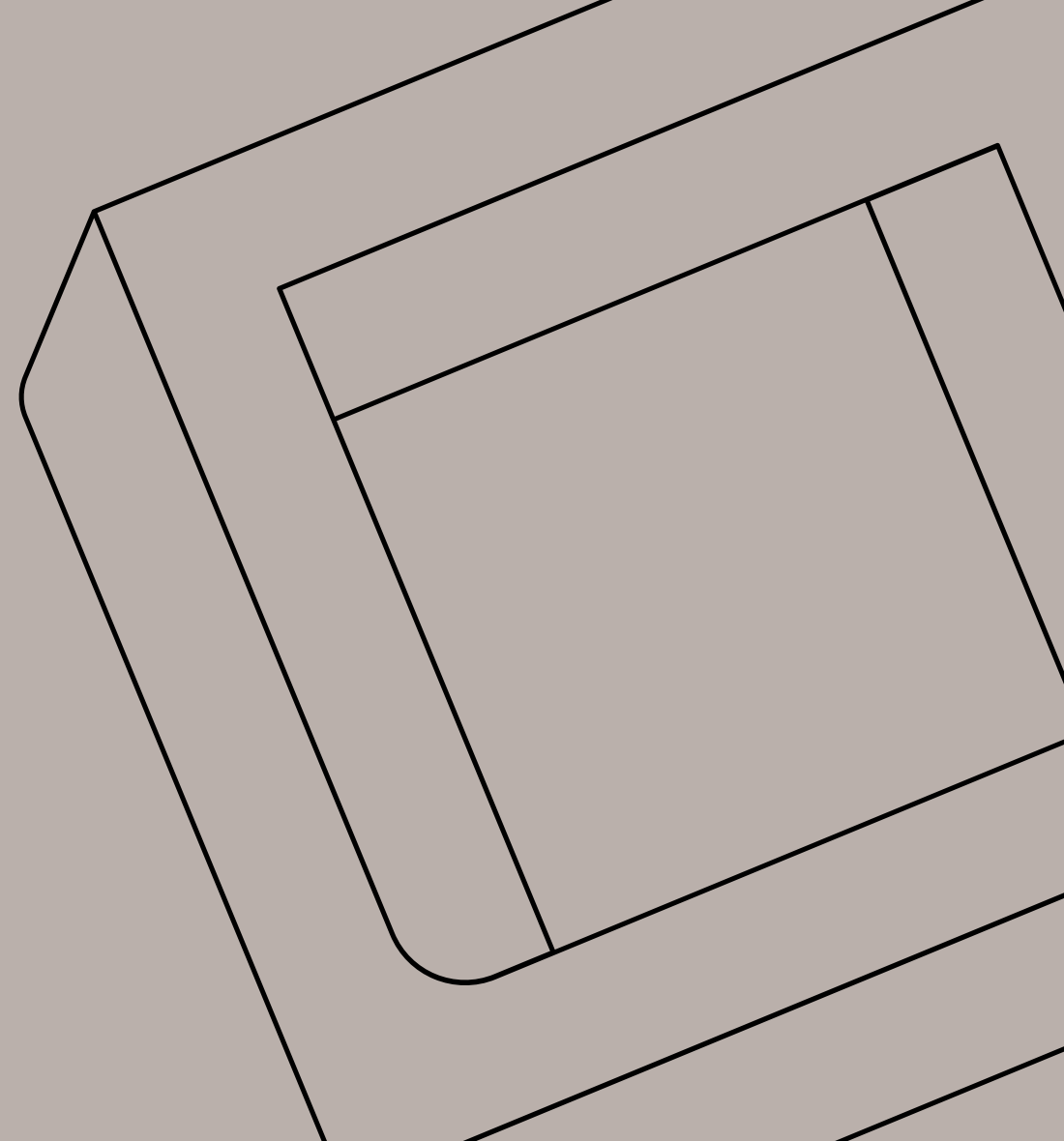


Utilising online probability panels for pan-European policy research on digital skills and labour market transition

Cedefop AI Skills Survey (2024) using Public Voice

Russell Castañeda – Verian Belgium

Current Innovations in Probability-based Household Internet Panel Research (CIPHER) Conference
Washington, D.C. | February 26 - 28, 2025

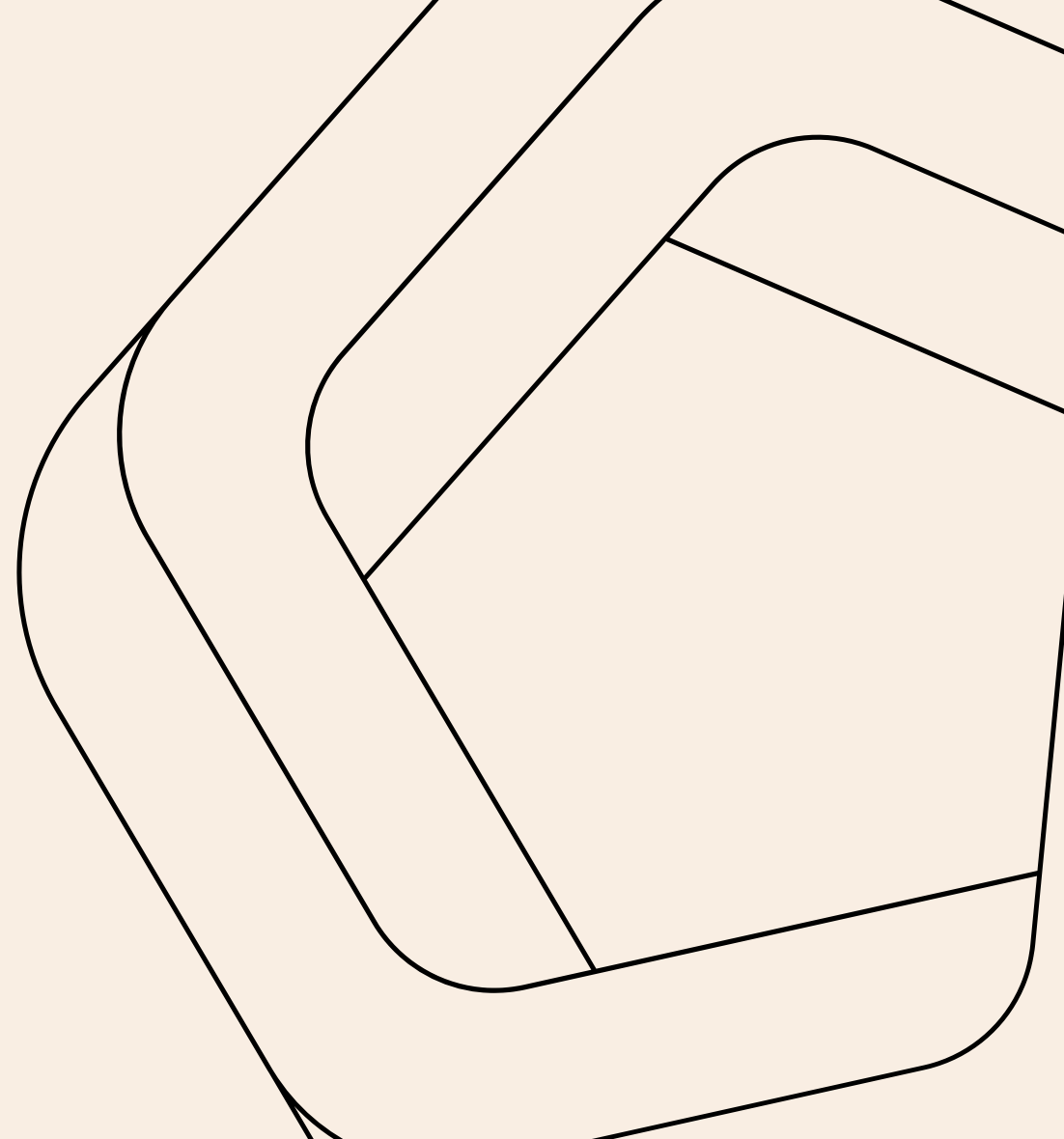


Objectives of this presentation

1. To provide an overview of the Cedefop AI Skills Survey;
2. To detail the methodological approach using Public Voice;
3. To present some key early findings from the survey; and
4. To highlight the benefits of using probabilistic panels like Public Voice for evidence-based policy research.

Background of the study

Cedefop AI skills survey



Background of the study

Cedefop AI skills survey

Cedefop, the European Centre for the Development of Vocational Training, is an EU agency based in Thessaloniki, Greece.

- plays a key role in shaping VET policies in Europe.
- conducts research on wide aspects in the field: labour market trends, skills demand/gap forecasts, EU policy support, and recognition of non-formal and informal learning, etc.

The Cedefop AI skills survey

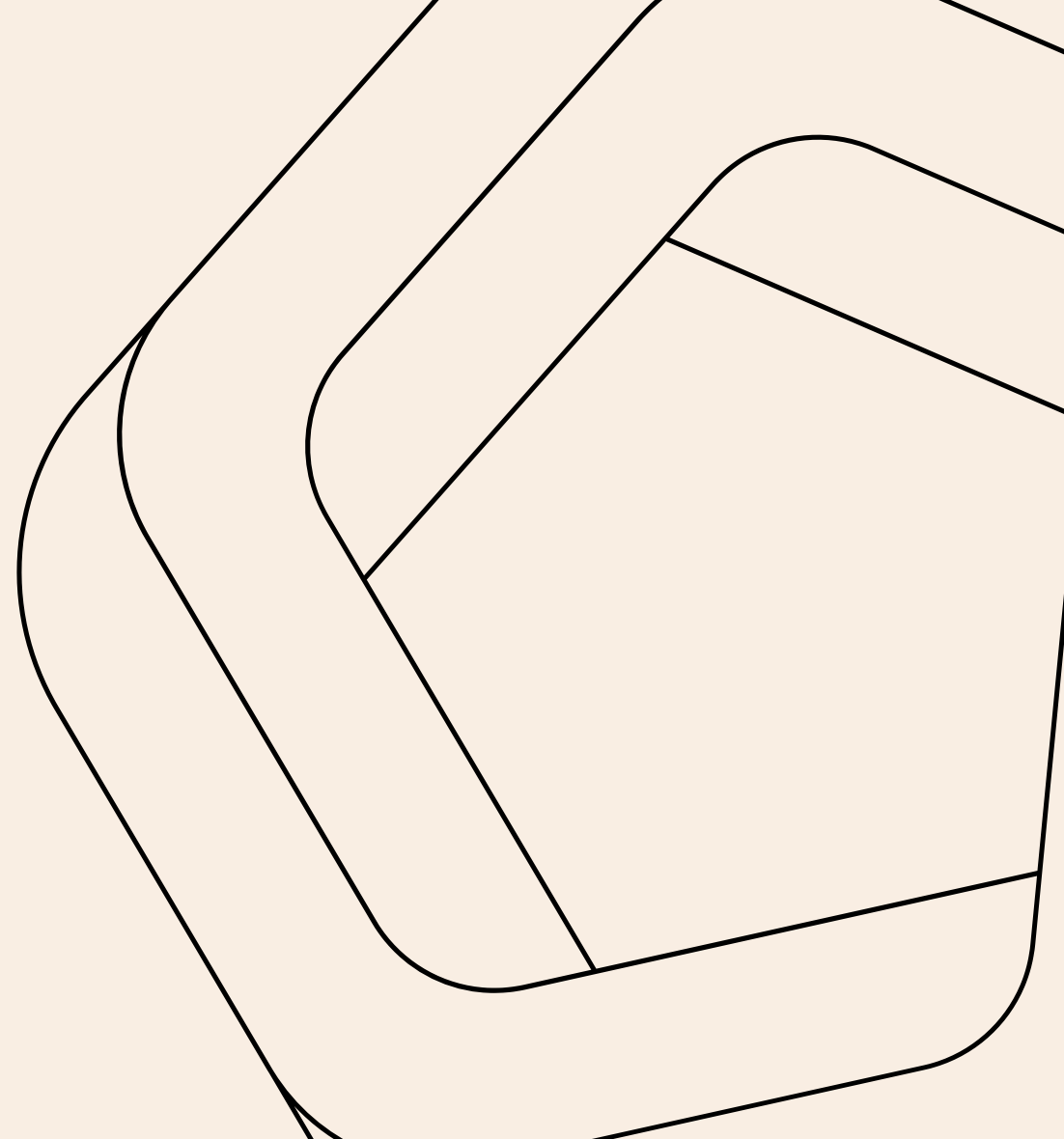
- **Purpose:** Understand AI's impact on workers' skills in Europe.
- **Context:** AI reshapes economies, labour markets, and society, highlighting the need for upskilling and reskilling.
- **Significance:** The first EU-wide study on the use of AI at work and its impact on jobs.
- **Contribution:** The survey's findings can inform policy decisions and encourage social dialogue.

Topics covered by the survey:

- **AI competency**
- **Job skill needs**
- **AI usage at work**
- **AI skill gaps and training**
- **Job routinisation/organisational support/worker representation**
- **Automation upskilling/reskilling Wages**

Methodology

Cedefop AI skills survey using Public Voice



Methodology

Fieldwork information

Probability-based approach in all countries through **Public Voice***

Fieldwork duration
21 February to 8 May 2024

Target population

Workers aged 16 to 64 (excluding self-employed and family workers)

Total interviews
5,357

Sample size

500 respondents per country (250 in Luxembourg)

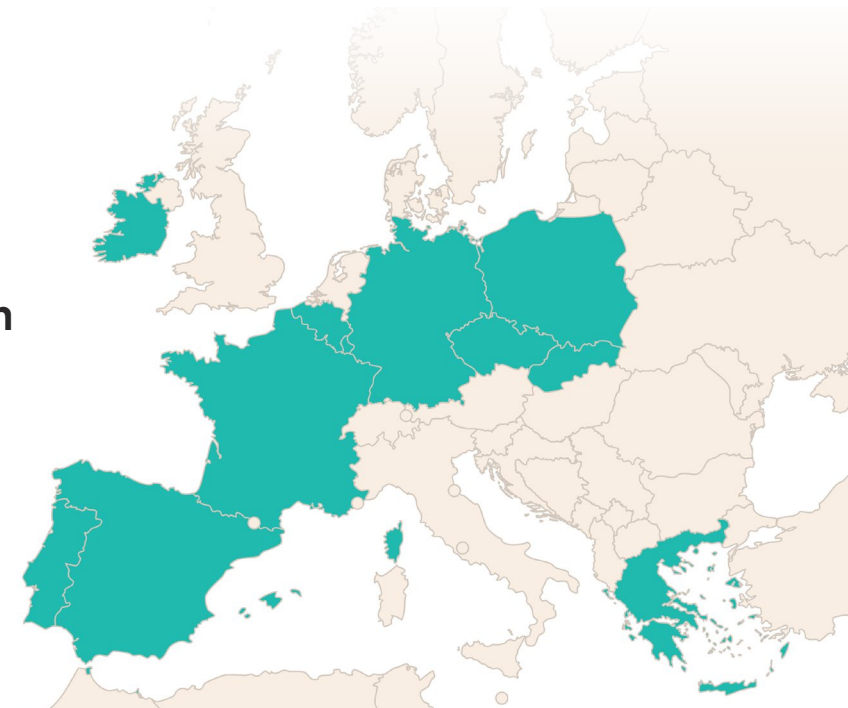
Average interview length
15 minutes

Belgium, Czechia, Germany, Greece, Spain*, France, Ireland, Luxembourg, Poland, Portugal, Slovakia

Weighting

- **Design weights to adjust for selection probabilities and non-response**
- **calibration weights to improve representativeness** (gender, age, education, region, occ. and ind.)

* legacy probabilistic panel used in Spain



Methodology

Public Voice

Public Voice is our high-quality proprietary survey panel, representing the national population aged 16+.

- uses probability-based sampling
- to ensure everyone has a chance of being selected
- guaranteeing data accuracy and reliability.

Sample Frames:

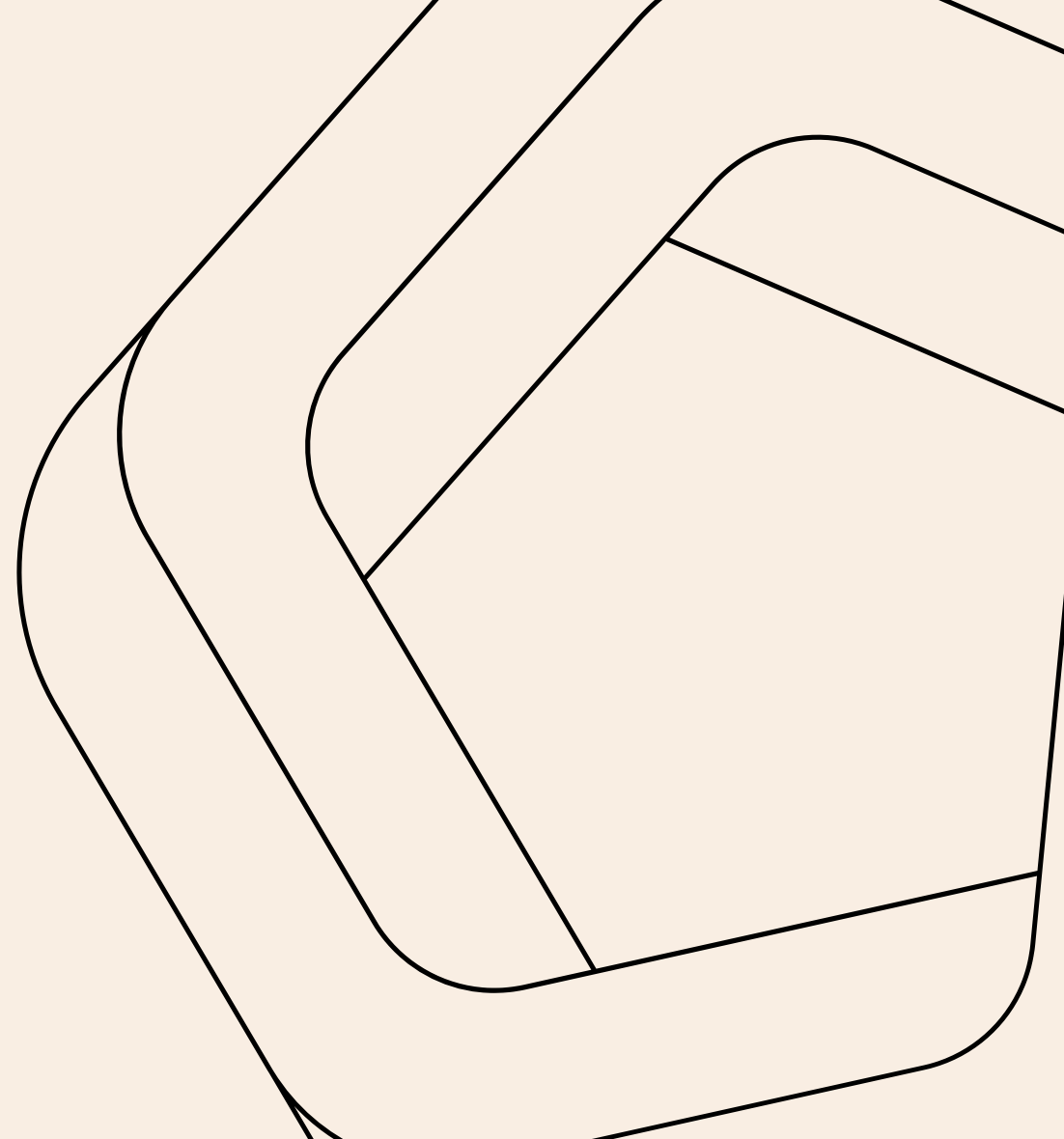
- Official numbering plans
- Population or address registers

Recruitment methods:

- Phone-to-Web recruitment: Overlapping dual frame mobile and landline RDD design or single mode mobile design
- Within-household selection: Ensures all eligible individuals in a household have an equal chance of selection.
- Onboarding: Follow-up onboarding procedure includes completing a profiling questionnaire.
- Postal Push-to-Web recruitment: Stratified random sample of addresses, with reminders and incentives for participation

Key findings

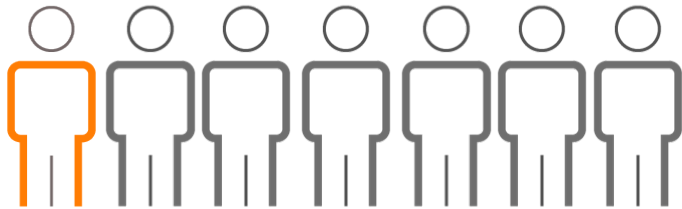
Cedefop AI skills study



Prevalence of the use of AI tools in the workplace

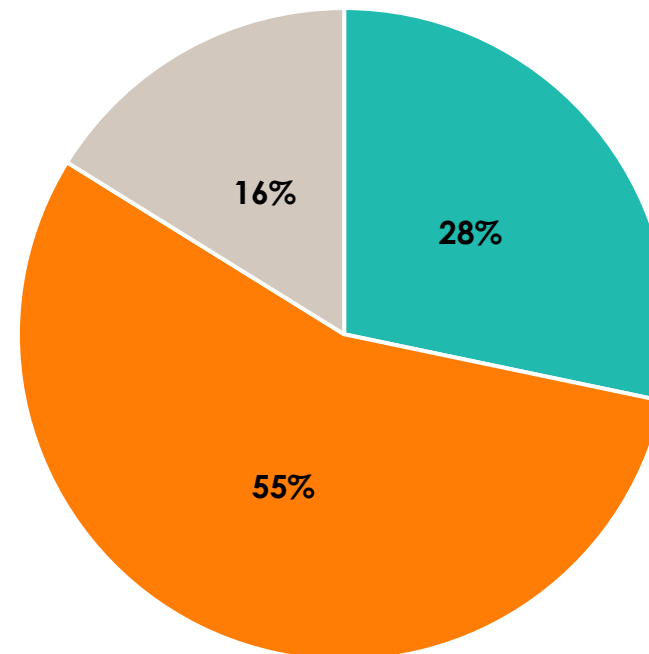
1 in 7

workers regularly work with digital tools or apps that automate tasks with algorithms.



Q9_1: To the best of your knowledge, do you or your colleagues use any AI tools or systems at your workplace?

- Yes
- No
- Not sure



28%

of workers say they or their colleagues use AI tools or systems at their workplace.

Cedefop AI skills survey, 2024

Q8. As part of your main job, how often do you work with any digital tools, applications or systems that can do the following tasks automatically, for instance by using algorithms?

Cedefop AI skills survey, 2024

Increase in time spent using AI tools among users compared to last year

37%

of AI users now spend more time using AI tools.

49%

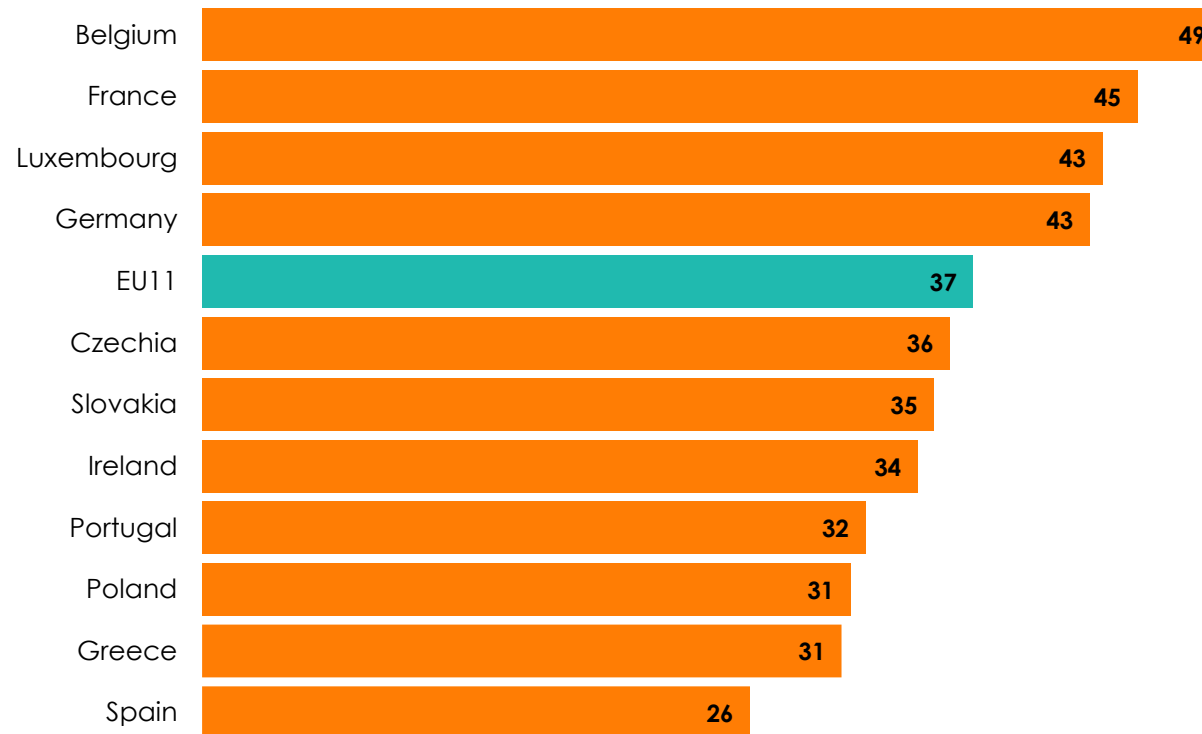
in Belgium, the highest;

26%

in Spain, the lowest.

Q11. Comparing now and 12 months ago, do you now spend more, less or about the same time using such AI tools or systems in your job?

% - 'More time'



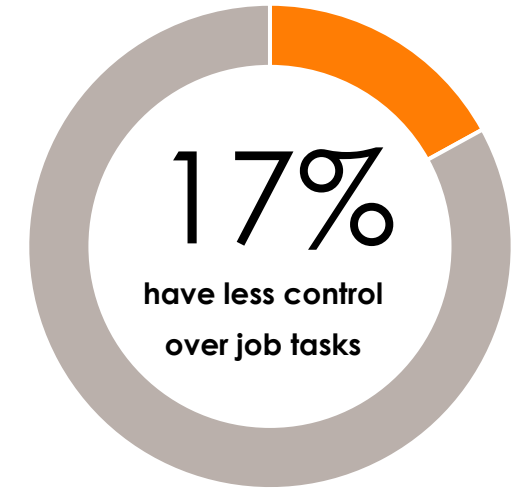
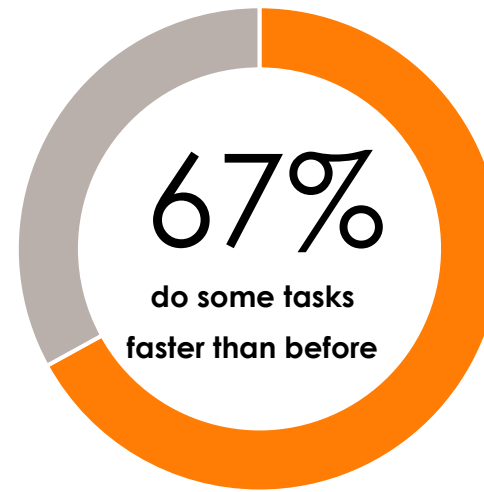
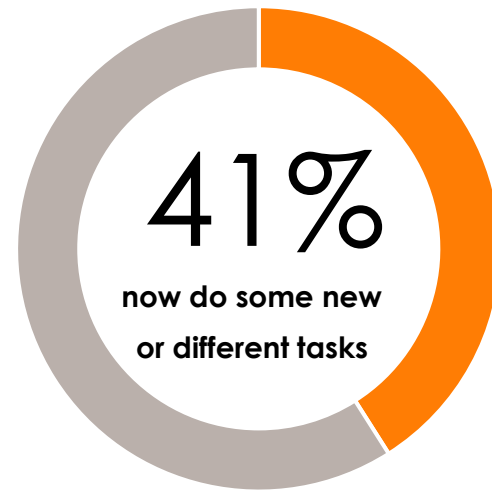
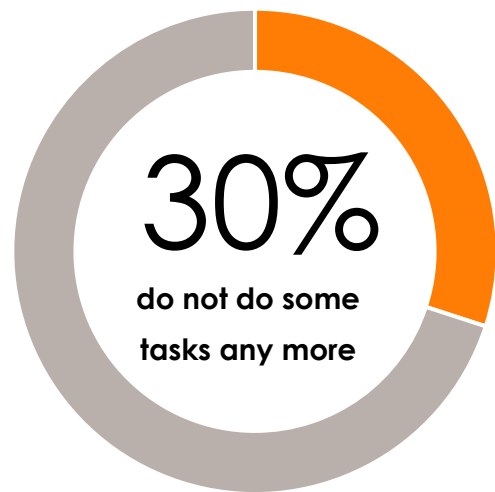
Cedefop AI skills survey, 2024

Base = workers who use AI at their workplace

How AI tools have transformed job responsibilities among AI users

Q12_1~4. As a result of your use of AI tools or systems in your job, have your job tasks changed in any of the following ways?

% - "Yes"



Task displacement risk by industry



Cedefop AI skills survey, 2024

Q12_3: As a result of your use of AI tools or systems in your job, have your job tasks changed in any of the following ways?: I do not do some tasks any more | Ranking based on % - 'Yes'

Base = workers who AI at their workplace

How we collected and coded industry categories with precision

1. Used SERISS* databases for keyword mapping of 300+ categories and conversion to NACE**, the standard classification of industries in the EU.
2. Verified translations by sampling and testing, ensuring accuracy.
3. Scripted a search box to filter categories based on initial characters, matching the questionnaire's language.
4. Mapped results back to broader NACE branches.

*What does your company or organisation mainly make or do at your workplace, that is t
your company or organisation and select the option that best describes the activity or s*

Q Search I

- Accounting, bookkeeping and auditing activities; tax consultancy
- Activities of amusement parks and theme parks
- Activities of business and employers membership organisations
- Activities of collection agencies and credit bureaus
- Activities of employment placement agencies
- Activities of extraterritorial organisations and bodies

*Synergies for Europe's Research Infrastructures in the Social Sciences

** Statistical Classification of Economic Activities in the European Community (nomenclature statistique des activités économiques dans la Communauté européenne)

Fear of job loss due to AI

15%

of workers think AI will affect their job in the next five years.

24%

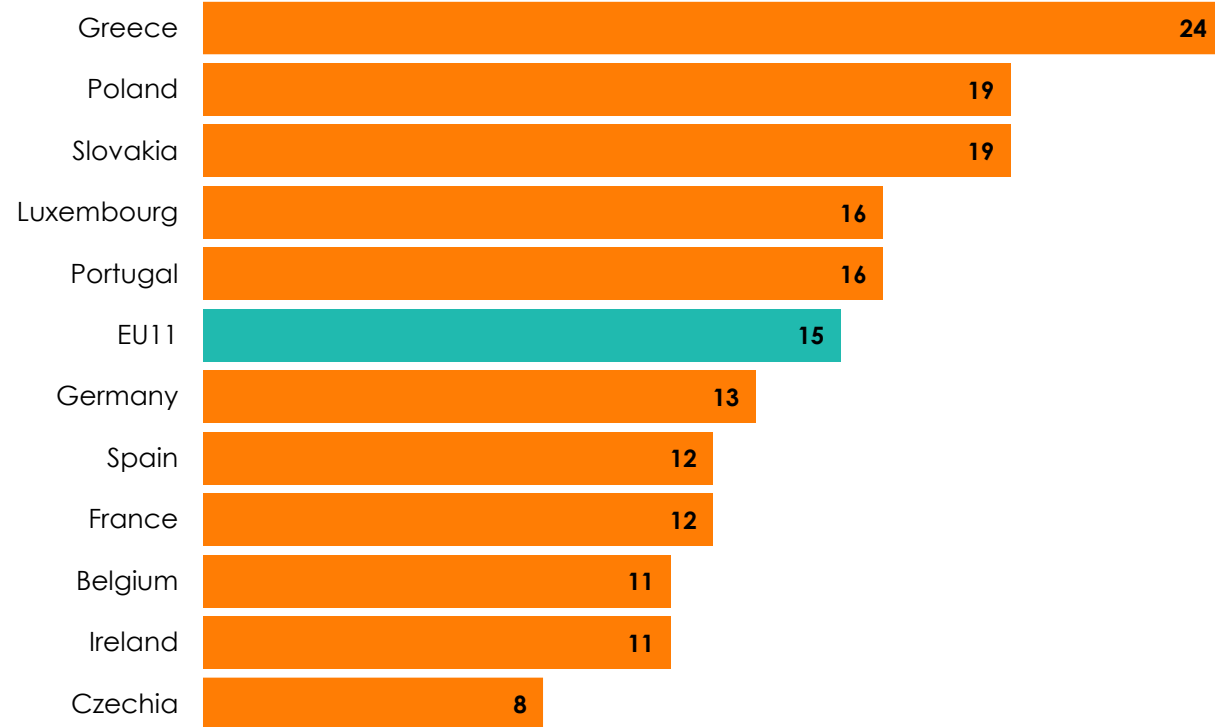
in Greece, the highest

8%

In Czechia, the lowest.

Q17.1. Thinking about how AI tools or systems may impact your work in the next five years, how likely is it that each of the following situations may happen? I will lose my job.*

% - 'Fairly likely' or 'Very likely'



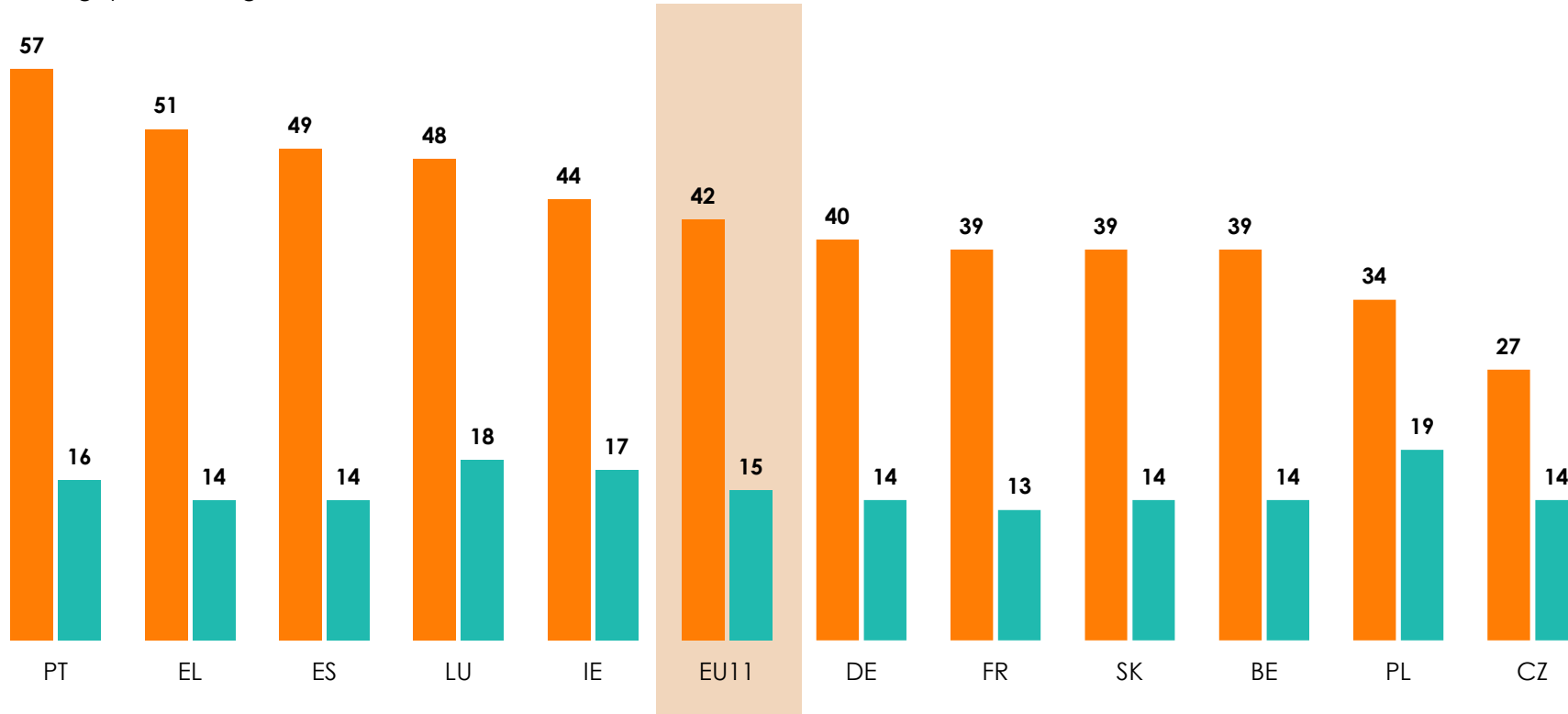
Cedefop AI skills survey, 2024

Skills needs versus training on AI

Workers citing the need to upskill themselves on AI versus those who have participated in AI skills training

%

■ Skill gap ■ Training



42%
need AI upskilling

15%
participated in AI skills
training in the past year

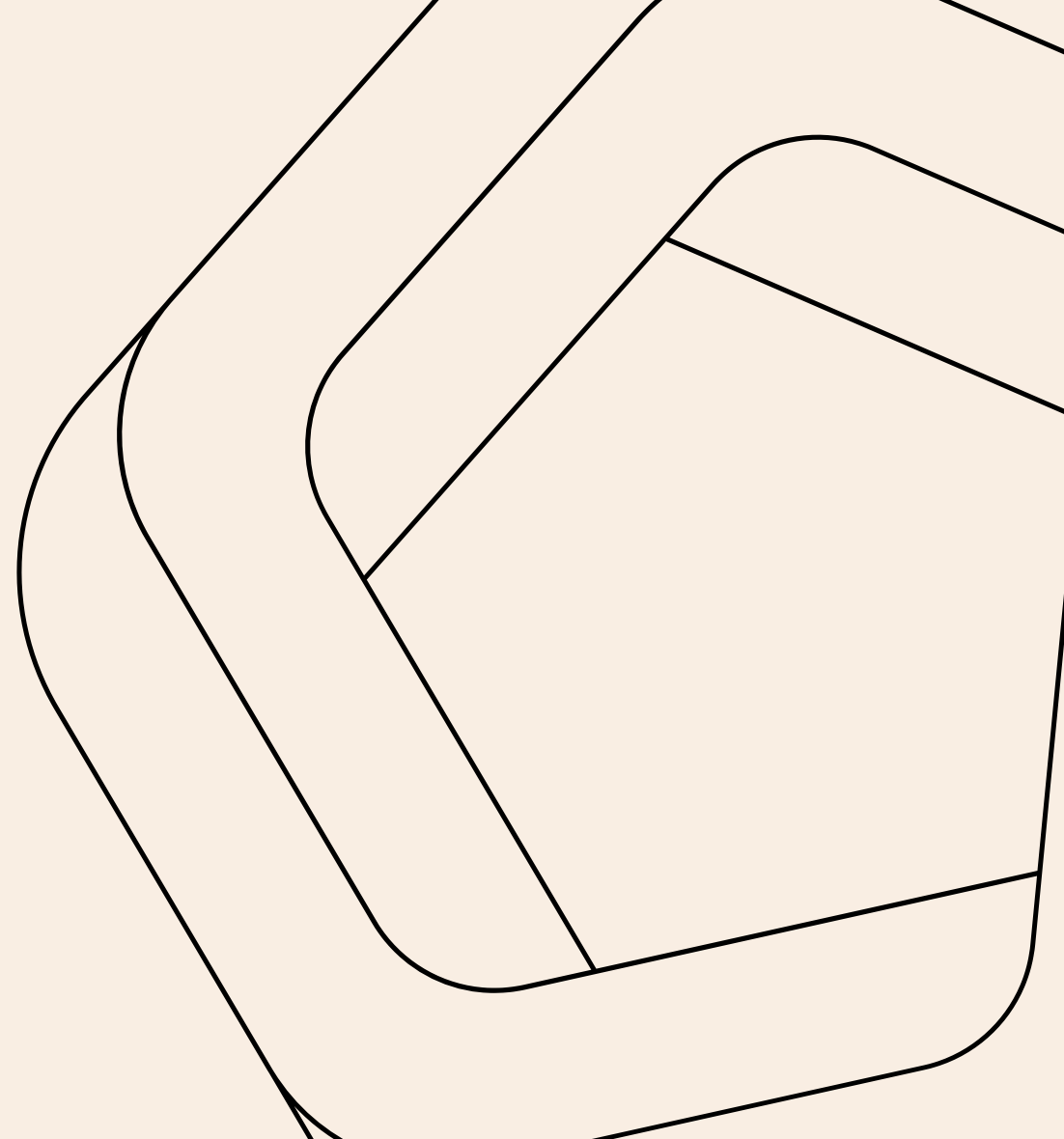
Q15: To what extent do you need to further develop your knowledge and skills in using AI tools and systems for your job?

% - 'to some large extent' or 'to some extent'

Q16_2: In the last 12 months, have you participated in any education or training activities to further develop the following skills? : My knowledge and skills in using AI tools or systems

% - 'yes'

Conclusions



Conclusions

We helped Cedefop, leveraging their policy expertise and ambition, achieve key outcomes using our Public Voice panel:

- Nuanced understanding of AI impact and skill gaps:
 - A minority using AI but growing use; large skills gap
 - AI transition is a skills transition
- Representative data as basis for policy decisions and advocacy, especially for a topic related to digital skills (AI at the workplace)
- Strategic and flexible interventions:
e.g. non-procedural jobs and unexpected work situations, organisational culture friendly to AI adoption
- Exploring potential sub-topics:
e.g. productivity, income association, gender, job skill intensity, industry and ethical/responsible use.

Verian's takeaway:

- **Public Voice** provides rapid, high-quality evidence for policy structuration and understanding complex topics not only concerning the general population, but also among a subset (employed population).
- **Public Voice**, as a probabilistic panel, is adaptable to diverse research needs, covering various topics, especially highly complex ones, and is a promising direction for future projects.

Thank you.

Russell Castañeda

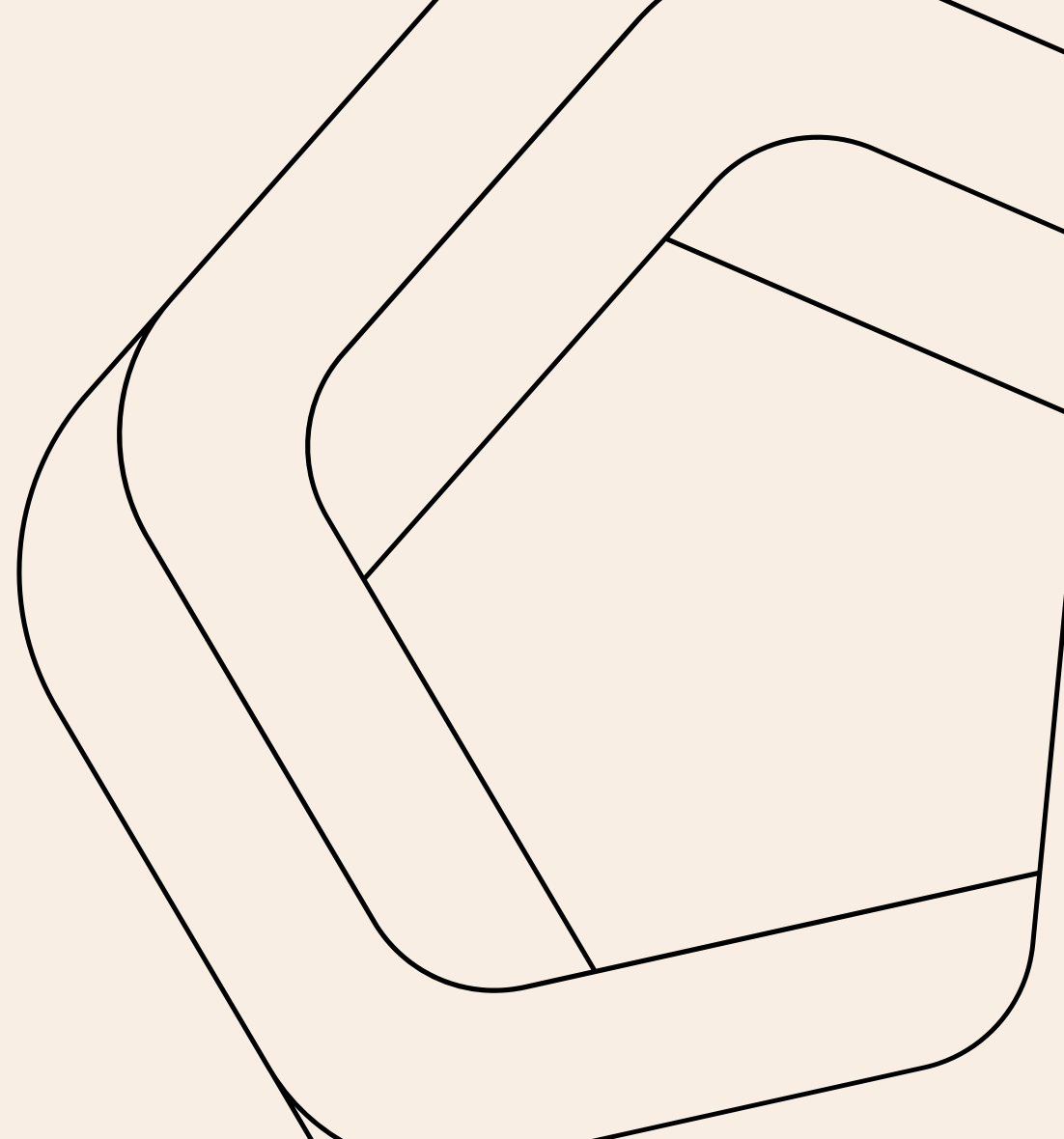
russell.castaneda@veriangroup.com

 [@russelljdc](#)

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