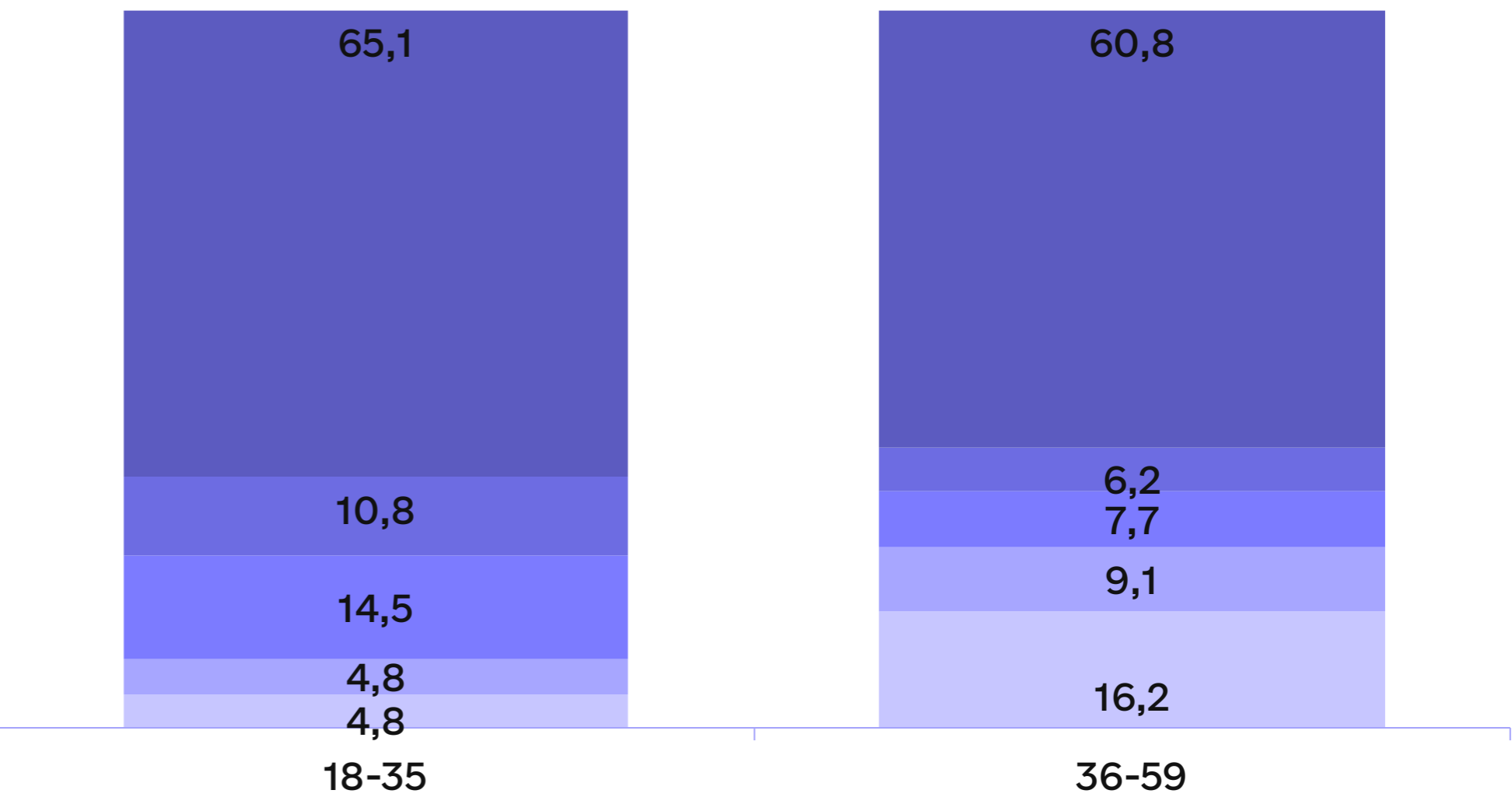
Basic skills



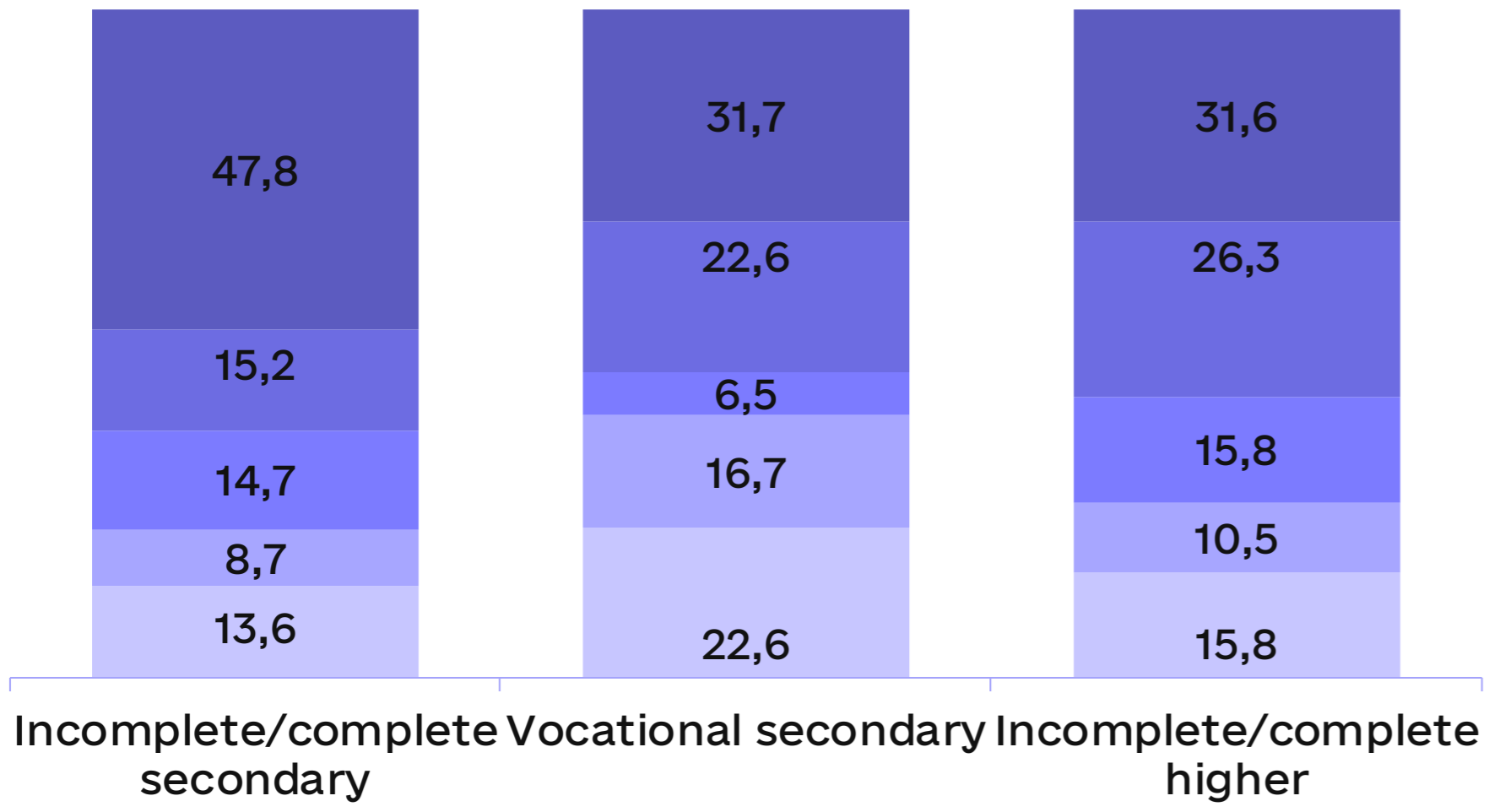
Courses one would like to complete



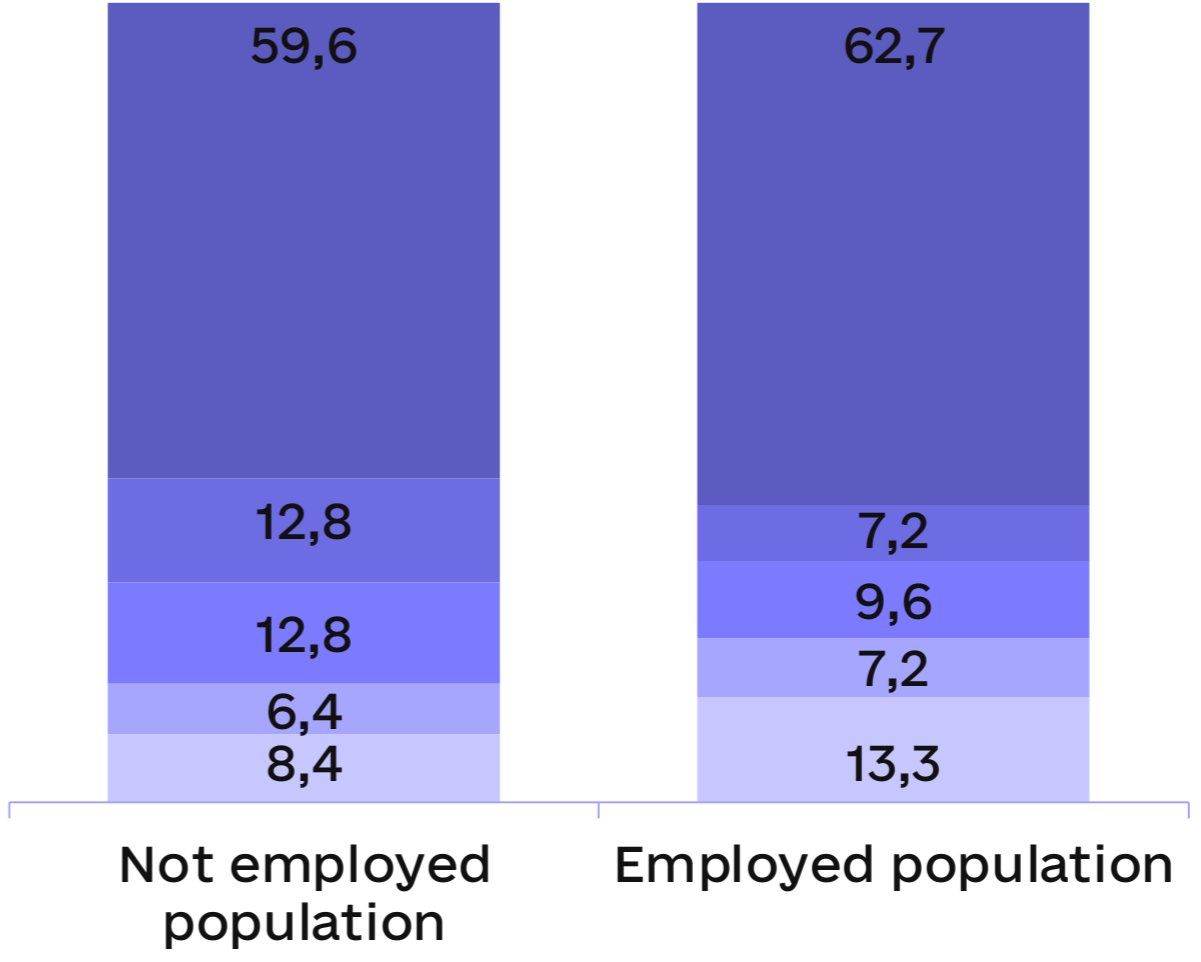
By age



By educational level



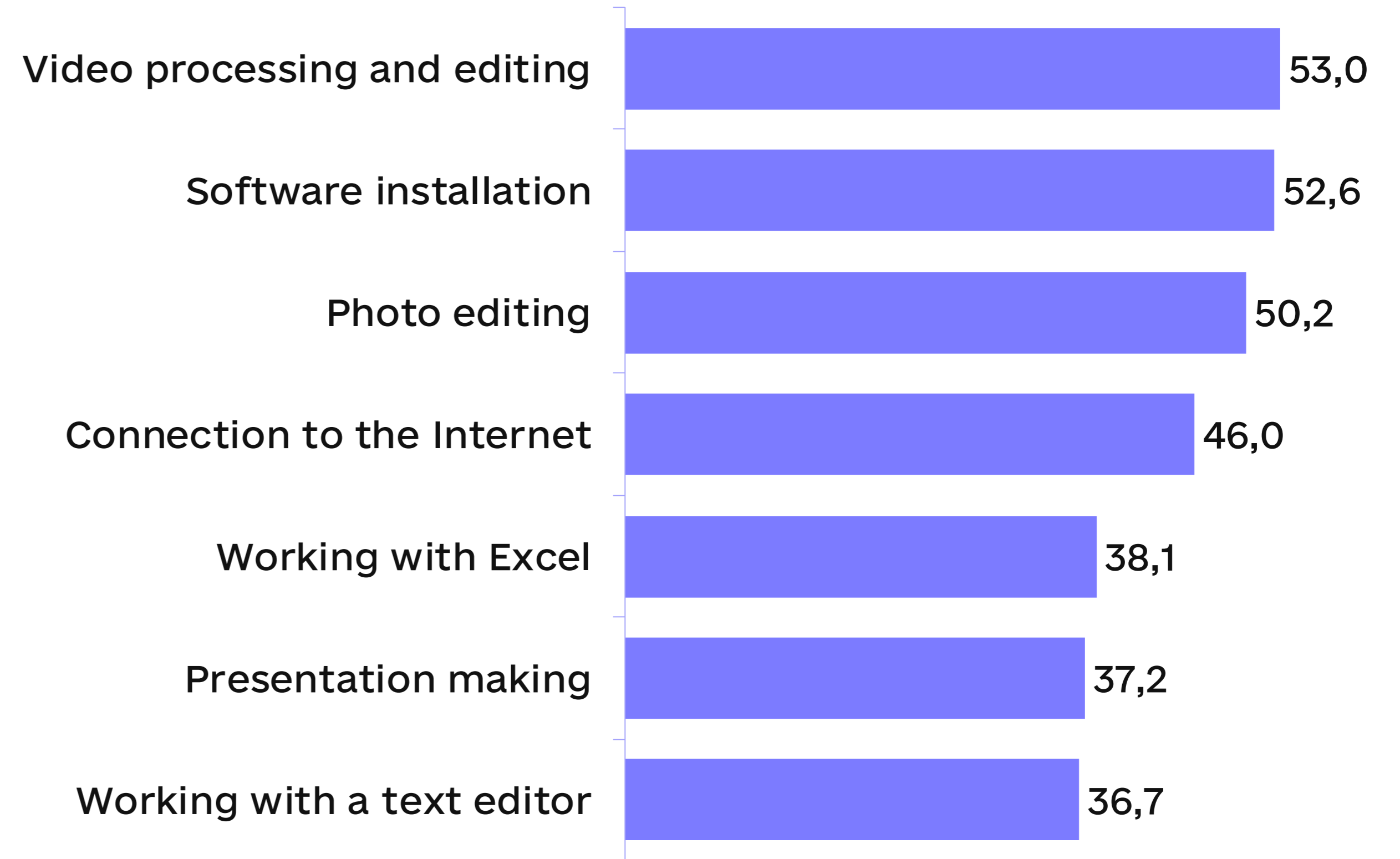
By employment status



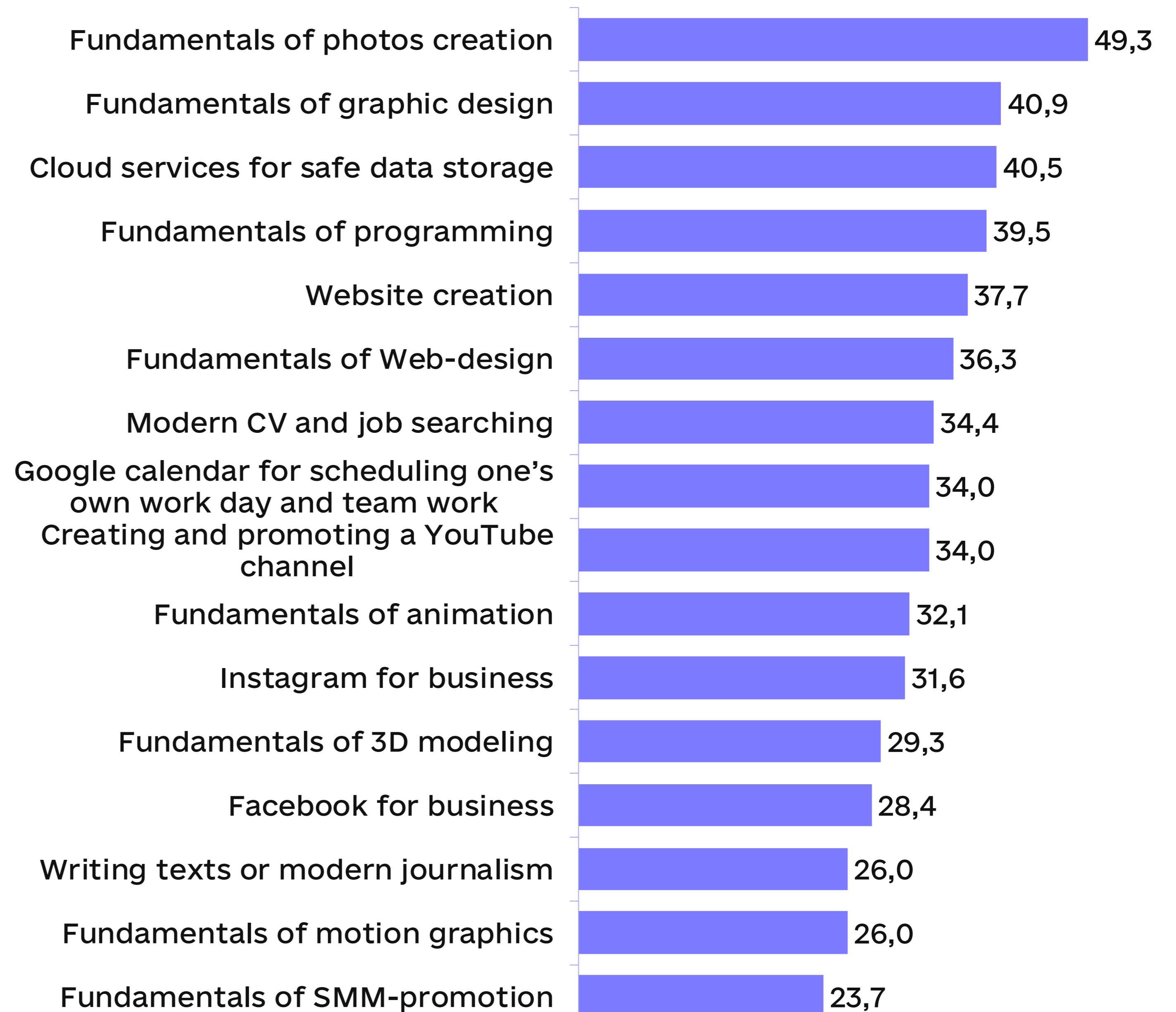
Basic courses



Advanced courses

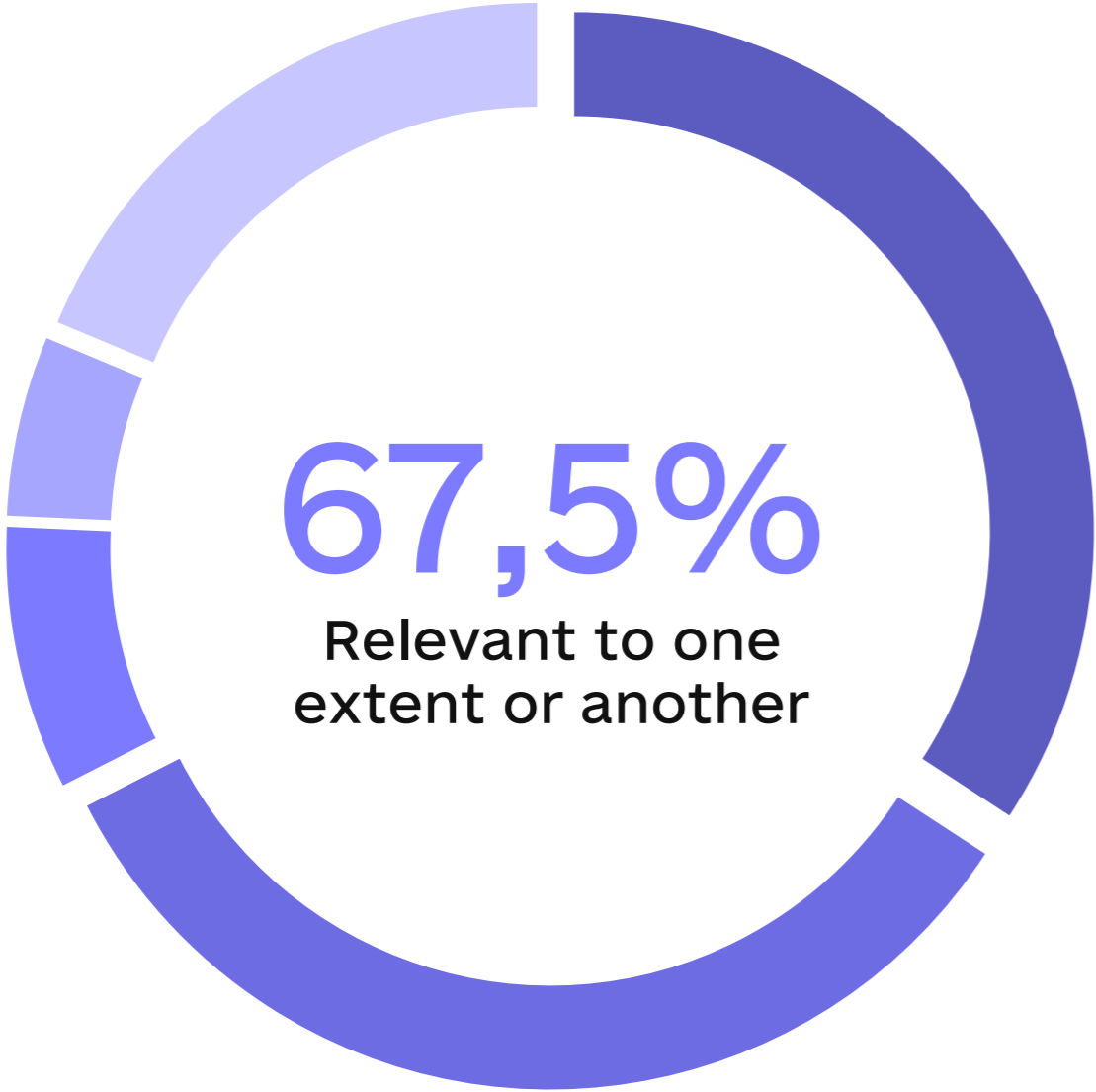


Basic professional courses



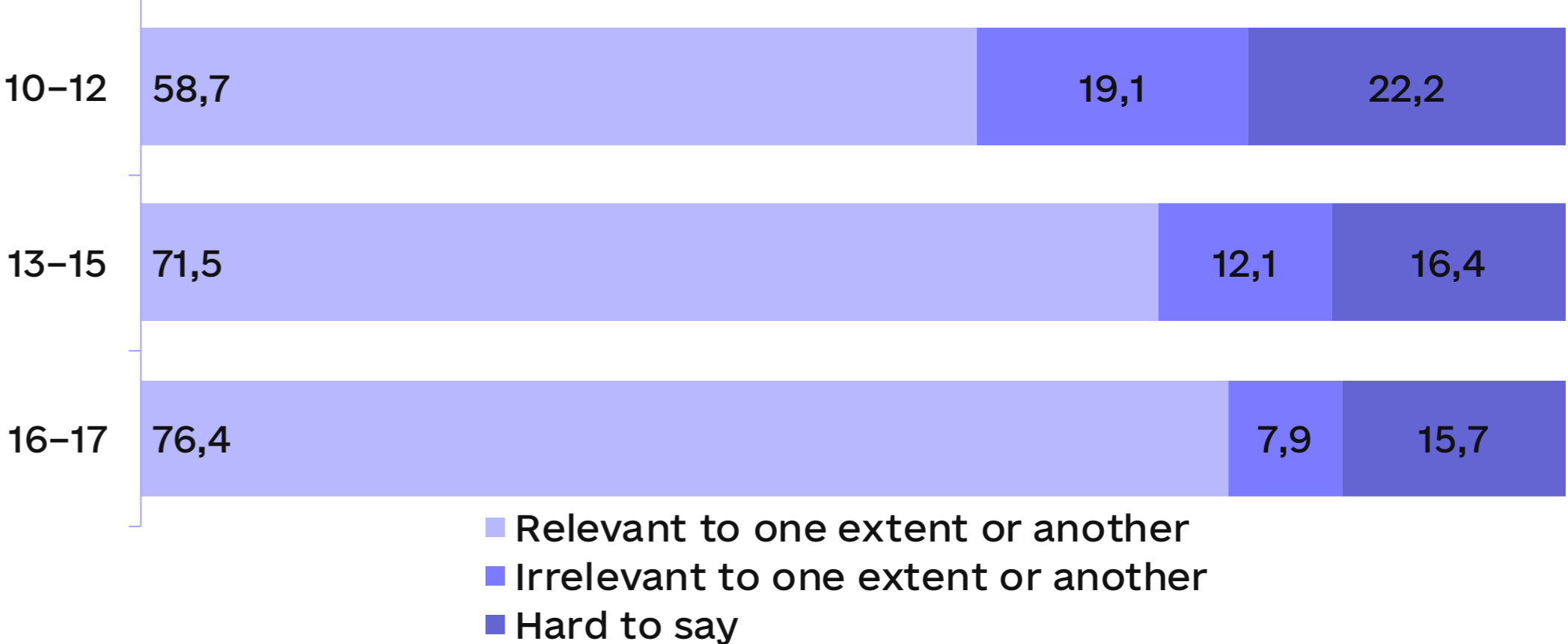
Relevance of digital skills learning

Youth aged 10–17 years 🧑

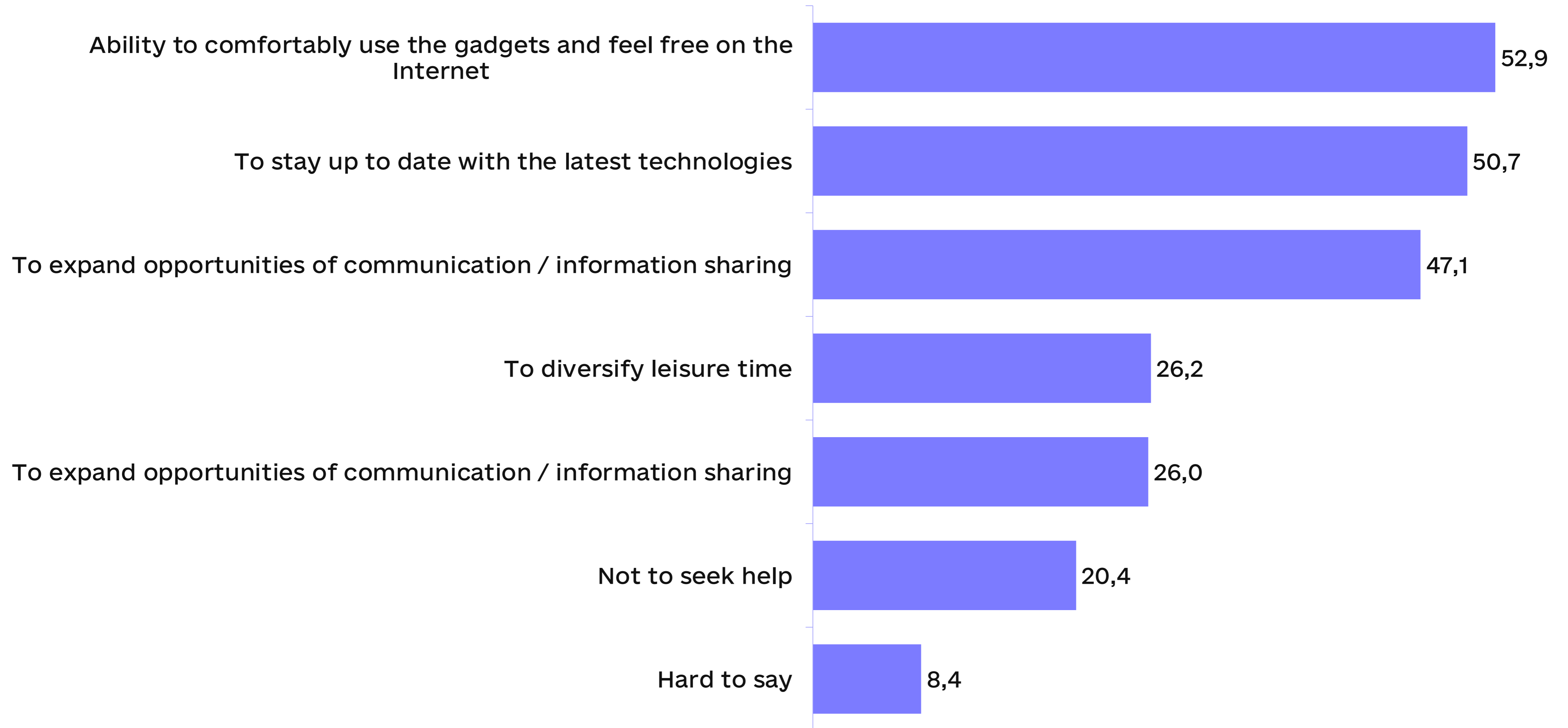


- Very relevant
- Rather relevant
- Rather irrelevant
- Absolutely irrelevant
- Hard to say

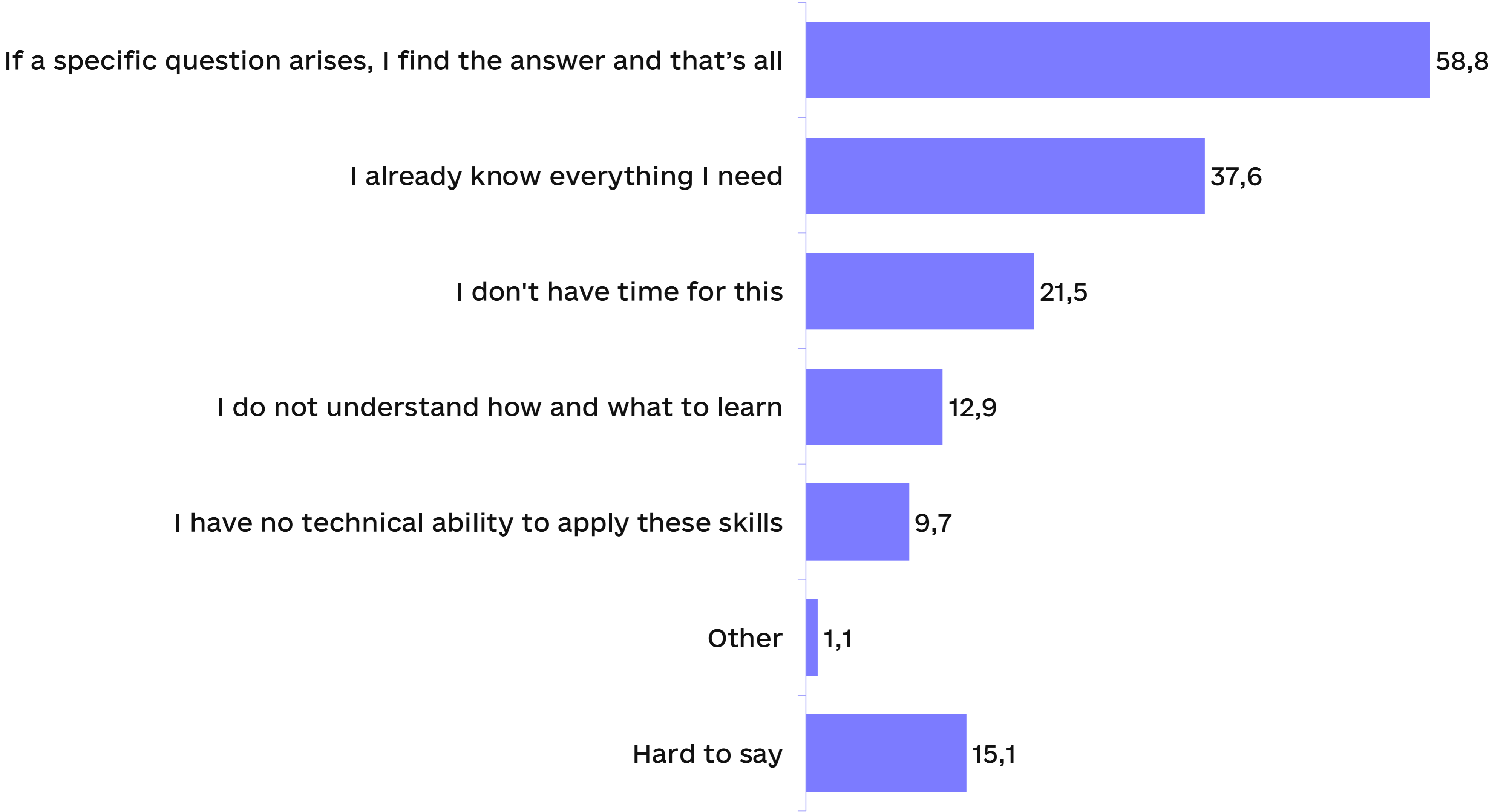
By age



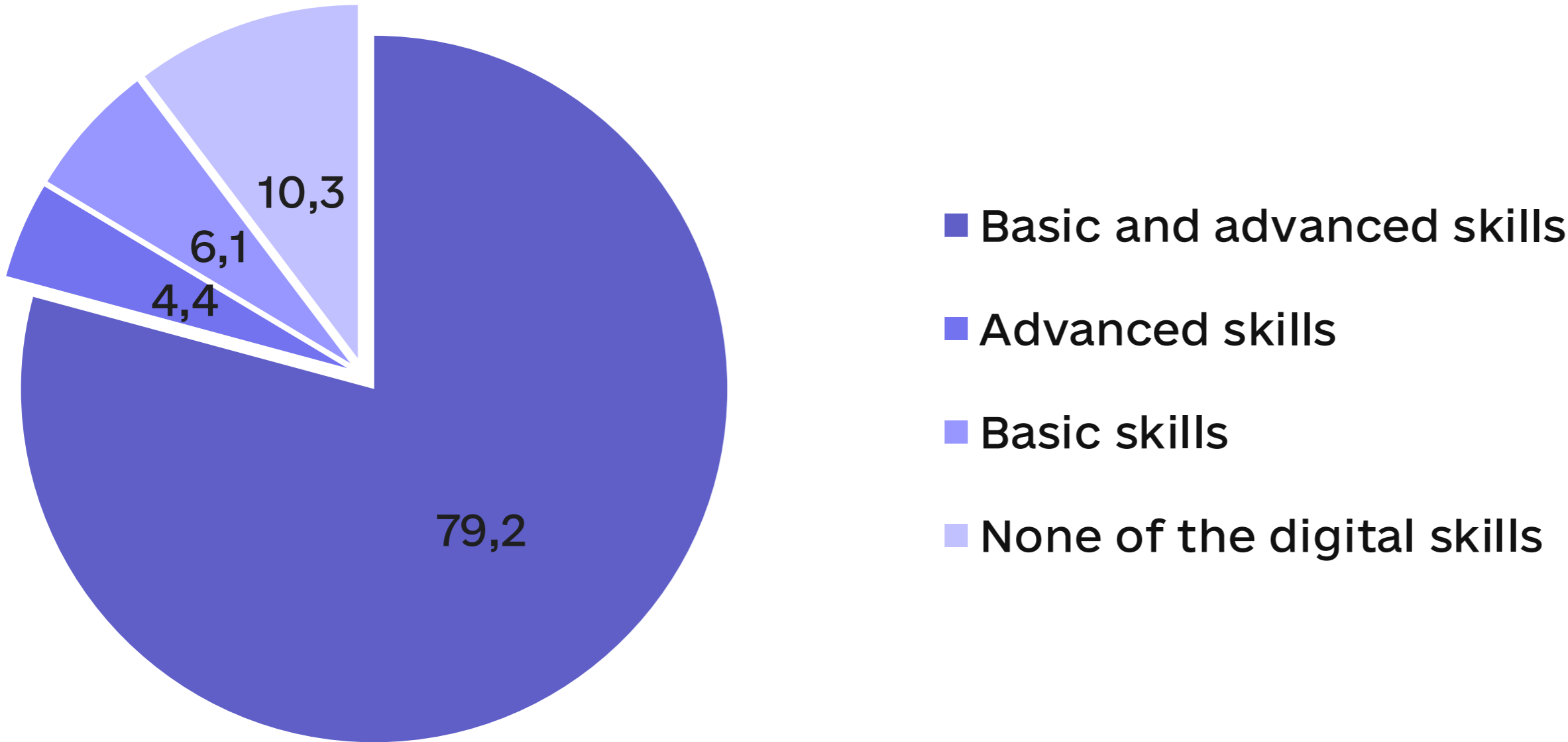
Reasons for relevance of digital skills learning



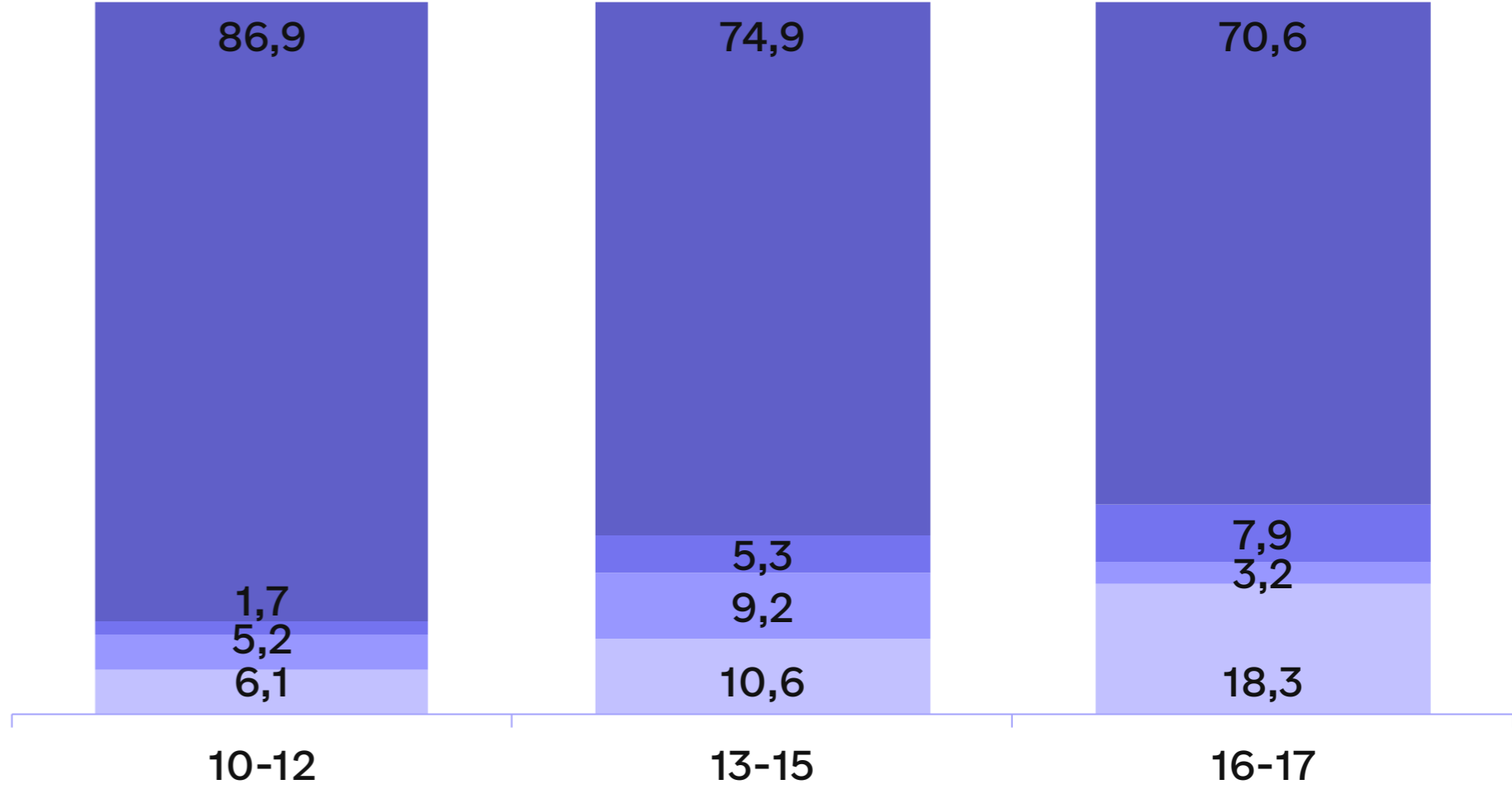
Reasons for irrelevance of digital skills learning



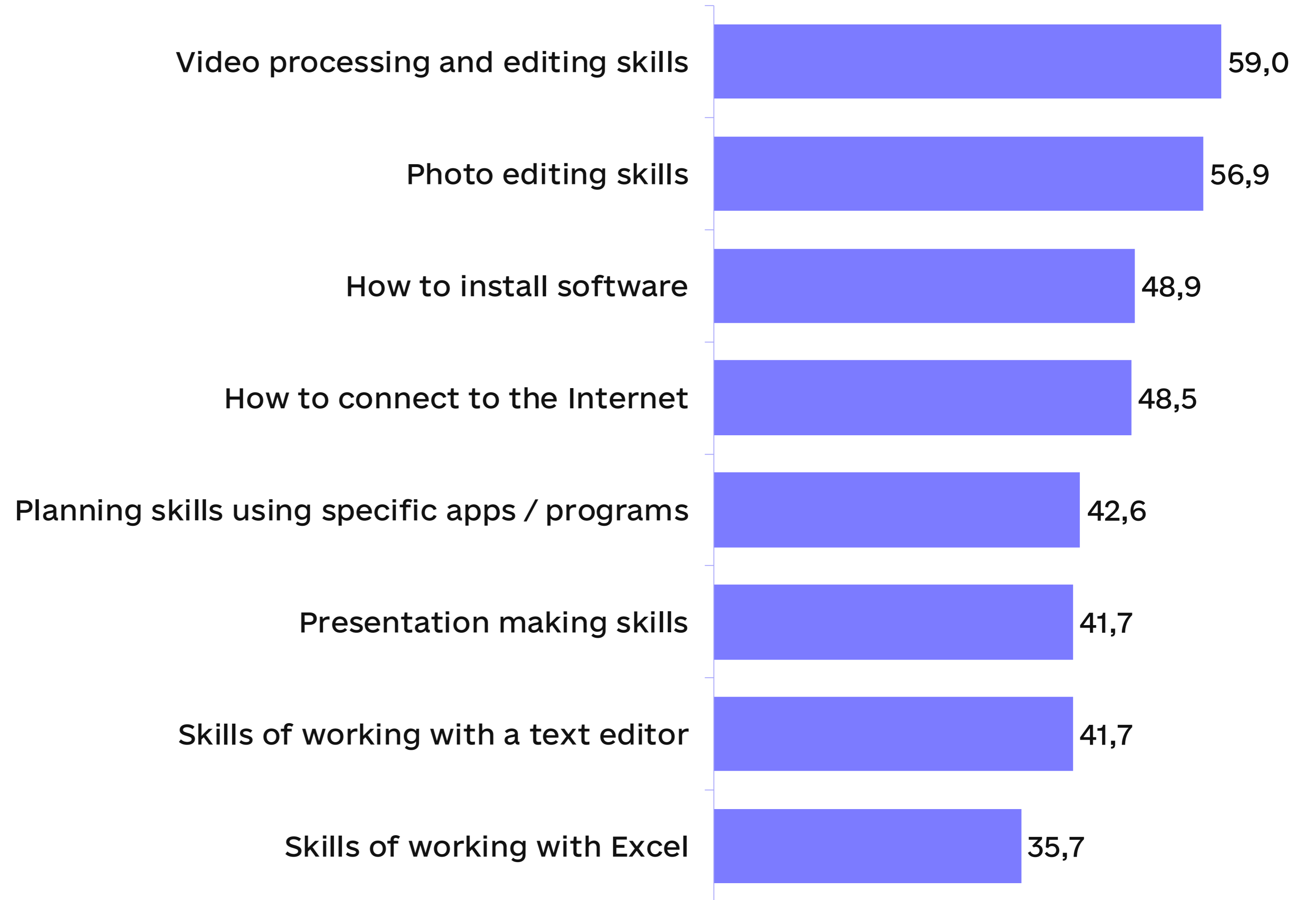
Digital skills one would like to develop



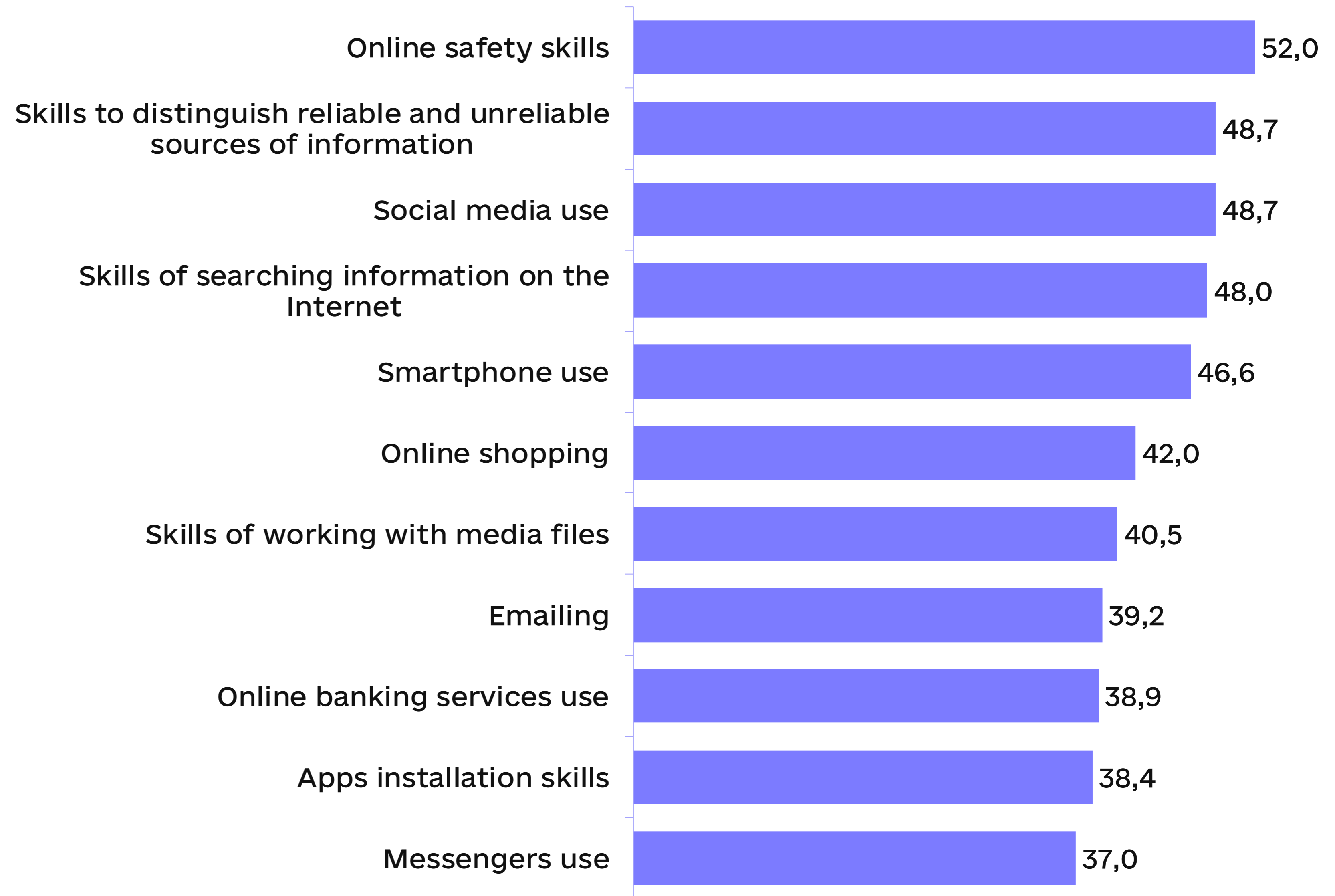
By age



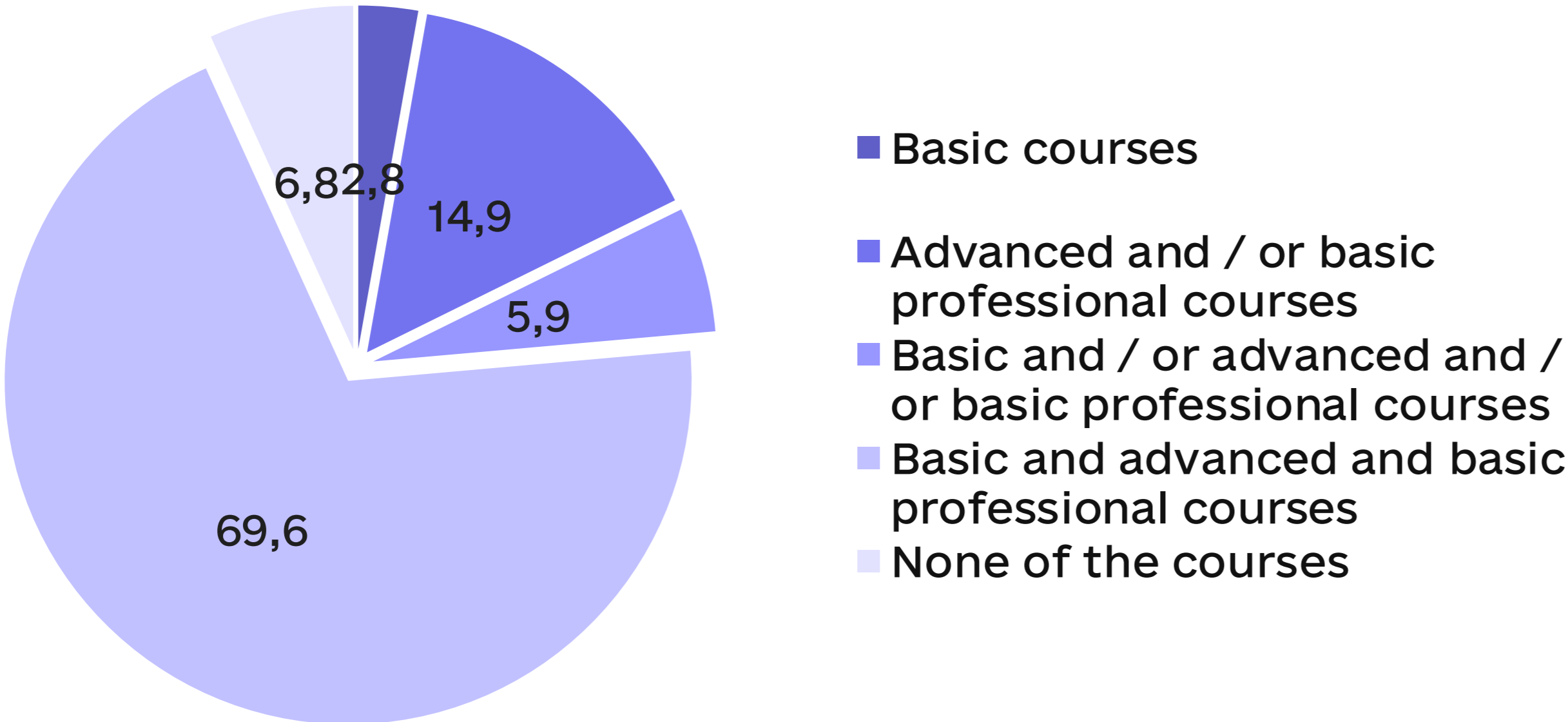
Advanced skills



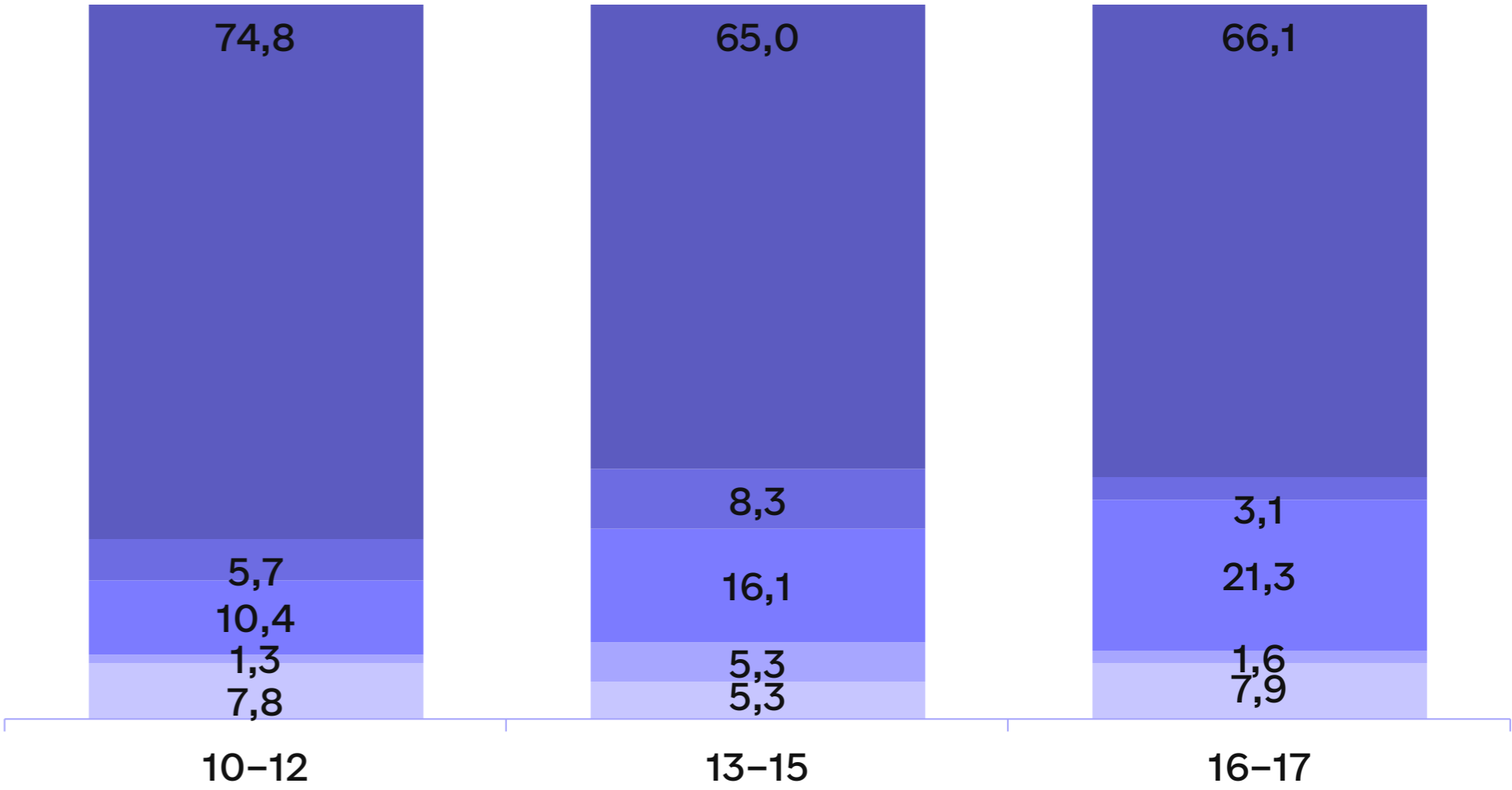
Basic skills



Courses one would like to complete



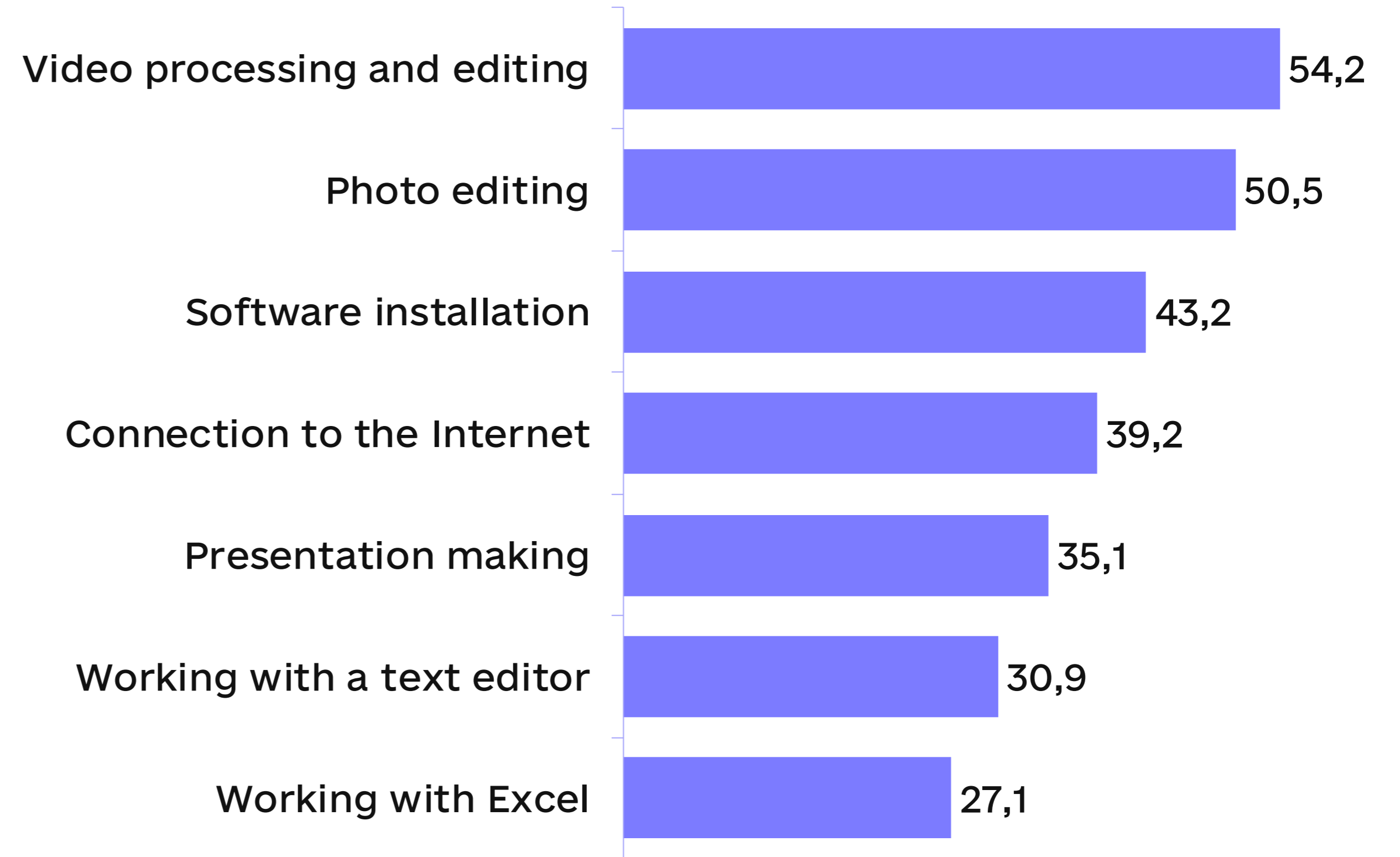
By age



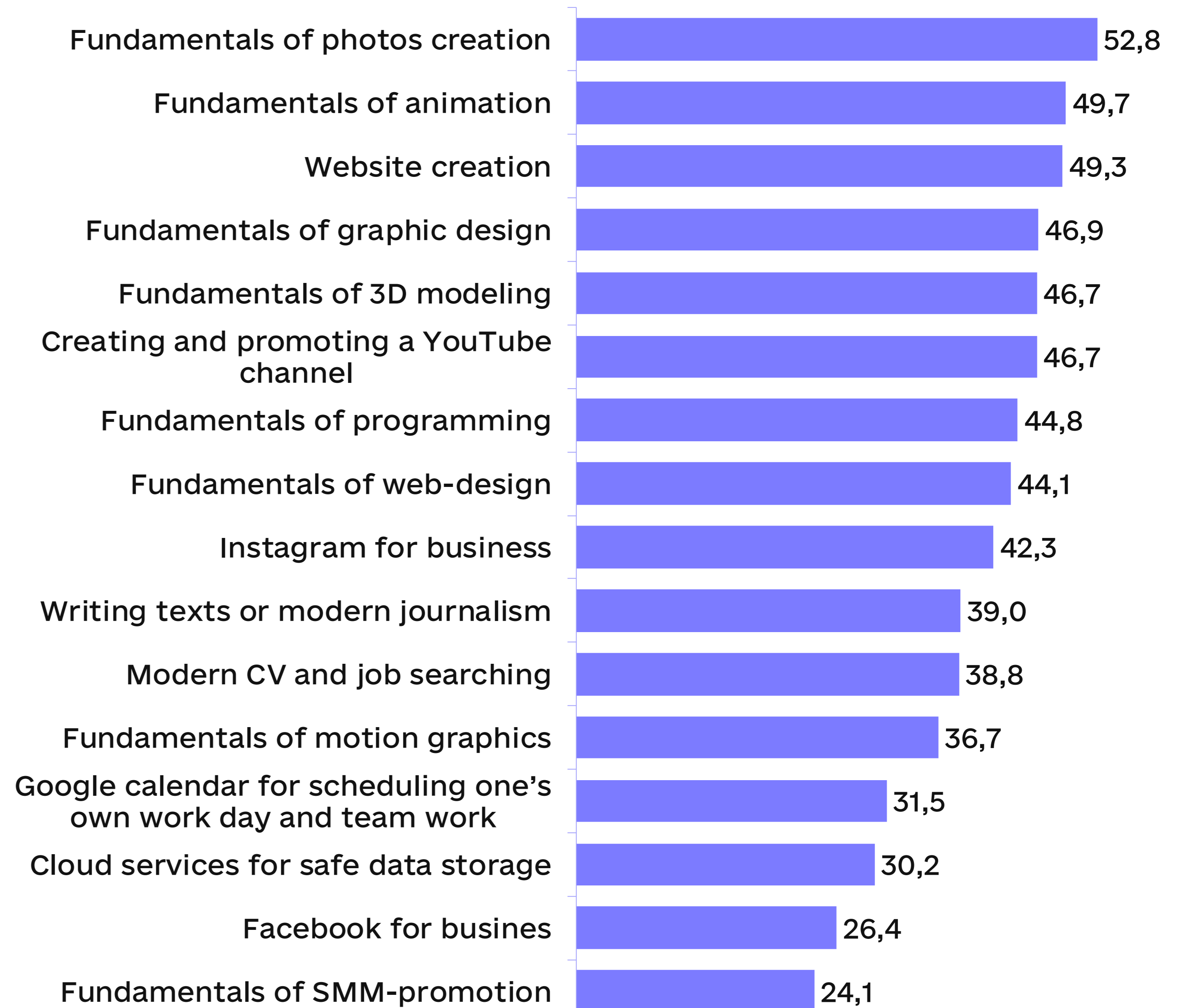
Basic courses



Advanced courses



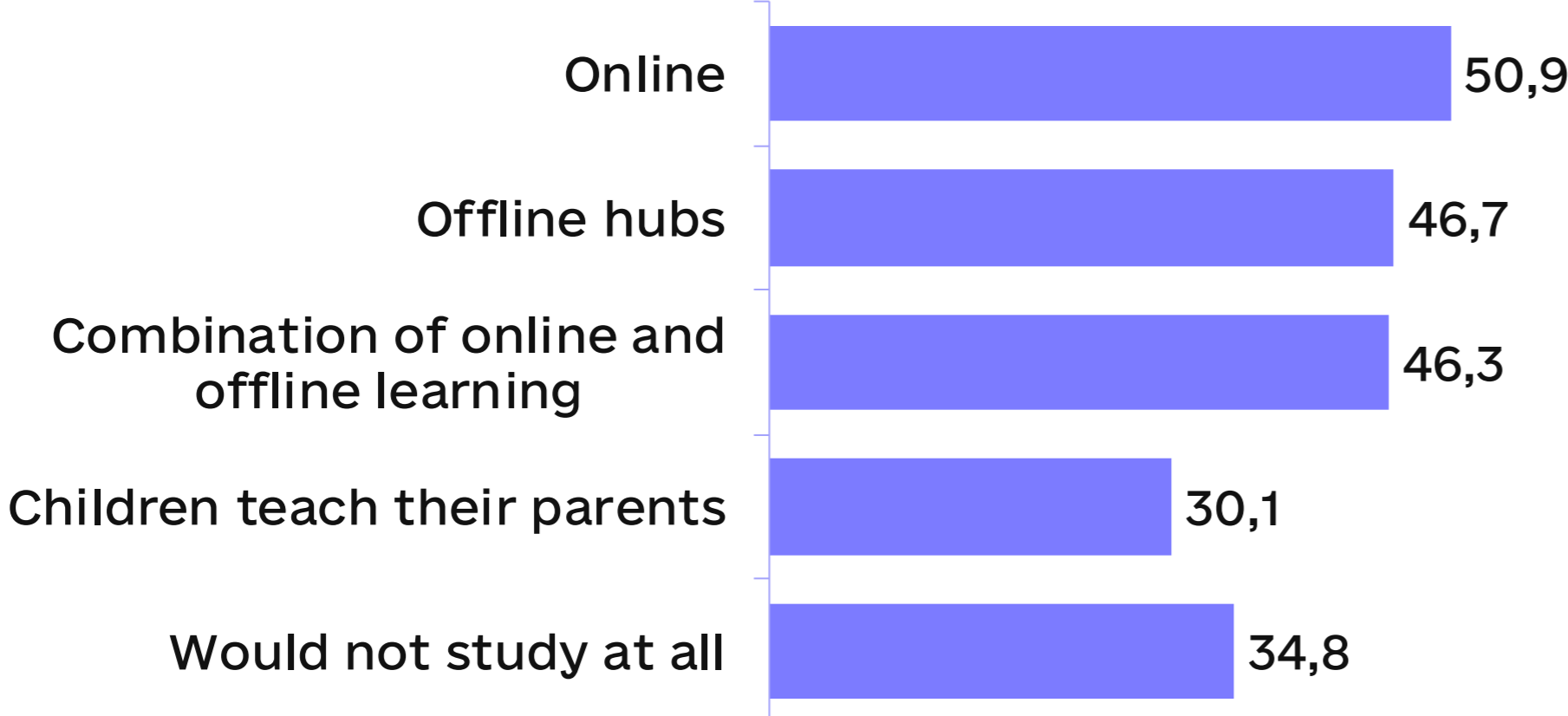
Basic professional courses



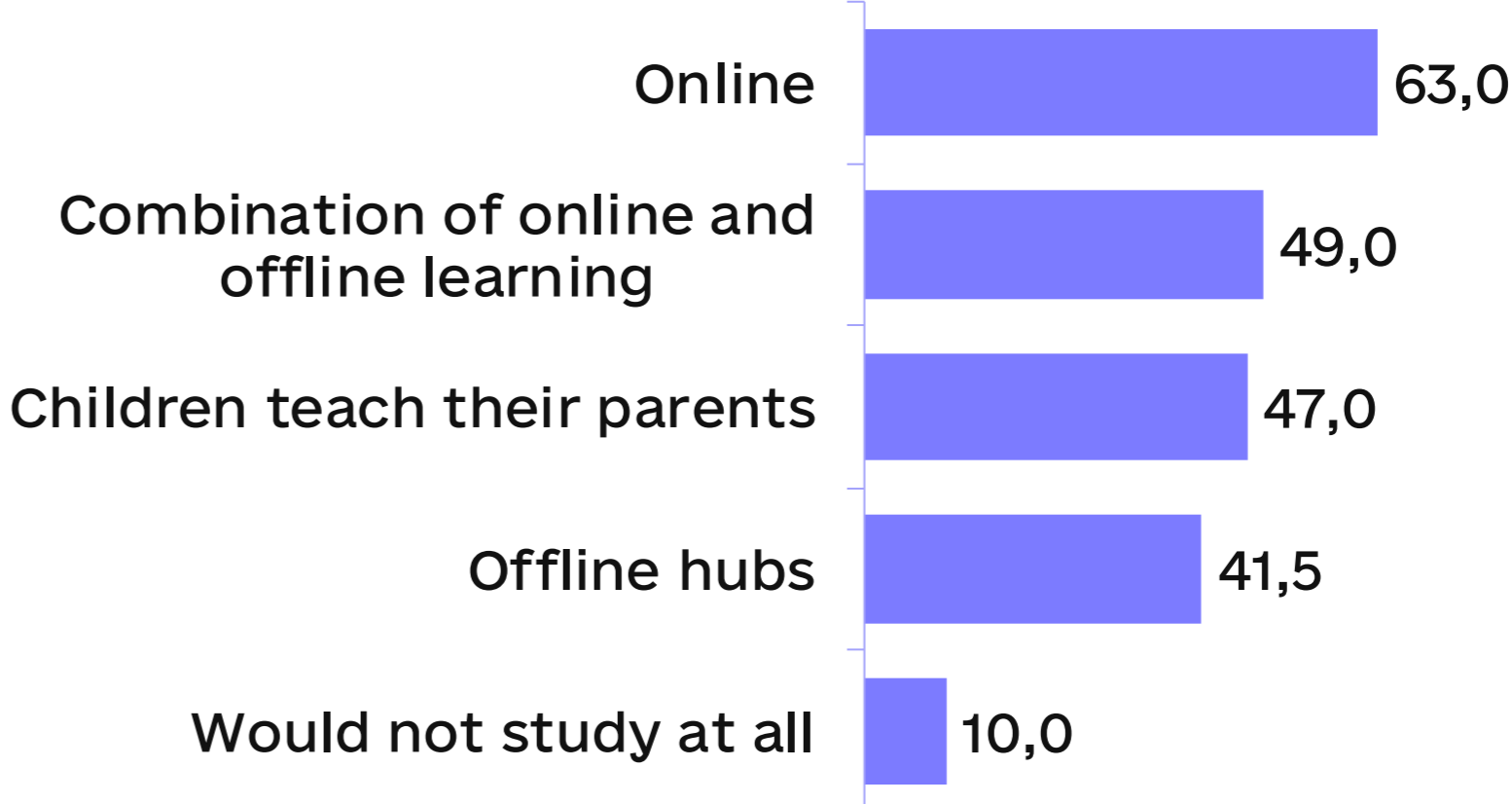
Form of digital skills learning

(in %, several possible answers)

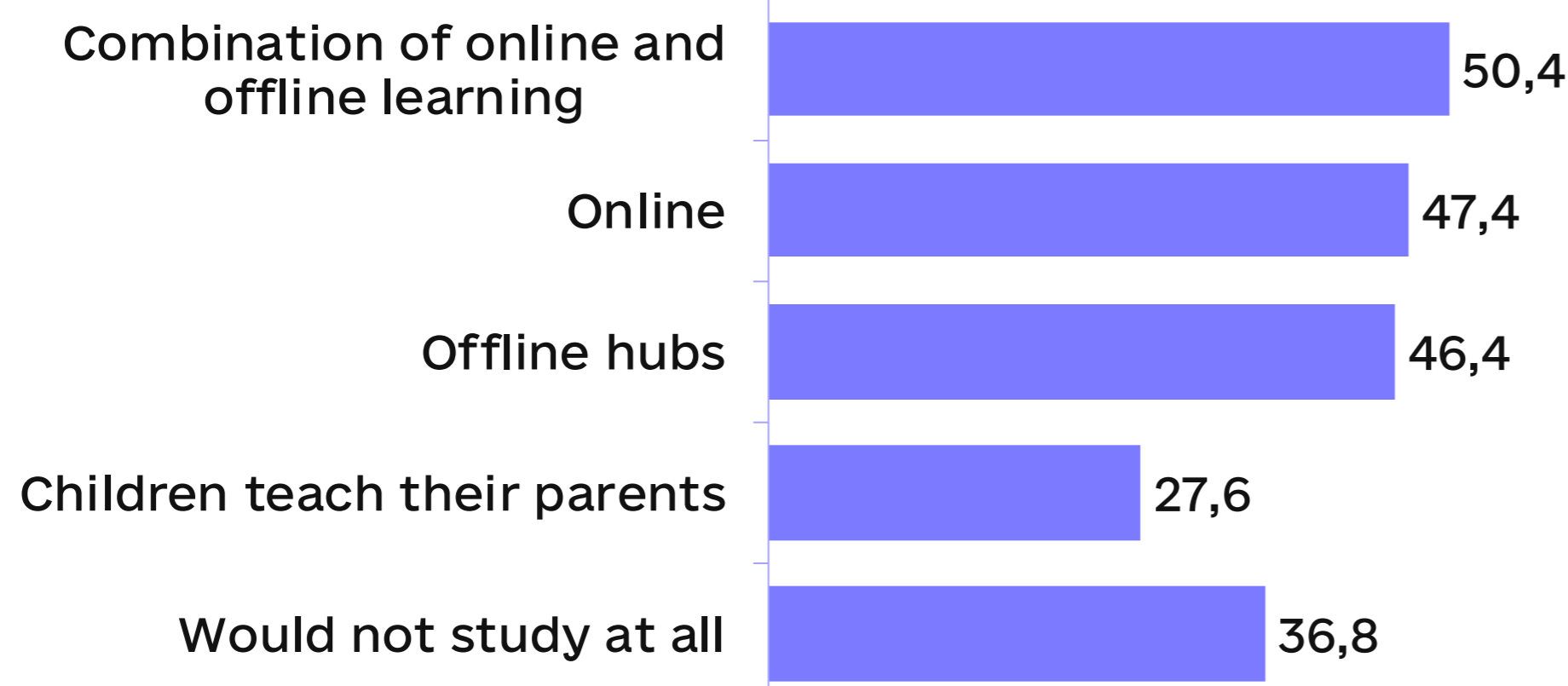
Ukraine in a whole



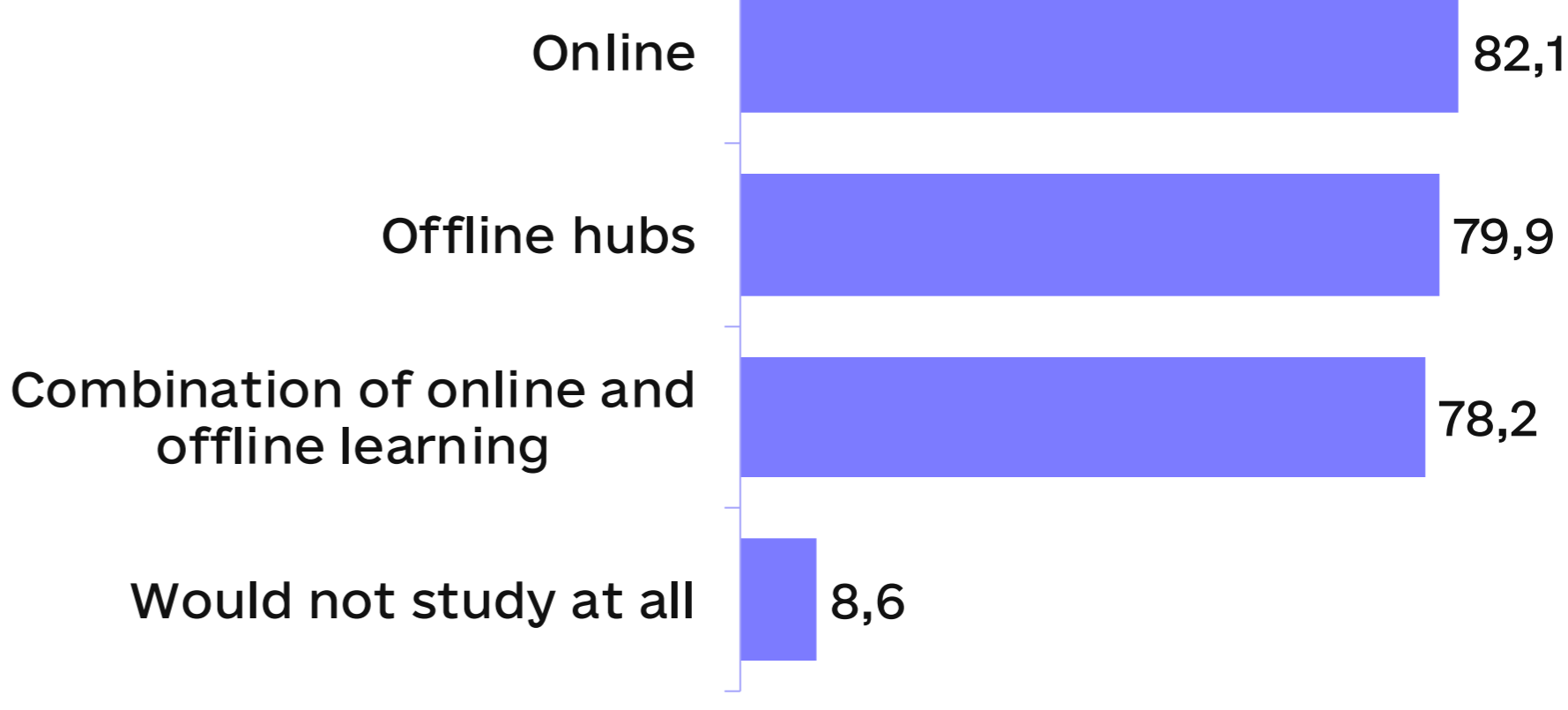
People with hearing impairment



Uncontrolled territories



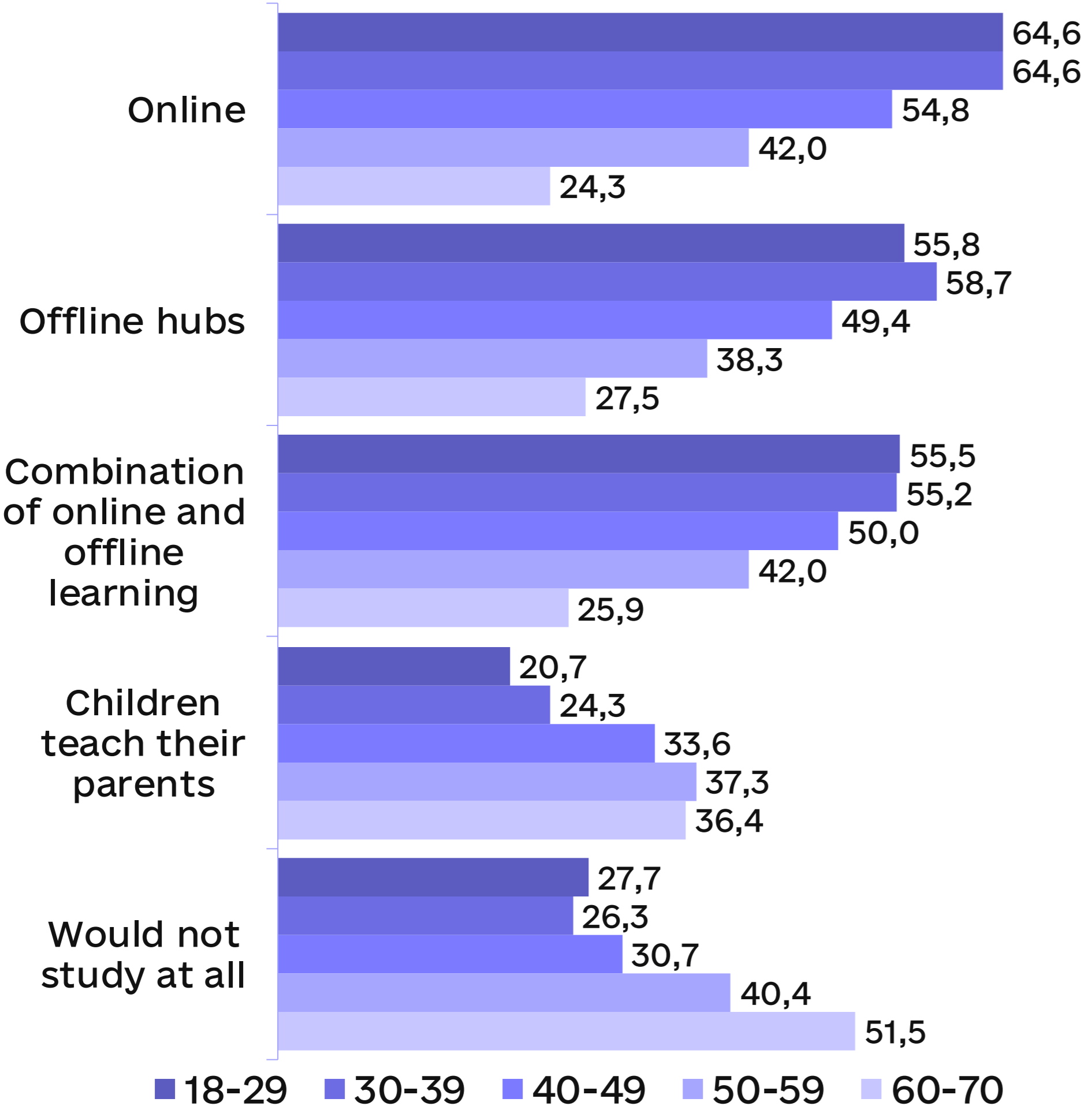
Youth aged 10–17 years



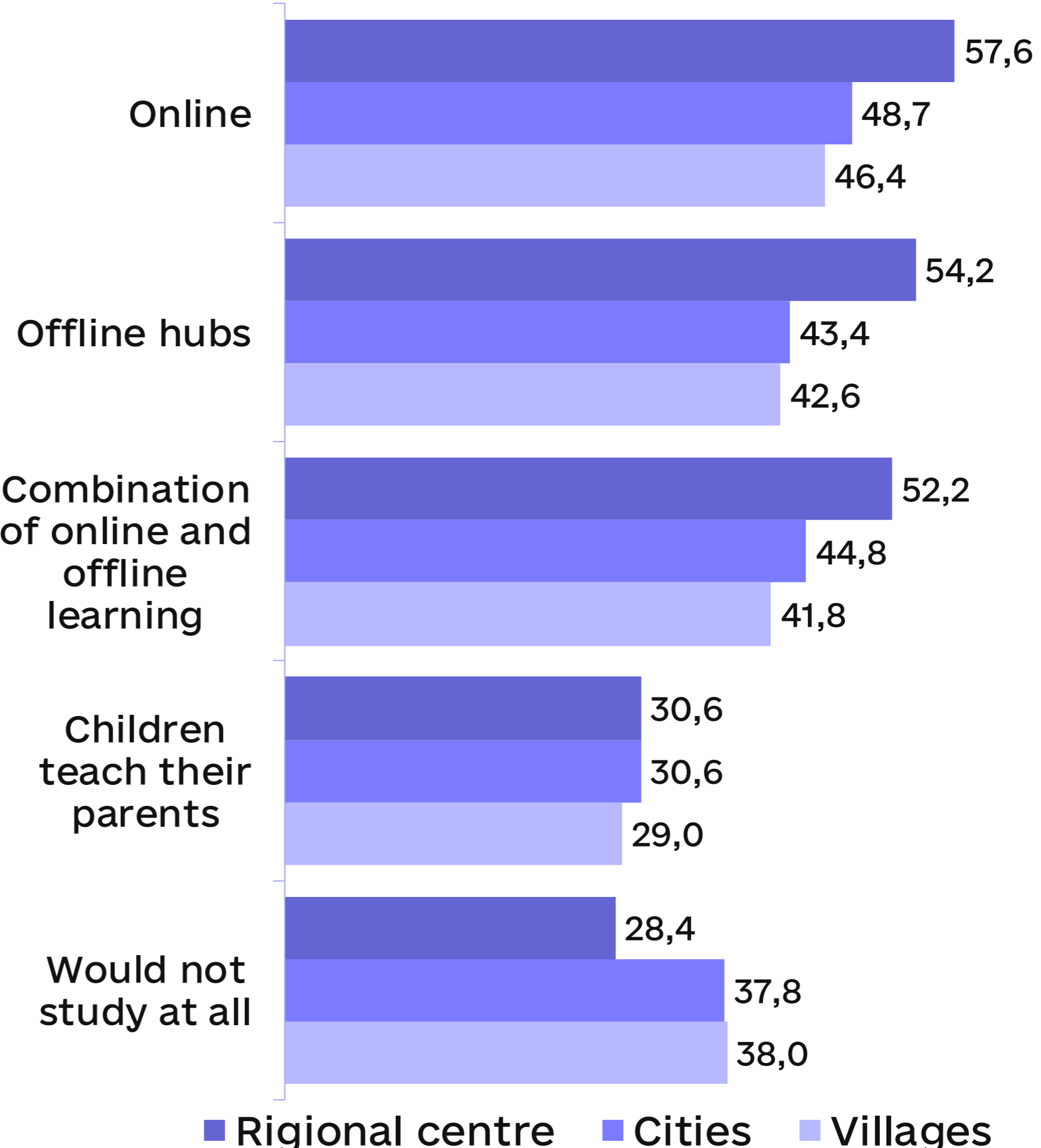
Forms of learning

Ukraine in a whole

By age



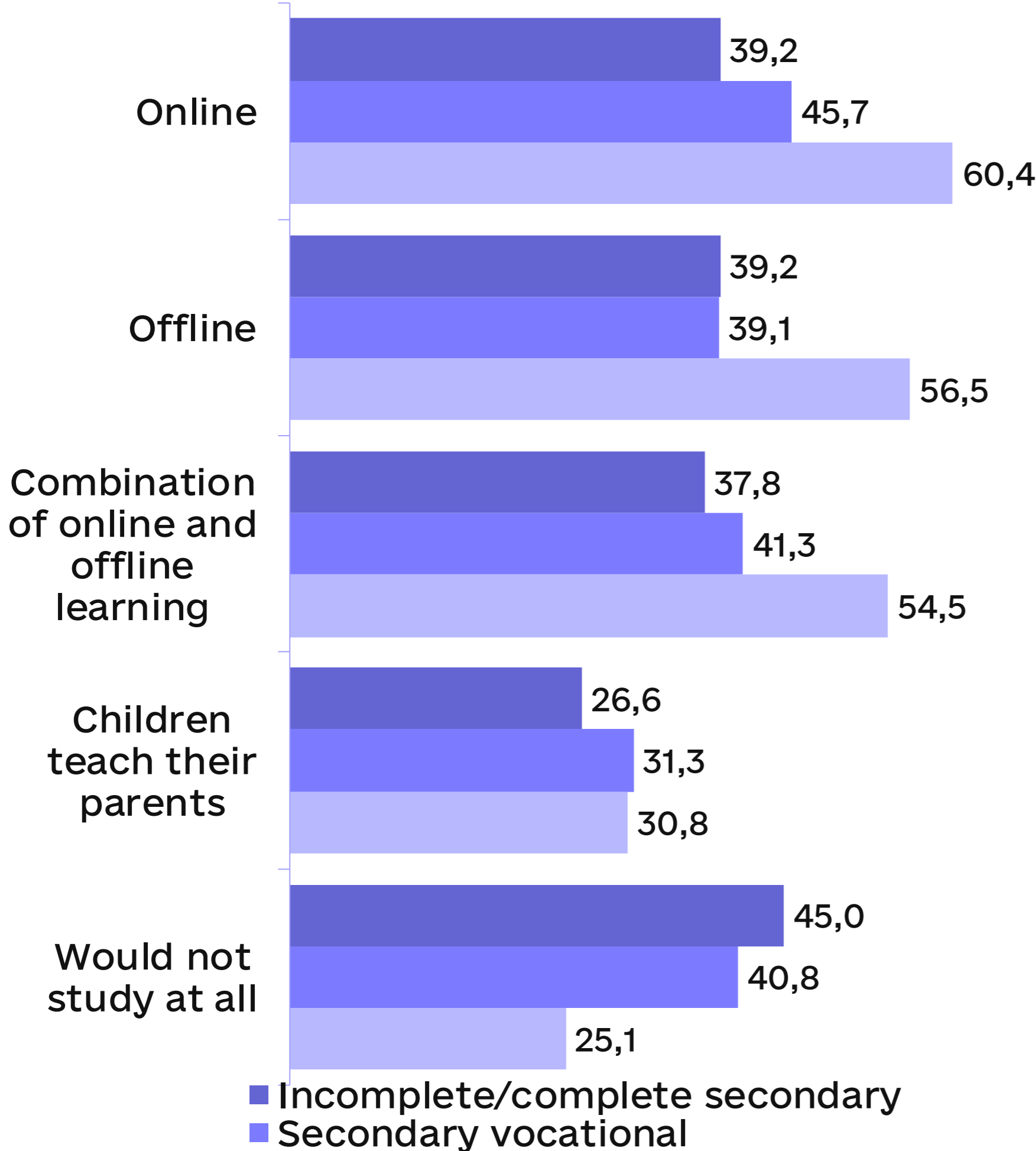
By type of area



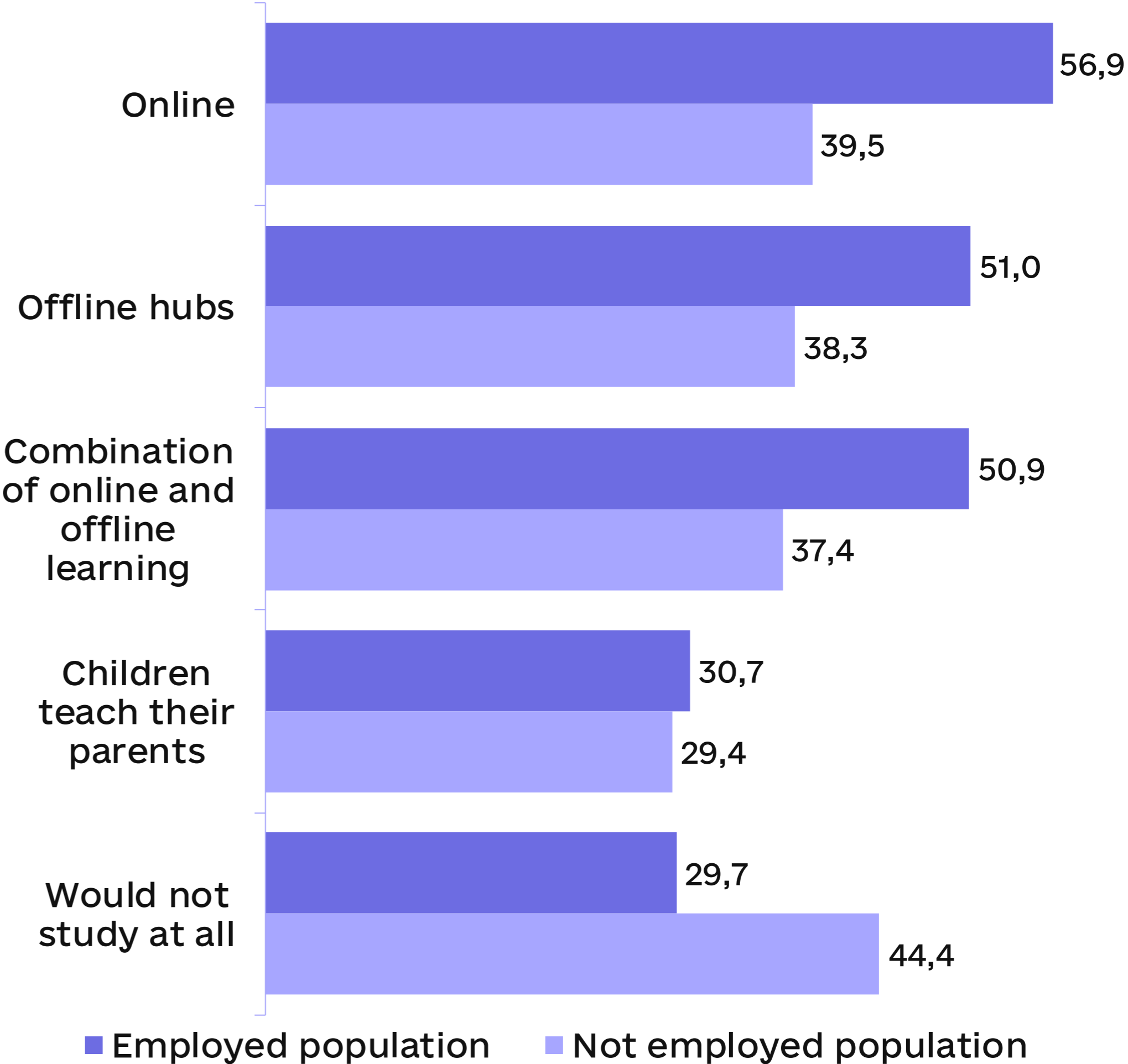
Forms of learning

Ukraine in a whole 🇺🇦

By educational level



By employment status

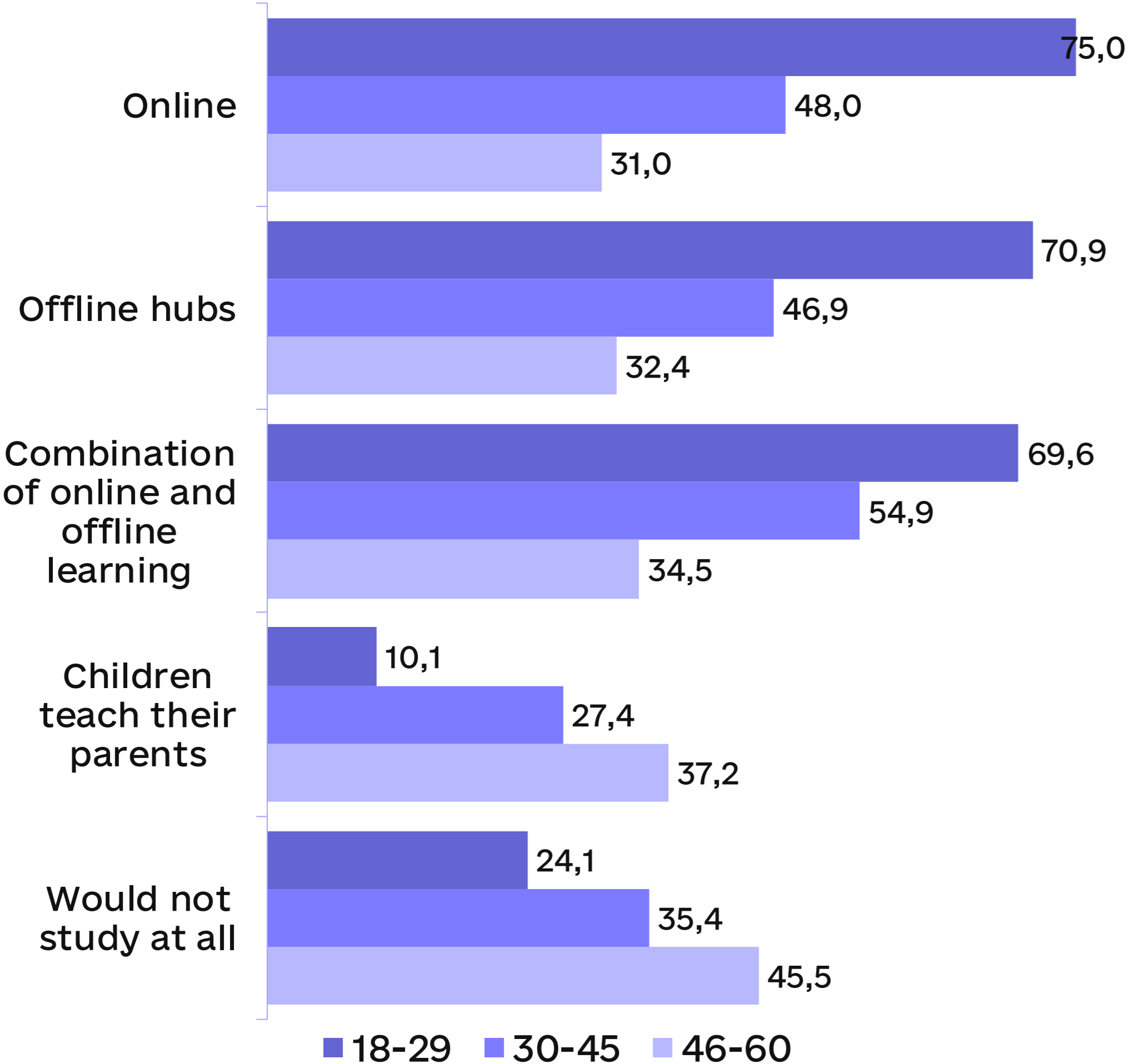


Forms of learning

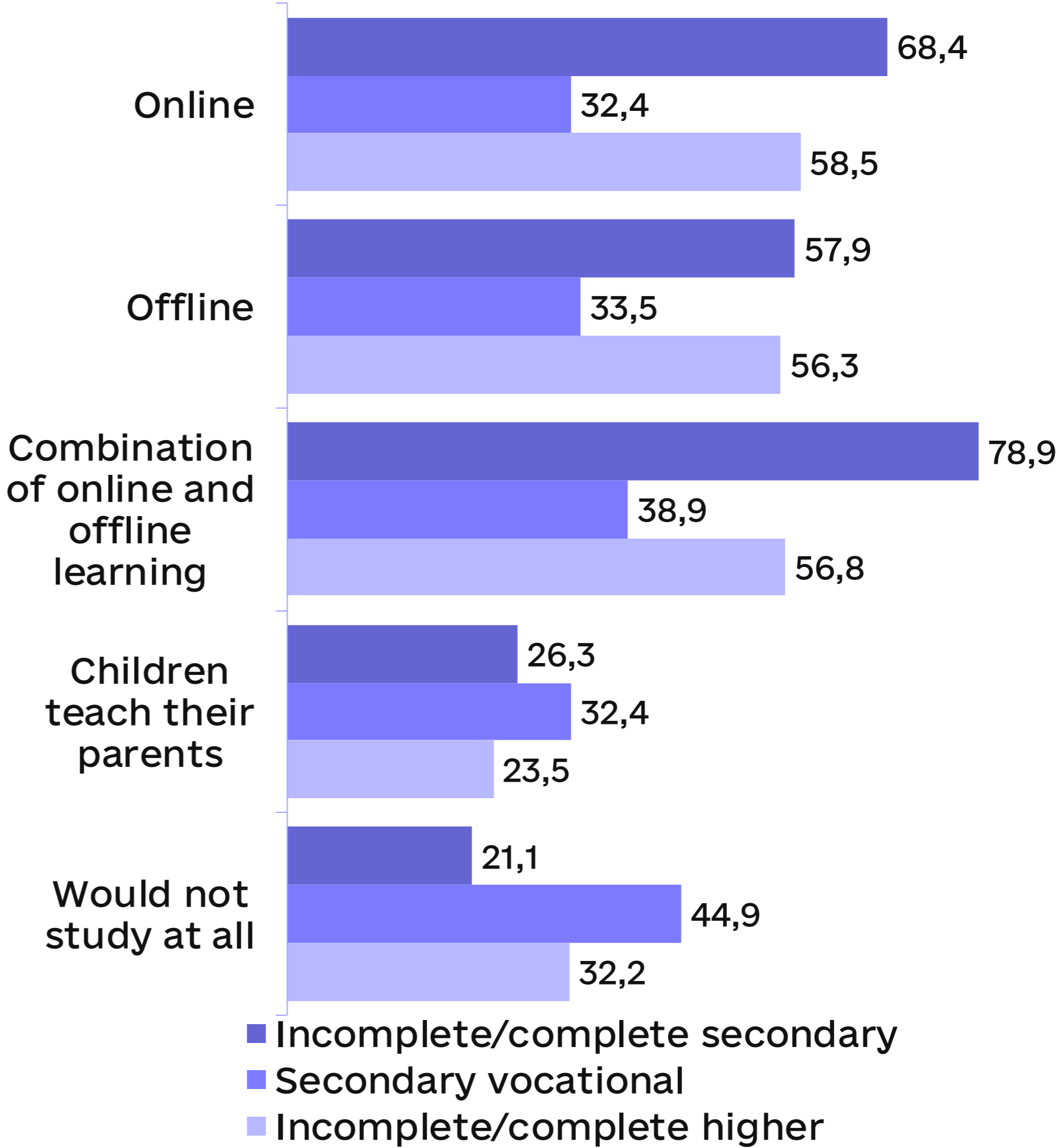
Uncontrolled territories



By age



By type of area

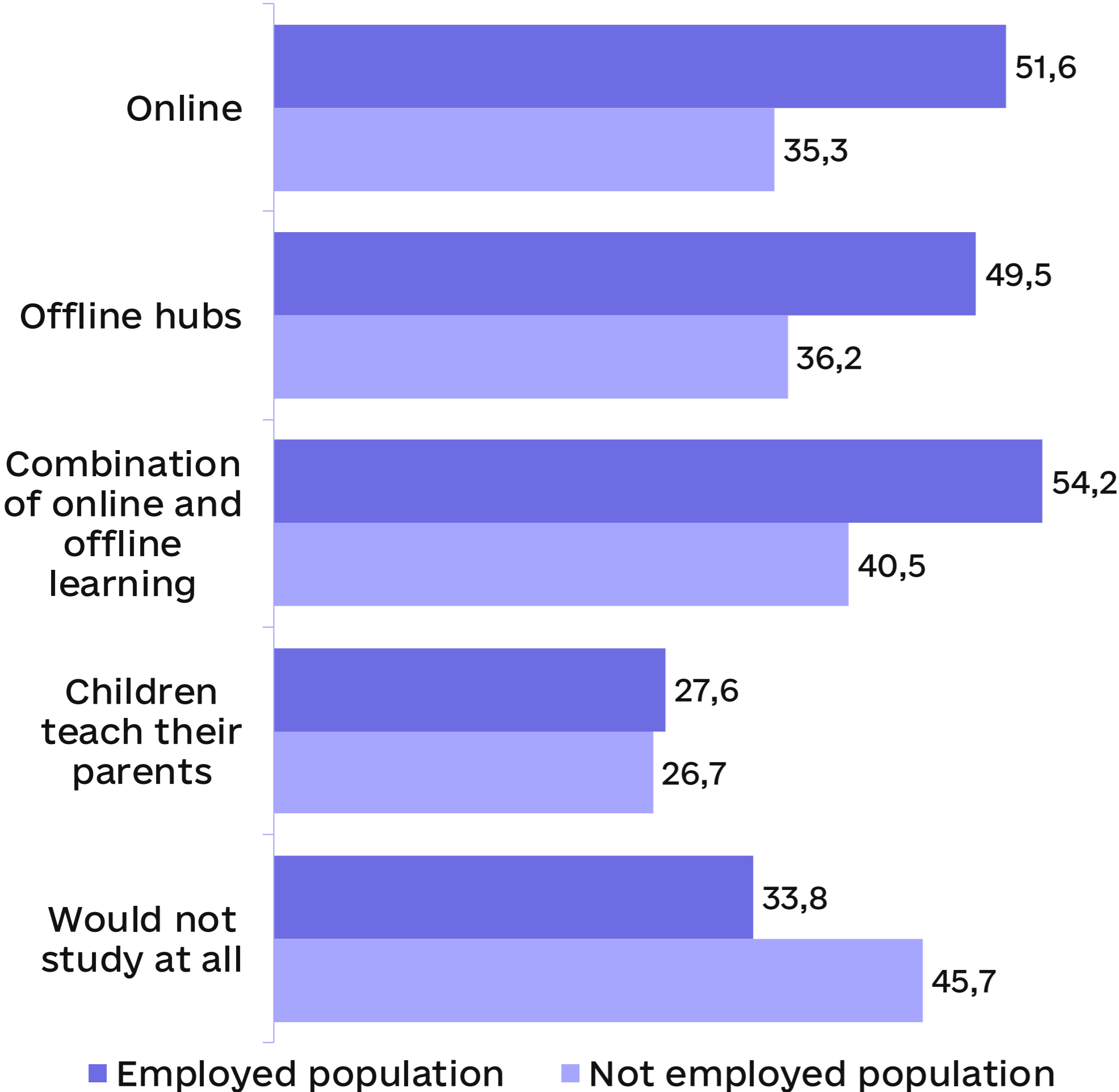


Forms of learning

Uncontrolled territories



By employment status

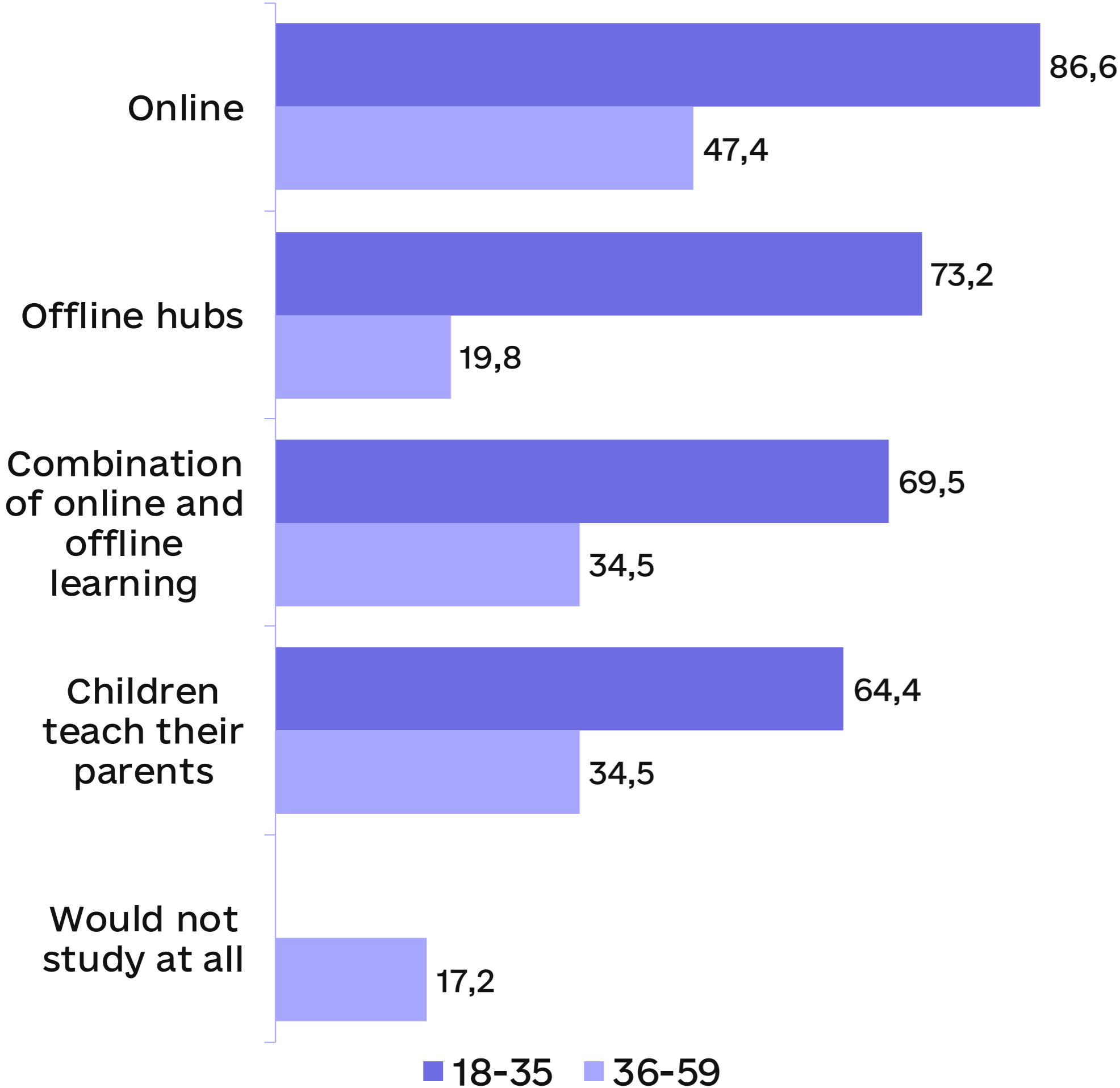


Forms of learning

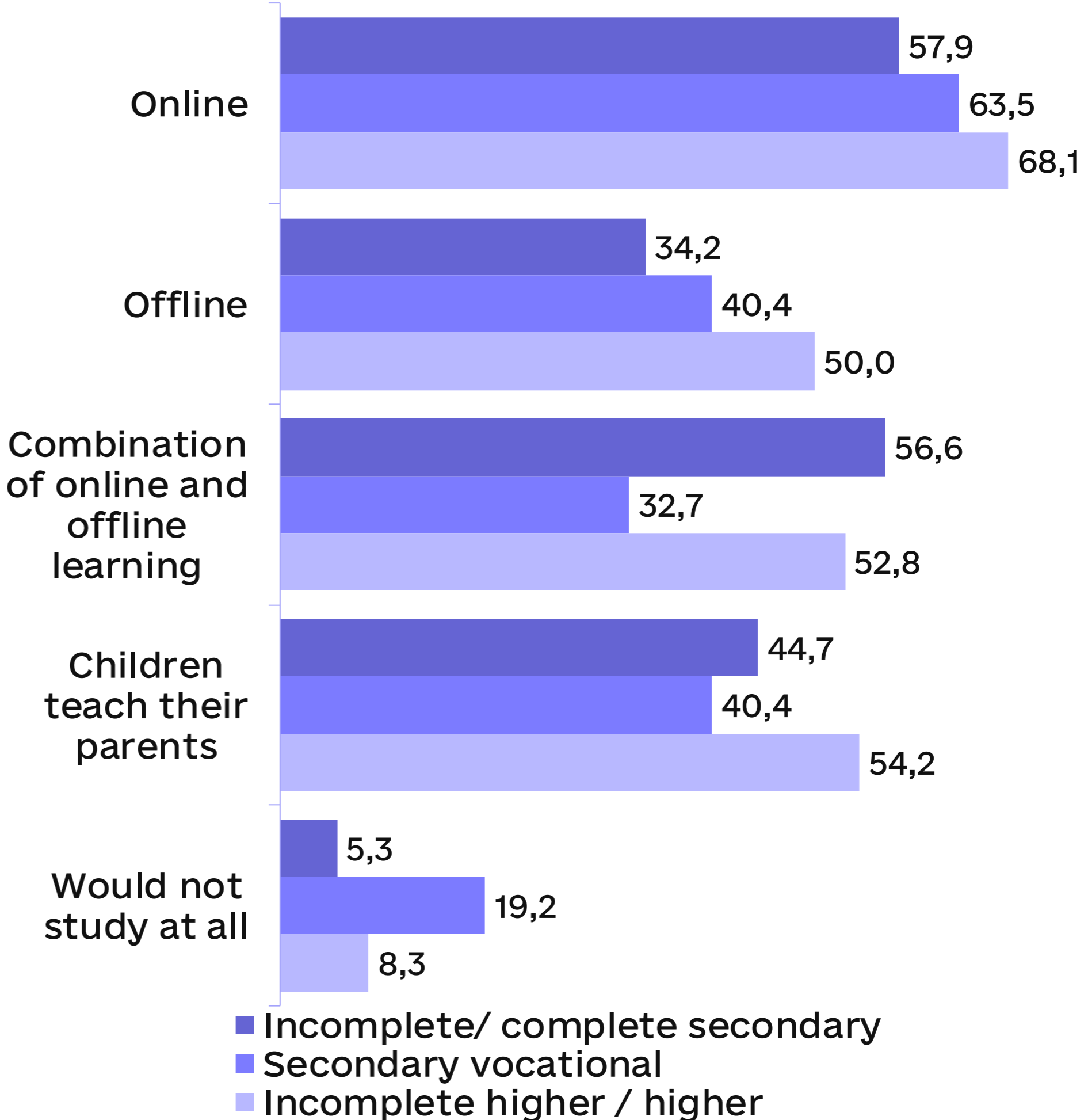
People with hearing impairments



By age



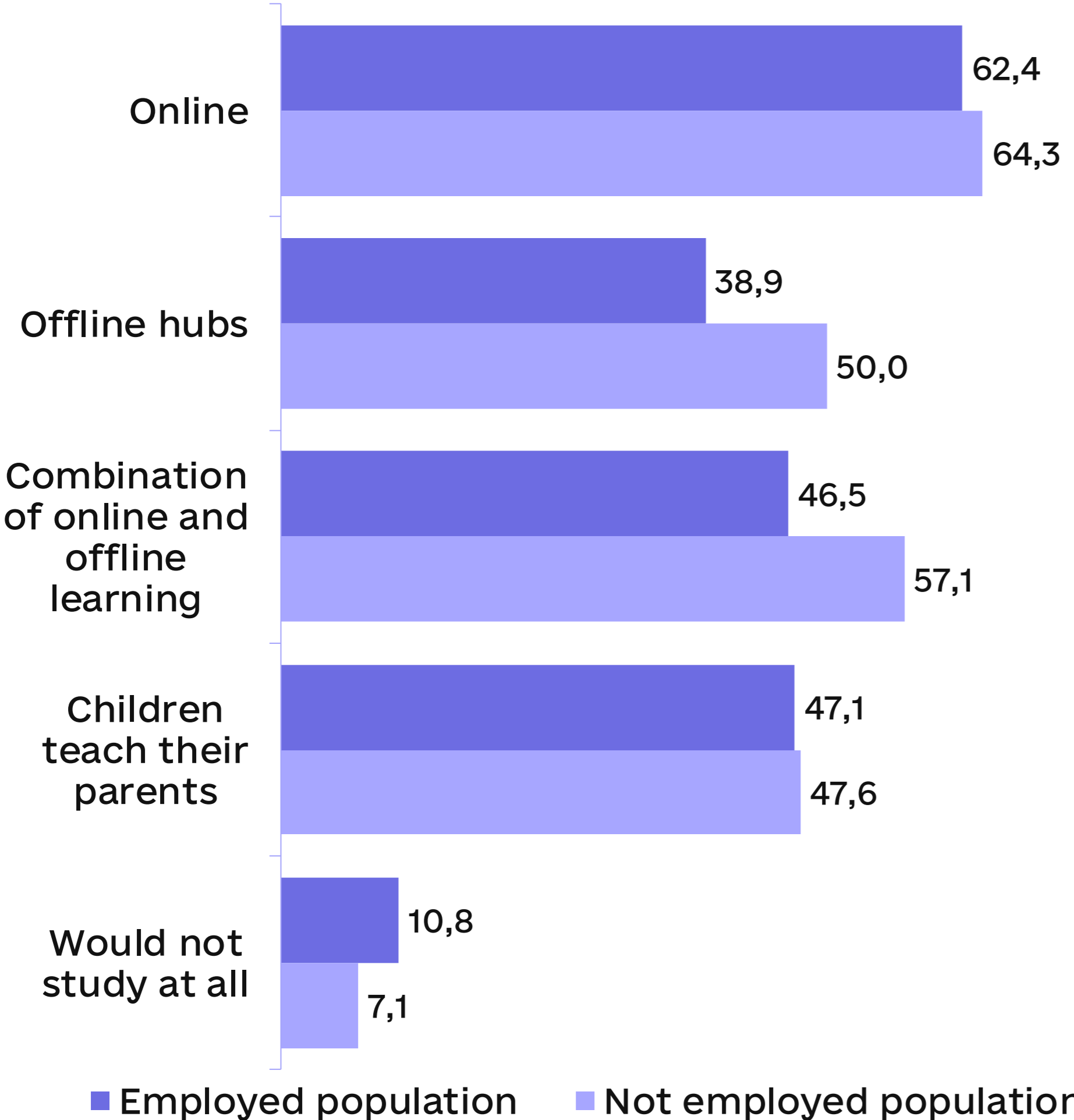
By type of area



Forms of learning

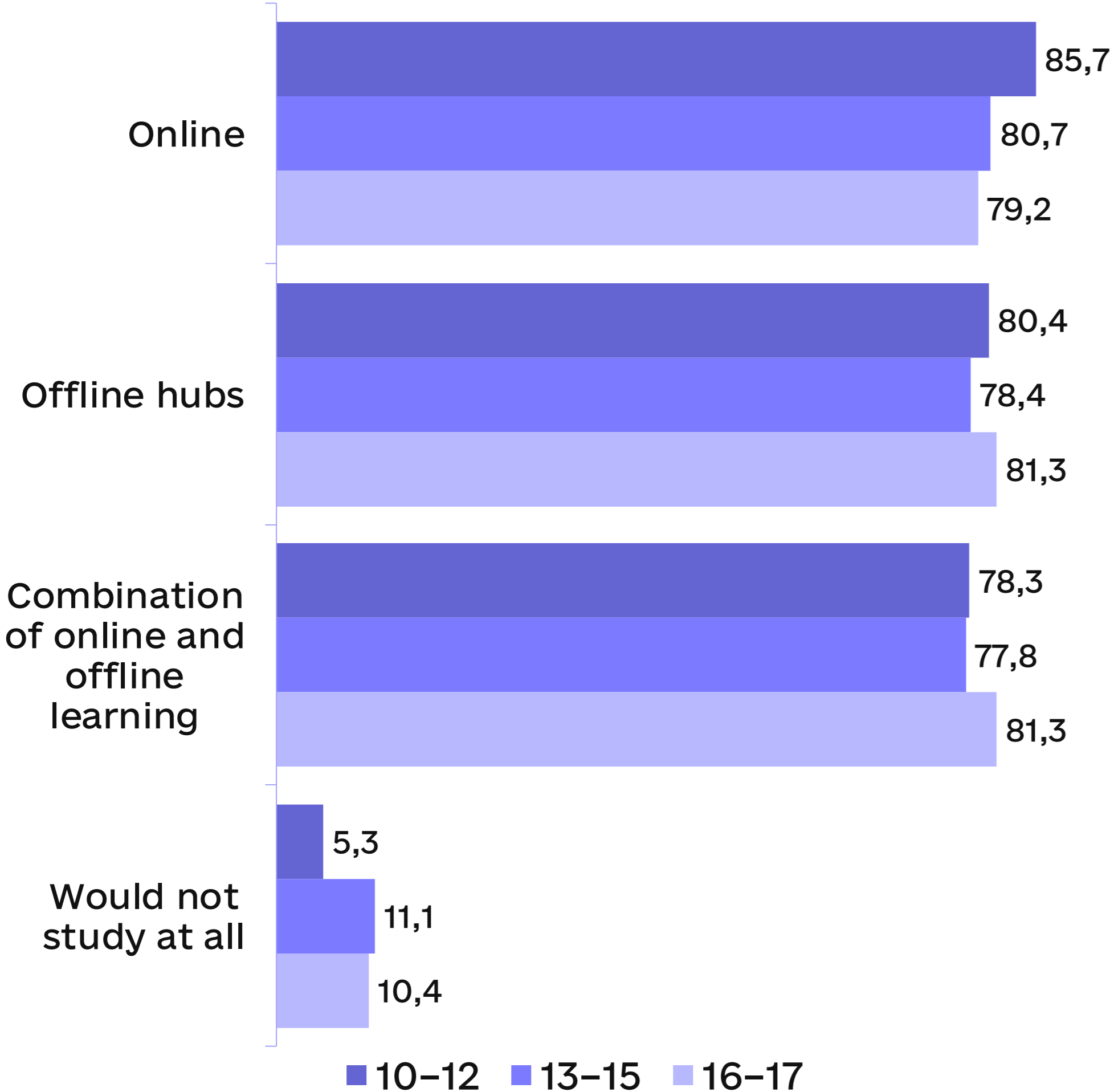
People with hearing impairment

By employment status



Forms of learning

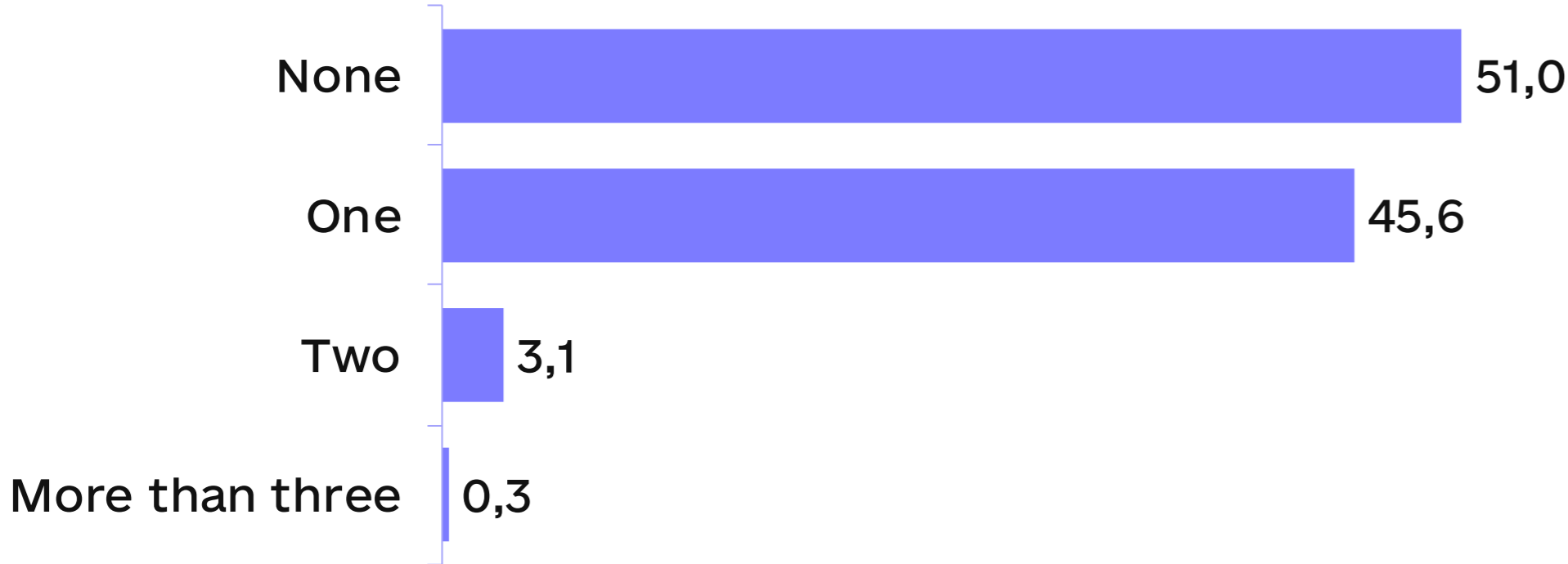
Youth aged 10–17 years 🧑



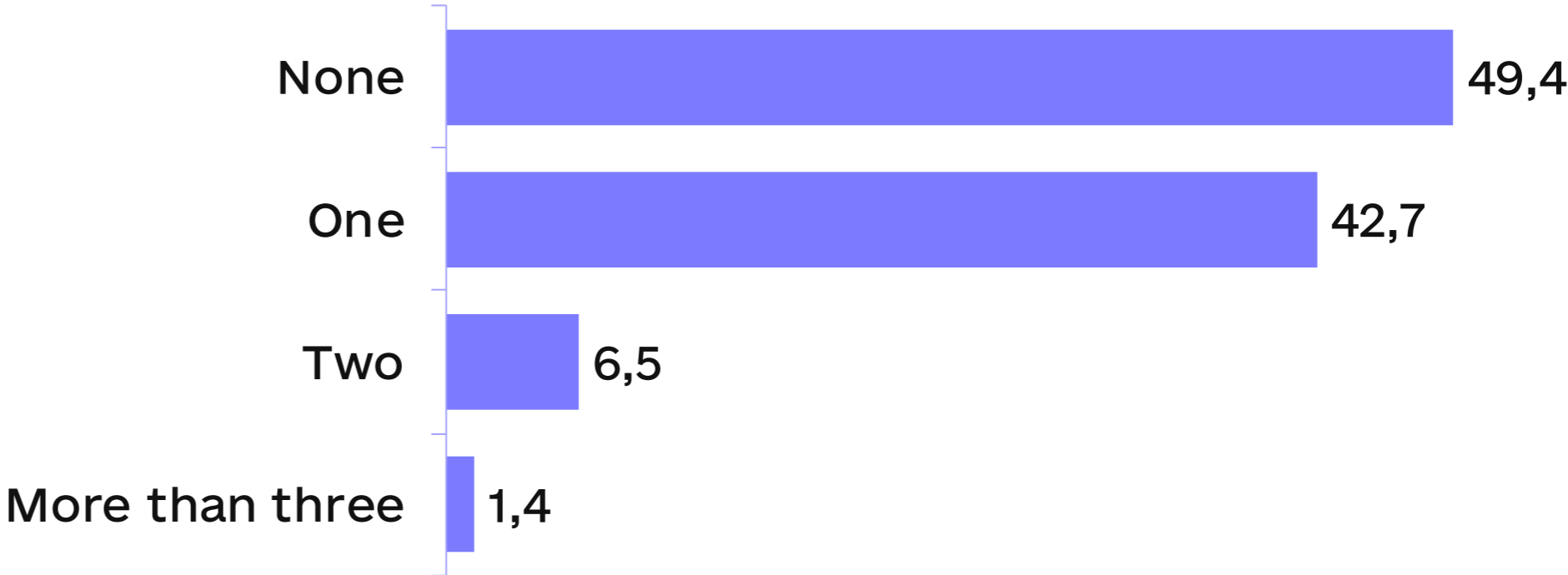
Number of devices

Ukraine in a whole 🇺🇦

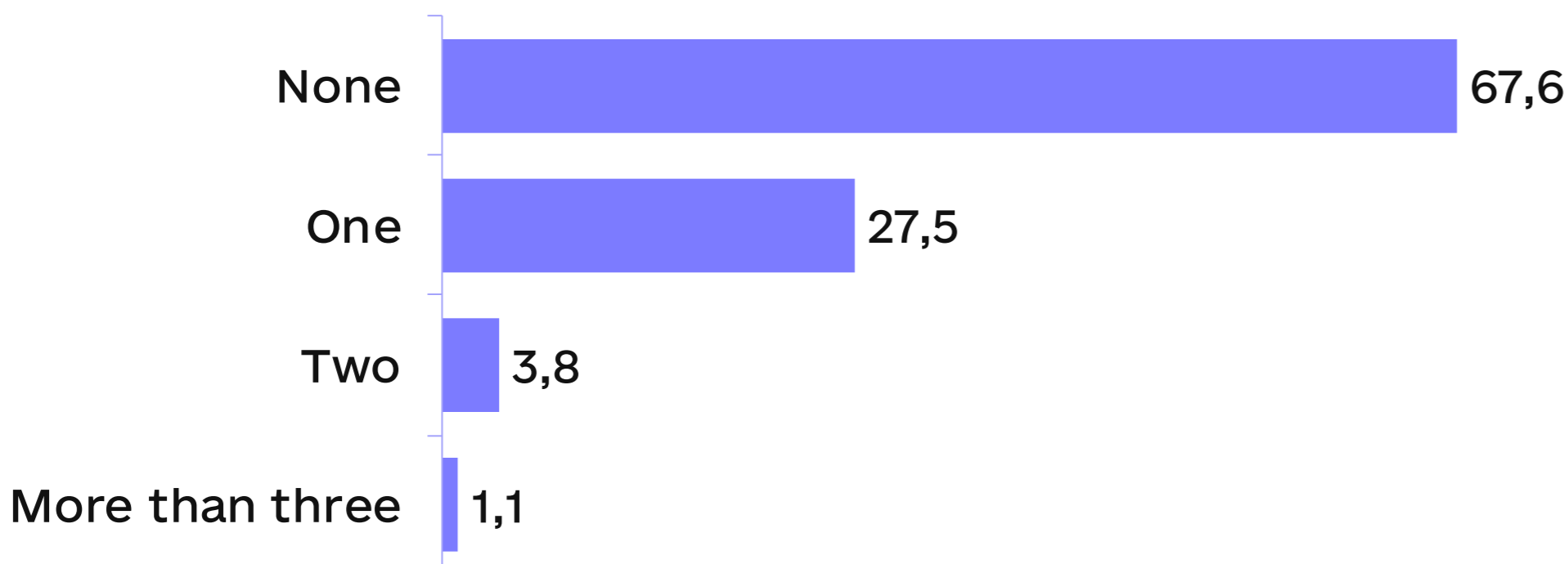
PC



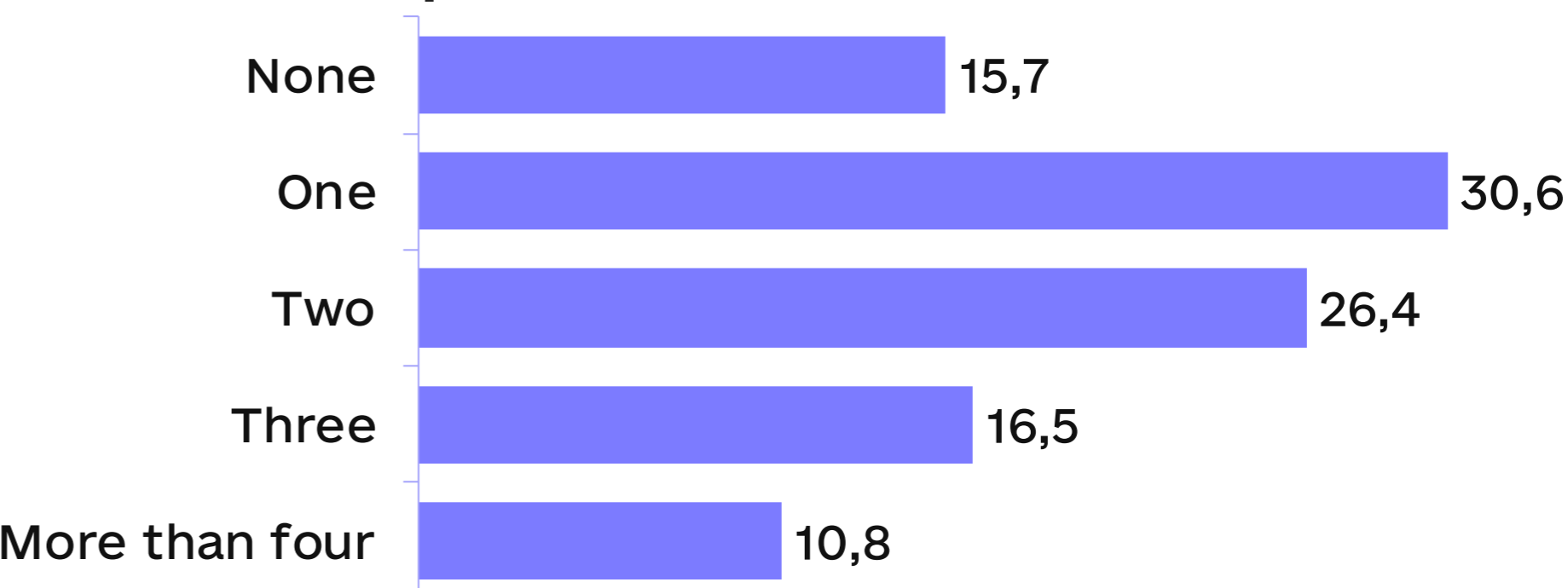
Laptop



Tablet

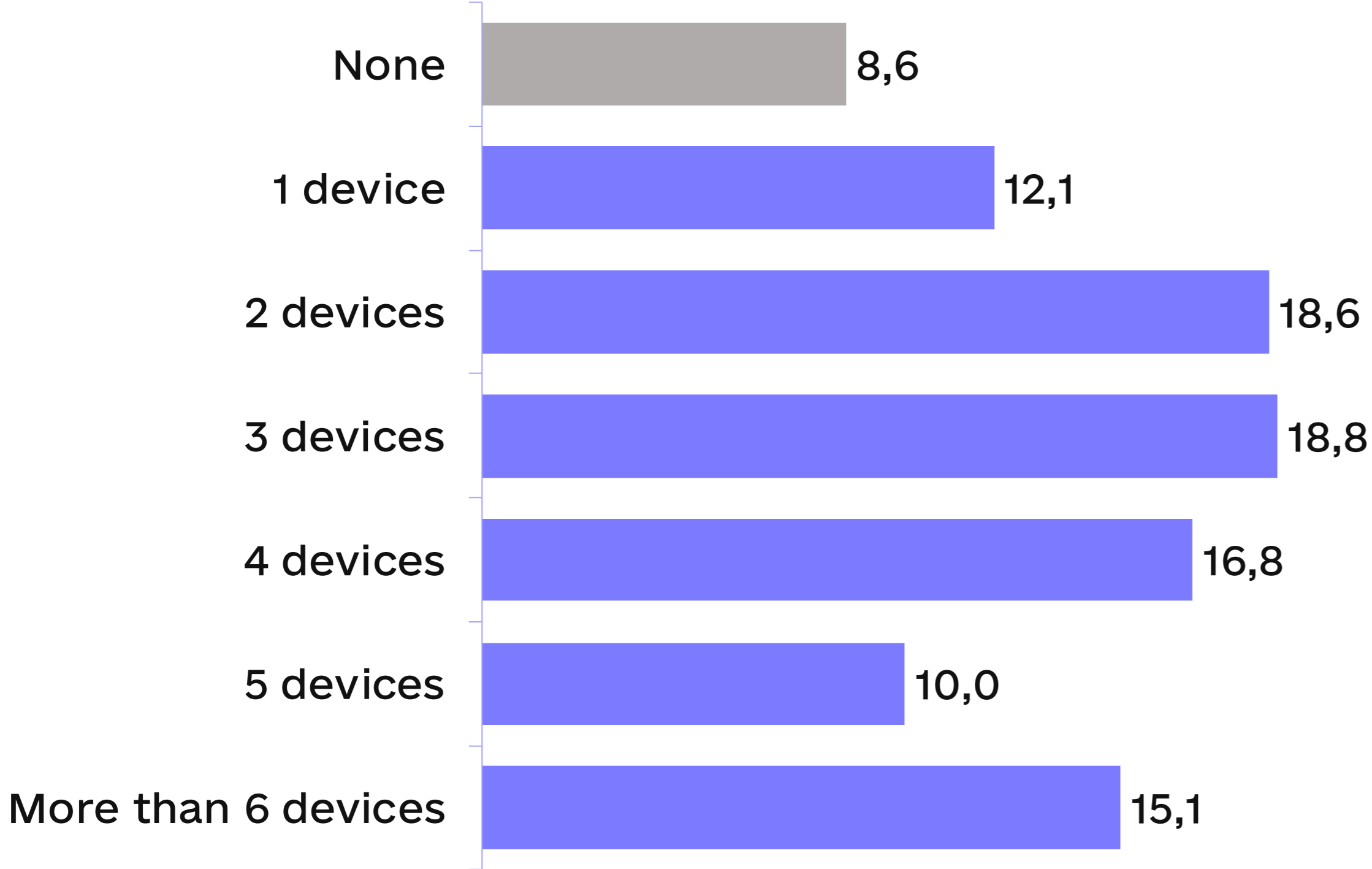


Smartphone



Total number of devices

(PC's, laptops, tablets and smartphones in one household)



An average of
3 devices
per household

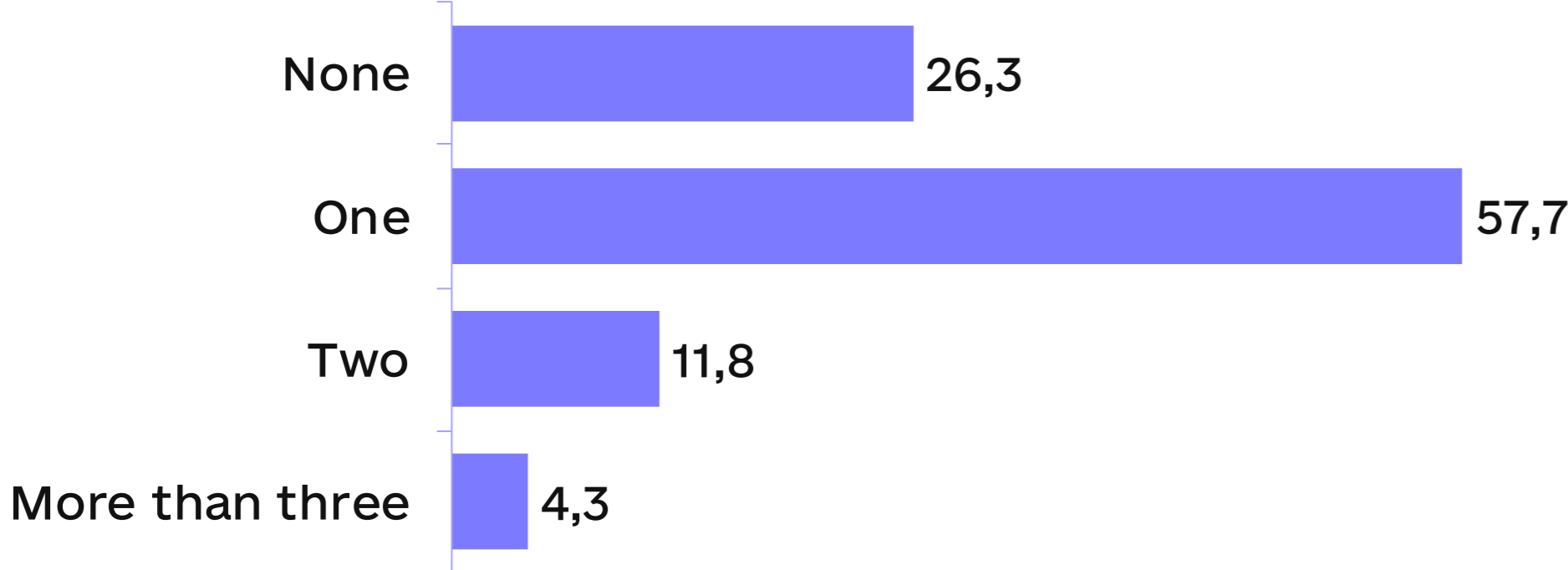
or

An average of
1 device
per a household owner

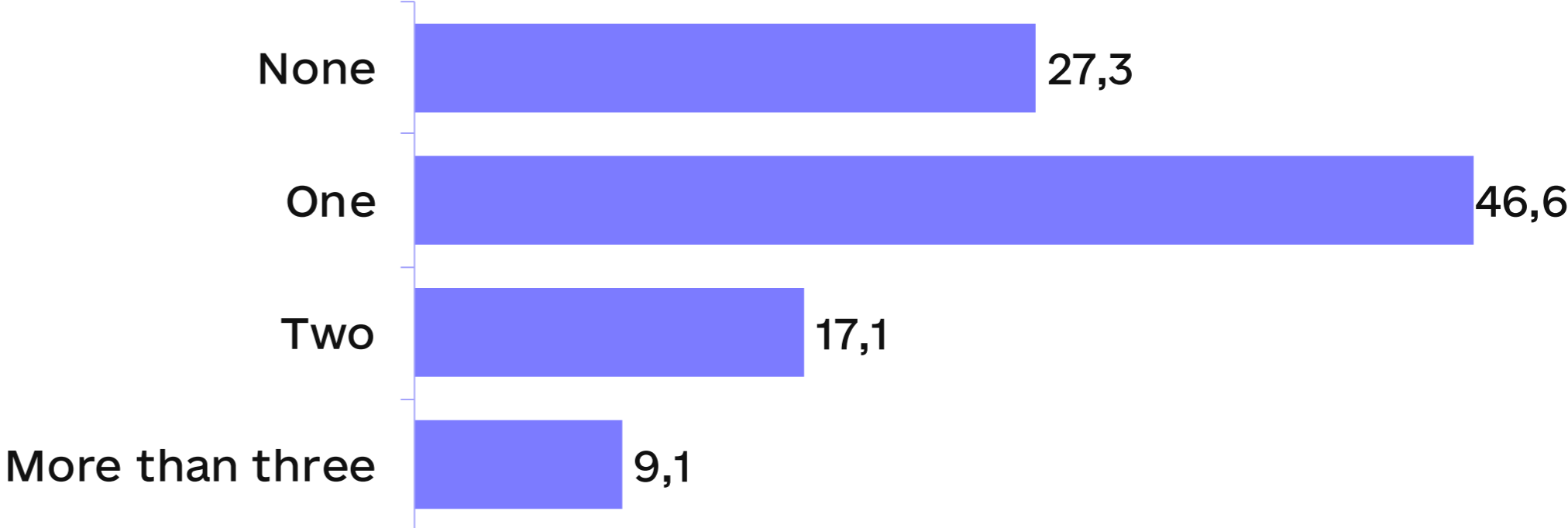
Number of devices

Youth aged 10–17 years 🧒

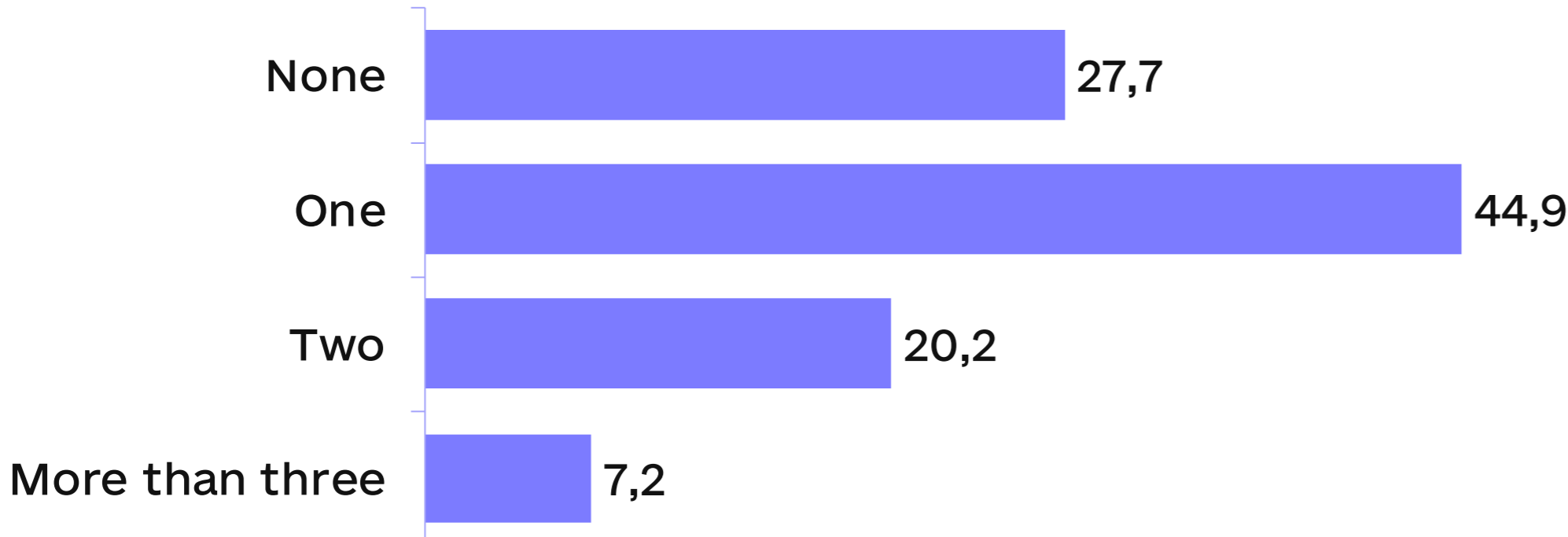
PC



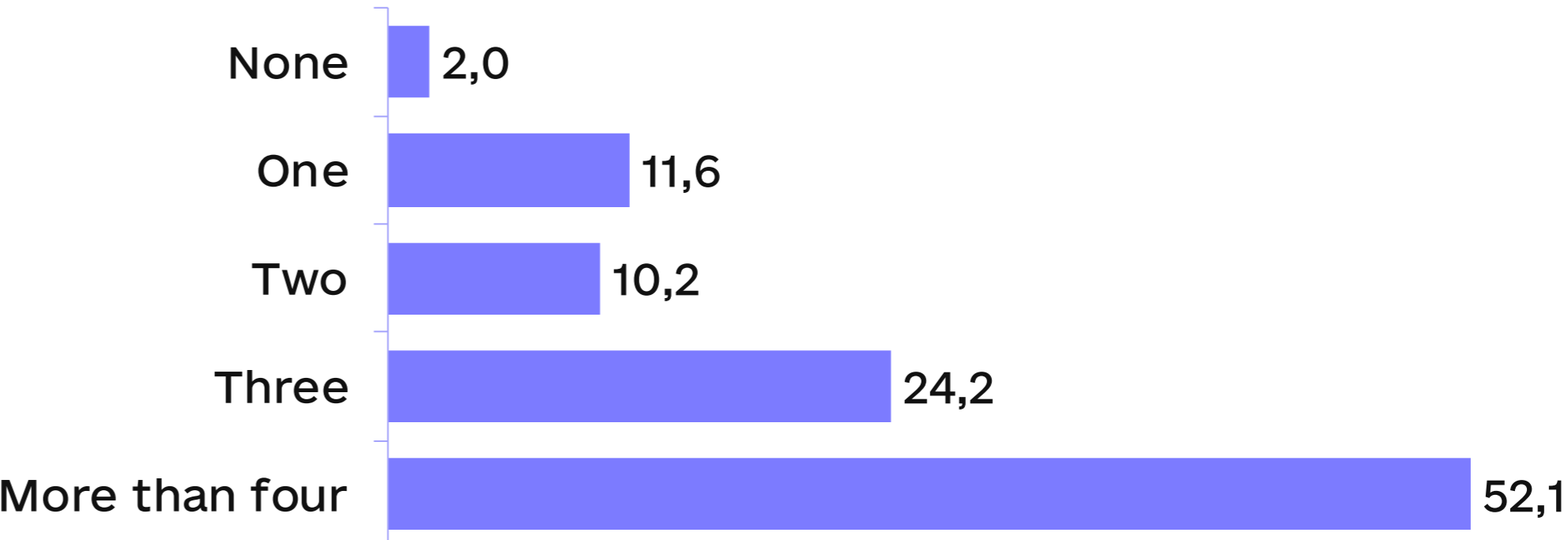
Laptop



Tablet



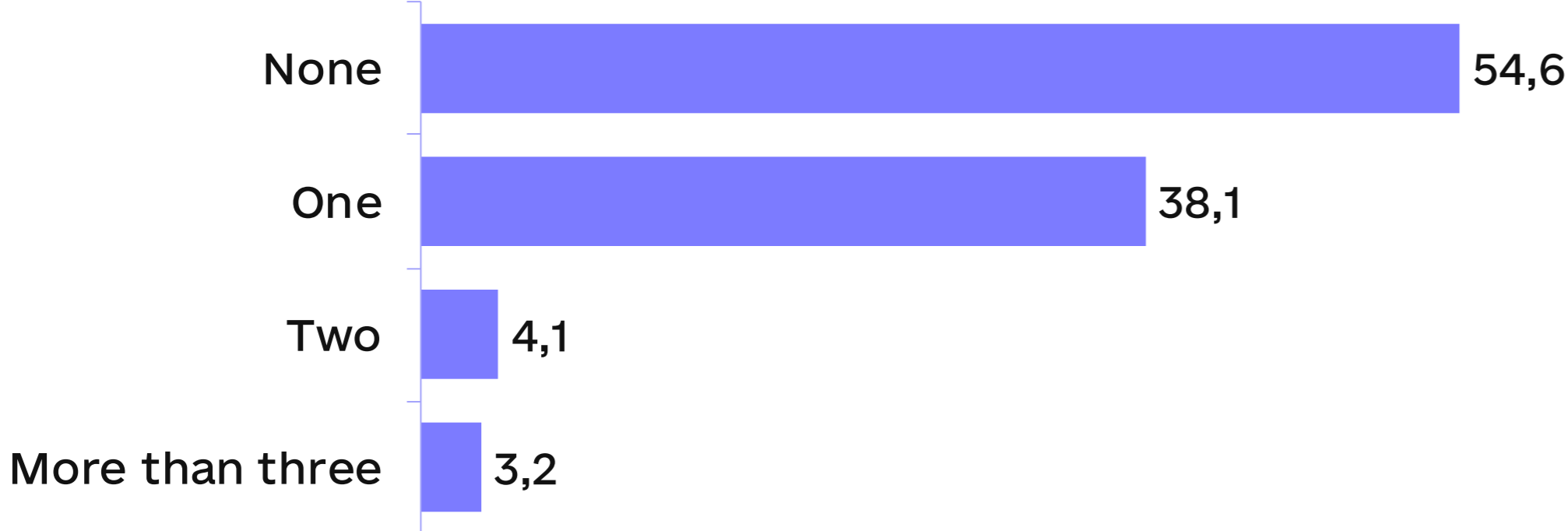
Smartphone



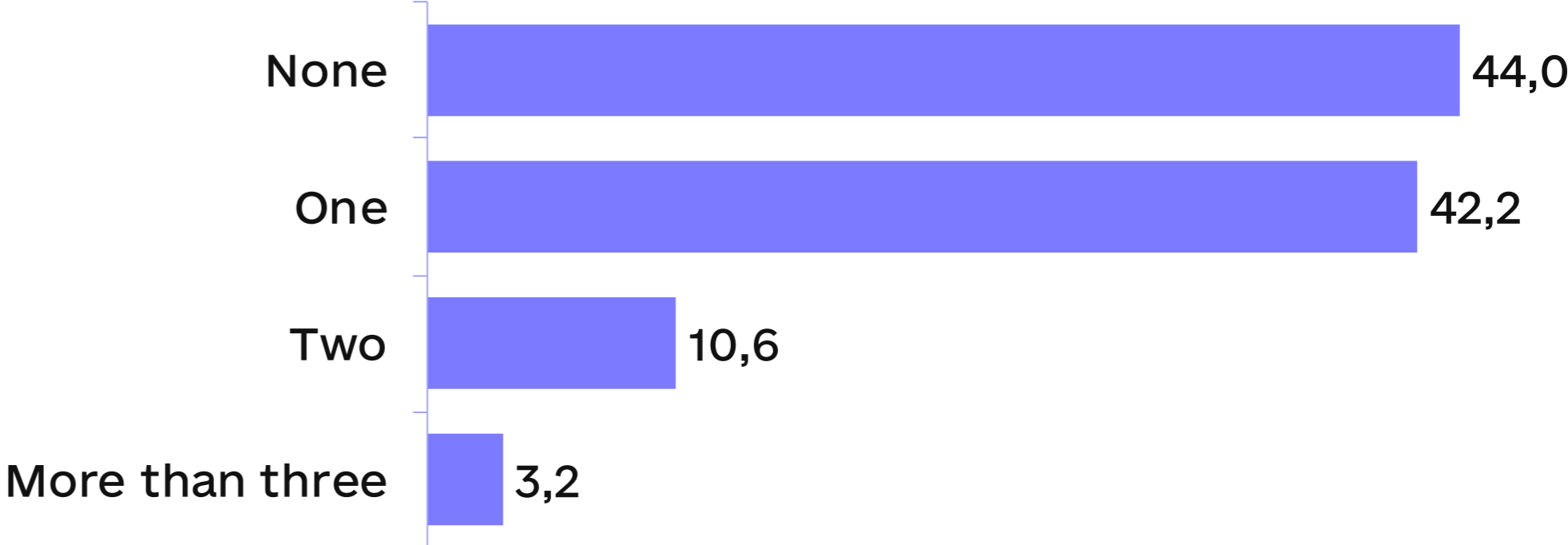
Number of devices

People with hearing impairment

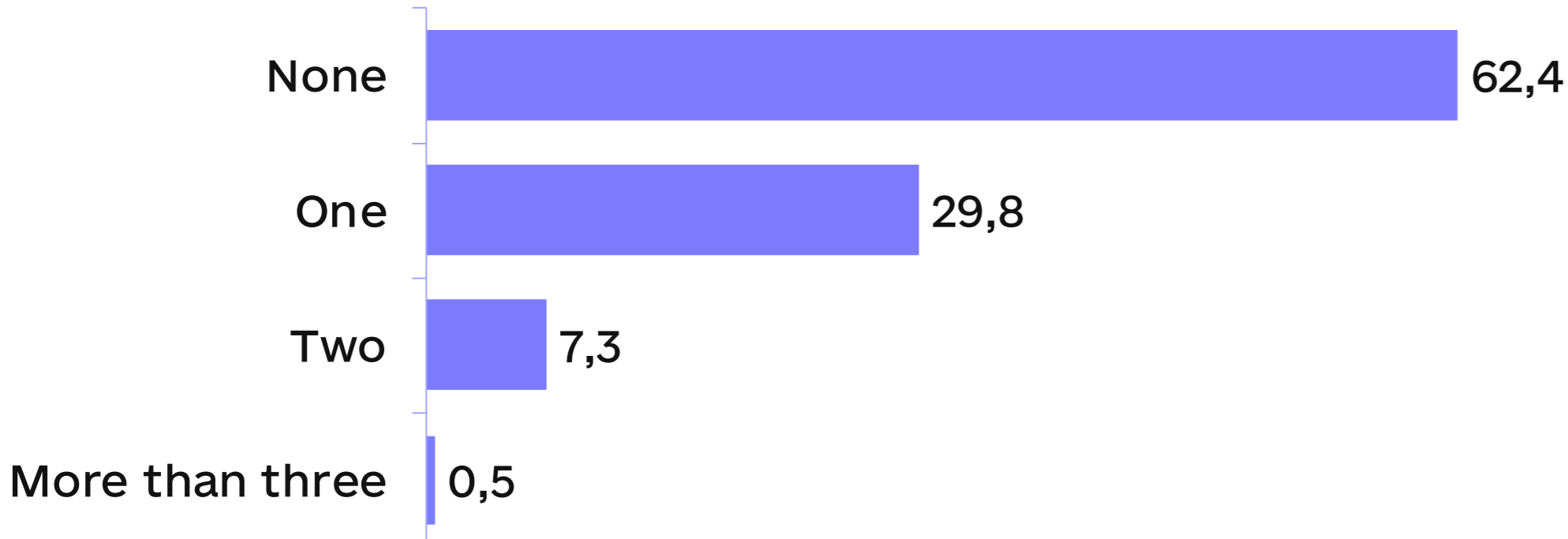
PC



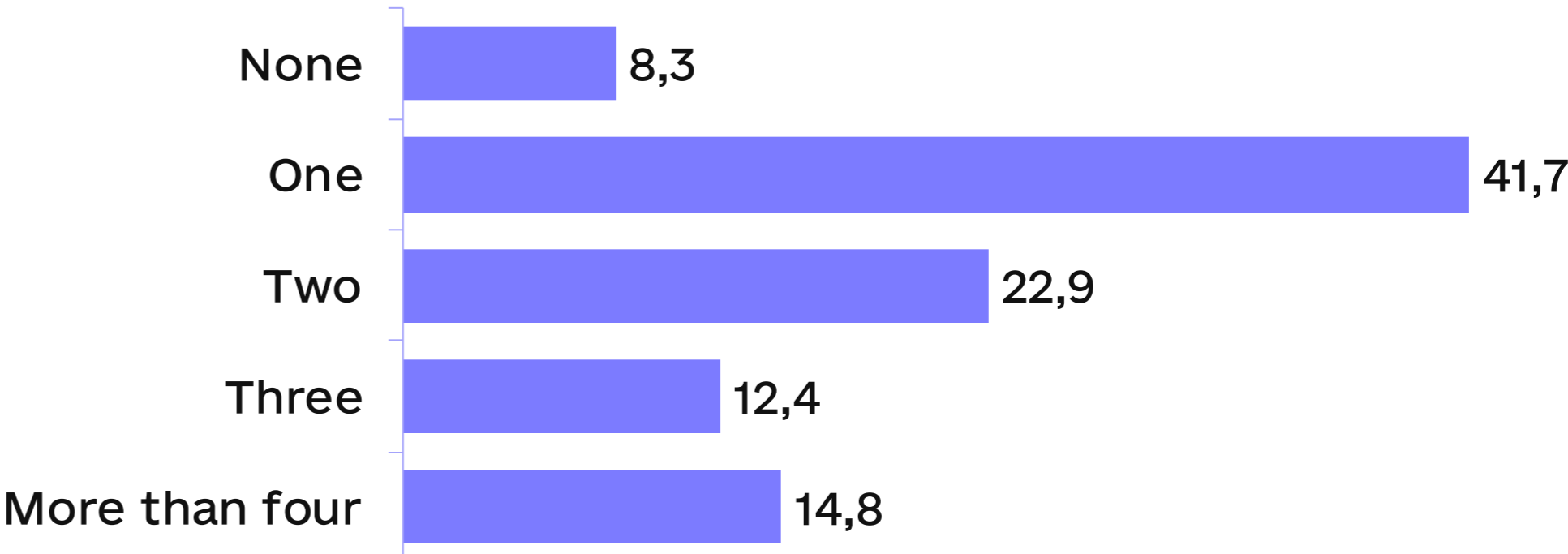
Laptop



Tablet



Smartphone



Methodology

What was the purpose of focus group discussions performed?

To get insights of the project target group concerning the needs in digital skills acquisition and existing "pains", that can / to be solved by implementing digital literacy courses.

How many focus groups were organized?

4 focus groups, including
2 in urban areas
2 in rural areas

In what localities and when was the focus group study conducted?

19.11.2019 – Dzvyniach village (Ivano-Frankivsk region);
20.11.2019 – Kreminna city (Luhansk region);
21.11.2019 – Bila Tserkva city (Kyiv region);
22.11.2019 – Sinhury village (Zhytomyr region).

Methodology

Who participated in focus groups?

Sex / Age	Women	Men
30 – 45	2	2
46 – 60	2	2
Total	4	4
Employment	Employed	Not employed
Soft quota	4	4

Total urban focus groups

Sex / Age	Women	Men
30 – 45	4	4
46 – 60	4	4
Total	8	8
Employment	Employed	Not employed
Soft quota	8	8

Total rural focus groups

Sex / Age	Women	Men
30 – 45	4	4
46 – 60	4	4
Total	8	8
Employment	Employed	Not employed
Soft quota	12	4

Barriers preventing the policy in improving the level of digital skills of the population being implemented

The level of the people's awareness of the Ministry of Digital Transformation existence is low and it prevents from distribution of information concerning its specific activity.

Non-awareness about the Ministry leads to ignorance of its activity resulting in high level of distrust towards the end result of its work.

Common opinion: 

If I don't know who they are, then I'm not sure about the quality of courses offered by them; I doubt whether it is not done for money laundering, and whether this time everything is accomplished.

Barriers preventing the policy in improving the level of digital skills of the population being implemented



Recommendation

1. To adapt own communication strategy to the socio-demographic structure of Ukrainian society, considering the fact that when using online channels (the main focus on them) of target groups notification, the level of access of the population over 50, as well as the population living in rural (including mountainous) areas, decreases.
2. To generally increase provision of information about the Ministry using online and offline channels, and do it as simply and clearly as possible (for example, short videos about the essence of the Ministry of Digital Transformation activity for the average citizen, which would be broadcast on television, on the screens of the social welfare institutions, transport etc.)

Barriers preventing the policy in improving the level of digital skills of the population being implemented

The country's infrastructural unreadiness for a high-quality digital jump in the field of level increase of digital skills of the population. There is undeniable infrastructure disproportion between the cities and villages, which is reflected in unequal access to telecommunication services, of different provision quality and cost.

Common opinion: 

Implemented online digital skills learning will involve those, who already have basic knowledge and skills, while categories of the population with zero level will stay out of this policy, same as before.

Barriers preventing the policy in improving the level of digital skills of the population being implemented



Recommendation

1. To synchronize as maximum as possible actions to introduce 'soft' (training) and 'hard' (offline hubs, Internet-covering in the territory of Ukraine, provision of the population of the country with technical means) components of the people digital literacy policy being implemented.
2. To make qualitative improvements of technical support of state institutions acting as specific providers of digital changes (social, educational, medical and cultural institutions): conformity of PC technical performances to the requirements of the software being used, work performance improvement.

Barriers preventing the policy in improving the level of digital skills of the population being implemented

Digital skills learning request is not relevant enough, especially among the older age group, as well as among the representatives of the rural areas. Age, level of education, employment status, and place of residence are a set of independent performances that determine the need for learning in general and digital skills learning in particular. The people mostly interested in are those who have digital skills and need to improve, expand and deepen them.

Common opinion: 

If there is a need, they will think over the learning, but such a need may not occur because of the lack of understanding of "for what?"

Barriers preventing the policy in improving the level of digital skills of the population being implemented



Recommendation

1. Purposefully and systematically to form demand for digital skills among the population, using not only messages about convenience, time saving, simplicity, but also about inevitability of transition of all (most) processes into the online space and automation of many social and public services.

Barriers preventing the policy in improving the level of digital skills of the population being implemented

Distrust towards online education for safety reasons, as well as quality concerns.

Common opinion #1:

Online space raises fear (especially in the older population from rural areas), because people do not understand how to behave there. Repeated experience of falling victim to fraudulent actions enhances such distrust and results in giving up even the simplest digital services (e.g., withdrawal of pension from ATM).

Common opinion #2

A large number of training courses results in decreasing their value and trust as for their quality. The 'state' status is not synonym for 'quality' in people's mind and it rather causes skepticism.

Barriers preventing the policy in improving the level of digital skills of the population being implemented



Recommendation

1. To develop as simple as possible, intuitively comprehensible and at the same time safe mechanism of 'entry' into the digital skills learning platform and provide promotional support focusing on this component. That is, in this case, we inform not just about the product, but about the safety and easy use of it, etc.

Barriers preventing the policy in improving the level of digital skills of the population being implemented

Problems with implementation of systematic both technical and informational support for digitization / automation initiatives in the country.

Common opinion: 

If a program is implemented, then everything should work, starting from the service itself and ending with information support; and when the service is ready to operate, but there are problems with registration and no information on how to handle it, there is no desire to to learn out details, moreover, the feeling of distrust and confidence that 'everything as always' are growing.

Barriers preventing the policy in improving the level of digital skills of the population being implemented



Recommendation

1. To launch a test run of the Digital Learning Platform with a limited number of users but with a well-defined target group.
2. A full-scale launch of the platform for all target groups should occur when the product is already adjusted under the results of testing period with full information and service support.

Key conclusions and recommendations

Key point #1

The effectiveness of implementation the policy in increasing the level of digital skills of the population depends on a comprehensive introduction of online and offline education mechanisms.

If we want to develop basic skills we focus on offline support provided at the place of residence of a person (in his/her locality).

The available staff and infrastructural resources include: libraries, clubs, educational institutions, youth cultural spaces, ASCs (Administrative Services Centers), etc. and their employees; employees of local self-government, social protection and pension provision bodies.

If we want to deepen / expand our existing digital skills - we are focusing on online education.

Key conclusions and recommendations

Key point #1



Recommendation

1. To allocate pilot territories to run simultaneously online courses and offline hubs. It is important to declare launching of both components at the same time, even if offline operates in test mode only in the designated area. This approach will make the declared plans to be the subject matter in people's eyes. That is, we are not just planning to open hubs with offline support over the next five years, we are we show that we already do it. And then we will extrapolate the tested experience over the territory of Ukraine. To consider the opportunity to synchronize the actions of the Ministry with logistical assistance programs, in particular. It's nice where a similar focus can be traced: the arrangement of spaces for sharing by different age categories. For example, teaching digital literacy to old people basing on young people space.

2. To introduce a network of 'shared workplaces' throughout Ukraine focusing on the rural areas. To allocate workplaces available for people without any technical support to use certain online services - pay for utilities, make a doctor's appointment, etc. The premises of village councils, ASCs (Administrative Services Centers) can be used as the basis for such 'workplaces'.

Key conclusions and recommendations

Key point #2

Regarding their attitude to developing digital skills the target group can be divided into the following subcategories:

- | | |
|-----------------------------------|--|
| ✗ No desire to learn | ➤ Status of non-target group |
| ✗ Desire to learn is not relevant | ➤ status of target group
"To develop request" |
| ✓ Desire to learn is relevant | ➤ status of target group
"To satisfy request" |



Recommendation

1. To exclude those listed in sub-category 1 from the primary target group, because of the the need to maximize the impact, and based on the need to optimize existing resources, including the information ones.
2. To focus the main system activities on sub-categories 2 and 3, developing different information campaigns for them.

Key conclusions and recommendations

Key point #3

The 30 to 60 year old people are heterogeneous in their requests for digital skills development. The people up to 45 are more focused on expanding the knowledge and skills they already have with a primary focus on their own safety, and safety of their children, as well as on improving basic professional competencies: to learn how to develop promo and template websites, SMM competencies and opportunities to use QR code in their professional activity.

The people over 45 are more interested in deepening and detalization their existing skills. For example, we know how to use a smartphone, but understand that only know a small part of the features in it; we use social media, but feel uncomfortable if we need to replace the cover photo, allow to repost a message; we also feel some stress if an application should be installed.

Key conclusions and recommendations

Key point #3



Recommendation

To develop multilevel courses on the same subject taking into account specific features of information perception by each group. Thus, it is ineffective way to teach different sub-categories of the target group how to make their Internet stay safe using the only one universal course, because they have different expectations from the content and different starting level of knowledge and skills. Thus, it is important to have different offers within the subject of Internet Safety.

Key conclusions and recommendations

Key point #4

The online education is perceived by most focus group participants as real time training. Besides, it is not always clear that online education can also use visual aids and step-by-step illustration of how to do an activity, e.g., how to create a user account or sign up for a social media.



Recommendation

To focus on explanations what online education is by showing the actual action algorithm as well as its **benefits comparing with offline**. It is appropriate to involve traditional channels of information such as television by analogy with T2 advertising, which was rated by the participants as effective and exemplary relating to this issue.

Key conclusions and recommendations

Key point #5

The very idea of digital skills development is supported by focus group participants and is rated as promising. In case of the absence of significant results, it will be taken as "nothing new", and if it is successful and shows real performance metrics it will be taken as an unexpected but desirable outcome.



Recommendation

To base an information campaign on the message of a systematic and comprehensive approach to solve an existing issue:

- have learnt
- have developed
- have launched online testing for a limited target group
- have launched offline pilot in a definite locality
- have got the following feedback
- plan to start a full-scale launching of a platform on date
- monitoring target groups requests
- make changes in the content
- make the course list more... and again start passing all points circle wise

How do people understand digital literacy?

The primary understanding is based on the idea that digital literacy means the following...

01

Ability to use different gadgets

Starting from smartphone and ending with, e.g., smart home.

02

Common practice «using in a similar way»

«Using all digital devices to get information. Even if you don't know how to use this device, you understand where to enter».

«To take an unknown device and to learn how it operates for a certain period of time».

03

Knowledge and skills to use safely all gadgets

«Safe use means to know where to enter, where not to enter, how to clean up traces if any».

The digital literacy association area



What determines digital literacy?

Location

urban or rural

Availability of trained staff

those who can teach and provide support

The infrastructure component

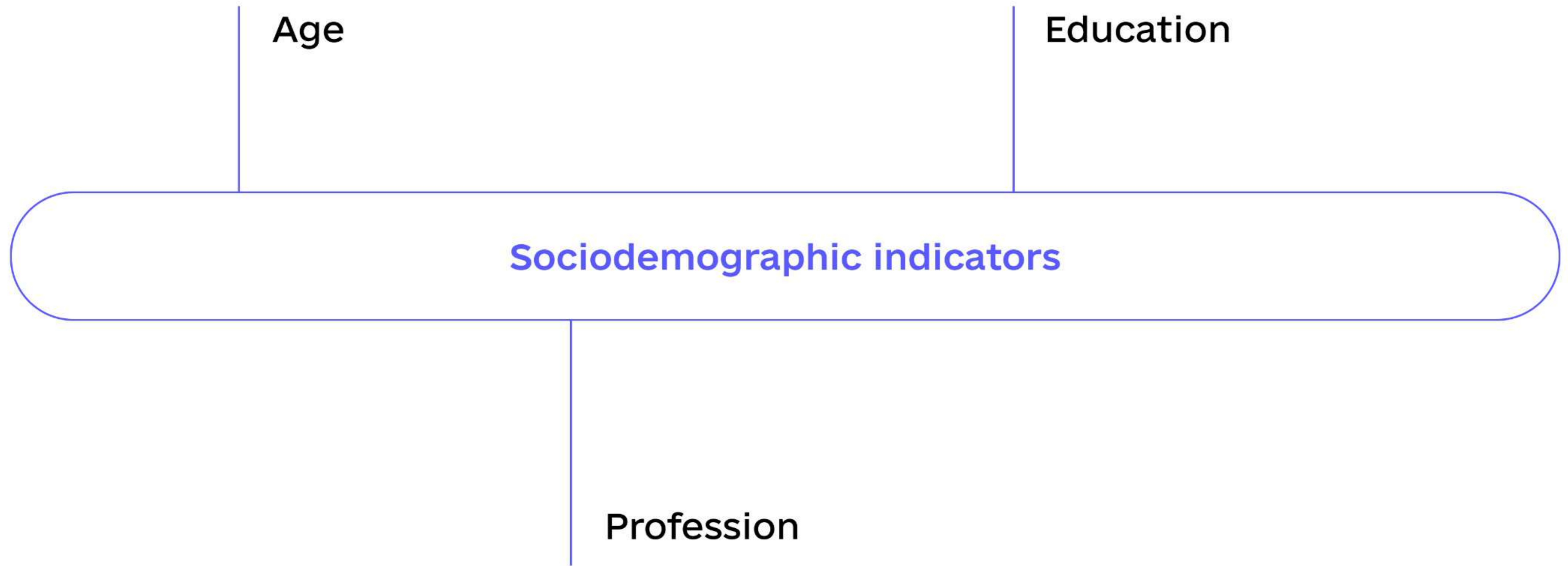
Availability of material and technical base

smartphones/tablets/PC's

The availability of the complete ecosystem to implement the governmental digitalization policy

availability of a working mechanism to support all launched processes

What determines digital literacy?



What should the government do to increase the level of digital literacy?



Infrastructure

To provide infrastructure for digitalization



Education

To adapt the governmental educational policy to the digitalization strategy of the country



Informing

To provide information support for the policy of the population digital skills development

What should the government do to increase the level of digital literacy?



Infrastructure



Education



Infroming

Locality

to balance the disproportion between urban and rural areas regarding to telecommunication services

to introduce the quality standards for telecommunication services providers

What should the government do to increase the level of digital literacy?



Infrastructure



Education



Infroming

Avalability of material and technical basis

to create conditions to access to digital gadgets

What should the government do to increase the level of digital literacy?



Infrastructure



Education



Infroming

Availability to train staff

to trin personnel who work with people offline and provide online support



Infrastructure



Education



Infroming

What should the government do to increase the level of digital literacy?

Availability of the complete ecosystem to implement to governmental digitalization policy

the product should be intellectual and well-tested, the infrastructure for its full support should be available

offline support system for the population should be introduced

training programs for various segments of the population should be introduced

What should the government do to increase the level of digital literacy?



Infrastructure



Education



Infroming

To adapt education policy of the states under the strategy of digitalization of the country

What should the government do to increase the level of digital literacy?

To provide information support for the policy of the population digital skills development



Infrastructure



Education



Infoming

This information campaign should be based on understanding of all target groups targeted by the Ministry, regarding the specific features of the information perception by each category, as well as the effectiveness of communication channels.

Digital skills of a modern human

The minimum set of digital skills of modern human

- Be able to use household appliances
- Be able to make calls, including video calls using their gadgets
- Be able to search for information
- Be able to create personal online account (for any purpose)
- Be able to take, send, and receive photos
- Be able to find, launch movie / music online
- Be able to pay for services online, full the mobile phone balance / payment card via terminal, withdraw salary / pension in ATM
- Be able to communicate through social media, email

Learnt depending on request / need

- Be able to work with Word
- Be able to work with Excel
- Be able to work with PowerPoint
- Be able to set up the Wi-Fi
- Be able to reinstall the software



Навчання цифровій грамотності: драйвери та причини незацікавленості

Drivers

The desire to be up to date, be on equal with children / grandchildren / colleagues

Need stimulated by professional activity

Desire to be independent and prove personal level of competency

Disinterest is explained by...

evaluation of one's personal digital skills as sufficient for existing needs

opportunity to learn what is needed personally

Internet safety

Safety on the Internet is the key requirement of various age categories.

2/3 of all participants of focus group discussions faced at least one fraudulent action as a result of their activity on the Internet.

The participants consider the following categories to be **the most vulnerable**:



Youth under 16



Older generation,
mostly 60+

The most common safety issues are:



Page / mail accounts hacked



Getting of fraudulent
messages



Loss of information
because of viruses

Existing requests for safety training

The Internet safety for children

- Q “To learn how to protect your child better”
- Q “Courses at the psychological level... How to get a child to understand; because the child has objections if you prohibit something”.
- Q “Developing business on the Internet - communication with children, racket”
- Q “It’s totally unsafe environment for our kids”

The Internet safety for everyone

- Q “To show the process: a user opens PC, starts the Internet, and what happens then. To show what data where get, and who can use certain data, how to avoid this. There is such a certain problem, it happened because of..., so the solution is as follows”
- Q “I can't determine which website is safety and which is viral”

The study was conducted



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