

# European survey about underwater noise

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# Methodology

## FIELDWORK



Survey conducted in 5 European countries among representative samples of 1000 respondents aged 18 years old and over in each country (France, Germany, the Netherlands, Spain and Sweden).

A total of **5 000** individuals were interviewed.

## TIMING



Interviews were conducted from February 11<sup>th</sup> to 26<sup>th</sup> 2026



This report has been produced in accordance with international standard ISO 20252 "Market, opinion and social research". *This report was proofread by Alice Tétaz, Public Affairs.*



## SAMPLING

Online interviews via Ipsos Access Panel.

Representative samples were constructed using the quota method based on gender, age, occupation, region and market size.

## NOTE TO READERS



For aggregate results, each country is weighted equally.

All results are expressed in percentages (%) Results that are statistically significantly lower than average are highlighted in red, while those that are statistically significantly higher are highlighted in green

# Main findings

## KEY NUMBERS

**98%** consider marine protection important  
**57%** have heard of underwater noise pollution  
When informed, **89%** agree that urgent action is needed  
**84%** support speed reduction measures  
**78%** prefer mandatory regulations over voluntary actions

## A strong European commitment to marine conservation

There is a near-universal recognition among Europeans of the importance of protecting marine life: **98%** consider marine protection important, including **67%** who rate it as "very important". This consensus transcends national boundaries with a wide agreement among the 5 countries surveyed, where the percentage of respondents rating marine protection as "very important" ranges from **65%** in Germany and the Netherlands to **71%** in Spain.

## A hierarchy of concerns: the dominance of visible pollution

When asked to identify the main threats to marine life, respondents revealed a clear hierarchy shaped largely by

visibility. Plastic pollution and microplastics dominate public consciousness, cited by **81%** of respondents as the main threat. Climate change and ocean warming are the second most recognized threats at **57%**, while overfishing and bycatch rank third at **47%**.

## A growing awareness of underwater noise

More than half of respondents are already familiar with underwater noise, with **57%** having heard of it as a form of marine pollution. **20%** of respondents report that they know exactly what underwater noise pollution entails, and awareness levels are stronger among younger adults and those with higher education. Notably, several countries demonstrate encouraging levels of familiarity – Germany leads with 61% awareness, while the Netherlands and France follow closely (respectively **59%** and **56%**). Importantly, once people who never heard about noise pollution learn about the issue, concern rises sharply. **89%** of respondents agree that it is a problem that must be dealt with immediately.

# Main findings

## A clear mandate to action

**89%** of respondents agree the problem of underwater noise should be urgently addressed. This support remains consistent across demographic groups and national contexts. Europeans broadly recognize it as deserving immediate attention.

Globally, respondents think that current action against noise pollution is insufficient. **54%** of respondents believe that the EU institutions are not doing enough to address underwater noise, while **57%** believe that national governments are not doing enough to address this issue. Additionally, **30%** believe NGOs are taking adequate action.

## Strong support for regulatory measures

In this context, respondents show support for a range of regulations: **78%** think that regulations are necessary to ensure ships slow down, rejecting voluntary industry self-regulation. This belief is even stronger in France and in Sweden, reaching up to **81%**. Thus, there is a wide consensus on speed limits: **84%** support the implementation of speed reduction measures for commercial and recreational vessels, even when informed that such measures may result in higher shipping costs and delays. France (**91%**) and Spain (**90%**) show the highest support.

# Main findings

## Focus on the role of the EU

There is a significant positive sentiment toward EU leadership for addressing the issue of underwater noise. **31%** would feel hopeful if the EU was the first in the world to implement a mandatory ship speed reduction to protect marine life. Besides, **28%** would feel proud. In total, **59%** express positive feelings about EU action, suggesting that such leadership would generate political capital rather than resistance. Only **13%** are primarily concerned about potential negative economic impacts.

## Personal willingness to act

Globally, respondents indicate a readiness to take action: **69%** say they would be willing to accept little shipping delays, and **59%** say that they would support or vote for policies aimed at reducing underwater noise pollution. Moreover, **51%** would be ready to share information or raise awareness and **44%** would be ready to accept higher shipping costs.

When it comes to the "Blue Speeds" label, a total of **84%** of respondents would choose a product shipped via reduced-speed vessels even if it results in delayed and/or more expensive delivery. However, the majority (**51%**) would choose it only if the price is the same and delivery takes longer, while a committed **28%** would opt for this even at higher costs and delays. Only **6%** would never choose this option, demonstrating strong consumer receptivity to sustainable shipping labels.

**In the context of multiple forms  
of pollution, Europeans care deeply  
about marine life**

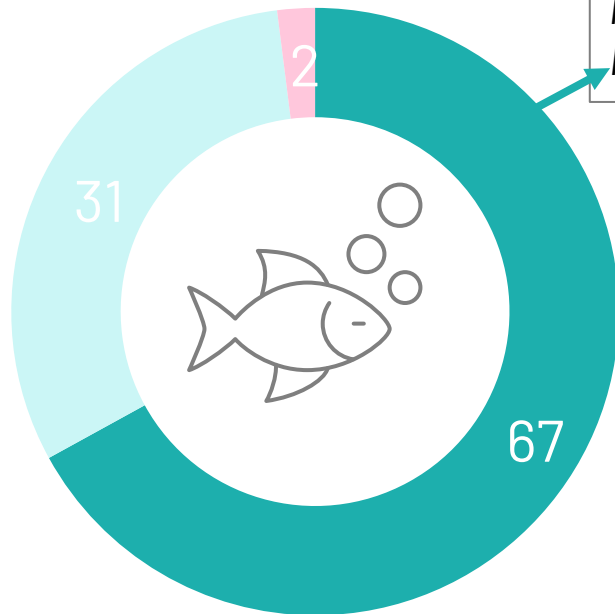
**01**

# More than 6 citizens out of 10 think that it is very important to protect marine life – a European consensus

Question : In your opinion, how important is it to protect marine life?

Base : All

## 5-country average



- Very important
- Rather important
- Rather not important
- Not important at all

People aged 65 and more : 73% vs People under 35 : 60%  
 People living in densely populated area : 69%  
 High education : 69%

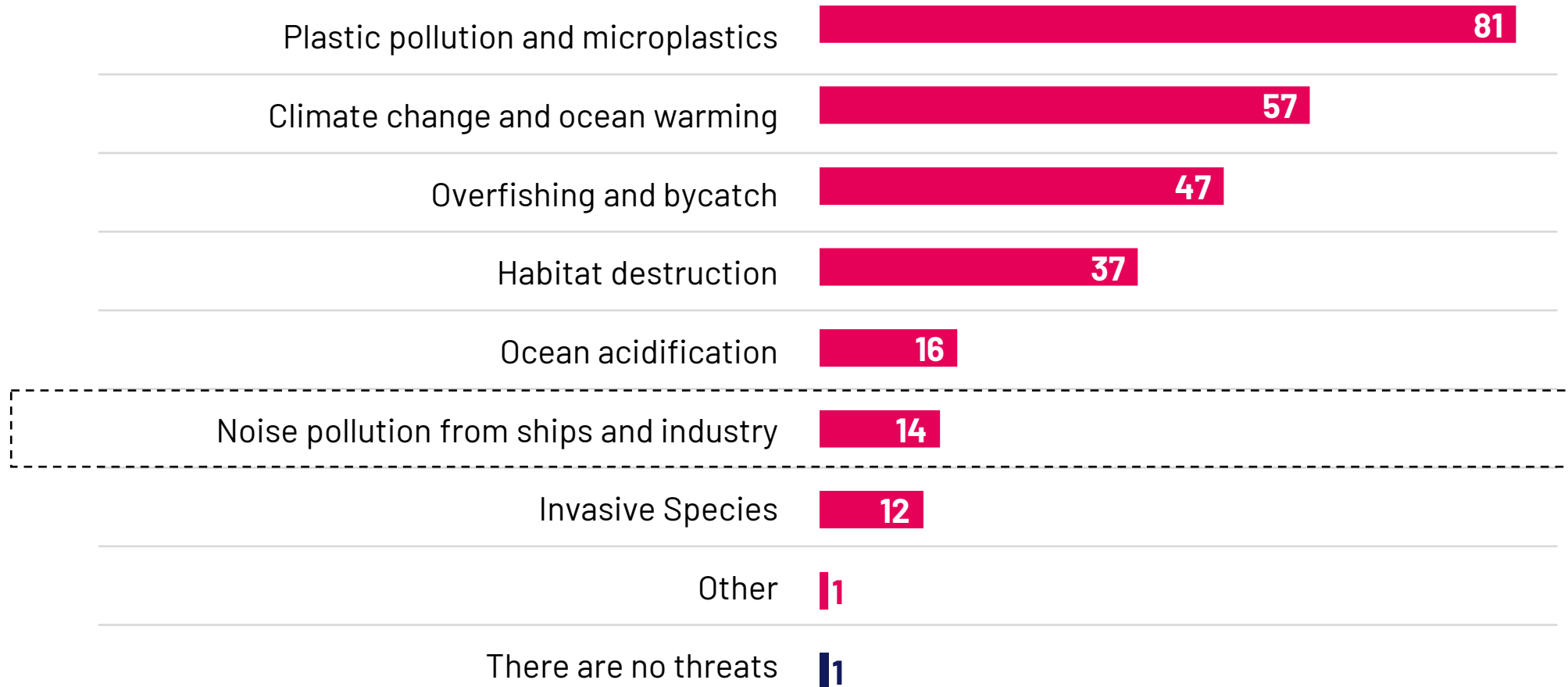
## Average per country

	5-country average	France	Germany	NL	Spain	Sweden
<b>ST Important</b>	<b>98</b>	<b>99</b>	<b>97</b>	<b>97</b>	<b>98</b>	<b>97</b>
Very important	<b>67</b>	69	65	65	71	65
Rather important	<b>31</b>	30	32	32	27	32
<b>ST Not important</b>	<b>2</b>	<b>1</b>	<b>3</b>	<b>3</b>	<b>2</b>	<b>3</b>
Rather not important	<b>2</b>	1	3	2	1	2
Not important at all	-	-	-	1	1	1

# Plastic pollution is the main threat identified, followed by climate change. Noise pollution is only cited by 14%

Question : What, in your opinion, are the main threats to marine life? - Three answers possible, total higher than 100%

Base : All








# The perception of underwater noise as a threat is higher in France and Spain compared to other countries

Question : What, in your opinion, are the main threats to marine life? – Three answers possible, total higher than 100%

Base : All

 Highest result

	5-country average	France 	Germany 	Netherlands 	Spain 	Sweden 
Plastic pollution and microplastics	<b>81</b>	87	83	83	82	71
Climate change and Ocean warming	<b>57</b>	61	54	57	59	55
Overfishing and bycatch	<b>47</b>	54	50	42	40	51
Habitat destruction	<b>37</b>	23	46	42	40	34
Ocean acidification	<b>16</b>	16	14	15	10	22
Noise pollution from ships and industry	<b>14</b>	20	12	13	19	7
Invasive Species	<b>12</b>	15	6	6	16	16
Other	<b>1</b>	1	1	1	1	1
There are no threats	<b>1</b>	1	1	2	1	1

# Plastic pollution is the main threat identified by people of all ages and educational backgrounds

Question : What, in your opinion, are the main threats to marine life? – Three answers possible, total higher than 100%

Base : All

	Av.	Gender*age														Education		
		Men	18-24	25-34	35-44	45-54	55-64	65 and more	Women	18-24	25-34	35-44	45-54	55-64	65 and more	Low	Medium	High
Plastic pollution and microplastics	<b>81</b>	79	76	72	74	73	82	88	83	78	77	82	81	87	89	78	80	82
Climate change and Ocean warming	<b>57</b>	53	51	47	54	52	51	58	61	57	61	60	55	63	65	47	54	62
Overfishing and bycatch	<b>47</b>	52	43	49	51	51	52	58	42	34	43	43	43	42	45	38	50	48
Habitat destruction	<b>37</b>	36	38	41	40	39	36	31	37	45	43	40	34	35	30	38	37	37
Ocean acidification	<b>16</b>	16	20	20	20	17	16	12	15	21	18	14	13	16	10	12	15	16
Noise pollution from ships and industry	<b>14</b>	12	12	14	13	12	12	10	17	17	15	18	21	17	16	15	16	13
Invasive Species	<b>12</b>	14	11	14	12	13	14	15	10	8	7	8	11	10	14	11	12	12
Other	<b>1</b>	1	1	1	1	1	2	1	1	1	1	-	1	1	1	1	1	1
There are no threats	<b>1</b>	1	1	2	1	2	1	-	1	2	1	1	2	2	1	4	1	1

# Underwater noise : an unknown threat

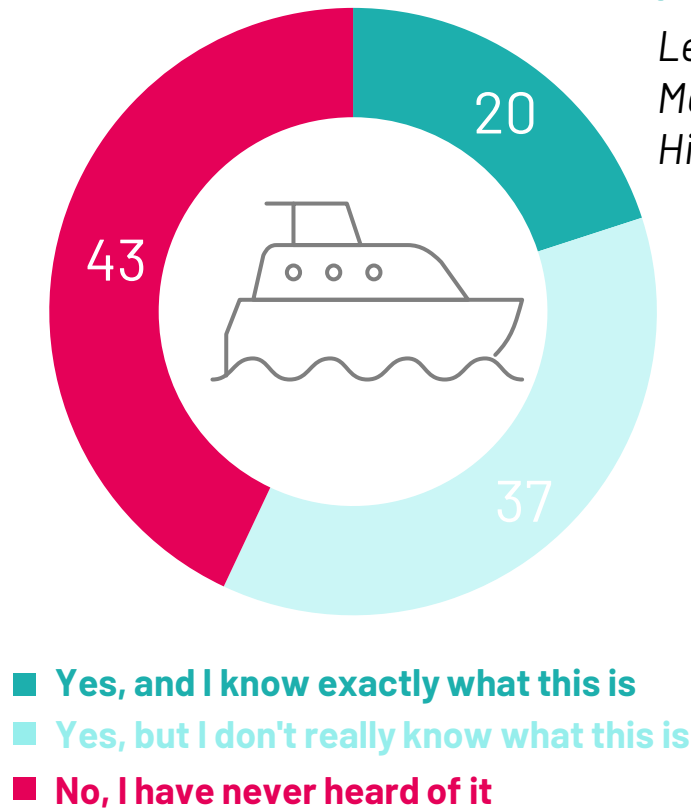
# 02

# Almost 6 of 10 Europeans have heard of underwater noise as a form of marine pollution

Question : Have you already heard of underwater noise as a form of marine pollution?

Base : All

## 5-country average



**% Yes : 57%**

Less than 35 years old : **63%** vs 55 and over : **55%**

Managers and professionals: **65%**

High education : **61%**

## Average per country

	5-country average	France	Germany	NL	Spain	Sweden
Yes	<b>57</b>	<b>56</b>	<b>61</b>	<b>59</b>	<b>56</b>	<b>54</b>
Yes, and I know exactly what this is	<b>20</b>	18	25	23	17	15
Yes, but I don't really know what this is	<b>37</b>	38	36	36	39	39
No, I have never heard of it	<b>43</b>	44	39	41	44	46

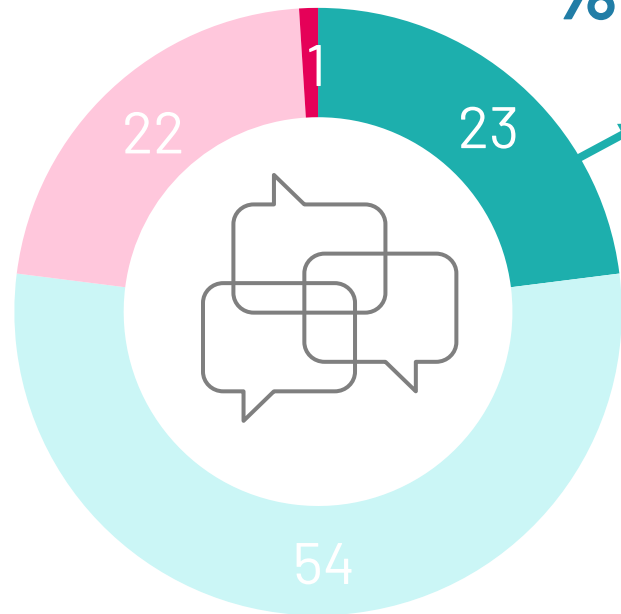
# Those who know what this is are particularly concerned, especially in Germany and Spain

Question : How concerned are you about the impact of underwater noise on marine life?

Base : Know about underwater noise

5-country average






**%Concerned : 77%**



People who know exactly what underwater noise is : **41%**

- **Extremely concerned**
- **Somewhat concerned**
- **Not very concerned**
- **Not at all concerned**

**Average per country**

	5-country average	France 	Germany 	NL 	Spain 	Sweden 
<b>ST Concerned</b>	<b>77</b>	<b>73</b>	<b>85</b>	<b>71</b>	<b>81</b>	<b>76</b>
Extremely concerned	23	21	28	20	28	17
Somewhat concerned	54	52	57	51	53	59
<b>ST Not concerned</b>	<b>23</b>	<b>27</b>	<b>15</b>	<b>29</b>	<b>19</b>	<b>24</b>
Not very concerned	22	26	14	26	18	23
Not at all concerned	1	1	1	3	1	1

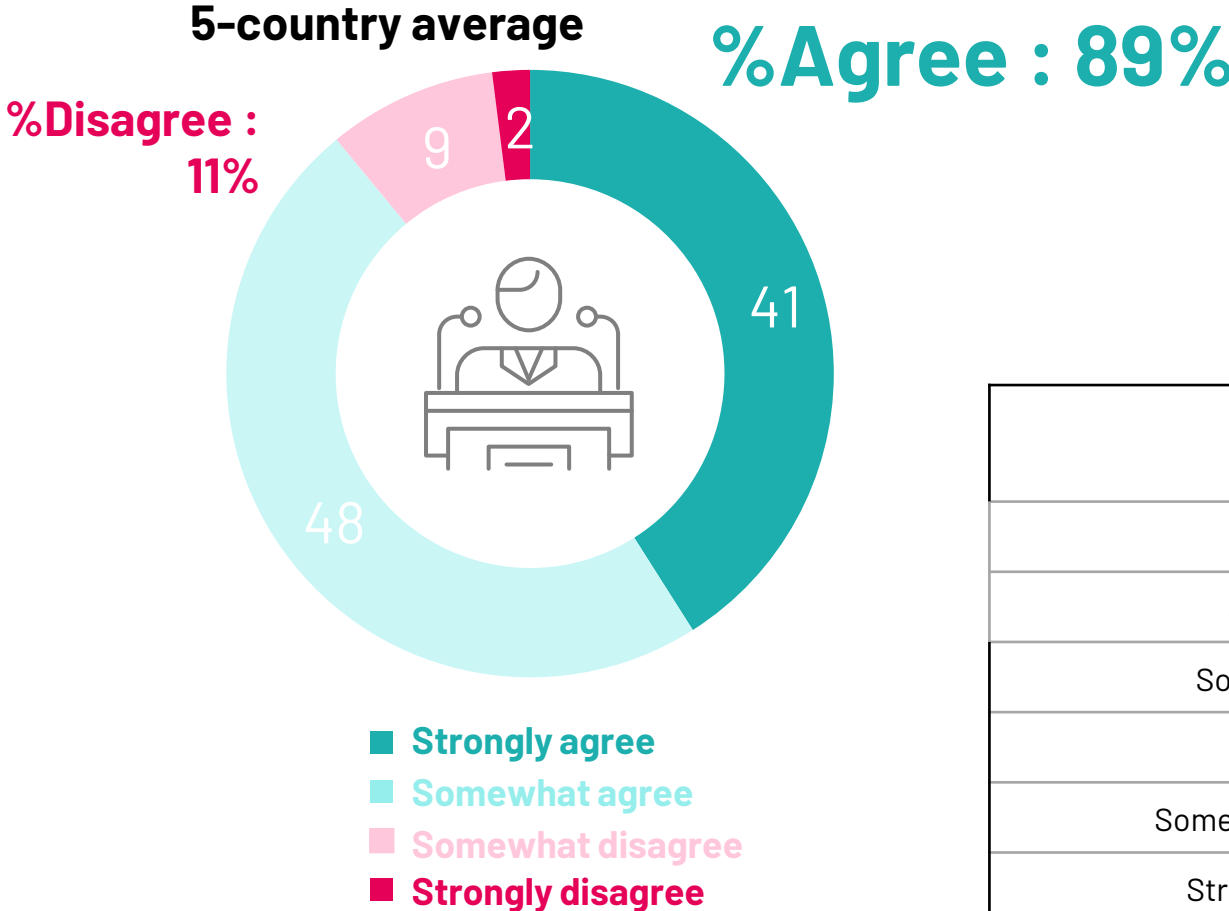
At this moment of the survey, all respondents have been given a description of underwater noise pollution: *“Under the sea, noise from shipping adversely impacts marine life. Sound is the primary cue upon which a wide range of marine animals rely, from the largest whales to tiniest plankton. Sound is essential to communicate with one another, find food, navigate and avoid predators. Scientific studies undeniably show that underwater noise pollution is detrimental to marine species. Globally, more than half of all underwater noise is produced by the commercial shipping sector.”*



# Once Europeans learn about underwater noise, they believe that it is a problem that must be dealt with immediately (41%)

Question : Do you think this problem should be urgently dealt with?

Base : All



**Average per country**

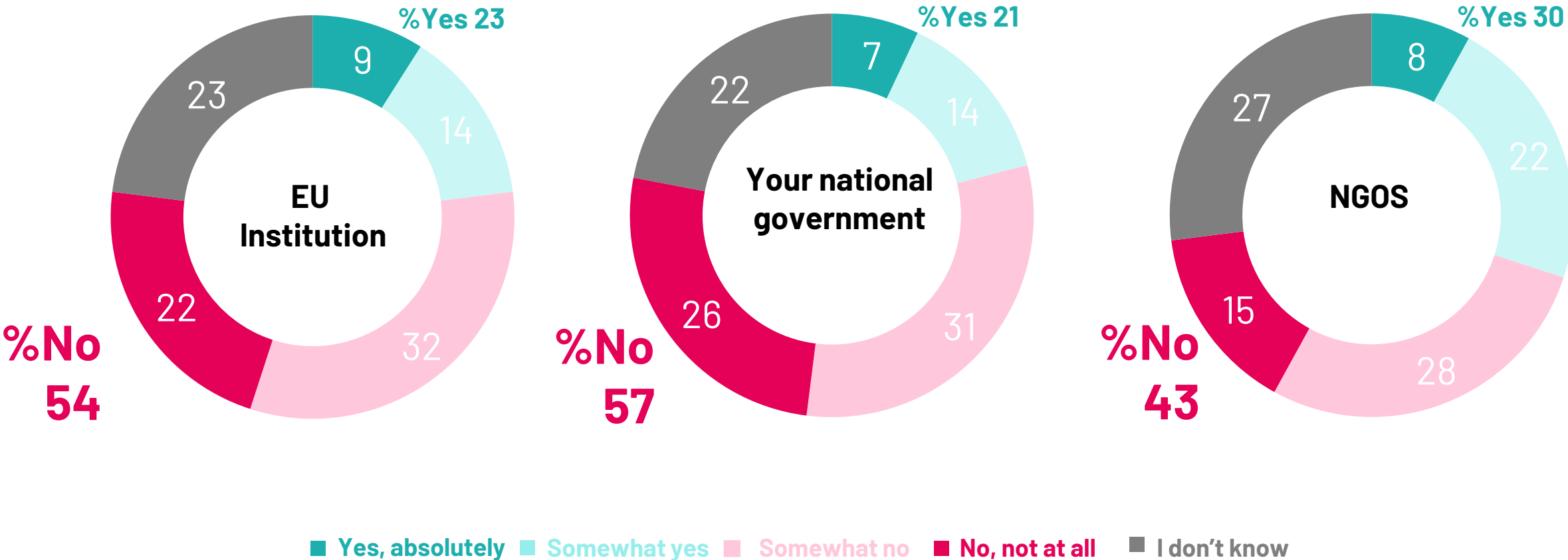
	5-country average	France	Germany	NL	Spain	Sweden
<b>ST Agree</b>	<b>89</b>	<b>89</b>	<b>95</b>	<b>88</b>	<b>90</b>	<b>81</b>
Strongly agree	41	29	53	33	43	46
Somewhat agree	48	60	42	55	47	35
<b>ST Disagree</b>	<b>11</b>	<b>11</b>	<b>5</b>	<b>12</b>	<b>10</b>	<b>19</b>
Somewhat disagree	9	10	4	10	9	16
Strongly disagree	2	1	1	2	1	3

# Besides, they think either the actors are not doing enough, or they do not know what the actors have undertaken

Question : For each actor, do you think they are doing enough to address underwater noise?

Base : All

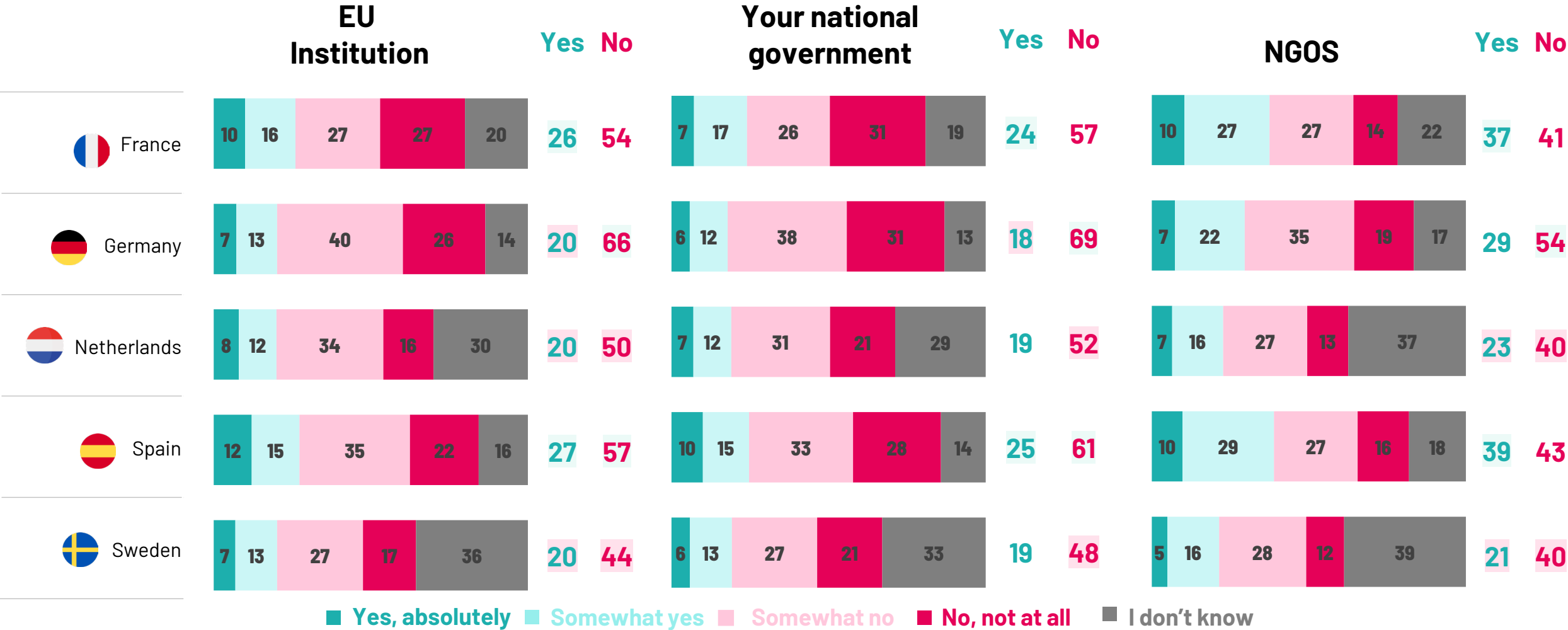
## 5-country average



# In France and Spain, people are a little more aware of the actions undertaken by different actors, especially NGOs

Question : For each actor, do you think they are doing enough to address underwater noise?

Base : All



# A strong support for regulatory action

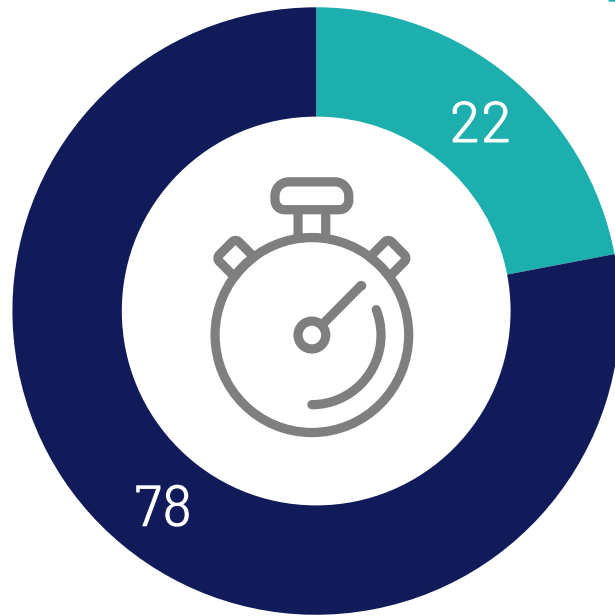
# 03

# A majority of European think that regulation is necessary to ensure that ships slow down

Question : Currently, there are no speed limits for ships on the open ocean. Which of the following statements comes closest to your view?

Base : All

Shipping companies should be allowed to regulate their own speeds voluntarily



Regulations are necessary to ensure ships slow down

Average per country

	5-country average	France	Germany	NL	Spain	Sweden
Shipping companies should be allowed to regulate their own speeds voluntarily	22	19	26	21	25	19
Regulations are necessary to ensure ships slow down	78	81	74	79	75	81

# In this context, 8 in 10 support the implementation of such measures in the next 5 years

Question : To reduce underwater noise pollution and improve the conservation status of our seas, a slight speed reduction for commercial and recreational vessels could be implemented. This reduction may imply higher shipping costs and shipping delays.

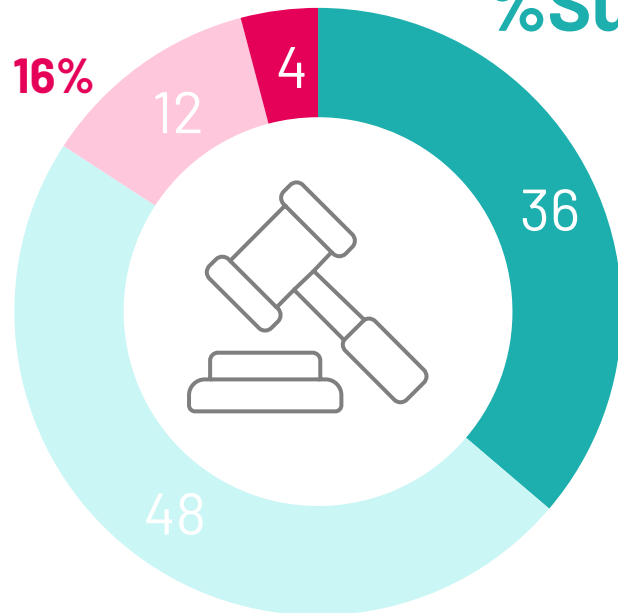
Would you support the implementation of such measures in the next 5 years?

Base : All

5-country average






%Support : 84%

%Oppose: 16%



- **Totally support**
- **Somewhat support**
- **Somewhat oppose**
- **Totally oppose**

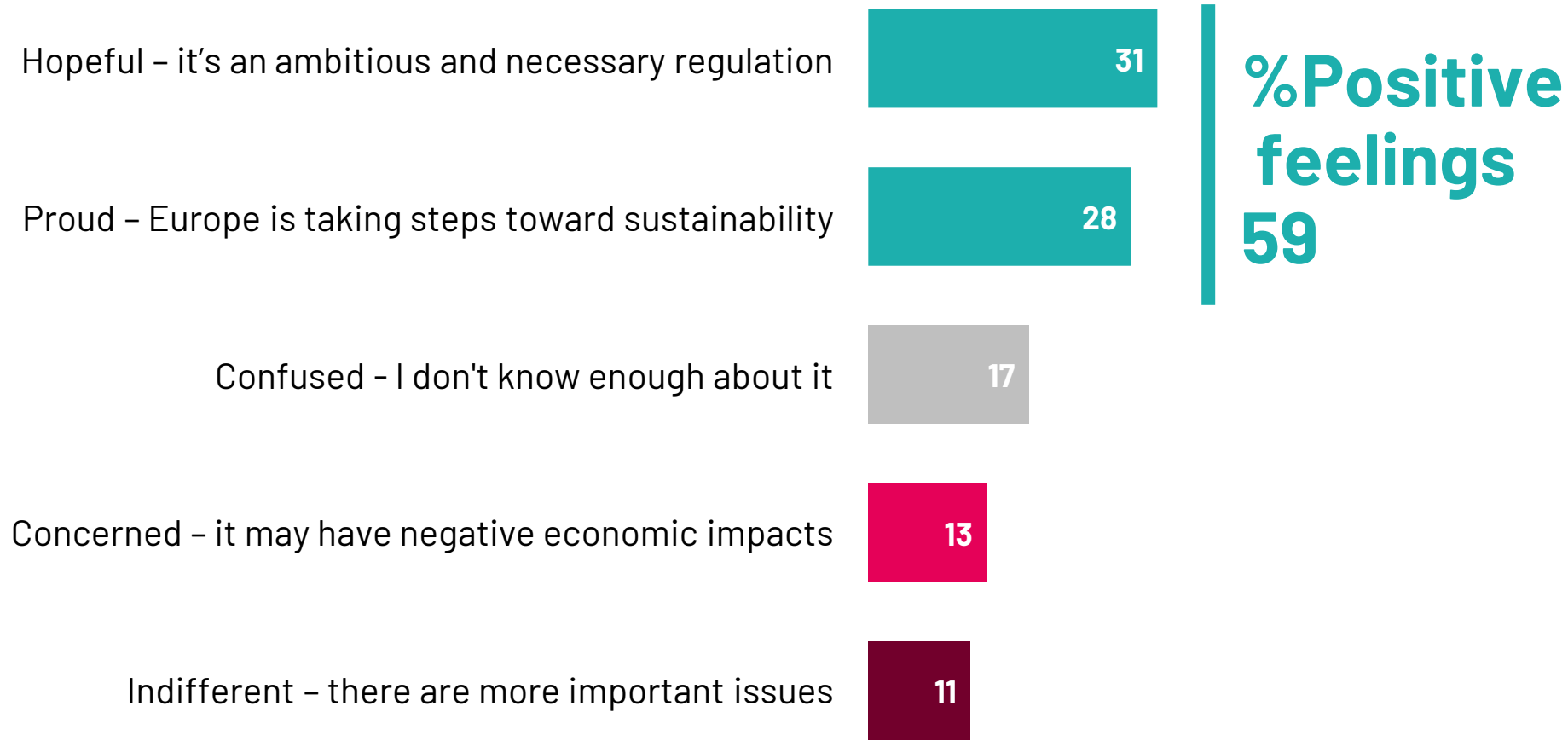
Average per country

	5-country average	France 	Germany 	NL 	Spain 	Sweden 
<b>ST Support</b>	<b>84</b>	<b>91</b>	<b>84</b>	<b>85</b>	<b>90</b>	<b>69</b>
Totally support	36	38	37	37	40	28
Somewhat support	48	53	47	48	50	41
<b>ST Oppose</b>	<b>16</b>	<b>9</b>	<b>16</b>	<b>15</b>	<b>10</b>	<b>31</b>
Somewhat oppose	12	7	12	11	8	22
Totally oppose	4	2	4	4	2	9

# Moreover, this measure would make them feel hopeful and proud !

Question : How would you feel if the EU was to be the first in the world to implement a mandatory ship speed reduction to protect marine life?

Base : All








# French respondents would feel particularly hopeful, while Spaniards would feel proud

Question : How would you feel if the EU was to be the first in the world to implement a mandatory ship speed reduction to protect marine life?

Base : All

 Highest result

	5-country average	France 	Germany 	Netherlands 	Spain 	Sweden 
Hopeful – it’s an ambitious and necessary regulation	<b>31</b>	35	31	28	31	30
Proud – Europe is taking steps toward sustainability	<b>28</b>	27	24	30	32	30
Confused – I don't know enough about it	<b>17</b>	17	22	16	15	15
Concerned – it may have negative economic impacts	<b>13</b>	10	14	15	13	10
Indifferent – there are more important issues	<b>11</b>	11	9	11	9	15

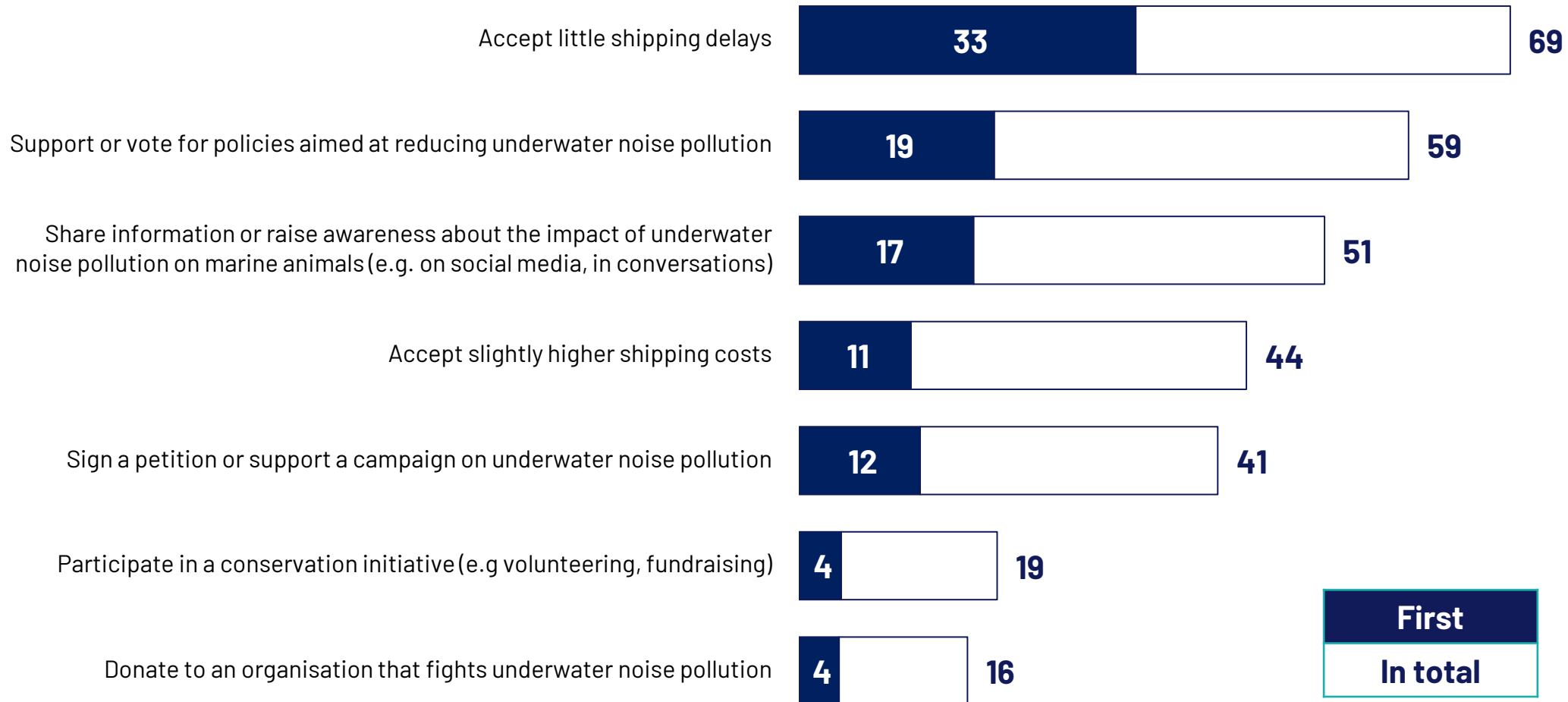
# Citizens are ready to take actions

# 04

# Willing to wait: 69% would accept little shipping delays

Question : People can take different actions when it comes to underwater noise pollution. To protect marine life from noise pollution, which of the following would you be willing to do? First, Second, Third?






Base : All



# Shipping delays are particularly accepted in France and Germany

Question : People can take different actions when it comes to underwater noise pollution. To protect marine life from noise pollution, which of the following would you be willing to do? First, Second, Third?

Base : All

%Total	5-country average	France 	Germany 	Netherlands 	Spain 	Sweden 
Accept little shipping delays	<b>69</b>	78	72	71	60	65
Support or vote for policies aimed at reducing underwater noise pollution	<b>59</b>	56	54	57	64	66
Share information or raise awareness about the impact of underwater noise pollution on marine animals (e.g. on social media, in conversations)	<b>51</b>	48	45	43	54	66
Accept slightly higher shipping costs	<b>44</b>	42	52	50	28	46
Sign a petition or support a campaign on underwater noise pollution	<b>41</b>	44	42	44	52	22
Participate in a conservation initiative (e.g. volunteering, fundraising)	<b>19</b>	21	16	17	27	16
Donate to an organisation that fights underwater noise pollution	<b>16</b>	12	18	18	15	21

# In terms of age, the youngest are less inclined to accept little shipping delays

Question : People can take different actions when it comes to underwater noise pollution. To protect marine life from noise pollution, which of the following would you be willing to do? First, Second, Third?

Base : All

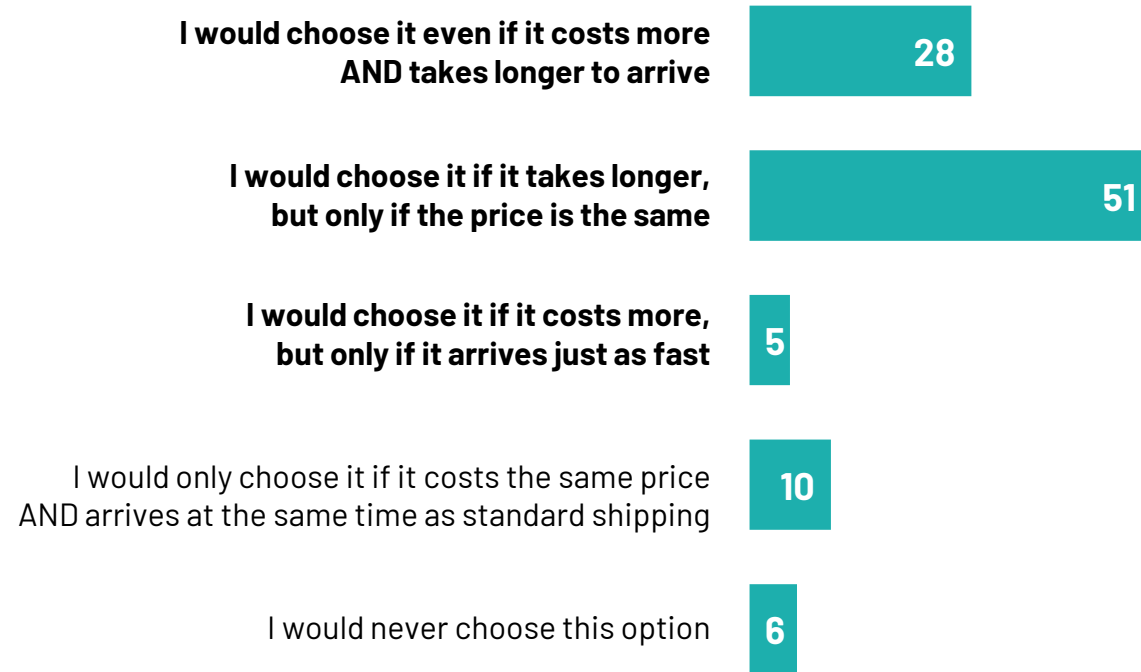
%Total	Av.	Gender*age													
		Men	18-24	25-34	35-44	45-54	55-64	65 and more	Women	18-24	25-34	35-44	45-54	55-64	65 and more
Accept little shipping delays	<b>69</b>	71	54	64	69	71	77	76	68	55	67	67	68	66	77
Support or vote for policies aimed at reducing underwater noise pollution	<b>59</b>	61	54	57	57	57	61	69	58	56	55	57	58	59	60
Share information or raise awareness about the impact of underwater noise pollution on marine animals (e.g. on social media, in conversations)	<b>51</b>	50	52	50	46	51	51	51	52	55	51	51	54	53	52
Accept slightly higher shipping costs	<b>44</b>	45	34	38	45	43	47	51	42	31	40	41	44	43	48
Sign a petition or support a campaign on underwater noise pollution	<b>41</b>	38	47	40	39	39	39	34	43	45	44	45	42	46	40
Participate in a conservation initiative (e.g volunteering, fundraising)	<b>19</b>	19	32	27	24	22	13	11	20	32	24	21	18	18	12
Donate to an organisation that fights underwater noise pollution	<b>16</b>	16	28	24	20	17	12	9	17	26	19	18	17	15	12

# However, price is the key factor: 51% would choose a reduced speed shipping option if it takes longer but only if the price were the same

Question : Imagine you are buying a product online. If you had the choice between two identical products, would you choose the one labeled as "Shipped via Blue Speeds" (meaning it was transported on a ship with reduced speed to protect marine life)?

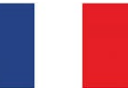
Base : All

## 5-country average



	France	Germany	NL	Spain	Sweden
I would choose it even if it costs more AND takes longer to arrive	26	29	33	22	31
I would choose it if it takes longer, but only if the price is the same	55	51	46	57	46
I would choose it if it costs more, but only if it arrives just as fast	4	5	6	5	6
I would only choose it if it costs the same price AND arrives at the same time as standard shipping	9	8	9	12	12
I would never choose this option	6	7	6	4	5
<b>ST Ready to choose it even if it takes longer and/or costs more</b>	<b>85</b>	<b>85</b>	<b>85</b>	<b>84</b>	<b>83</b>

# Appendices



# OUR COMMITMENTS

## PROFESSIONAL CODES, QUALITY CERTIFICATION CONSERVATION AND DATA PROTECTION

Ipsos is a member of the following French and European market and opinion research professional bodies:

- **SYNTEC (professional union of market research companies in France; [www.Syntec-etudes.Com](http://www.Syntec-etudes.Com))**
- **ESOMAR (European Society for Opinion and Market Research, [www.Esomar.Org](http://www.Esomar.Org))**



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Market Research - version 2019  
BY AFNOR CERTIFICATION**

This document has been produced in compliance with these international codes and standards.

Ipsos France undertakes to apply the **ICC/Esomar** code for market and opinion research. This code defines the ethical rules for market research professionals and establishes the protective measures from which the persons questioned benefit. Ipsos is committed to complying with applicable laws.



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As such, the retention period for the personal data of people interviewed as part of a study is, unless there is a specific contractual commitment:

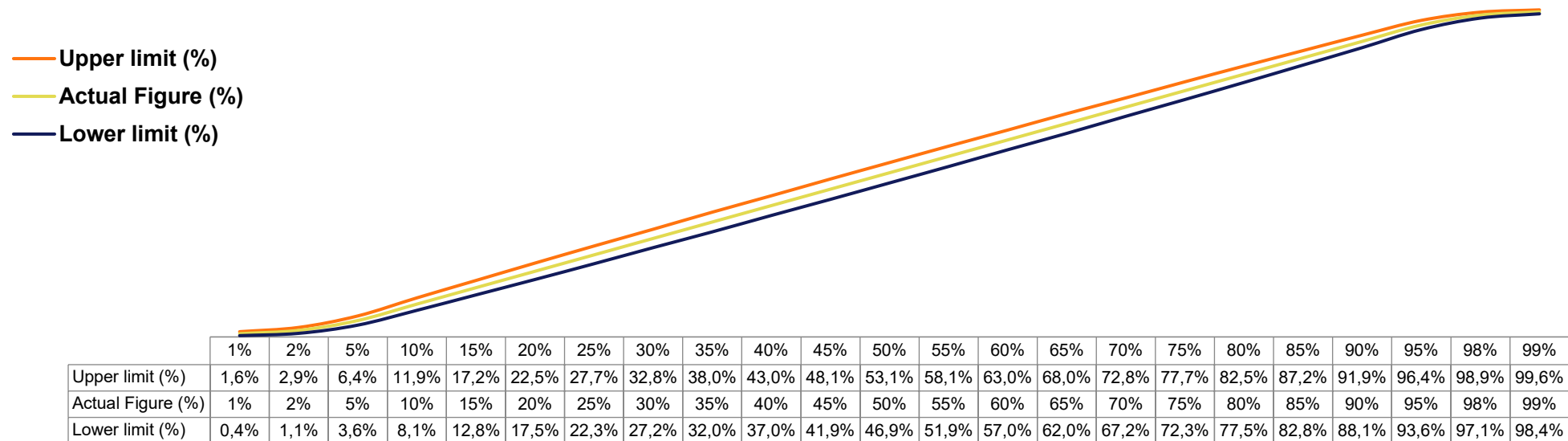
- 12 months following the end date of an Ad Hoc study.
- 36 months following the end date of each wave of a recurring study.

# RELIABILITY OF RESULTS SPREADSHEET

In this instance, with regard to this study:

- Confidence interval: **95%**
- Size of sample: **5000**

The proportions observed are between :



# Survey overview

CAWI survey – Online panel

## SAMPLE

- **Target** : national representative samples, 18 years old and over, in France, Germany, the Netherlands, Spain and Sweden
- **Selection of the respondent** : participant selection using quota method
- **Sample representativeness** : age, gender, occupation, region and market size.

## DATA COLLECTION

- **Fieldwork dates** : 11th February to 26th February 2026
- **Sample achieved** : 5000 interviews
- **Data collection** : on line with IIS Panel
- **Loyalty program with points- based award system for panelists**
- **Response quality control methods: monitoring of participants' response behaviour (identification of responses that are too quick or careless, e.g. ticked in a straight or zigzag line)**
- **Checking of IP and consistency of demographic data.**
- Data will be kept on a protected network for 1 year

## DATA PROCESSING

- Weighted sample
- Method used: Rim Weighting Method
- Weighting criteria: age, gender, occupation, region and market size.

# RELIABILITY OF RESULTS:

## Self completion online surveys

**To ensure the overall reliability of a survey, all possible error components must be taken into account. That is why Ipsos imposes strict controls and procedures at each stage of the survey process.**

### UPSTREAM OF THE DATA COLLECTION

- **Sample** : structure and representativeness
- **Questionnaire** : the questionnaire is worded by following an editing process with 12 compulsory standards. It is proofread and approved at a senior level and then sent to the client for final validation. The programming (or questionnaire script) **is tested by at least 2 people and validated.**
- **Data collection** : the interviewers are trained in survey techniques through a dedicated training module prior to any participation in a survey. In addition, they receive or attend a detailed briefing at the start of each survey.

### DURING THE DATA COLLECTION

- **Sampling** : Ipsos imposes very strict operating rules for its selection frame in order to maximize the random nature of the sample selection : random selection from telephone listings, quota method, etc.

- **Fieldwork monitoring** : collection is monitored and checked (exclusive link, IP validation, panelists' behavior monitoring penetration, interview length, consistency of responses, participation rate, number of reminders, etc.)

### DOWNSTREAM OF THE DATA COLLECTION

- The results are analyzed in accordance with the statistical analysis methods (confidence interval versus sample size, significance tests). The first results are systematically checked against the raw results from the data collection. The consistency of results is also checked (particularly the results observed versus comparison sources in our possession).
- In cases where sample weighting is used (margin calibration method), this is checked by the processing teams (DP) and then validated by the survey teams.

# Survey overview

Organization (CAWI survey - Online panel)

## ACTIVITIES CARRIED OUT OR COORDINATED BY IPSOS bva

- Design and methodology
- Conception and design of questionnaire/ validation of scripting
- Coordination and validation of translation
- Coordination of data collection
- Data processing
- Validation of the statistical analyses
- Creation of survey report
- Results presentation design
- Formatting of results

## ACTIVITIES CARRIED OUT BY IPSOS EXPERT LOCAL TEAMS

- Sampling (IIS panel)
- Emailing
- Data collection
- Data Map

## ACTIVITIES ENTRUSTED TO OUR APPROVED PARTNERS

- Translation

# ABOUT IPSOS

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Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees.

Our 75 business solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarizes our ambition to help our 5,000 clients navigate with confidence our rapidly changing world.

Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120, Mid-60 indices, STOXX Europe 600 and is eligible for the Deferred Settlement Service (SRD).  
ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg, IPS:FP

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# GAME CHANGERS

In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:

**You act better when you are sure.**