

# 2024 NATIONAL RISKS PUBLIC SURVEY ALL THREATS & HAZARDS



GAME CHANGERS



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# BACKGROUND & METHODOLOGY

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# RESEARCH OBJECTIVES

This is the third annual survey the Department of the Prime Minister and Cabinet (DPMC) has commissioned to understand public perceptions of National Risks (including both national security threats and significant hazards). While previous surveys focused more on national security threats, the scope has been broadened to include significant hazards.

The Survey explores:

- New Zealanders' awareness of National Risks, including the public's perceived likelihood of these over the short (next 12 months) and long term (next 10 years).
- Public confidence in government agencies' abilities to protect and respond.
- Opportunities to build confidence, share information and better engage the public.

Survey findings inform the work of the National Hazards Board (NHB) and the National Security Board (NSB) and their agencies. The survey is also part of the National Security Strategy's current Programme of Action.

*This research report presents results from the third year of surveying (2024) and compares findings to results from the 2023 survey (where applicable).*

The Survey provides an understanding, across a nationally representative total sample of 2,350 people. The Survey is split across two 'tracks' where survey respondents are asked to share their views in relation to either **National Security Threats** (n=1,172) or **Significant Hazards** (n=1,178).

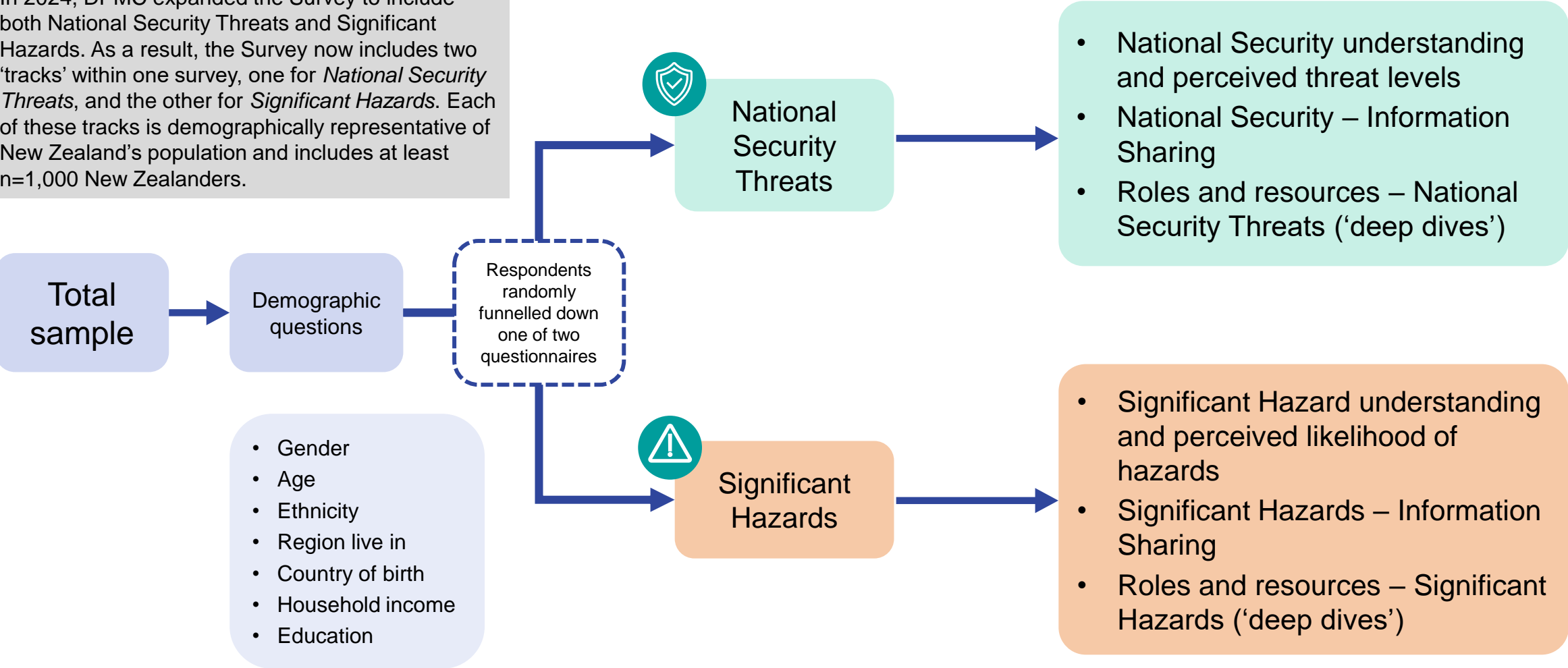


National security threats

Significant hazards

# 2024 NATIONAL RISKS PUBLIC SURVEY QUESTIONNAIRE FLOW

In 2024, DPMC expanded the Survey to include both National Security Threats and Significant Hazards. As a result, the Survey now includes two 'tracks' within one survey, one for *National Security Threats*, and the other for *Significant Hazards*. Each of these tracks is demographically representative of New Zealand's population and includes at least n=1,000 New Zealanders.



# METHODOLOGY – ALL HAZARDS AND THREATS



## Fieldwork dates

19<sup>th</sup> February–14<sup>th</sup>  
March 2024\*



## Methodology

Interviews were conducted online (self-completion). Respondents were recruited from Ipsos, Ipsos-partner panels and river sampling\*\*



## Weighting

The data was weighted to match NZ population for region, ethnicity & gender



## Sample achieved

Total survey = 2,350  
*National Security Threats*  
(n=1,172);  
*Significant Hazards*  
(n=1,178).

## \*Notes

- The Port Hills wildfire in Christchurch (early February 2024) overlapped with survey fieldwork. This may have impacted responses, especially from South island survey respondents.
- Statistically significantly **higher** / **lower** figures are reported at 95% confidence.
- We calculate the precision of Ipsos online polls using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points.
- Where results do not sum to 100 or the 'difference' appears to be + / -1 more / less than the actual, this may be due to rounding, multiple responses or the exclusion of 'don't know' or 'not stated' responses.
- Throughout the report, demographic differences are shown amongst the demographic groups that have a base size larger than n=50.
- \*\*See Appendix for further details on panels.

# CONTEXT – WHAT WAS MAKING THE NEWS DURING FIELDWORK?

It is likely news reporting at the time of surveying may have impacted responses. National headlines during survey fieldwork included the Port Hills fire and the Te Whatu Ora data breach. International headlines included Ukraine and Israel– Hamas conflicts.

Friday, 16 February 2024

## Port Hills fire now '70 per cent contained'

Gaza death toll: 29,000  
Palestinians have been killed in Israel-Hamas war

AP

20 Feb, 2024 10:19 AM ⌚ 7 mins to read

🔖 Save | ➦ Share

## Westpac releases economic overview for 'challenging' year ahead

5:50 am on 21 February 2024

Share this     

Monday, 11 March 2024

## Crews bring Waitaki District fires under control

Te Whatu Ora data breach has vaccinators fearing for their safety

10:16 am on 23 February 2024

Share this     

## Ukraine war: Eastern residents brace for Russian advance

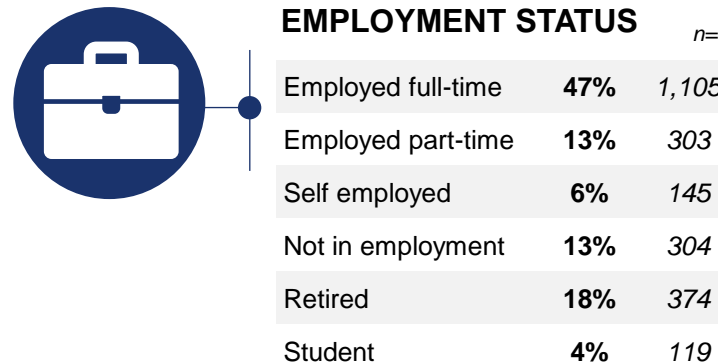
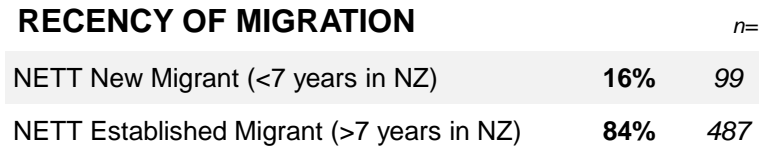
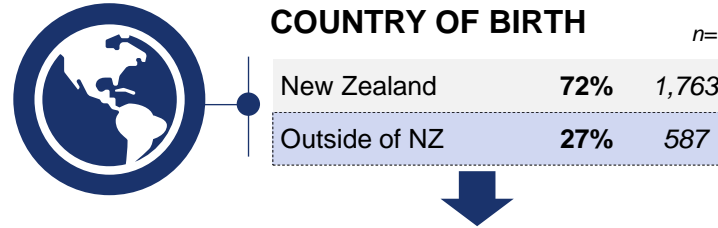
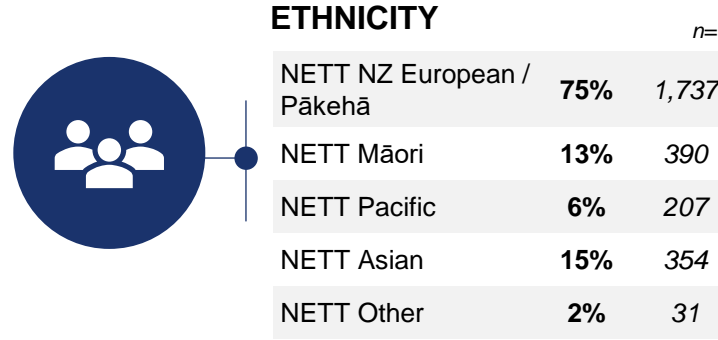
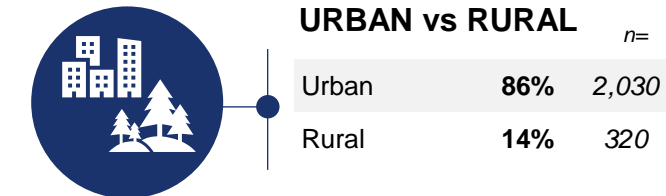
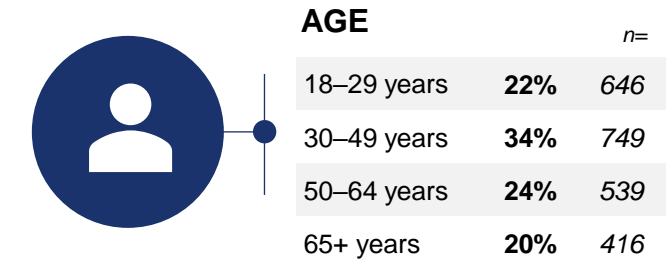
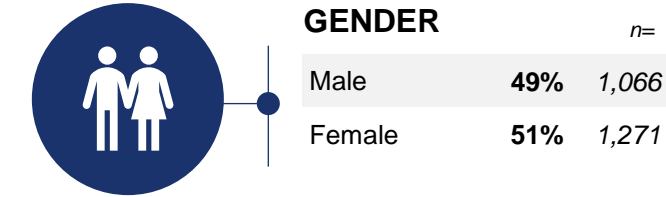
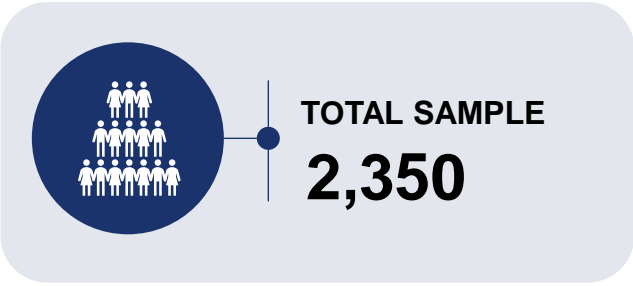
7 March 2024

By James Waterhouse, BBC Ukraine correspondent in the Donetsk region

➦ Share

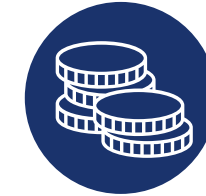
# SAMPLE INFORMATION

*\*Note: Where percentages do not add to 100%, this is due to 'don't know' and 'prefer not to say' responses. Percentages reflect the weighted distribution of sample, while the 'n' figures represent the actual number of responses against that demographic variable. As a result, the percentages and the 'n' figures do not map.*



**REGION** n=

Auckland	34%	811
Waikato	9%	212
Wellington	11%	262
Rest of North Island	21%	502
Canterbury	14%	325
Rest of South Island	10%	238



**HH INCOME\*** n=

\$0–50k	22%	518
\$50k–\$100k	31%	739
\$100k+	37%	852



**EDUCATION\*** n=

NETT None + Levels 1–3	32%	783
NETT Levels 4–7	48%	1,122
NETT Levels 8–10	18%	415



# 2023 HALIFAX INTERNATIONAL SECURITY FORUM

Ipsos' survey of citizens from 33 countries on behalf of the Halifax International Security Forum provides a useful point of comparison.

A 30-market survey conducted by Ipsos on its Global Advisor online platform and, in India, on its IndiaBus platform. Ipsos interviewed a total of 23,220 adults aged 18 years and older in India; 18–74 in Canada, Republic of Ireland, Malaysia, New Zealand, South Africa, Türkiye and the United States; 20–74 in Thailand; 21–74 in Indonesia and Singapore; and 16–74 in all other countries, between Friday, September 22 and Friday, October 6, 2023.

The sample consisted of approximately 2,000 individuals in Japan, 1,000 individuals each in Australia, Brazil, Canada, France, Germany, Great Britain, Italy, New Zealand, Spain and the US, and 500 individuals each in Argentina, Belgium, Chile, Colombia, Hungary, Indonesia, Ireland, Malaysia, Mexico, the Netherlands, Peru, Poland, Singapore, South Africa, South Korea, Sweden, Thailand and Türkiye. The sample in India consists of approximately 2,200 individuals, of whom approximately 1,800 were interviewed face-to-face and 400 were interviewed online.

The data is weighted so each country's sample composition best reflects the demographic profile of the adult population according to the most recent census data.

The 'Global Country Average' used in this report reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. To find out more, visit Ipsos' [website](#)<sup>1</sup> or view the full report [here](#)<sup>2</sup>.

**Where possible, we have used the Halifax Report results to compare New Zealand results with global country averages for perceived likelihood of National Risks in the next 12 months.**

<sup>1</sup> <https://www.ipsos.com/en-nz/threats-and-engagement-world-affairs-halifax-international-security-forum-survey>

<sup>2</sup> [https://www.ipsos.com/sites/default/files/ct/news/documents/2023-11/HISF%202023\\_FINAL%20NZ%20version.pdf](https://www.ipsos.com/sites/default/files/ct/news/documents/2023-11/HISF%202023_FINAL%20NZ%20version.pdf)



# KEY FINDINGS SUMMARY

# 2



# OVERALL FINDINGS

## Perceived global danger and National Risks to New Zealand in the short and long term

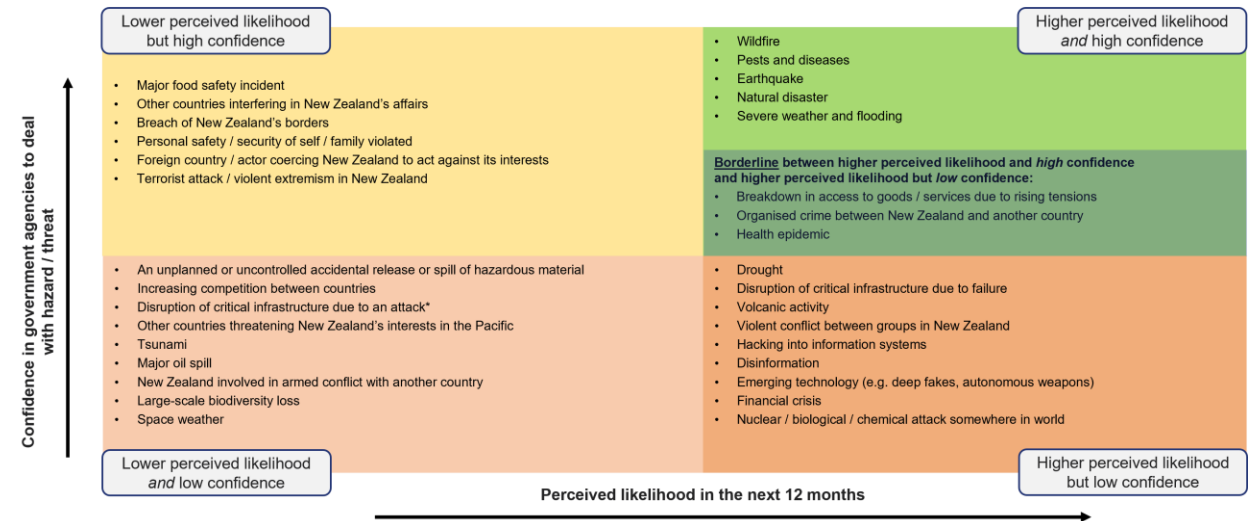
- Most New Zealanders (80%) believe the world has become a more dangerous place in the last year. Ipsos asked this same question in a [global World Affairs survey](#) across 30 countries and found New Zealanders held the same view as the global country average (84%).
- Across All National Risks (which include both National Security Threats and Significant Hazards) those seen as most likely and of concern in the next 12 months are:
  - *severe weather & flooding, earthquake and natural disaster.*
  - This 'top 3' is then followed by *organised crime, hacking into information systems and disinformation.*
- Across all six of these National Risks, New Zealanders reported they had already felt the effects or had experience of these Risks. New Zealand's *geography, natural environment and climate change* were also mentioned, particularly in relation to Significant Hazards. On National Security Threats, New Zealanders referred to a perceived a rise in crime and global events.
- In terms of National Risks over the next 10 years, the top-5 remain, although most of the threats and hazards are seen to be *more of a threat* in the next 10 years than the next 12 months.



# OVERALL FINDINGS

- 62% of New Zealanders want more information on *National Security Threats* and 61% about *Significant Hazards*. While just under half (48%) know where to find information about *Significant Hazards*, 22% know where to find information about *National Security*.
- As in previous years, just 20% agree that New Zealand’s national security agencies currently share enough information about National Security with New Zealanders. Only 30% agree government agencies share enough information about Significant Hazards.
- Confidence in government agencies’ abilities to provide protection or response to Risks is highest for *wildfire, major food-safety incident, pests & diseases* and *earthquakes*. The next three include: *other countries interfering in NZ affairs, breach of NZ borders* and *personal safety / being violated*.
- New Zealanders are least confident in government agencies’ abilities to provide protection or respond to: *nuclear / biological attack happening somewhere in the world, space weather* and *financial crisis*.

- When considering perceived Likelihood of a Risk vs. Confidence, the National Risks where New Zealanders have lower confidence relative to high perceived likelihood included: *drought, failure in infrastructure, volcanic activity, violent conflict between groups in New Zealand, hacking, disinformation, emerging technology, financial crisis* and *nuclear / biological / chemical attack somewhere in the world*.





# OVERALL FINDINGS – NATIONAL SECURITY THREATS

In 2024, we included ‘deep dives’ on *increased competition between countries*, *disruption of critical infrastructure (attack)* and *emerging technology*.

The majority of New Zealanders believe **the Government and its agencies have the most responsibility to protect against or respond to** the threats of *increasing competition between countries*, *disruption of critical infrastructure* and *emerging technology*. Fewer believe they are fully resourced to do so.



## INCREASING COMPETITION BETWEEN COUNTRIES

New Zealanders who mentioned *increased competition between countries* as a very real threat in the next 12 months, cited current international conflicts, foreign interference, trade and our country’s size and location making us vulnerable. Another reason is the ongoing Russian invasion of Ukraine.

### Perceived likelihood in next 12 months

11<sup>th</sup> out of 16 threats surveyed

### Perceived likelihood in next 10 years

11<sup>th</sup> out of 16 threats surveyed



## DISRUPTION OF CRITICAL INFRASTRUCTURE (ATTACK)

New Zealanders who stated they view *disruption of critical infrastructure* as a very real threat in the next 12 months, did so because of the size of our country’s population making us vulnerable, cyber security, seeing it is already happening and technological advances.

### Perceived likelihood in next 12 months

9<sup>th</sup> out of 16 threats surveyed

### Perceived likelihood in next 10 years

7<sup>th</sup> out of 16 threats surveyed



## EMERGING TECHNOLOGY

New Zealanders who mentioned *emerging technology* as a very real threat in the next 12 months, cited technological advances, seeing it is already happening now and cyber security. Another reason is the size of our country’s population making us vulnerable to larger foreign powers.

### Perceived likelihood in next 12 months

4<sup>th</sup> out of 16 threats surveyed

### Perceived likelihood in next 10 years

4<sup>th</sup> out of 16 threats surveyed



# OVERALL FINDINGS – SIGNIFICANT HAZARDS

In 2024, we included ‘deep dives’ on *severe weather & flooding*, *tsunami* and *disruption of critical infrastructure due to failure*.

The majority of New Zealanders believe that **the Government and its agencies have the most responsibility to protect against or respond to severe weather & flooding, tsunami and disruption of critical infrastructure due to failure**. Fewer believe they are fully resourced to do so.



## SEVERE WEATHER & FLOODING

New Zealanders who saw *severe weather & flooding* as a very real threat in the next 12 months, cited it as already happening now, a ‘natural phenomenon’, and the effects of climate change / global warming. Another reason is its likelihood to happen again based on past experience and get worse.

### Perceived likelihood in next 12 months

1<sup>st</sup> out of 16 hazards surveyed

### Perceived likelihood in next 10 years

2<sup>nd</sup> out of 16 hazards surveyed



## TSUNAMI

New Zealanders who stated they view a *tsunami* as a very real threat in the next 12 months, did so because of the geography / location of New Zealand, as well as it being a ‘natural phenomenon’ that is unpredictable.

### Perceived likelihood in next 12 months

12<sup>th</sup> out of 16 hazards surveyed

### Perceived likelihood in next 10 years

11<sup>th</sup> out of 16 hazards surveyed



## DISRUPTION OF CRITICAL INFRASTRUCTURE DUE TO FAILURE

New Zealanders who stated they view *disruption of critical infrastructure due to failure* as a very real threat in the next 12 months, did so because of the state of current infrastructure / roads, having already seen the effects of this as well as it being a ‘natural phenomenon’.

### Perceived likelihood in next 12 months

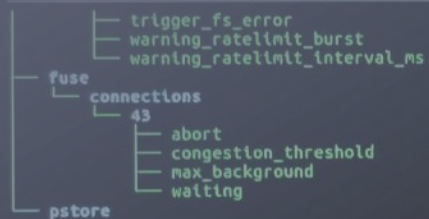
6<sup>th</sup> out of 16 hazards surveyed

### Perceived likelihood in next 10 years

7<sup>th</sup> out of 16 hazards surveyed

# WHAT DO 'NATIONAL RISK' & 'NATIONAL SECURITY' MEAN TO NEW ZEALANDERS?

# 3



159 directories, 927 files

```
EAENOSUPPORT 97 Address family not supported
by protocol
ENOSYS 38 Function not implemented
EXDEV 18 Invalid cross-device link
EREMOTEIO 121 Remote I/O error
ENOLINK 67 Link has been severed
EPROTOTYPE 91 Protocol wrong type for socket
ENETUNREACH 101 Network is unreachable
EMOTSUP 95 Operation not supported
ERFILE 23 Too many open files in system
EL2NSYNC 45 Level 2 not synchronized
ELIBSCN 81 .lib section in a.out corrupted
EQQUOT 122 Disk quota exceeded
```

A: 184.7 V: 209.9 A-V: -25.123 ct: -14.229 354

```
Derphattat (Derph-att-at) Delta-echo-romeo-pa
pa-hotel-alfa-tango-tango-alfa-tango
webBisgau (web-Bis-gau) whiskey-echo-bravo-Br
avo-india-sierra-golf-alfa-uniform
Atmeghomby (At-me-ghom-by) Alfa-tango-mike-ec
ho-golf-hotel-oscar-mike-bravo-yankee
jIudloym. (jI-Ud-loym-PERIOD) juliett-India-U
niform-delta-lima-oscar-yankee-mike-PERIOD
NenMothIc (Nen-Moth-Ic) November-echo-novembe
r-Mike-oscar-tango-hotel-India-charlie
```

```
9iv+U netcon1@ubuntu
The key's randomart image is:
+---[DSA 1024]-----+
+==0...
+o..o.
+o..o.
+o..+
+*oo+ . 5
oBo* .
+oBo...
```

CPU [||||| 100.0%] Tasks: 151  
Mem [||||| 631M/973M] Load average: 0.00  
Swp [||||| 432M/1022M] Uptime: 00:00

PID	USER	PRI	NI	VIRT	RES	SHR	S
55531	netcon1	39	19	23992	2568	2300	R
55705	netcon1	39	19	23992	2576	2344	R
47651	netcon1	20	0	65012	31712	2704	R
4826	netcon1	20	0	655M	25200	11900	S

# KEY FINDINGS

## What do 'National Risk' and 'National Security' mean to New Zealanders?

- Most respondents have a view on the terms 'National Risk' and 'National Security' when asked to describe what these mean, in their own words.
  - The most common concepts associated with the term 'National Risk' are '*general risk or threats that affect the whole country*'.
  - The most common concepts for National Security related to '*protecting / defending NZ*', '*NZ's security*' and '*keeping people protected & safe*'.
- 4 in 5 New Zealanders (80%) feel the world has become a more dangerous place in the last year. When asked about the impacts of climate change, 70% of New Zealanders perceive the risks from climate change have increased over the last year.
- The perceived likelihood and concern related to National Risks (either a National Security Threat or Significant Hazard) happening in the next twelve months is high. However, *severe weather & flooding, earthquake and a natural disaster (general)* are seen as most likely.
- The level of perceived likelihood over the next 10 years is seen to be significantly higher than in the next 12 months. *Organised crime between NZ & another country, hacking into information systems, disinformation, emerging technology and nuclear / biological / chemical attack somewhere in the world* are considered likely National Security Threats, both in the next 12 months and the next 10 years. *Severe weather, earthquake, natural disaster, wildfire and drought* are the top-5 Significant Hazards both in the next 12 months and the next 10 years.



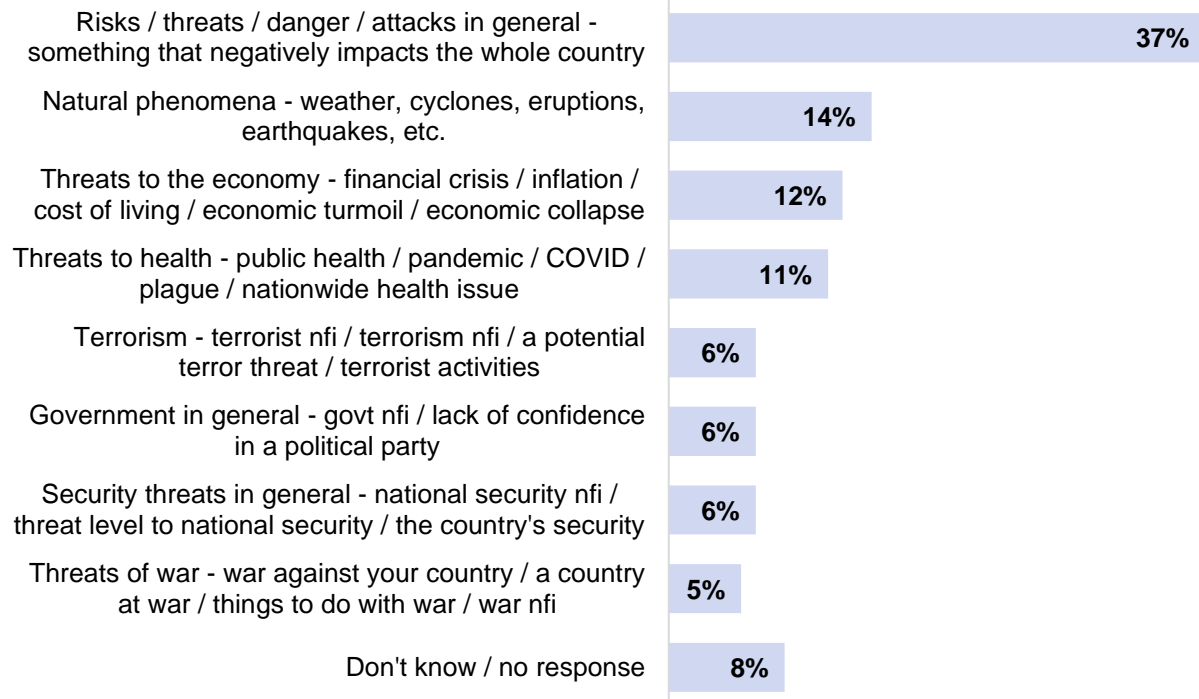


# UNDERSTANDING TERMS: 'NATIONAL RISK' / 'NATIONAL SECURITY'

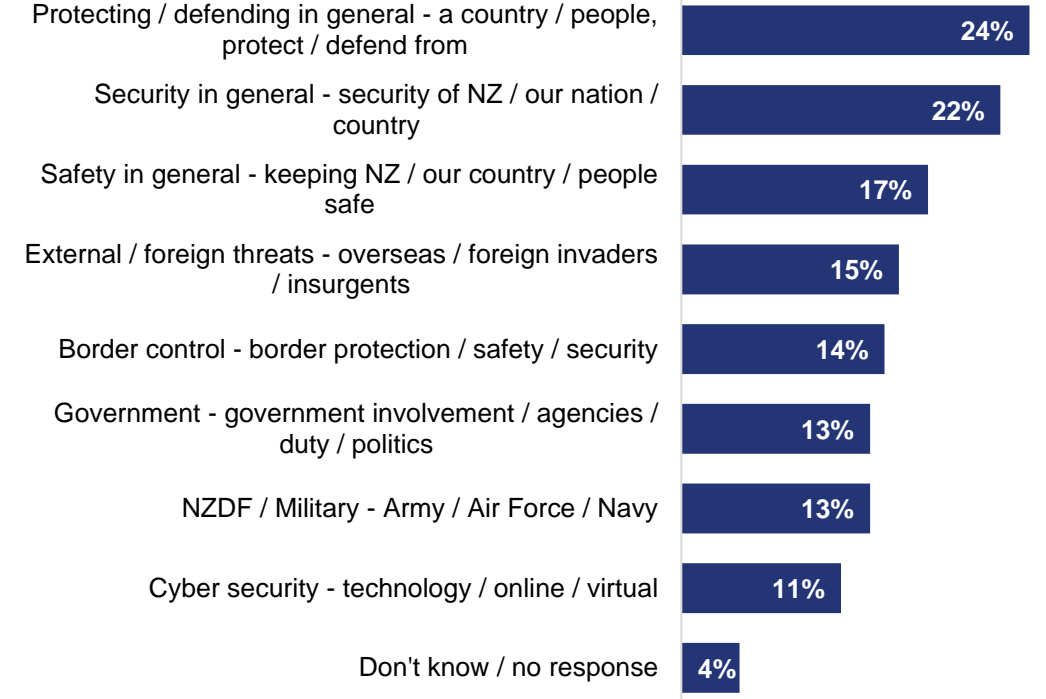
Most respondents had a view on what *National Risk* and *National Security* meant to them. The most *common* concepts for *National Risk* are 'overall risk or threats for New Zealand' while the most common concepts for *National Security* are 'protecting / defending NZ', 'NZ's security' and 'keeping people protected & safe'.



## What comes to mind when you see the term 'National Risk'?\*



## What comes to mind when you see the term 'National Security'?\*



**Q8:** When you see the term 'National Security', what comes to mind? **Base:** Total sample – 2024 (n=1,172). **\*Note:** Only the top-8 concepts are shown.

**Q8h:** When you see the term 'National Risk', what comes to mind? **Base:** Total sample – 2024 (n=1,178). **\*Note:** Only the top-8 concepts are shown.



# WHAT COMES TO MIND WHEN YOU SEE THE TERM ‘NATIONAL RISK’ – STATISTICALLY SIGNIFICANT DIFFERENCES

## Demographic Differences



### Risks / threats / danger / attacks in general (37%)

45% 18–29 years

32% Male



### Natural phenomena (14%)

19% 50–64 years

9% 18–29 years

5% NETT Māori



### Threats to the economy (12%)

21% NETT Levels 8–10

17% 65+ years

7% NETT None + Levels 1–3



### Government in general (6%)

10% Retired



### Security threats in general (6%)

11% Wellington

1% NETT Pacific peoples



### External / foreign threats (4%)

7% Born outside of NZ

1% 18–29 years



### Climate change / global warming (4%)

7% NETT Levels 8–10

1% NETT None + Levels 1–3



### Threats to the ecosystem (3%)

6% Rest of NI (excl. Wellington, Auckland, Waikato)



### We should take notice (1%)

5% NETT Pacific peoples



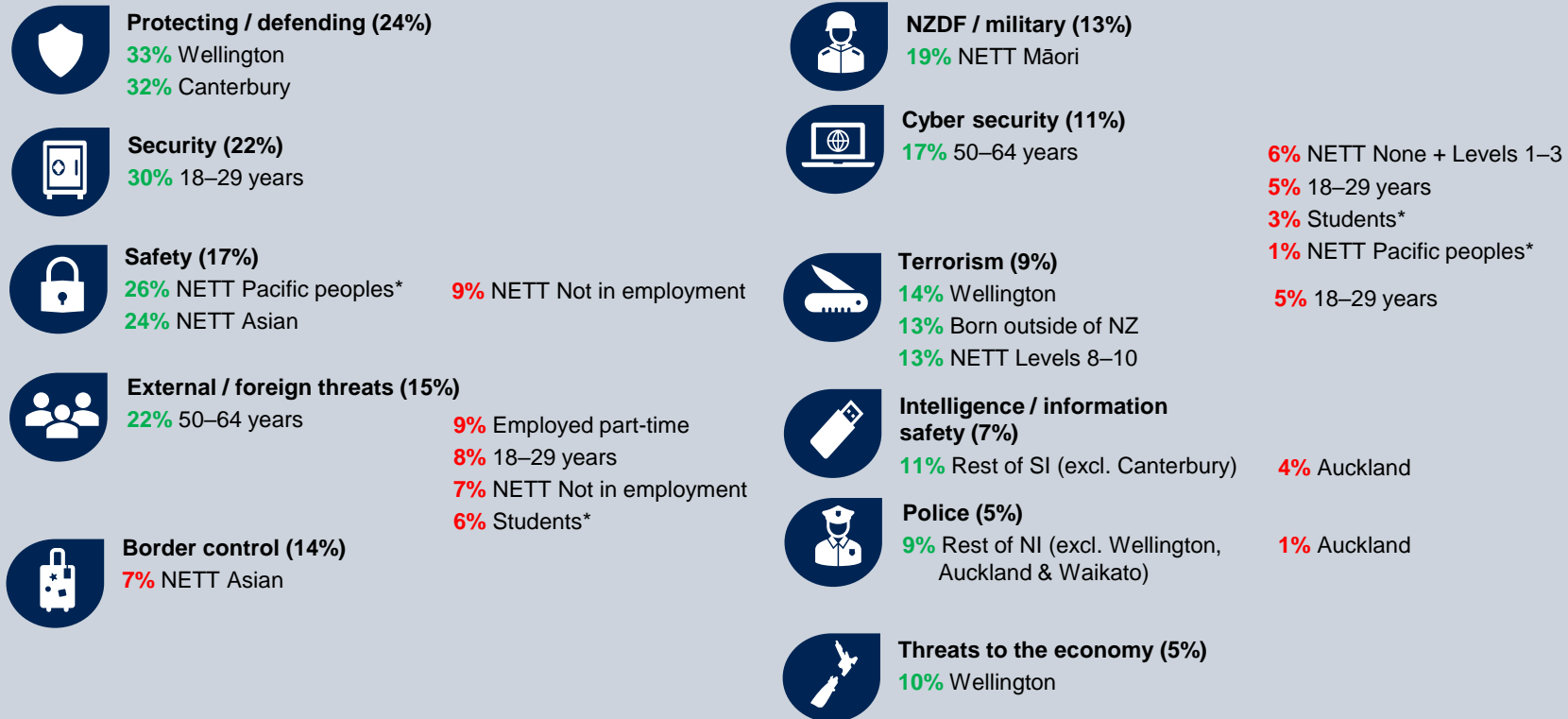
Q8h: When you see the term ‘National Risk’, what comes to mind?

Base: Total sample (n=1,178). Green / red indicates statistically significantly higher / lower than the total.



# WHAT COMES TO MIND WHEN YOU SEE THE TERM 'NATIONAL SECURITY' – STATISTICALLY SIGNIFICANT DIFFERENCES

## Demographic Differences



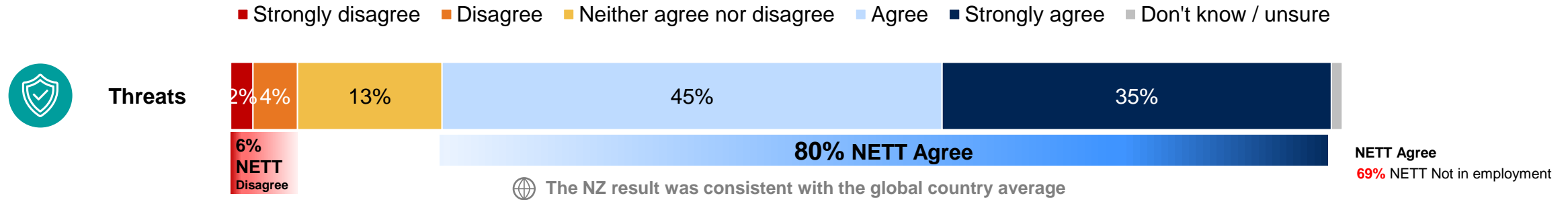
Q8: When you see the term 'National Security', what comes to mind?

Base: Total sample (n=1,172). \*CAUTION: Low base size, results indicative only (50 ≤ n < 100). Green / red indicates statistically significantly higher / lower than the total.

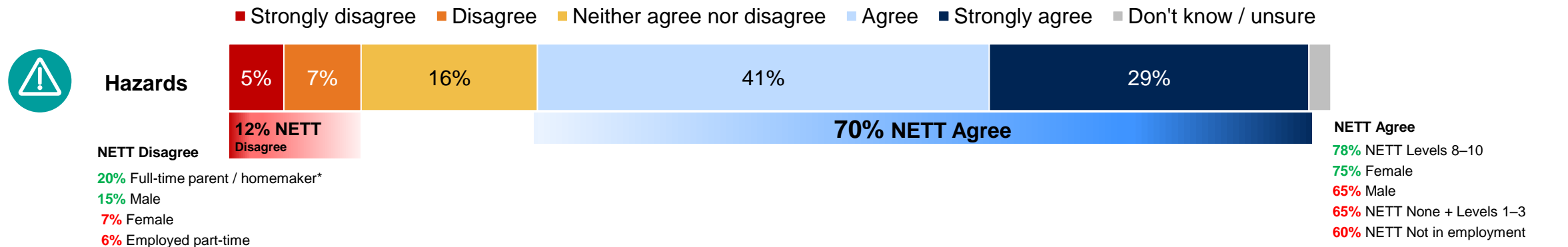
# PERCEIVED LEVEL OF GLOBAL DANGER / RISKS FROM CLIMATE CHANGE

4 in 5 New Zealanders (80%) feel *the world has become a more dangerous place*. When asked specifically about *climate change*, 70% of New Zealanders report *the risks from climate change have increased over the last year*.

## Over the last year I feel the world has become a more dangerous place



## Over the last year, I feel the risks from climate change have increased



Q20 / Q20h: Thinking again about all the threats we have covered so far, do you agree or disagree with each of the following statements?

Base: Total sample – threats (n=1,172), hazards (n=1,178). \*Note: Global country average figures are taken from the Ipsos-Halifax World Affairs global survey conducted in October 2023 (n=23,220) where applicable.

Green / red indicates statistically significantly higher / lower than the total.



# SPECIFIC QUESTION WORDING – NATIONAL SECURITY THREATS MEASURED

Respondents' views were sought on a group of potential threats throughout the Survey. The wording of each has been shortened to the bold text in the charts that follow. The full wording used in the Survey is as below:

**Terrorist attack / violent extremism in New Zealand:** A terrorist attack or act of violent extremism taking place in New Zealand

**Violent conflict between groups in New Zealand:** A violent conflict breaking out between groups with different views in New Zealand

**New Zealand involved in armed conflict with another country:** New Zealand being involved in an armed conflict with another nation

**Nuclear / biological / chemical attack somewhere in world:** A nuclear, biological or chemical attack taking place somewhere in the world

**Personal safety / security of self / family violated:** The personal safety and security for you or your family members being violated

**Hacking into information systems:** Some person, organisation or country hacking into either a public, private or personal information system for criminal or espionage purposes

**Breach of New Zealand borders:** A breach of New Zealand's borders (including land, ocean and / or airspace)

**Disinformation\*:** The spread of disinformation (deliberately sharing false information to mislead or cause harm) in New Zealand (e.g. about vaccines, elections, climate change)

**\*Note:** In 2023, *misinformation* (as included in the 2022 survey) was changed to *disinformation*. The change in wording from *misinformation* to *disinformation* could result in differences in how respondents interpret and respond to the question, which may impact the comparability of the results.

**\*\*Note:** In 2024, *breakdown in national infrastructure due to an attack* (as included in the 2023 survey) was changed to *disruption of critical infrastructure due to an attack*. The accompanying description changed from 'A breakdown in critical national infrastructure due to a malicious attack (e.g. cyber attack on transport system)' to 'Disruption of New Zealand's critical infrastructure (e.g. water, transport, energy telecommunications) due to a malicious attack (e.g. cyber attack on transport system)' to improve clarity. In addition, 'Artificial Intelligence' was added to the description of 'Emerging technology' question.

**Another major health epidemic breaking out in NZ and a major natural disaster occurring in New Zealand were removed & added to the Significant Hazards survey Track**

**Organised crime between New Zealand and another country:** Organised crime (such as the illegal movement of money, drugs or people) happening between New Zealand and another country

**Emerging technology (e.g. deep fakes, autonomous weapons):** New Zealand's and / or New Zealanders' security being affected by emerging technology (e.g. artificial intelligence, deep fakes, autonomous weapons)

**Other countries interfering in New Zealand affairs:** Other country / countries interfering in New Zealand's affairs (e.g. interference in general elections or relationships with other countries)

**Foreign country / actor coercing New Zealand to act against its interests:** A foreign country or actor coercing New Zealand to act against its interests (e.g. by threatening an attack or to cut off trade links)

**Disruption of critical infrastructure due to an attack\*\*:** Disruption of New Zealand's critical infrastructure (e.g. water, transport, energy telecommunications) due to a malicious attack (e.g. cyber attack on transport system)

**Other countries threatening New Zealand interests in Pacific:** Other country / countries threatening New Zealand interests in the Pacific region (e.g. establishing a foreign military base)

**Breakdown in access to goods / services due to rising tensions:** A breakdown in access to critical goods and services caused by rising tensions between countries (e.g. through restrictions on trade or other penalties)

**Increasing competition between countries:** Increasing competition between countries that negatively impacts how New Zealand protects its interests internationally and that may lead to military conflict



# SPECIFIC QUESTION WORDING – HAZARDS MEASURED

Respondents' views were sought on a group of potential hazards throughout the Survey. The wording of each has been shortened to the bold text in the charts and tables that follow. The full wording used in the Survey is as below:

**Health epidemic:** Another major health epidemic breaking out in New Zealand

**Natural disaster:** A major natural disaster occurring in New Zealand

**Earthquake:** A major earthquake resulting in strong and violent ground shaking in New Zealand

**Tsunami:** A major tsunami (a series of large, damaging waves) in New Zealand

**Volcanic activity:** Significant volcanic activity (including release of gases, ash, lava emissions and / or an eruption) in New Zealand

**Drought:** An extended period of drought (unusually dry weather conditions or below normal rainfall) in New Zealand

**Wildfire:** An uncontrolled wildfire in a rural or urban environment in New Zealand

**Disruption of critical infrastructure due to failure:** Disruption of New Zealand's critical infrastructure (e.g. water, transport, energy, telecommunications) due to human error or a natural hazard

**Large-scale biodiversity loss:** A significant reduction in the number and variety of plants and animals in New Zealand caused by humans, natural hazard or disease

**Pests and diseases:** An outbreak of agricultural or environmental pests and diseases (e.g. an outbreak of fruit-flies) in New Zealand

**Severe weather and flooding:** A severe weather event (e.g. strong winds, heavy rain, snow, landslides and / or flooding) in New Zealand

**Financial crisis:** A financial crisis (e.g. failure of a major bank, insurer or stock market) causing disruption to New Zealand's financial system

**Major oil spill:** A major oil spill on New Zealand's land, at sea, or into waterways due to a shipping, transport or offshore oil and gas accident

**Space weather:** A space weather event that causes disruption or damage to New Zealand's information and communications, power grids and / or global navigation systems

**Unplanned or uncontrolled accidental release or spill of hazardous material:** An unplanned or uncontrolled accidental release or spill of hazardous material (e.g. corrosive, explosive, toxic or radioactive material) in New Zealand

**Major food-safety incident:** A major food-safety incident posing a risk to public health in New Zealand and / or trade with other countries

# TOP-10 NATIONAL RISKS – PERCEIVED LIKELIHOOD NEXT 12 MONTHS

*Severe weather & flooding and earthquakes are perceived as most likely Significant Hazards in the next 12 months ('somewhat + very real'). Organised crime between New Zealand & another country, hacking and disinformation are seen as most likely National Security Threats ('somewhat + very real').*

## Rank Order | Real threat of any of the following happening in the next 12 months...

- 1 Severe weather & flooding
- 2 Earthquake
- 3 Natural disaster
- 4 Organised crime between NZ & another country
- 5= Hacking into information systems
- 5= Disinformation
- 5= Wildfire
- 8 Emerging technology (e.g. deep fakes, autonomous weapons)
- 9 Drought
- 10 Nuclear / biological / chemical attack somewhere in the world



National security threats



Significant hazards



**Q9 / Q9h:** How real do you feel the threat is of any of the following happening in the next twelve months?

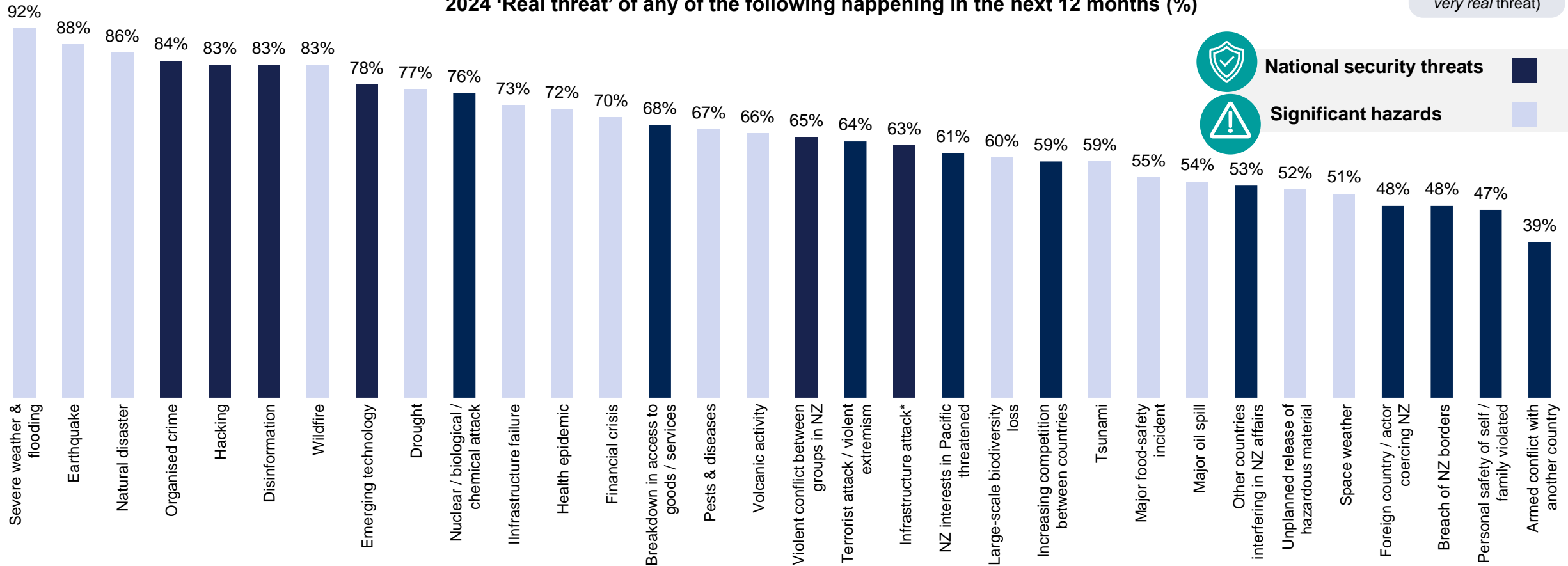
**Base:** Total sample – threats (n=1,172), hazards (n=1,178).

# PERCEIVED LIKELIHOOD OF NATIONAL RISKS

The perceived likelihood of National Risks (both National Security Threats and Significant Hazards) happening in the next twelve months is high. However, the likelihood of a *severe weather & flooding, earthquake and a natural disaster (general)* occurring in the next year is highest.

Figures represent top-2 box (% somewhat real + very real threat)

2024 'Real threat' of any of the following happening in the next 12 months (%)



Q9 / Q9h: How real do you feel the threat is of any of the following happening in the next twelve months?

Base: Total sample – threats (n=1,172), hazards (n=1,178). Note: Hazards and threats were presented 'one at a time' on screen and randomised to reduce response order bias. \*Note: In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.

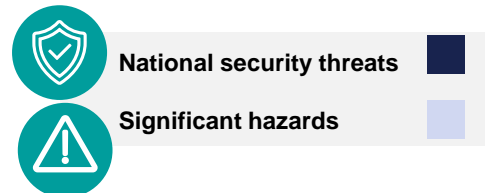
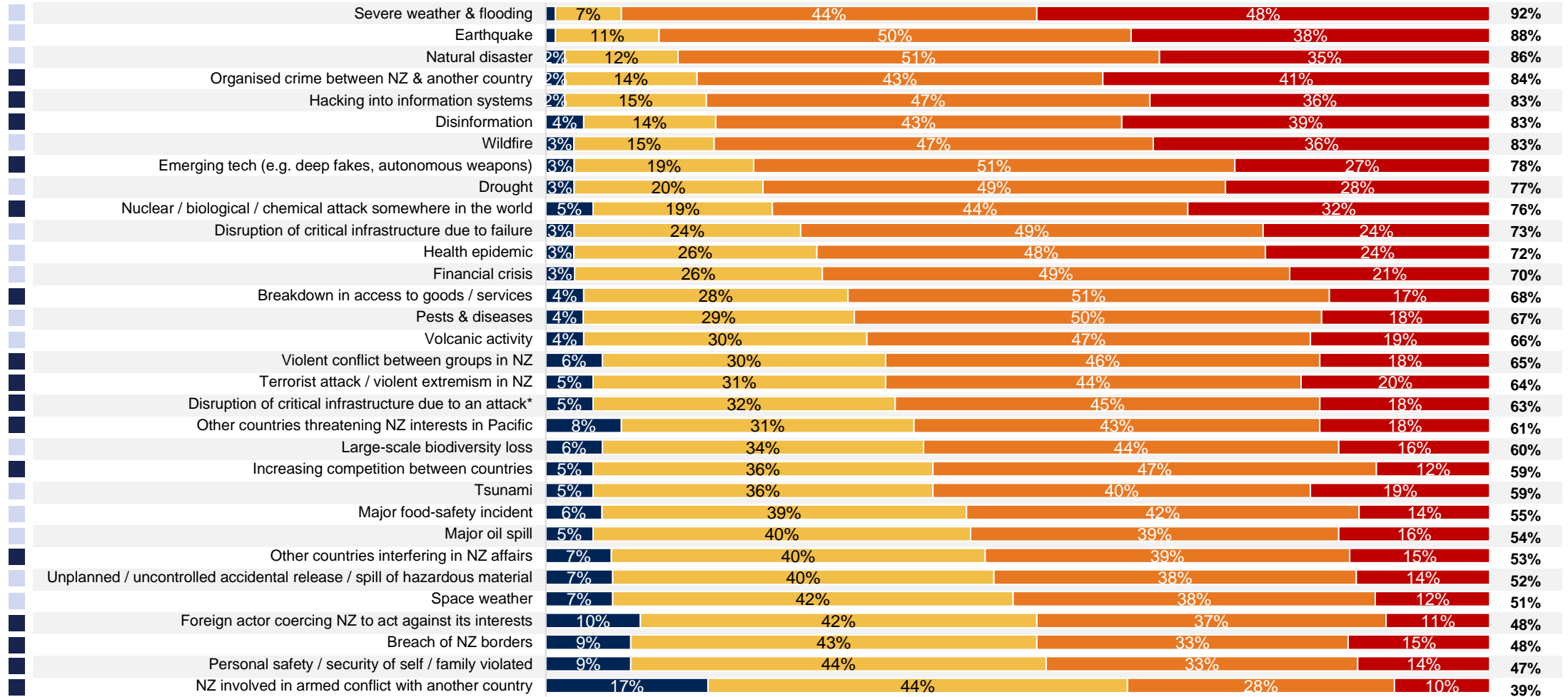


# PERCEIVED LIKELIHOOD OF NATIONAL RISKS IN THE NEXT 12 MONTHS

NETT figures represent very real + somewhat real threat

## Real threat of any of the following happening in the next 12 months...

2024 NETT Threat



■ Not a real threat at all    ■ Not much of a real threat    ■ Somewhat real threat    ■ Very real threat

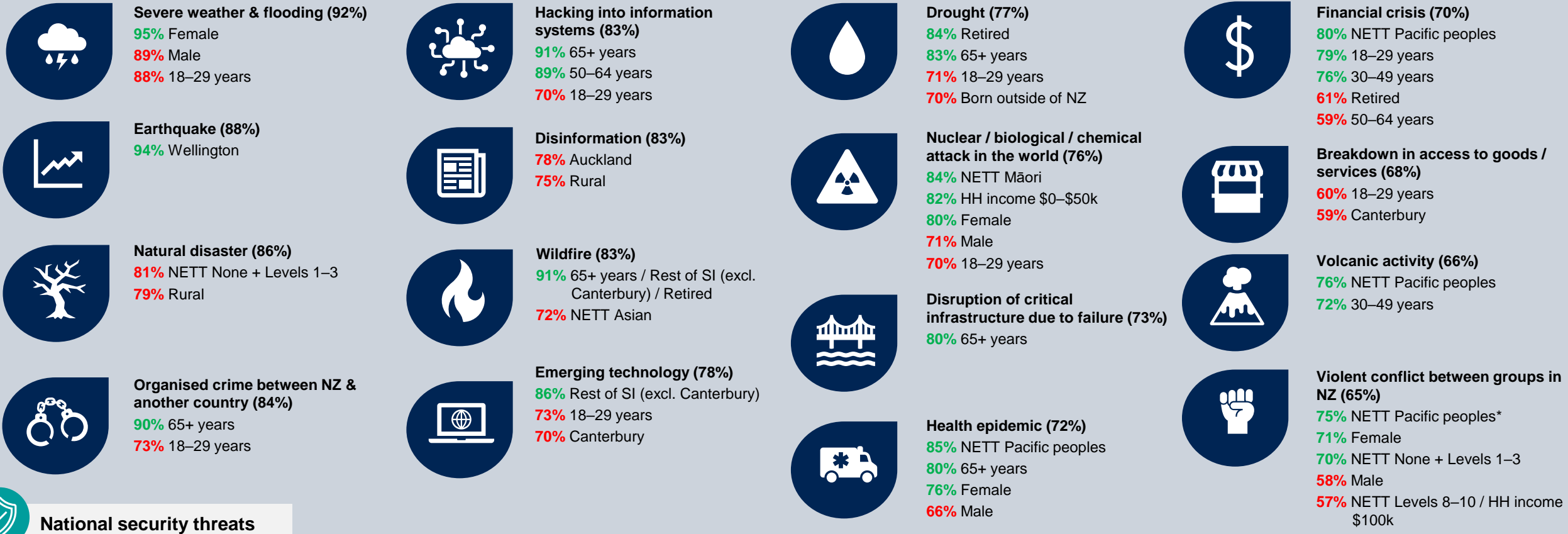
Q9 / Q9h: How real do you feel the threat is of any of the following happening in the next twelve months?

Base: Total sample – threats (n=1,172), hazards (n=1,178). \*Note: In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.



# NATIONAL RISKS – PERCEIVED LIKELIHOOD IN THE NEXT 12 MONTHS

## Demographic Differences



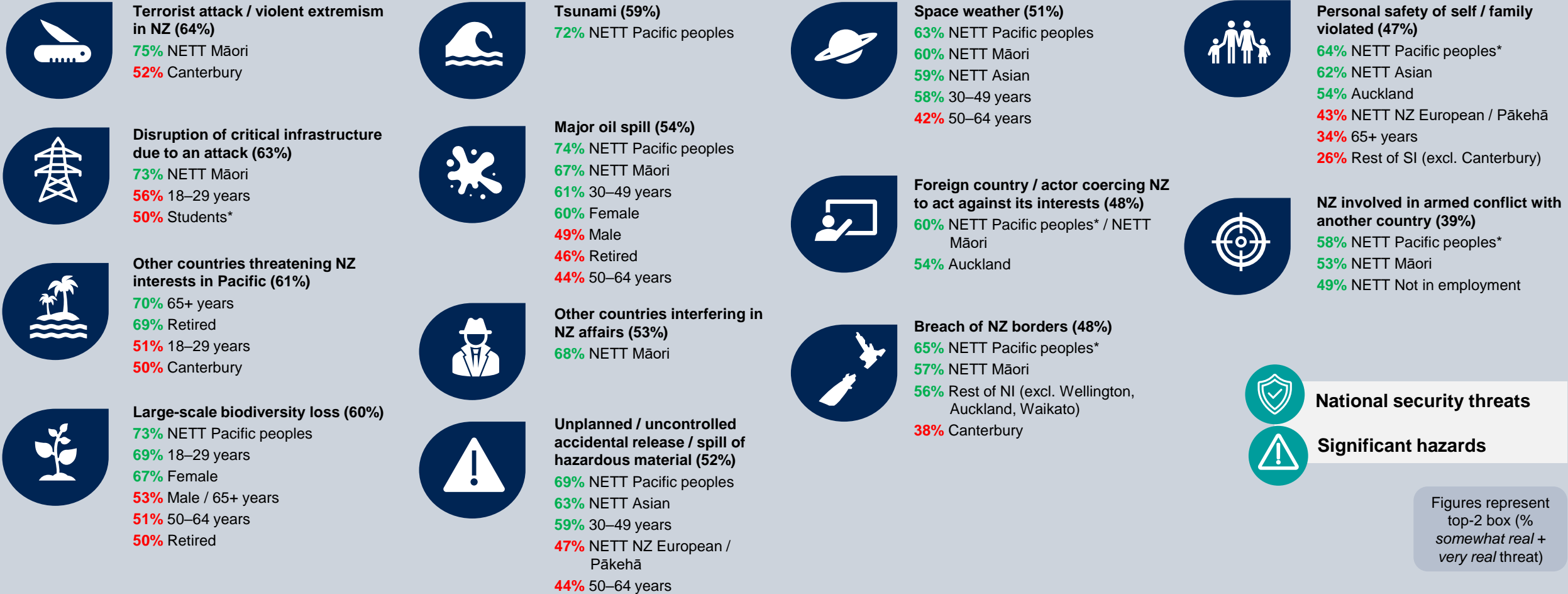
Q9 / Q9h: How real do you feel the threat is of any of the following happening in the next twelve months?

Base: Total sample – threats (n=1,172), hazards (n=1,178). \*Caution: Low base size, results indicative only (50 ≤ n < 100). Green / red indicates statistically significantly higher / lower than the total.

Figures represent top-2 box (% somewhat real + very real threat)

# NATIONAL RISKS – PERCEIVED LIKELIHOOD IN THE NEXT 12 MONTHS

## Demographic Differences



Q9 / Q9h: How real do you feel the threat is of any of the following happening in the next twelve months?

Base: Total sample – threats (n=1,172), hazards (n=1,178). \*Caution: Low base size, results indicative only (50 ≤ n < 100). Green / red indicates statistically significantly higher / lower than the total.

# TOP-3 REASONS WHY RATED AS A 'VERY REAL THREAT' IN NEXT 12 MONTHS

Severe weather & flooding (n=257)	Earthquake (n=160)	Natural disaster (n=150)	Organised crime between NZ & another country (n=114)	Hacking into information systems (n=107)	Disinformation (n=117)	Wildfire (n=169)	Emerging technology (e.g. deep fakes) (n=98*)
Have already seen / from past experience / happening now (59%)	Geography (51%)	Natural phenomena (44%)	Have already seen / from past experience / happening now (72%)	Have already seen / from past experience / happening now (59%)	Have already seen / from past experience / happening now (58%)	Have already seen / from past experience / happening now (55%)	Technological advances (53%)
Natural phenomena (52%)	Natural phenomena (43%)	Have already seen / from past experience / happening now (35%)	Rise in criminal activities (46%)	Cyber crimes & attacks (41%)	Use of social media / online platforms (22%)	Natural phenomena (44%)	Have already seen / from past experience / happening now (28%)
Climate change (37%)	Have already seen / from past experience / happening now (37%)	Geography (25%)	Likely to happen again (9%)	Current global events (14%)	Lack of critical thinking (16%)	Human error (14%)	Cyber crimes & attacks (15%)
Drought (n=108)	Nuclear / biological / chemical attack somewhere in the world (n=110)	Disruption of critical infrastructure due to failure (n=84*)	Health epidemic (n=92*)	Financial crisis (n=116)	Breakdown in access to goods / services due to rising tensions (n=92*)	Pests & diseases (n=63*)	Volcanic activity (n=56*)
Natural phenomena (55%)	Growing tension overseas (36%)	Failing infrastructure (36%)	COVID-19 (36%)	Economy (73%)	Dependent on trade with other countries (48%)	Biosecurity (24%)	Geography (66%)
Have already seen / from past experience / happening now (40%)	Armed conflict overseas (35%)	Have already seen / from past experience / happening now (31%)	Emergence of / exposure to other diseases (27%)	Global issues (18%)	Growing tensions overseas (44%)	Borders open again (15%)	Anything is possible / unpredictable (18%)
Climate change (22%)	Have already seen / from past experience / happening now (25%)	Natural phenomena (25%)	Complacency (15%)	Have already seen / from past experience / happening now (16%)	Armed conflict overseas (31%)	Damage to primary industries / Pests & insects (14%)	Natural phenomena (13%)



National security threats



Significant hazards

Q10 / Q10h: And why do you think there is a very real threat of the following happening in the next twelve months?

**Base:** Those who answered 'very real threat' at Q9 / Q9h. **Note:** These are the top-3 % reasons why each threat is likely to happen in the next 12 months. **\*Caution:** Low base size, results indicative only (50 ≤ n < 100).

# TOP-3 REASONS WHY RATED AS A 'VERY REAL THREAT' IN NEXT 12 MONTHS

Violent conflict between groups in NZ (n=96*)	Terrorist attack / violent extremism in NZ (n=96*)	Disruption of critical infrastructure due to an attack*** (n=94*)	Other countries threatening NZ interests in Pacific (n=89*)	Large-scale biodiversity loss (n=71*)	Increasing competition between countries (n=89*)	Tsunami (n=66*)	Major food-safety incident (n=46**)
NZ is small & vulnerable to attacks (31%)	Have already seen / from past experience / happening now (45%)	NZ is small & vulnerable to attacks (30%)	Providing aid / investments in exchange for bases (69%)	Damage to ecosystem (62%)	Tensions between foreign countries (35%)	Geography (38%)	Public health / safety (35%)
Issues with police / justice system (23%)	Extreme fringe groups (20%)	Cyber crimes & attacks (26%)	Have already seen / from past experience / happening now (30%)	Human error (19%)	Foreign interference & coercion (26%)	Natural phenomena (38%)	Trade (17%)
Rise in criminal activities (19%)	Likely to happen again (18%)	Have already seen / from past experience / happening now (24%)	Corruption / political lobbying (16%)	Have already seen / from past experience / happening now (19%)	Dependent on trade / NZ is small & vulnerable to attacks (14%)	Anything is possible / unpredictable (16%)	Anything is possible / unpredictable (9%)
Major oil spill (n=56*)	Other countries interfering with NZ affairs (n=87*)	Unplanned / uncontrolled accidental release / spill of hazardous material (n=49**)	Space weather (n=41**)	Foreign country / actor coercing NZ to act against its interests (n=87*)	Breach of NZ borders (n=92*)	Personal safety / security (n=90*)	NZ involved in armed conflict with another country (n=88*)
Shipping (25%)	Foreign interference & coercion (49%)	Human error (25%)	Atmospheric activity (22%)	Foreign interference & coercion (42%)	NZ is small & vulnerable to attacks (30%)	Rise in criminal activities (35%)	Armed conflict overseas (30%)
Fuel exploration (19%)	Have already seen / from past experience / happening now (27%)	Damage to lives / homes (15%)	Failing infrastructure (17%)	Dependent on trade (23%)	Rise in criminal activities (19%)	Have already seen / from past experience / happening now (19%)	Growing tension overseas (28%)
Damage to ecosystem (19%)	Issues with government / NZ is small & vulnerable to attacks (10%)	Have already seen / from past experience / happening now (13%)	Anything is possible / unpredictable (14%)	NZ is small & vulnerable to attacks (16%)	Have already seen / from past experience / happening now (19%)	Issues with police / justice system (12%)	Foreign interference & coercion (17%)



National security threats



Significant hazards

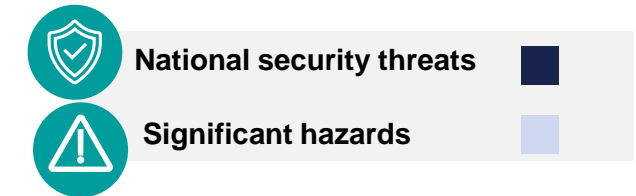
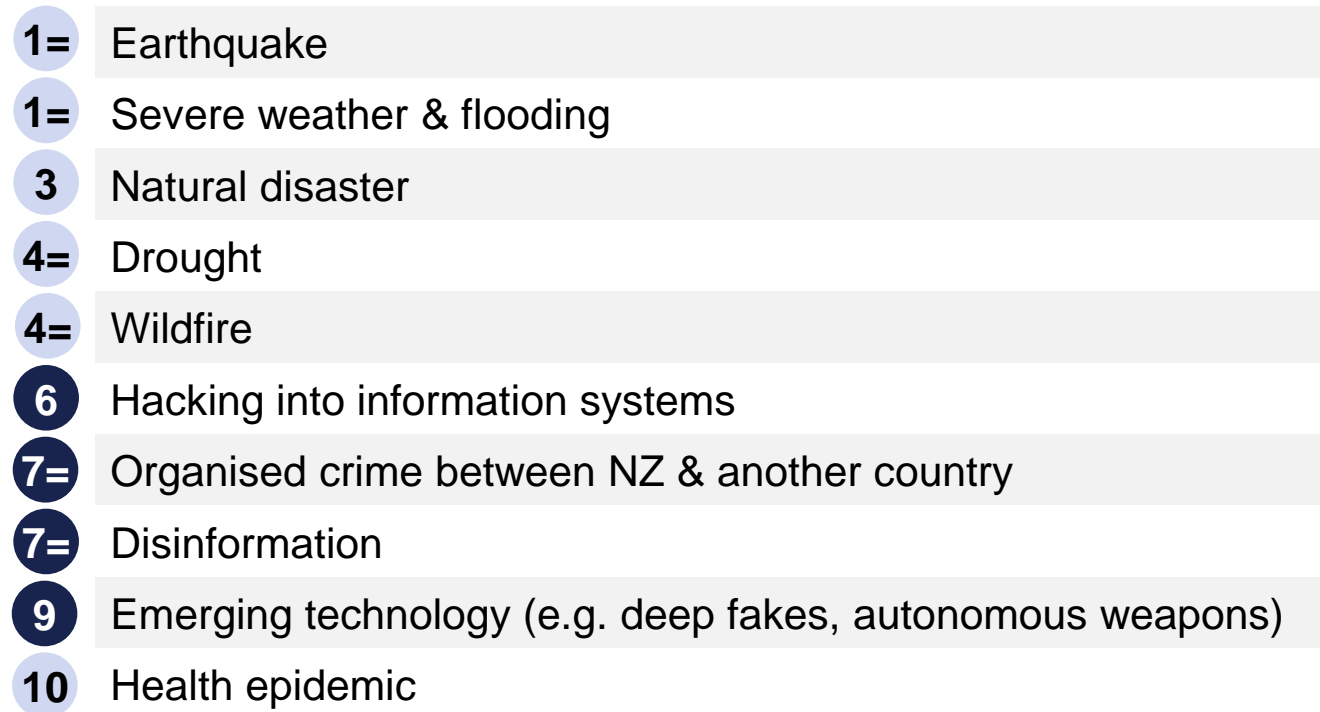
Q10 / Q10h: And why do you think there is a very real threat of the following happening in the next twelve months?

**Base:** Those who answered 'very real threat' at Q9 / Q9h. **Note:** These are the top-3 % reasons why each threat is likely to happen in the next 12 months. **\*Caution:** Low base size, results indicative only (50 ≤ n < 100). **\*\*Caution:** Very low base size, results indicative only (n < 50). **\*\*\*Note:** In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.

# TOP-10 NATIONAL RISKS – PERCEIVED LIKELIHOOD NEXT 10 YEARS

*Hacking into information systems, organised crime between NZ & another country, disinformation and emerging technology are seen as most likely National Security Threats in the next 10 years; earthquakes, severe weather & flooding and natural disasters are seen as the top-3 Significant Hazards most likely in the next 10 years.*

## Rank Order | Real threat of any of the following happening in the next 12 months...

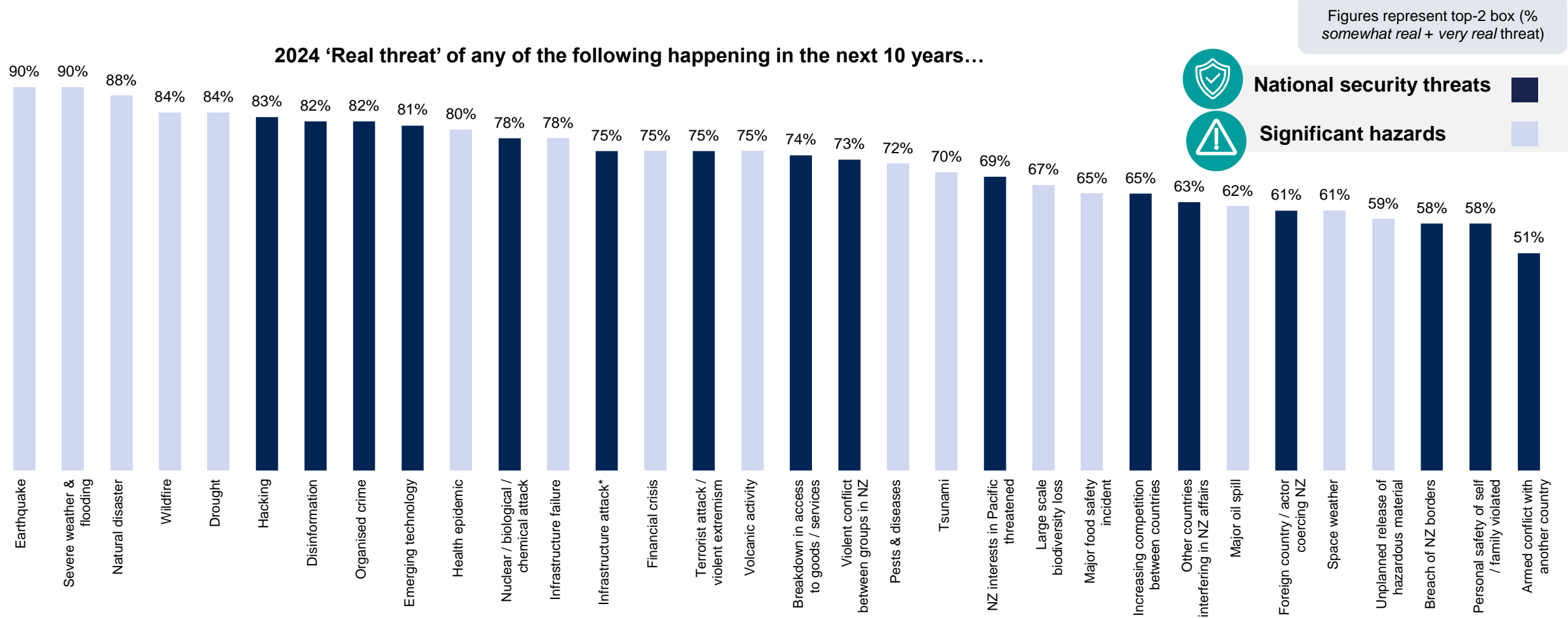


**Q17 / Q17h:** Thinking now about the future, how real do you feel the threat is of any of the following happening in the next 10 years?

**Base:** Total sample – threats (n=1,172), hazards (n=1,178).

# NATIONAL RISKS – NEXT 10 YEARS

The perceived likelihood of National Risks happening in the next 10 years is high. However, the perceived likelihood of a Significant Hazard such as an *earthquake, severe weather & flooding, natural disaster, wildfire or drought* occurring in the next 10 years is highest.



Q17 / Q17h: Thinking now about the future, how real do you feel the threat is of any of the following happening in the next 10 years?

Base: Total sample – threats (n=1,172), hazards (n=1,178). Note: Hazards and threats were presented 'one at a time' on screen and randomised to reduce response order bias. \*Note: In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.

# TOP-5 SHORT-TERM VS LONG-TERM NATIONAL RISKS

Organised crime between NZ & another country, hacking into information systems, disinformation, emerging technology and nuclear / biological / chemical attack are considered likely National Security Threats, both now and in the future. Severe weather, earthquake, natural disaster, wildfire and drought are considered the top-5 Significant Hazards both now and in the future.

Real threat of any of the following happening in the next 12 months / 10 years...



## THREATS

Position	Next 12 months	Next 10 years
1	Organised crime between NZ & another country	Hacking into information systems
2=	Hacking into information systems Disinformation	Organised crime between NZ & another country Disinformation
4	Emerging technology (e.g. deep fakes, autonomous weapons)	Emerging technology (e.g. deep fakes, autonomous weapons)
5	Nuclear / biological / chemical attack somewhere in the world	Nuclear / biological / chemical attack somewhere in the world



## HAZARDS

Position	Next 12 months	Next 10 years
1	Severe weather & flooding	(1=) Earthquake
2	Earthquake	Severe weather & flooding
3	Natural disaster	Natural disaster
4	Wildfire	(4=) Drought
5	Drought	Wildfire

Q9 / Q9h: How real do you feel the threat is of any of the following happening in the next twelve months? // Q17 / Q17h: Thinking now about the future, how real do you feel the threat is of any of the following happening in the next 10 years?

Base: Total sample – threats (n=1,172), hazards (n=1,178). Note: Hazards and threats were presented 'one at a time' on screen and randomised to reduce response order bias.



# SHORT-TERM VS LONG-TERM PERCEIVED LIKELIHOOD OF NATIONAL RISKS

Figures represent top-2 box (% somewhat real + very real threat)

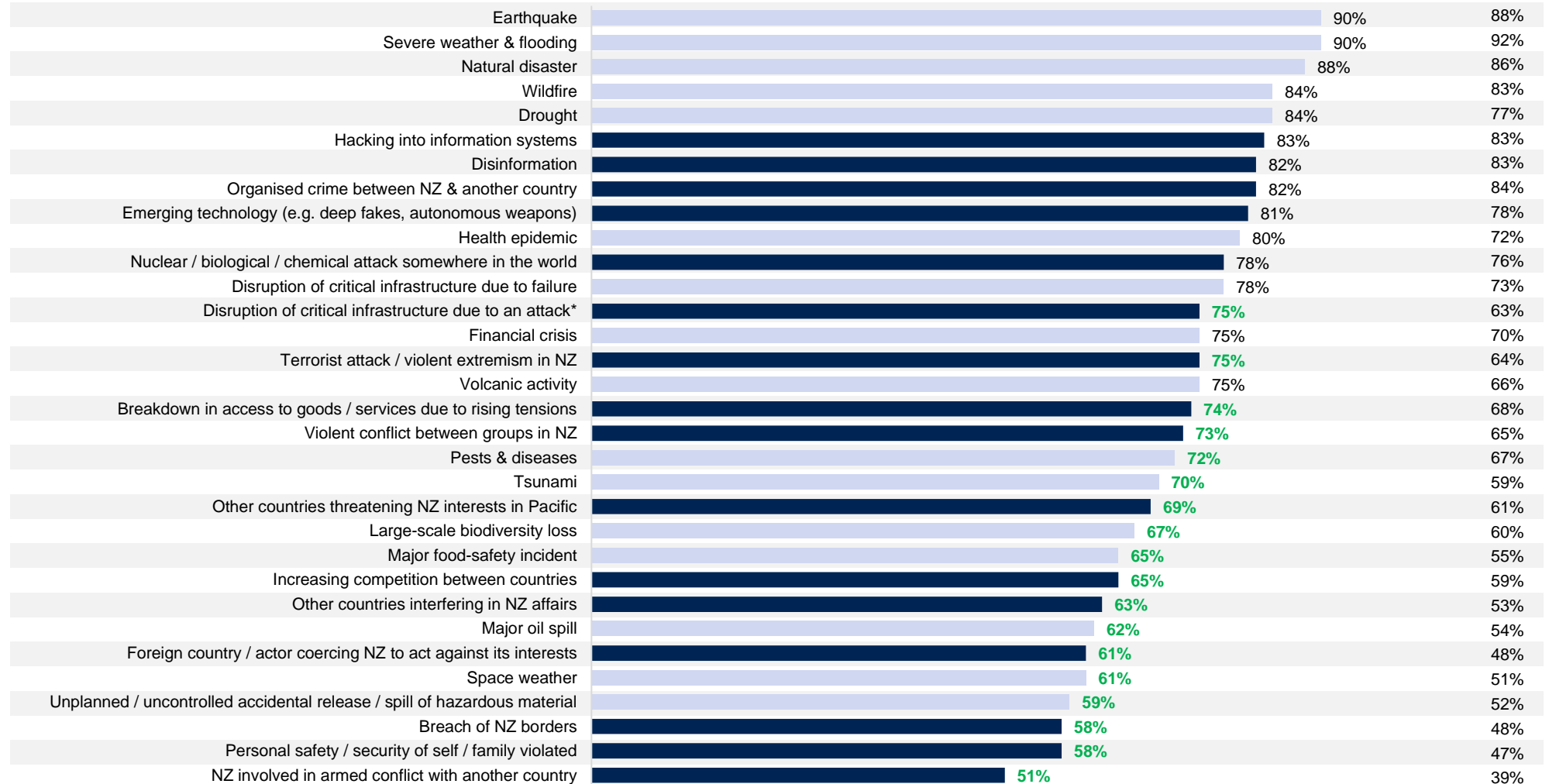


National security threats

Significant hazards

## Real threat of any of the following happening in the next 10 years...

Next 12 months



Q17 / Q17h: Thinking now about the future, how real do you feel the threat is of any of the following happening in the next 10 years? // Q9 / Q9h: How real do you feel the threat is of any of the following happening in the next twelve months?

Base: Total sample – threats (n=1,172), hazards (n=1,178). Note: Threats / hazards were presented 'one at a time' on screen and randomised to reduce response order bias. \*Note: In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack. Green / red indicates statistically significantly higher / lower than 'next 12 months'.

# ROLES & RESOURCES

- DISRUPTION OF CRITICAL INFRASTRUCTURE (DUE TO FAILURE)
- DISRUPTION OF CRITICAL INFRASTRUCTURE (DUE TO ATTACK)
- TSUNAMI
- SEVERE WEATHER & FLOODING
- INCREASING COMPETITION BETWEEN COUNTRIES
- EMERGING TECHNOLOGY

# 4

# KEY FINDINGS

In the survey we explored **six** National Risks (three National Security Threats and three Significant Hazards) to increase our understanding of New Zealanders' views on roles and resources in relation to these.

- We asked about three different threats and hazards:
  - National Security Threats – *disruption of critical infrastructure (due to attack), increasing competition between countries and emerging technology*
  - Significant Hazards – *disruption of critical infrastructure (due to failure), tsunami and severe weather & flooding*

Each respondent was asked (at random) about one threat or hazard.







- Overall, most New Zealanders consider *the Government* and its *agencies* to have the **most responsibility** to protect New Zealand against specific threats and hazards, but fewer believe these entities are **fully resourced** to do so.
  - However, across all National Risks surveyed, *the Government* is perceived as better resourced than *Global Organisations, New Zealand-based or Overseas Businesses, Communities and Individuals*.



# SUMMARY – RESPONSIBILITY TO PROTECT & RESPOND

The Government (including central and local government agencies) is seen as having the **greatest share of responsibility** across all National Risks, with *local government* being less responsible for Increasing Competition between Countries and Emerging Technology.

**NETT Responsible** (% 4 + 5 – full responsibility)

	NZ government	NZ government agencies	NZ local government	NZ businesses	NZ communities	NZ individuals	NZ's foreign partners	Overseas businesses	Global organisations	
Disruption of critical infrastructure due to failure (n=395)	85%	80%	76%	47%	45%	35%	25%	19%	29%	
Disruption of critical infrastructure due to attack* (n=391)	87%	82%	72%	43%	43%	36%	35%	22%	44%	
Tsunami (n=392)	81%	80%	77%	32%	54%	49%	22%	14%	34%	
Severe weather & flooding (n=391)	83%	79%	78%	44%	59%	55%	25%	15%	37%	
Increasing competition between countries (n=392)	82%	77%	53%	45%	34%	30%	51%	33%	54%	
Emerging technology (n=389)	82%	81%	61%	59%	43%	48%	53%	46%	58%	

**Q25:** How much responsibility do you think each of the following have to protect New Zealand and respond to <THREAT>? / **Q25h:** How much responsibility do you think each of the following have to protect New Zealand and respond to <HAZARD>?

**Base:** Respondents randomly asked about each deep-dive threat / hazard (base in table). **\*Note:** In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.



National security threats









Significant hazards

# SUMMARY – TOOLS & RESOURCES TO PROTECT & RESPOND

While the *NZ Government* (central and local) and *its agencies* are seen as having the most tools and resources, they are not considered fully resourced.

**NETT Well resourced** (% 4 + 5 – fully resourced to respond)

	NZ government	NZ government agencies	NZ local government	NZ businesses	NZ communities	NZ individuals	NZ's foreign partners	Overseas businesses	Global organisations	
Disruption of critical infrastructure due to failure (n=395)	65%	59%	49%	29%	27%	18%	27%	19%	36%	
Disruption of critical infrastructure due to attack* (n=391)	67%	60%	41%	26%	23%	19%	29%	19%	41%	
Tsunami (n=392)	62%	54%	45%	18%	29%	20%	21%	15%	36%	
Severe weather & flooding (n=391)	66%	58%	53%	26%	35%	25%	21%	16%	40%	
Increasing competition between countries (n=392)	64%	55%	30%	26%	19%	19%	40%	28%	51%	
Emerging technology (n=389)	55%	47%	30%	30%	19%	17%	41%	32%	43%	

**Q26:** In your view, do each of the following have tools and resources to protect New Zealand and respond to <THREAT>? / **Q26h:** In your view, do each of the following have tools and resources to protect New Zealand and respond to <HAZARD>?

**Base:** Respondents randomly asked about each deep-dive threat / hazard (base in table). **\*Note:** In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.



National security threats



Significant hazards

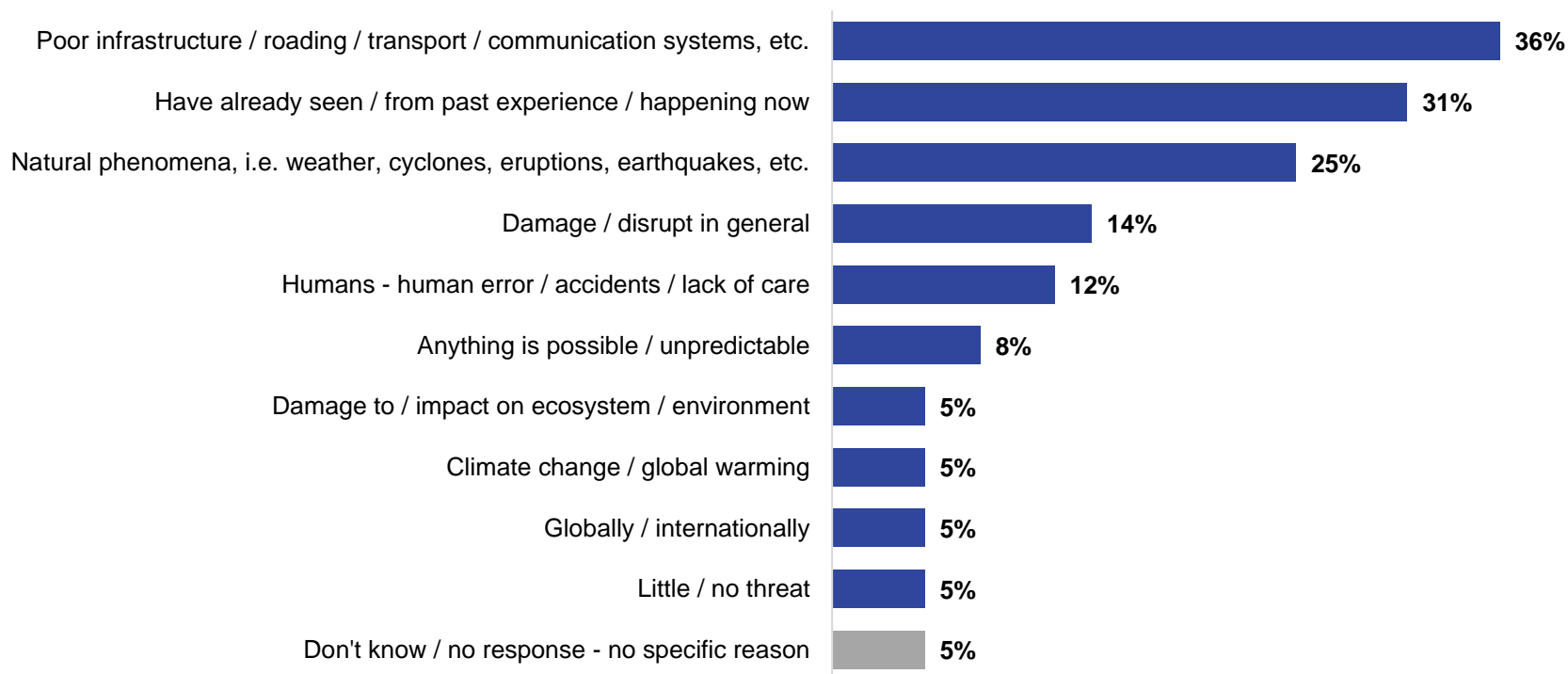


# WHY A VERY REAL THREAT – CRITICAL INFRASTRUCTURE (FAILURE)



New Zealanders stated that *poor infrastructure, feeling the recent effect of this and natural phenomena* are the main reasons they considered *disruption of critical infrastructure due to failure* a very real threat in the next 12 months.

## Reasons for a very real threat of ‘disruption of critical infrastructure due to failure’ in the next 12 months



**Q10h:** And why do you think there is a very real threat of the following happening in the next twelve months?

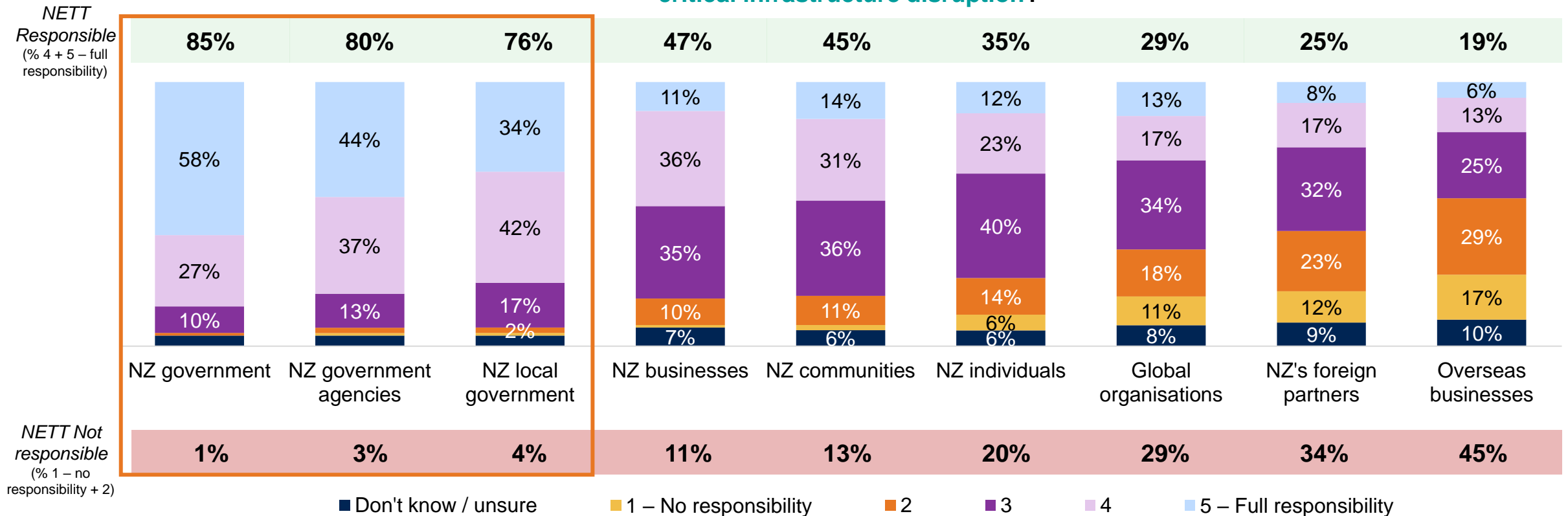
**Base:** Those who answered disruption of critical infrastructure due to failure is a 'very real threat' (n=84\*). **Note:** These are the top % reasons why disruption of critical infrastructure due to failure is likely to happen in the next 12 months. Reasons less than 5% not shown. **\*Caution:** Low base size, results indicative only (50 ≤ n < 100).



# ROLE TO PROTECT AGAINST – CRITICAL INFRASTRUCTURE (FAILURE)

New Zealanders believe the *Government and its agencies* have the most responsibility to *protect NZ against the threat of disruption of critical infrastructure due to failure*, while *overseas businesses and NZ's foreign partners* are least responsible.

How much responsibility does each of the following have to protect New Zealand and respond to critical infrastructure disruption?



Q25h: How much responsibility do you think each of the following have to protect New Zealand and respond to critical infrastructure disruption?

Base: Respondents randomly asked about 'critical infrastructure disruption' (n=395). Note: Due to rounding there are some differences (+ / - 1%) between NETT figures and more detailed breakdown of results.

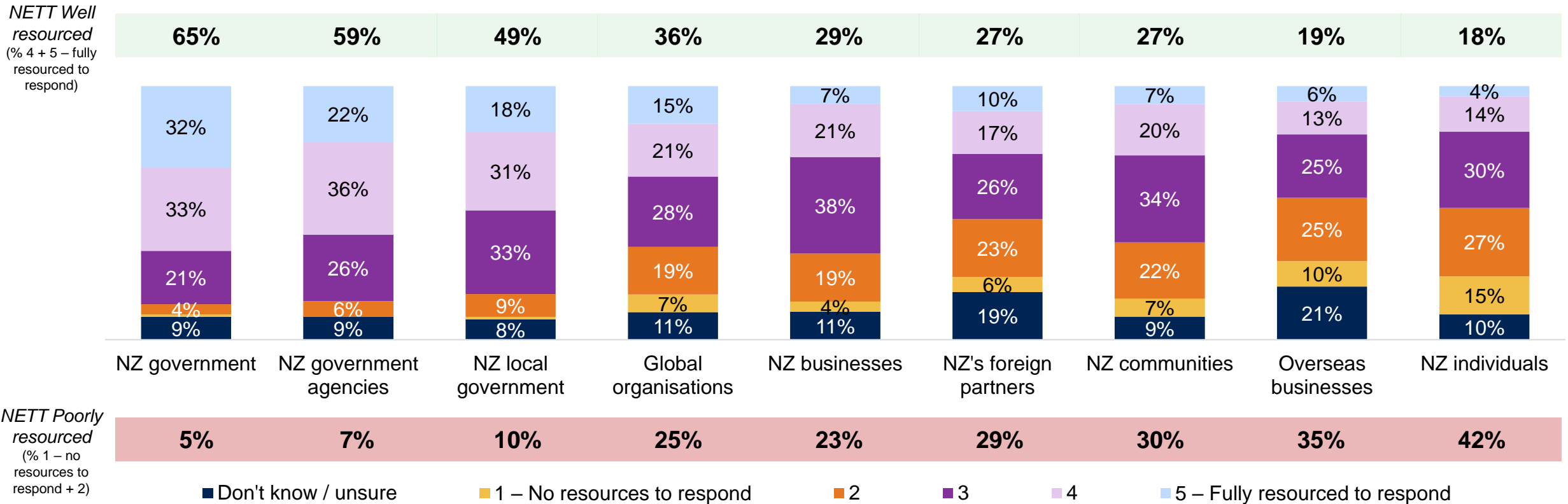


# TOOLS & RESOURCES TO PROTECT AGAINST – CRITICAL INFRASTRUCTURE (FAILURE)



New Zealanders believe that the *Government and its agencies* have more tools to protect NZ against the threat disruption of critical infrastructure due to failure, while *NZ individuals and overseas businesses* are the least equipped to do so.

## Who has the tools and resources to protect New Zealand and respond to critical infrastructure disruption?



**Q26h:** In your view, do each of the following have tools and resources to protect New Zealand and respond to critical infrastructure disruption?

**Base:** Respondents asked about critical infrastructure disruption (n=395). **Note:** Due to rounding there are some differences (+ / - 1%) between NETT figures and more detailed breakdown of results.





# ROLE / TOOLS & RESOURCES TO PROTECT AGAINST – CRITICAL INFRASTRUCTURE (FAILURE)



## Demographic Differences

### Role



**NZ government (85%)**  
96% Retired\*  
67% NETT Not in employment\*



**NZ government agencies (80%)**  
93% Retired\*  
92% 65+ years\*  
69% 18–29 years



**NZ local government (76%)**  
87% 50–64 years\*



**NZ's foreign partners (25%)**  
38% NETT None + Levels 1–3



**Overseas businesses (19%)**  
7% Retired\*

Figures represent NETT Responsible (% 4+ 5 – full responsibility)

### Tools & resources



**NZ government (65%)**  
51% NETT Not in employment\*



**Global organisations (36%)**  
46% NETT None + Levels 1–3  
22% NETT Levels 8–10\*



**NZ businesses (29%)**  
42% NETT Asian\*



**NZ's foreign partners (27%)**  
40% NETT Māori\*



**NZ communities (27%)**  
48% NETT Asian\*  
38% Born outside of NZ\*  
37% 30–49 years



**Overseas businesses (19%)**  
39% Employed part-time\*  
8% NETT Levels 8–10\*  
6% 65+ years\* / Retired\*



**NZ individuals (18%)**  
7% Rural\*

Figures represent NETT Well resourced (% 4+ 5 – fully resourced to respond)

**Q25h:** How much responsibility do you think each of the following have to protect New Zealand and respond to critical infrastructure disruption? / **Q26h:** In your view, do each of the following have tools and resources to protect New Zealand and respond to critical infrastructure disruption?

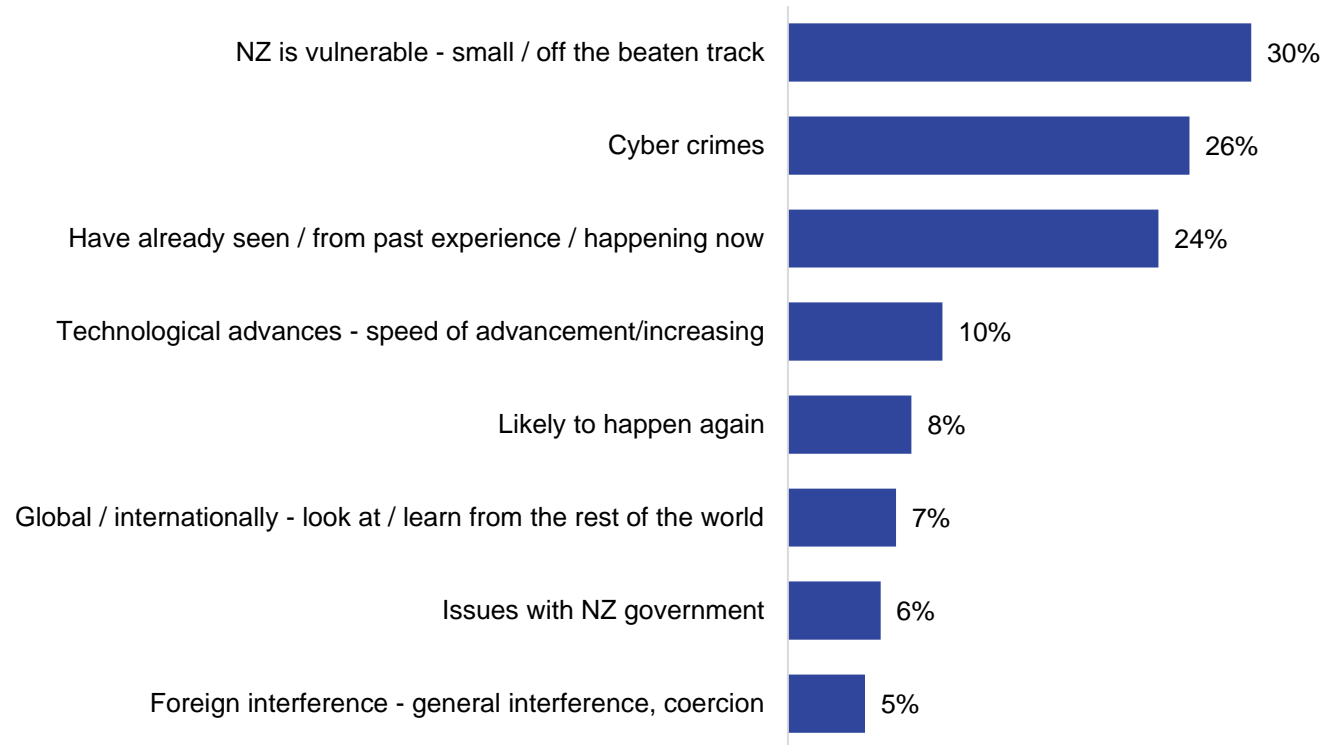
**Base:** Respondents asked about critical infrastructure disruption (n=395). **\*Caution:** Low base size, results indicative only (50 ≤ n < 100). Green / red indicates statistically significantly higher / lower than the total.



# WHY A VERY REAL THREAT – CRITICAL INFRASTRUCTURE (ATTACK)

The vulnerability of New Zealand and cyber crimes are considered the two biggest reasons for a potential disruption of critical infrastructure due to a malicious attack in the next 12 months.

**Reasons for a very real threat of 'disruption of critical infrastructure due to an attack' happening in the next 12 months\***



**Q10:** And why do you think there is a very real threat of the following happening in the next twelve months?

**Base:** Those who answered that 'disruption of critical infrastructure' is a 'very real threat' (n=94). **Note:** These are the top % reasons why 'disruption of critical infrastructure due to an attack' is likely to happen in the next 12 months.

Reasons less than 5% not shown. **\*Note:** In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.

Green / red indicates statistically significantly higher / lower than 2023.

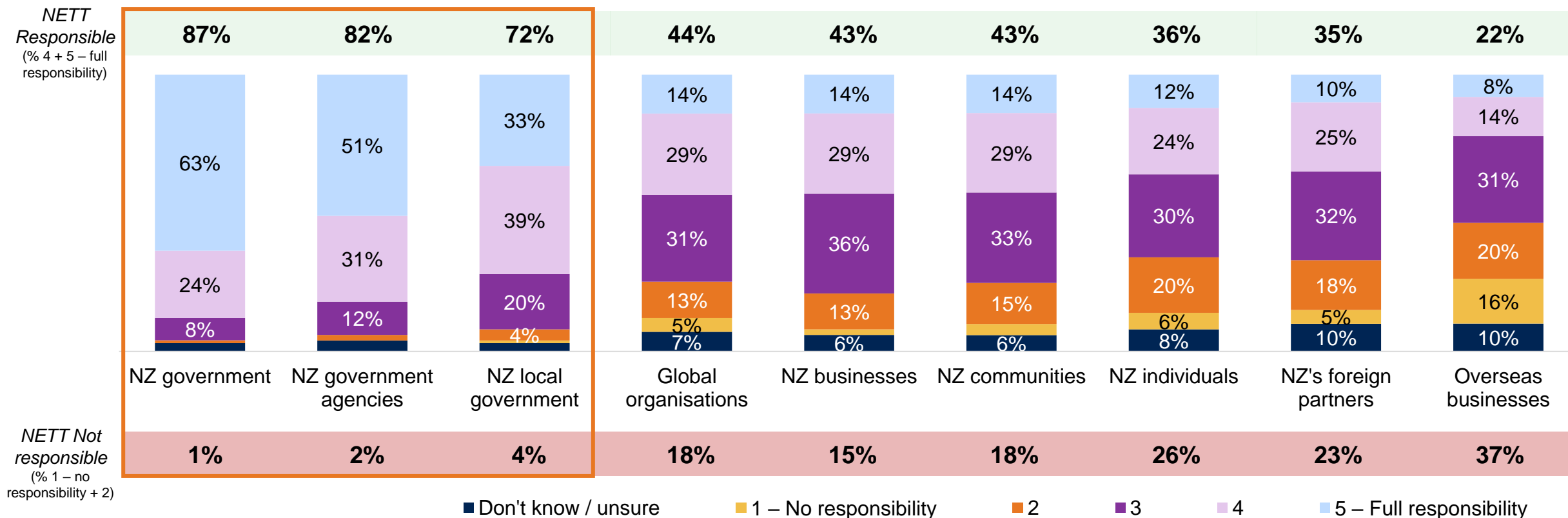


# ROLE TO PROTECT AGAINST – CRITICAL INFRASTRUCTURE (ATTACK)



New Zealanders believe that the *Government and its agencies* have the most responsibility to *protect NZ & respond to the disruption of critical infrastructure due to an attack*, while *overseas businesses* have the least responsibility.

How much responsibility does each of the following have to protect NZ and respond to threats to our disruption of critical infrastructure?



Q25: How much responsibility do you think each of the following have to protect New Zealand and respond to disruption of critical infrastructure?

**Base:** Respondents asked about disruption of critical infrastructure (n=385). **Note 1:** Due to rounding there are some differences (+ / - 1%) between NETT figures and more detailed breakdown of results. **Note 2:** In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.

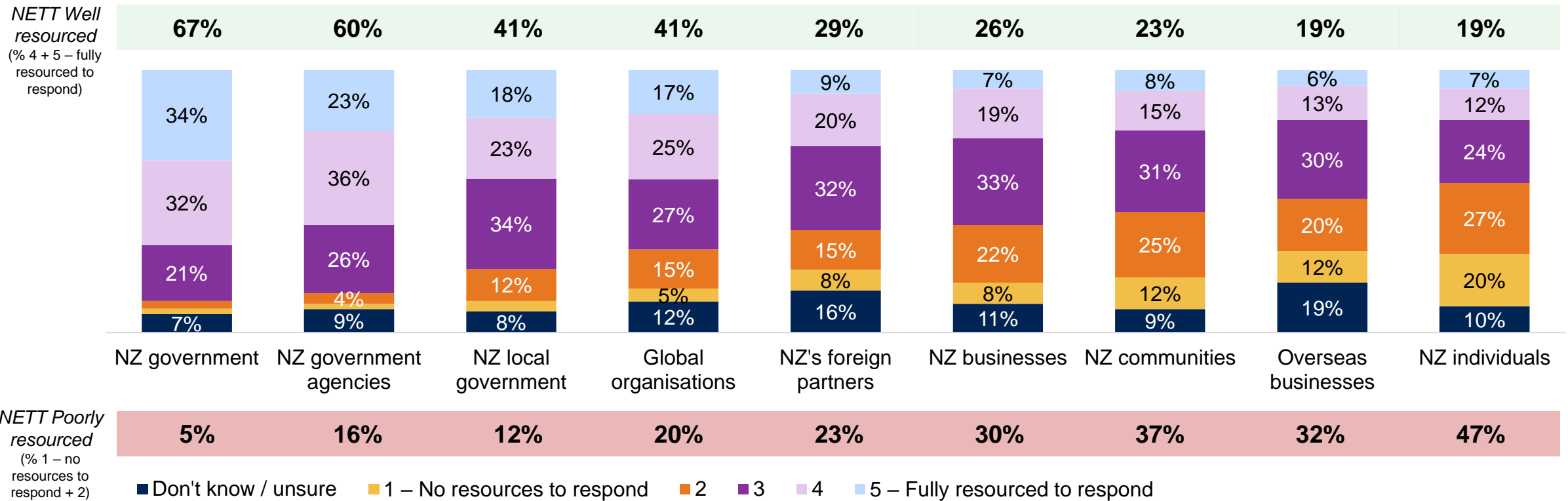




# TOOLS & RESOURCES TO PROTECT AGAINST – CRITICAL INFRASTRUCTURE (ATTACK)

New Zealanders believe that the *Government and its agencies* have more tools to *protect NZ & respond to the disruption of critical infrastructure due to an attack*, while *individuals, overseas businesses and communities* are the least equipped to do so.

**Who has the tools and resources to protect NZ and respond to threats to our disruption of critical infrastructure?**



**Q26:** In your view, do each of the following have tools and resources to protect New Zealand and respond to disruption of critical infrastructure?

**Base:** Respondents asked about disruption of critical infrastructure (n=385). **Note 1:** Due to rounding there are some differences (+ / - 1%) between NETT figures and more detailed breakdown of results. **Note 2:** In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.





# ROLE / TOOLS & RESOURCES TO PROTECT – DISRUPTION OF CRITICAL INFRASTRUCTURE (ATTACK)

## Demographic Differences

### Role



**NZ government (87%)**  
76% 18–29 years



**NZ local government (72%)**  
57% 18–29 years



**Global organisations (44%)**  
61% Asian\*  
56% Born overseas  
30% Rest of North Island (excl. Auckland, Wellington, Waikato)\*



**NZ businesses (43%)**  
32% 18–29 years



**NZ communities (43%)**  
63% Asian\*



**NZ individuals (36%)**  
51% Asian\*  
23% Rest of North Island (excl. Auckland, Wellington, Waikato)\*

Figures represent NETT Responsible (% 4+ 5 – full responsibility)



**Overseas business (22%)**  
34% 65+ years\*  
13% 18–29 years

### Tools & resources



**NZ government agencies (60%)**  
45% NETT Levels 8–10



**NZ local government (41%)**  
58% Asian\*  
52% 30–49 years



**NZ's foreign partners (29%)**  
45% Asian\*



**NZ communities (23%)**  
39% Asian\*



**Overseas business (19%)**  
34% Asian\*



**NZ individuals (19%)**  
31% Asian\*  
9% Rest of North Island (excl. Auckland, Wellington, Waikato)\*

Figures represent NETT Well resourced (% 4+ 5 – fully resourced to respond)

**Q25:** How much responsibility do you think each of the following have to protect New Zealand and respond to disruption of critical infrastructure? / **Q26:** In your view, do each of the following have tools and resources to protect New Zealand and respond to disruption of critical infrastructure?

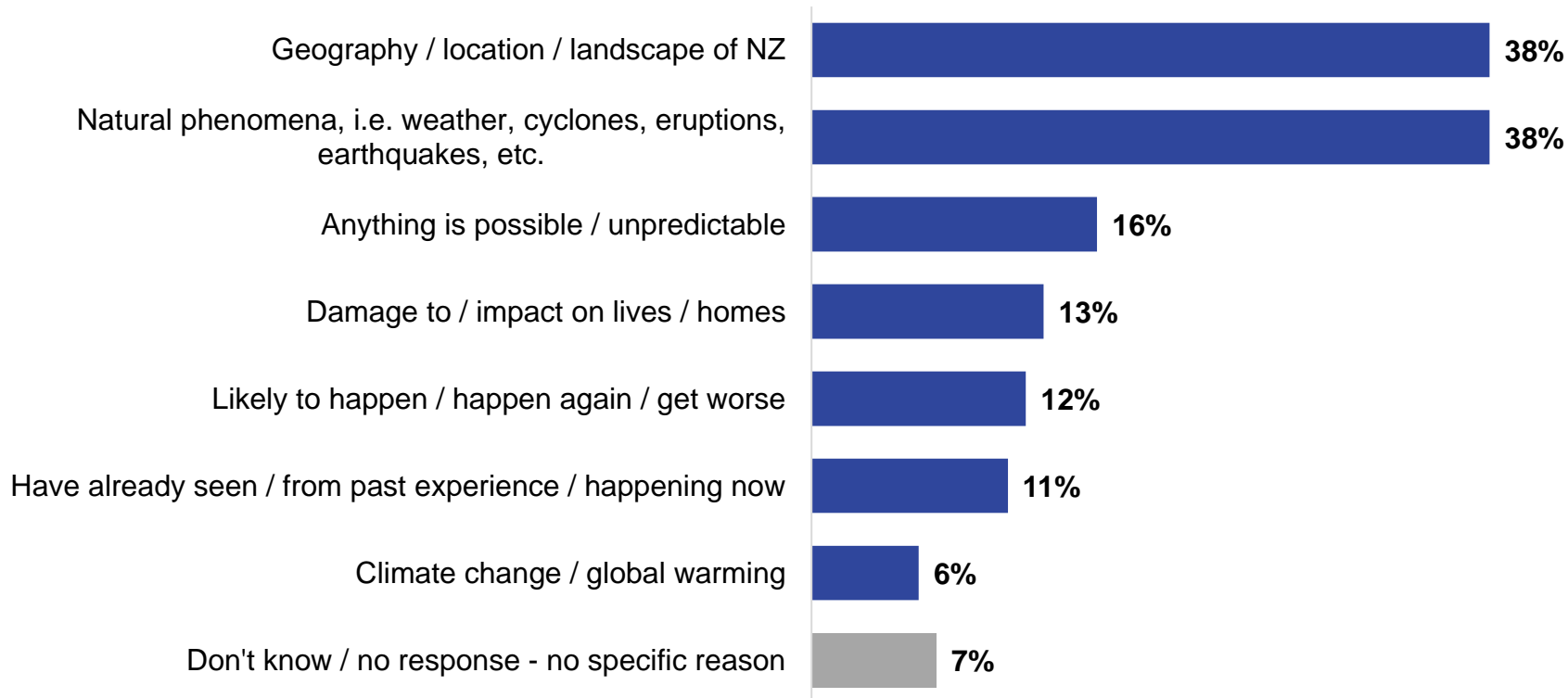
**Base:** Respondents randomly asked about 'disruption of critical infrastructure' (n=385). **Note:** In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack. **Green / red** indicates statistically significantly **higher / lower** than the total. **\*CAUTION:** Low base size, results indicative only (50 ≤ n < 100).



# WHY A VERY REAL THREAT – TSUNAMI

Geography and natural phenomena are stated as the main reasons New Zealanders consider a tsunami likely and concerning over the next 12 months

## Reasons for a very real threat of 'tsunami' happening in the next 12 months



**Q10h:** And why do you think there is a very real threat of the following happening in the next twelve months?

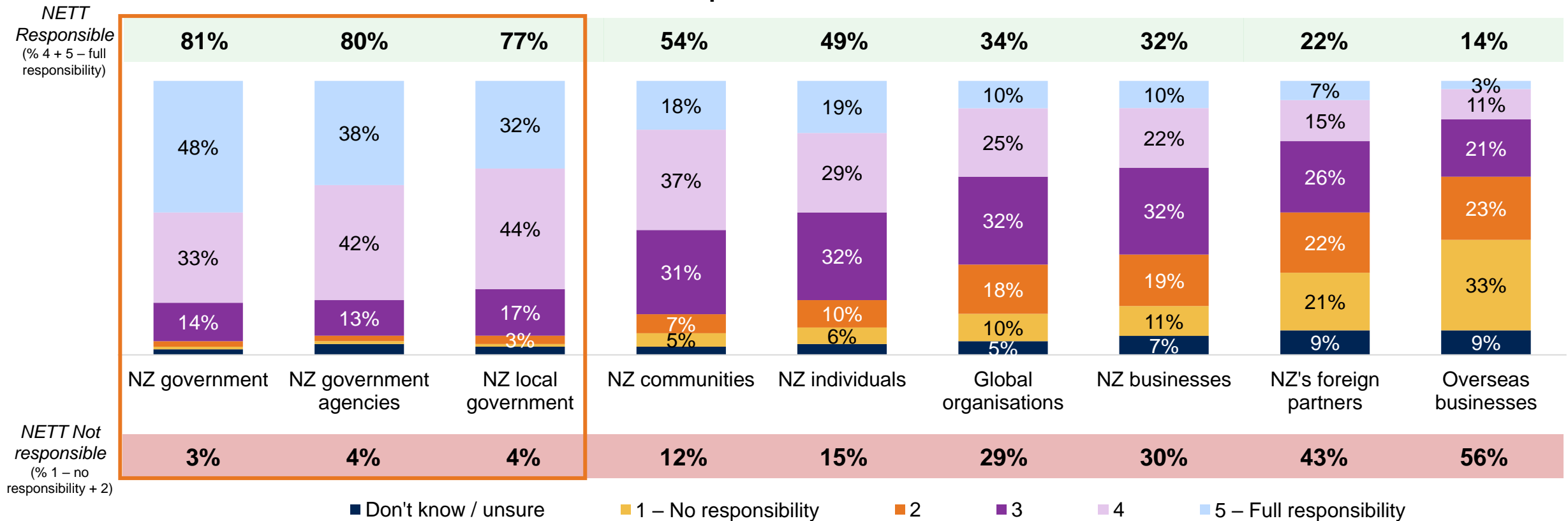
**Base:** Those who answered that tsunami is a 'very real threat' (n=66\*). **Note:** These are the top % reasons why a tsunami is likely to happen in the next 12 months. Reasons less than 5% not shown. **\*Caution:** Low base size, results indicative only (50 ≤ n < 100).



# ROLE TO PROTECT AGAINST – TSUNAMI

New Zealanders believe that the *Government and its agencies* have the most responsibility to protect NZ and respond to a tsunami, while *overseas businesses* and *NZ's foreign partners* have the least responsibility.

How much responsibility does each of the following have to protect New Zealand and respond to a tsunami?



Q25h: How much responsibility do you think each of the following have to protect New Zealand and respond to a tsunami?

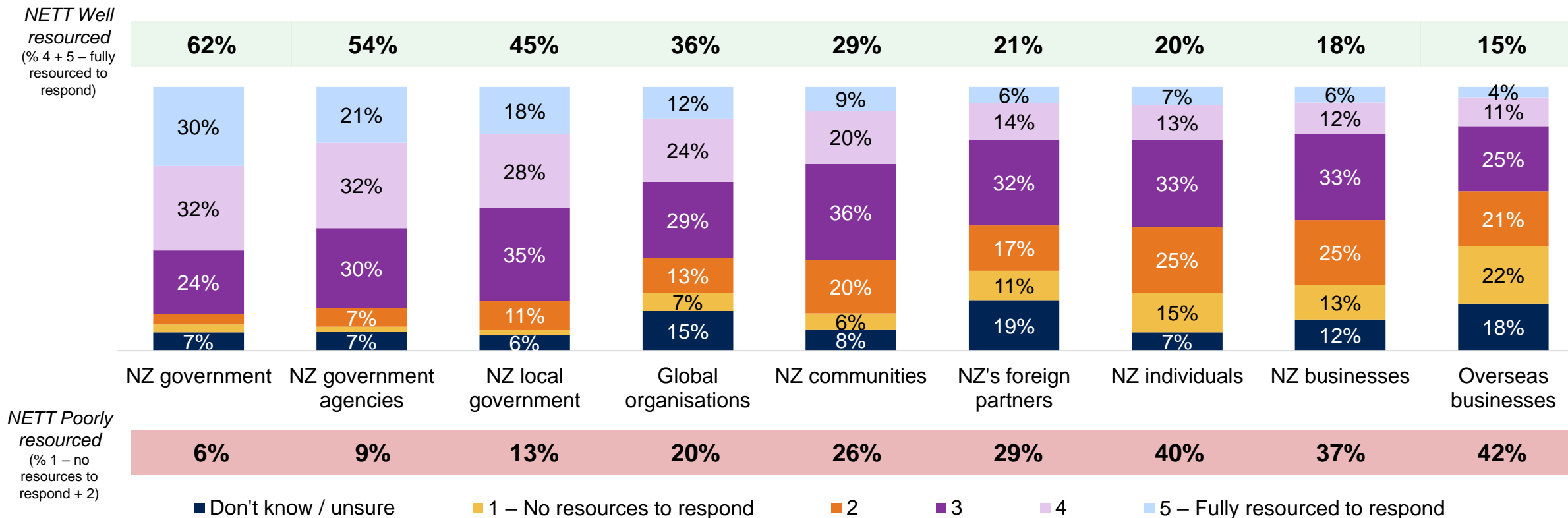
Base: Respondents asked about tsunami (n=392). Note: Due to rounding there are some differences (+ / - 1%) between NETT figures and more detailed breakdown of results.



# TOOLS & RESOURCES TO PROTECT AGAINST – TSUNAMI

New Zealanders believe that the *Government and its agencies* have more tools to protect NZ and respond to a tsunami, while *overseas and NZ businesses* as well as *NZ individuals* are the least equipped to do so.

## Who has the tools and resources to protect New Zealand and respond to a tsunami?



**Q26h:** In your view, do each of the following have tools and resources to protect New Zealand and respond to a tsunami?

**Base:** Respondents asked about tsunami (n=392). **Note:** Due to rounding there are some differences (+ / - 1%) between NETT figures and more detailed breakdown of results.





# ROLE / TOOLS & RESOURCES TO PROTECT AGAINST – TSUNAMI



## Demographic Differences

### Role



**NZ government agencies (80%)**

**65%** 18–29 years

Figures represent  
NETT Responsible  
(% 4+ 5 – full  
responsibility)



**NZ communities (54%)**

**72%** 65+ years\*

**69%** Retired\*

**39%** NETT Levels 8–10\*



**Overseas businesses (14%)**

**26%** NETT Asian\*



**NZ businesses (32%)**

**46%** NETT Not in employment\*

### Tools & resources



**NZ's foreign partners (21%)**

**32%** 18–29 years

**9%** 65+ years\*

Figures represent  
NETT Well resourced  
(% 4+ 5 – fully resourced  
to respond)



**Overseas businesses (15%)**

**27%** NETT Asian\*

**3%** Retired\*

**2%** 65+ years\*

**Q25h:** How much responsibility do you think each of the following have to protect New Zealand and respond to a tsunami? / **Q26h:** In your view, do each of the following have tools and resources to protect New Zealand and respond to a tsunami?

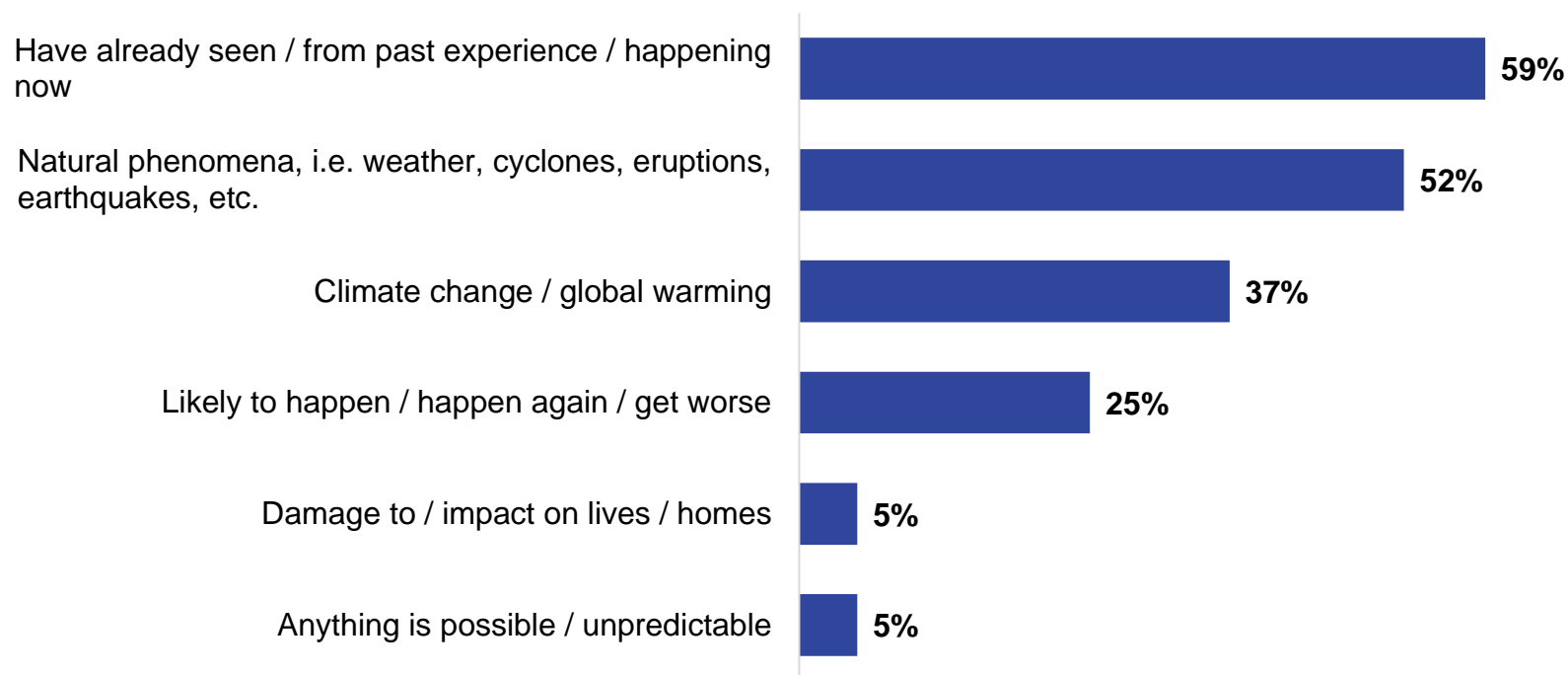
**Base:** Respondents randomly asked about tsunami (n=392). **\*Caution:** Low base size, results indicative only (50 ≤ n < 100). **Green / red** indicates statistically significantly **higher / lower** than the total.



# WHY A VERY REAL THREAT – SEVERE WEATHER & FLOODING

Having already seen / felt the effects (59%) of this hazard and *natural phenomena* (52%) were stated as the main reasons for a severe weather event being seen as likely and concerning in the next 12 months. The next most commonly stated reason was *climate change / global warming*.

## Reasons for a very real threat of ‘severe weather and flooding’ happening in the next 12 months



**Q10h:** And why do you think there is a very real threat of the following happening in the next twelve months?

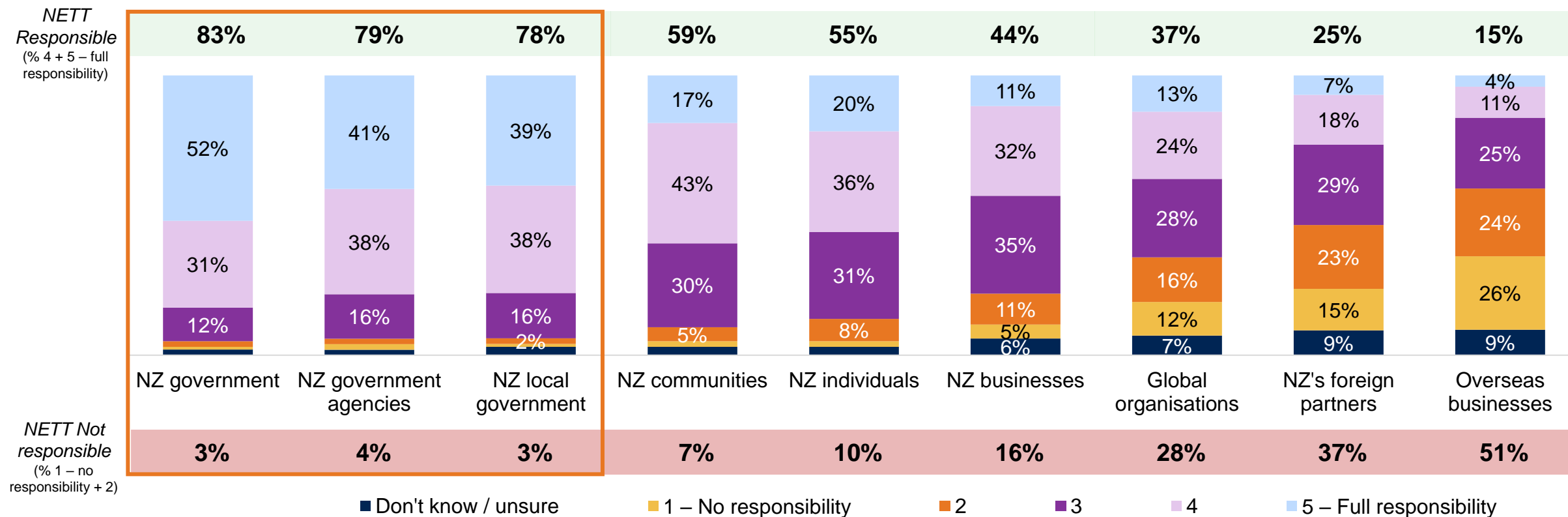
**Base:** Those who answered that severe weather and flooding is a ‘very real threat’ (n=257). **Note:** These are the top % reasons why severe weather and flooding is likely to happen in the next 12 months. Reasons less than 5% not shown.



# ROLE TO PROTECT AGAINST – SEVERE WEATHER & FLOODING

New Zealanders believe that the *Government and its agencies* are the most responsible for protecting NZ and responding to severe weather and flooding, while *overseas businesses* and *NZ's foreign partners* are the least responsible.

How much responsibility does each of the following have to protect New Zealand and respond to severe weather and flooding?



Q25h: How much responsibility do you think each of the following have to protect New Zealand and respond to severe weather?

Base: Respondents asked about severe weather and flooding (n=391). Note: Due to rounding there are some differences (+ / - 1%) between NETT figures and more detailed breakdown of results.





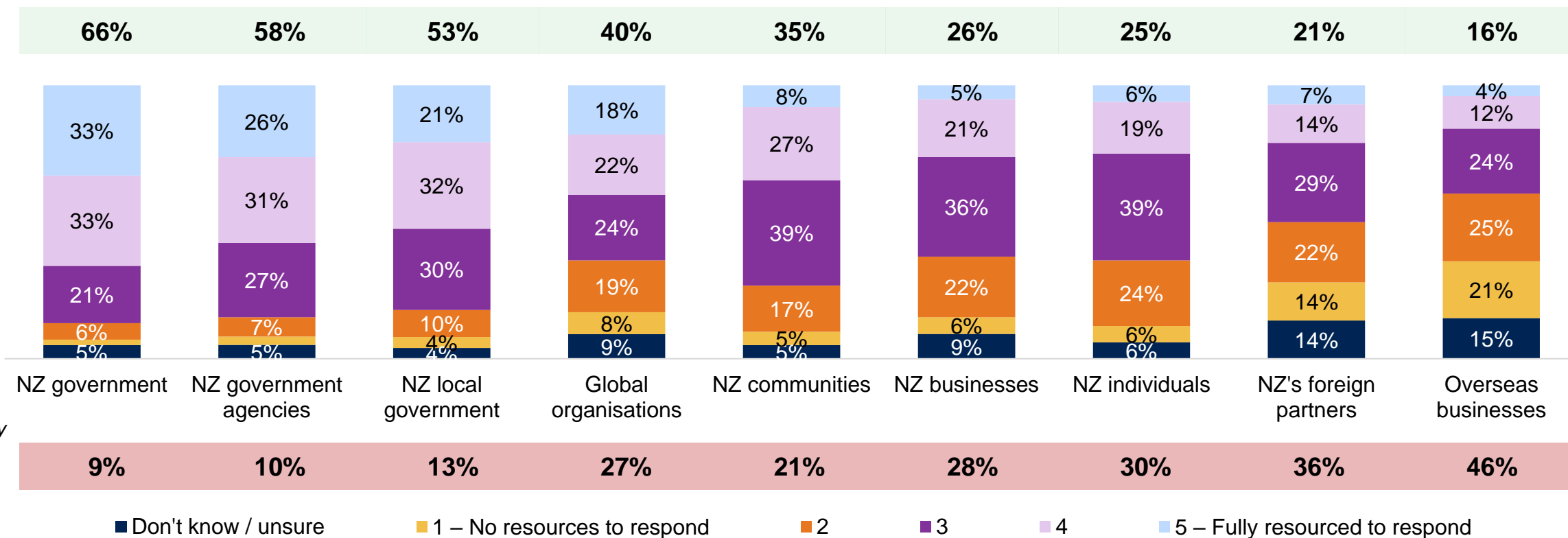
# TOOLS & RESOURCES TO PROTECT AGAINST – SEVERE WEATHER & FLOODING



New Zealanders believe that the *Government and its agencies* have more tools and resources to protect NZ and respond to severe weather and flooding, while *overseas businesses* and *NZ's foreign partners* are the least equipped to do so.

Who has the tools and resources to protect New Zealand and respond to severe weather and flooding?

NETT Well resourced (% 4 + 5 – fully resourced to respond)



Q26h: In your view, do each of the following have tools and resources to protect New Zealand and respond to severe weather?

Base: Respondents asked about severe weather and flooding (n=391). Note: Due to rounding there are some differences (+ / - 1%) between NETT figures and more detailed breakdown of results.





# ROLE / TOOLS & RESOURCES TO PROTECT AGAINST – SEVERE WEATHER & FLOODING



## Demographic Differences

### Role



**NZ government agencies (79%)**  
89% 65+ years\*



**NZ local government (78%)**  
66% 18–29 years



**NZ individuals (55%)**  
69% Retired\*  
62% 65+ years\*  
44% 18–29 years  
39% Canterbury\*



**NZ businesses (44%)**  
62% NETT Asian\*

Figures represent NETT Responsible (% 4+ 5 – full responsibility)



**Global organisations (37%)**  
48% 30–49 years  
24% 50–64 years\*



**NZ's foreign partners (25%)**  
33% NETT Levels 4–7  
16% NETT None + Levels 1–3  
13% HH income \$0–\$50k\*

### Tools & resources



**Global organisations (40%)**  
51% 30–49 years  
50% 18–29 years  
26% Retired\*  
24% 65+ years\*



**NZ's foreign partners (21%)**  
30% 30–49 years



**Overseas businesses (16%)**  
26% 18–29 years

Figures represent NETT Well resourced (% 4+ 5 – fully resourced to respond)

**Q25h:** How much responsibility do you think each of the following have to protect New Zealand and respond to severe weather? / **Q26h:** In your view, do each of the following have tools and resources to protect New Zealand and respond to severe weather?

**Base:** Respondents randomly asked about severe weather and flooding (n=391). **\*Caution:** Low base size, results indicative only (50 ≤ n < 100). Green / red indicates statistically significantly higher / lower than the total.

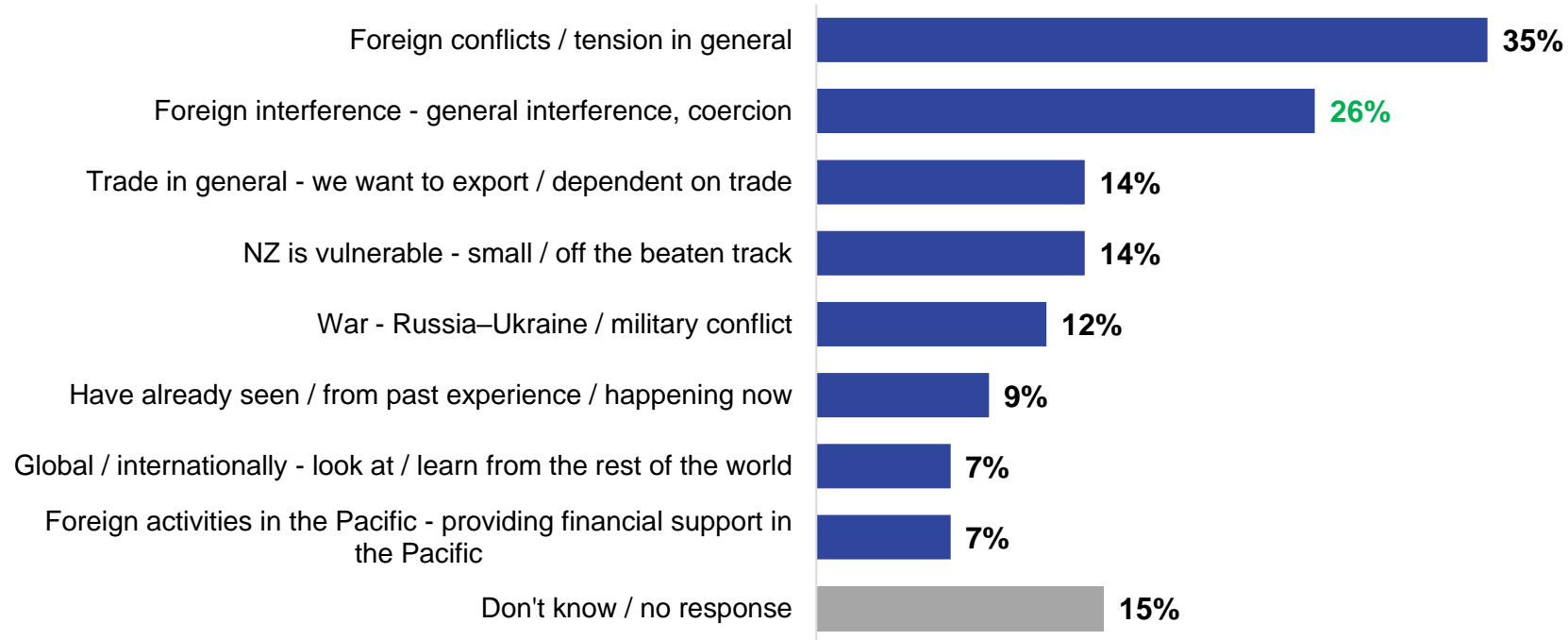


# WHY A VERY REAL THREAT – INCREASING COMPETITION BETWEEN COUNTRIES



When it comes to increasing competition between countries, New Zealanders believe *foreign conflicts / tensions* and *foreign interference* are driving this threat.

## Reasons for a very real threat of ‘increasing competition between countries’ happening in the next 12 months



**Q10:** And why do you think there is a very real threat of the following happening in the next twelve months?

**Base:** Those who answered that increasing competition between countries is a ‘very real threat’ (n=89\*). **Note:** These are the top % reasons why increasing competition between countries is likely to happen in the next 12 months. Reasons less than 5% not shown. **\*Caution:** Low base size, results indicative only (50 ≤ n < 100). **Green / red** indicates statistically significantly **higher / lower** than 2023.

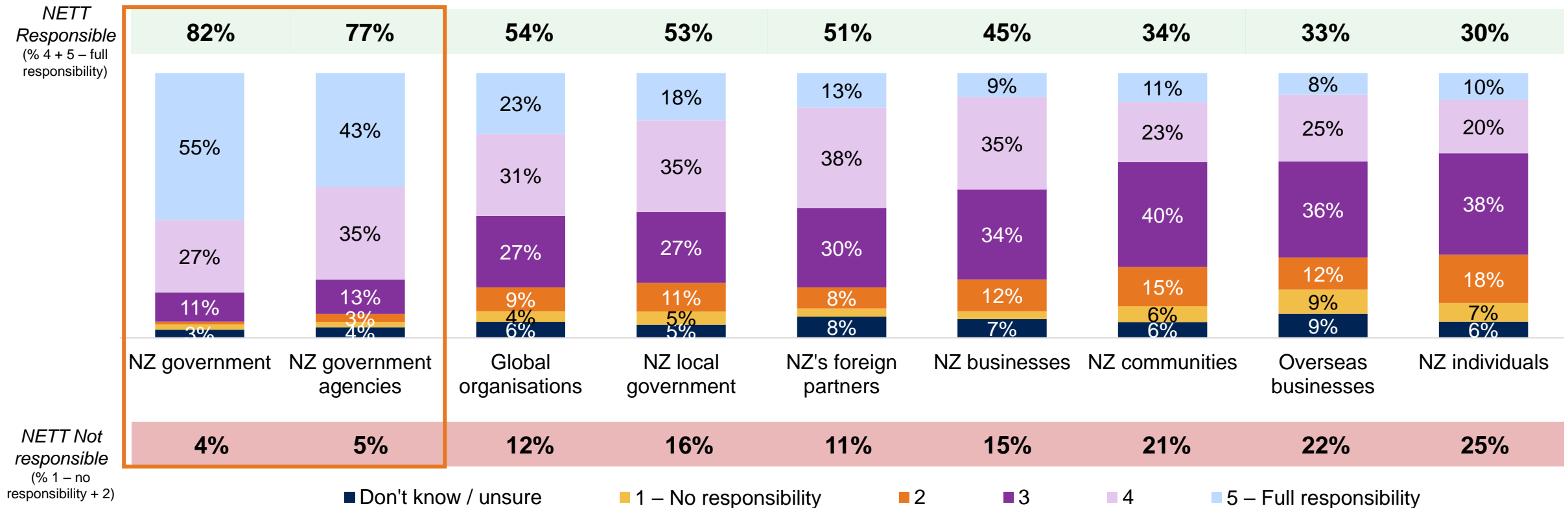


# ROLE TO PROTECT AGAINST – INCREASING COMPETITION BETWEEN COUNTRIES



New Zealanders believe the *Government and its agencies* have the most responsibility to *protect NZ against increasing competition between countries*, while *individuals, overseas businesses & NZ communities* have the least responsibility.

How much responsibility does each of the following have to protect NZ and respond to increasing competition between countries?



Q25: How much responsibility do you think each of the following have to protect New Zealand and respond to the threat of increasing competition between countries?

Base: Respondents randomly asked about increasing competition between countries (n=379). Note: Due to rounding there are some differences (+ / - 1%) between NETT figures and more detailed breakdown of results.



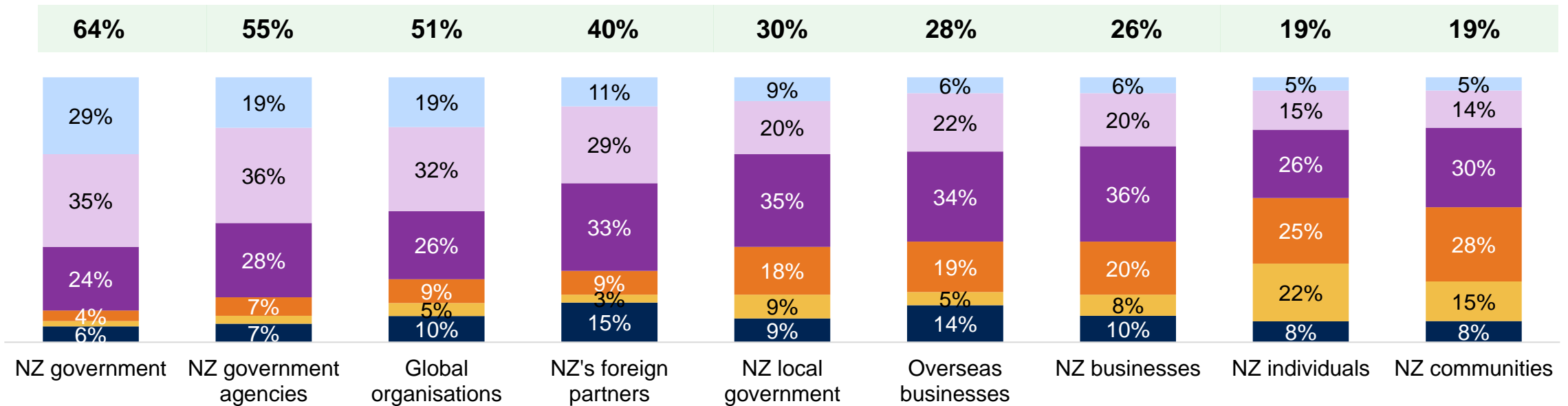
# TOOLS & RESOURCES TO PROTECT AGAINST – INCREASING COMPETITION BETWEEN COUNTRIES



New Zealanders believe that the *Government and its agencies* have the tools to *protect NZ against increasing competition between countries* (as do global organisations), while *communities & individuals* are the least equipped to do so.

## Who has the tools and resources to protect NZ and respond to increasing competition between countries?

NETT Well resourced (% 4 + 5 – fully resourced to respond)



NETT Poorly resourced (% 1 – no resources to respond + 2)

■ Don't know / unsure   ■ 1 – No resources to respond   ■ 2   ■ 3   ■ 4   ■ 5 – Fully resourced to respond

Q26: In your view, do each of the following have tools and resources to protect New Zealand and respond to increasing competition between countries?

Base: Respondents asked about increasing competition between countries (n=379). Note: Due to rounding there are some differences (+ / - 1%) between NETT figures and more detailed breakdown of results.







# ROLE / TOOLS & RESOURCES TO PROTECT AGAINST – INCREASING COMPETITION BETWEEN COUNTRIES



## Demographic Differences

### Role



**NZ government agencies (77%)**

**62%** 18–29 years



**NZ businesses (45%)**

**54%** Male

**36%** Female

**29%** 18–29 years

Figures represent  
NETT Responsible  
(% 4+ 5 – full  
responsibility)

### Tools & resources



**NZ businesses (26%)**

**34%** Male

**17%** Female

Figures represent  
NETT Well resourced  
(% 4+ 5 – fully resourced  
to respond)

**Q25:** How much responsibility do you think each of the following have to protect New Zealand and respond to increasing competition between countries? / **Q26:** In your view, do each of the following have tools and resources to increasing competition between countries?

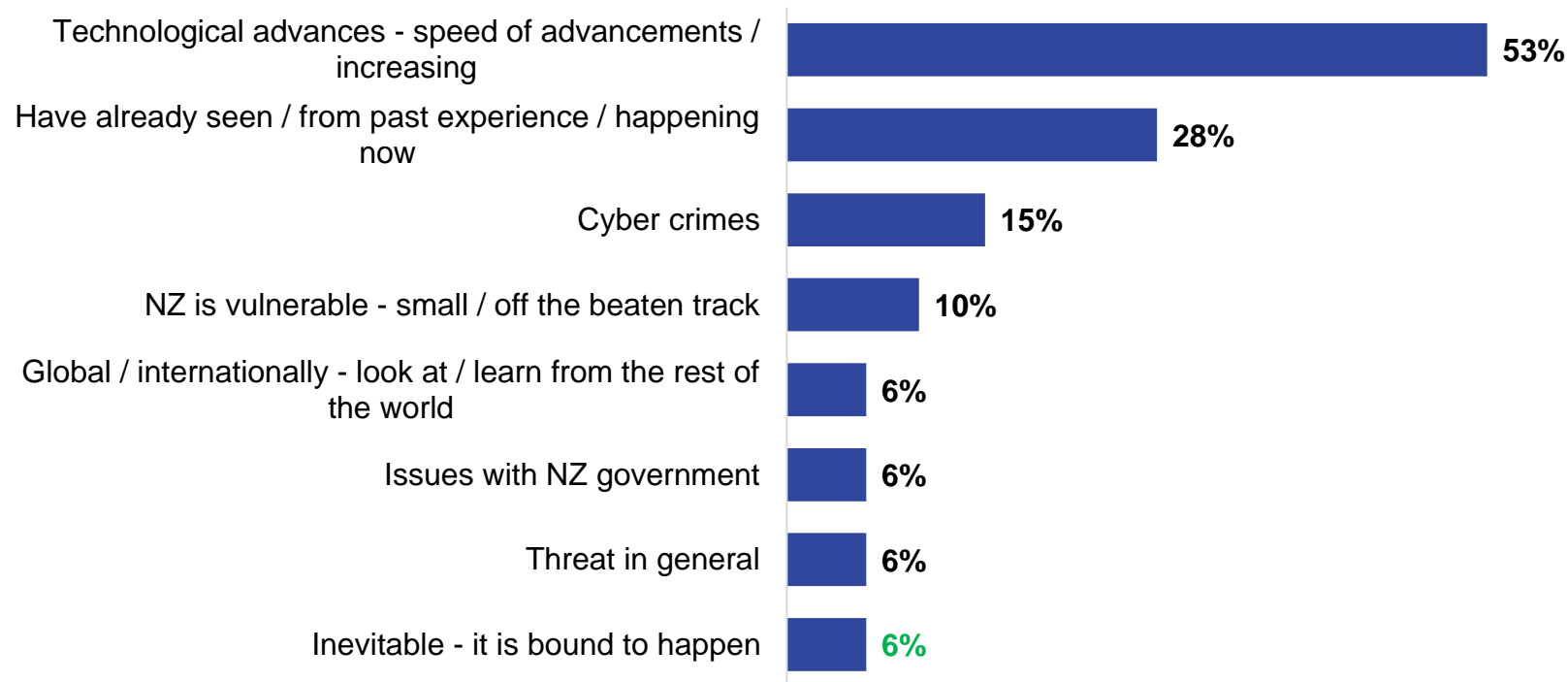
**Base:** Respondents randomly asked about increasing competition between countries (n=379). **Green / red** indicates statistically significantly **higher / lower** than the total.



# WHY A VERY REAL THREAT – EMERGING TECHNOLOGY

*Technological advances* are the main reason New Zealanders are concerned about the threat of *emerging technology* in the next 12 months, which they say *can already be seen happening* in New Zealand including via *cyber crimes*.

## Reasons for a very real threat of ‘emerging technology’ happening in the next 12 months



**Q10:** And why do you think there is a very real threat of the following happening in the next twelve months?

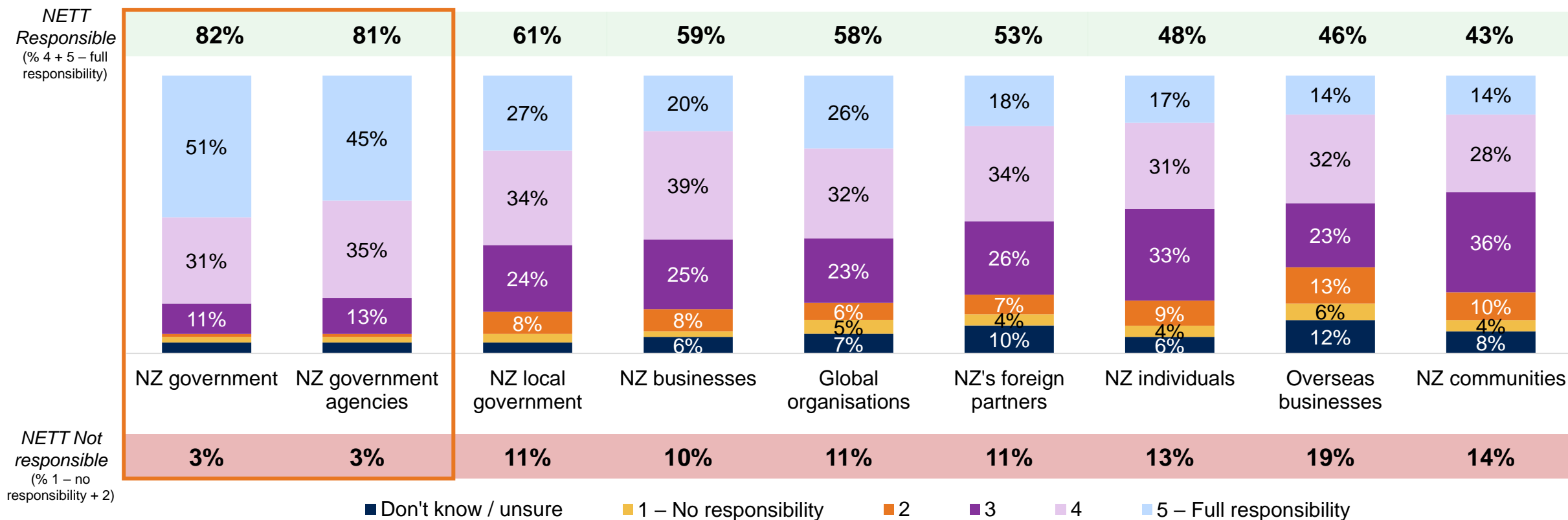
**Base:** Those who answered that emerging technology is a 'very real threat' (n=98\*). **Note:** These are the top % reasons why emerging technology is likely to happen in the next 12 months. Reasons less than 5% for 2023 not shown. **\*Caution:** Low base size, results indicative only (50 ≤ n < 100). **Green / red** indicates statistically significantly **higher / lower** than 2023.



# ROLE TO PROTECT AGAINST – EMERGING TECHNOLOGY

New Zealanders believe that the *Government and its agencies* have the most responsibility to *respond to emerging technology*, while *communities, individuals and overseas businesses* have the least responsibility.

How much responsibility does each of the following have to protect NZ and respond to emerging technology?



Q25: How much responsibility do you think each of the following have to protect New Zealand and respond to emerging technology?

Base: Respondents asked about emerging technology (n=389). Note: Due to rounding there are some differences (+ / - 1%) between NETT figures and more detailed breakdown of results.



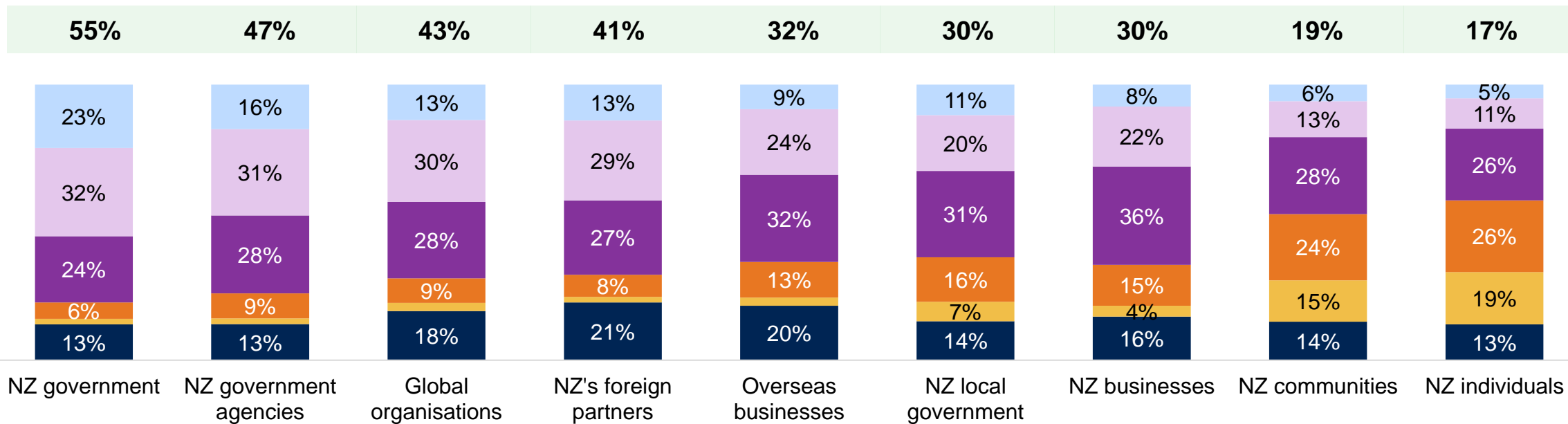
# TOOLS & RESOURCES TO PROTECT AGAINST – EMERGING TECHNOLOGY



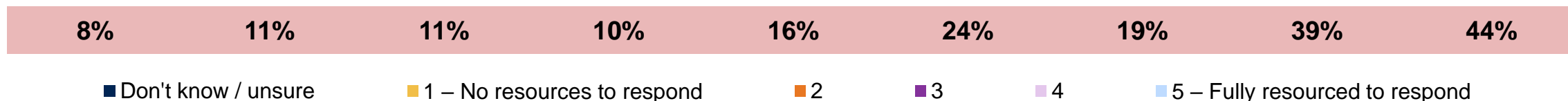
New Zealanders believe that the *Government and its agencies* have more tools to respond to emerging technology, while *individuals and communities* are the least equipped to do so.

## Who has the tools and resources to protect NZ and respond to emerging technology?

NETT Well resourced (% 4 + 5 – fully resourced to respond)



NETT Poorly resourced (% 1 – no resources to respond + 2)



■ Don't know / unsure   ■ 1 – No resources to respond   ■ 2   ■ 3   ■ 4   ■ 5 – Fully resourced to respond

Q26: In your view, do each of the following have tools and resources to protect New Zealand and respond to emerging technology?

Base: Respondents asked about emerging technology (n=389). Note: Due to rounding there are some differences (+ / - 1%) between NETT figures and more detailed breakdown of results.





# ROLE / TOOLS & RESOURCES TO PROTECT AGAINST – EMERGING TECHNOLOGY



## Demographic Differences

### Role



**NZ government (82%)**  
69% 18–29 years



**NZ government agencies (81%)**  
90% Born overseas  
64% 18–29 years



**NZ local government (61%)**  
74% Retired\*  
69% Female  
49% NETT None + Levels 1–3  
46% 18–29 years



**NZ businesses (59%)**  
47% NETT None + Levels 1–3  
44% 18–29 years



**Global organisations (58%)**  
74% 65+ years\*  
74% Retired\*  
47% 18–29 years

Figures represent  
NETT Responsible  
(% 4+ 5 – full  
responsibility)



**NZ's foreign partners (53%)**  
36% 18–29 years



**NZ individuals (48%)**  
65% Asian\*  
62% Born overseas  
36% NETT None + Levels 1–3  
35% Māori\*



**NZ communities (43%)**  
57% Asian\*

### Tools & resources



**Global organisations (43%)**  
27% Canterbury\*



**NZ's foreign partners (41%)**  
54% Rest of North Island (excl. Auckland, Wellington, Waikato)\*



**NZ businesses (30%)**  
45% Asian\*



**NZ communities (19%)**  
40% Asian\*  
30% Born overseas



**NZ individuals (17%)**  
30% Asian\*  
26% 18–29 years  
6% 50–64 years\*

Figures represent  
NETT Well resourced  
(% 4+ 5 – fully resourced  
to respond)

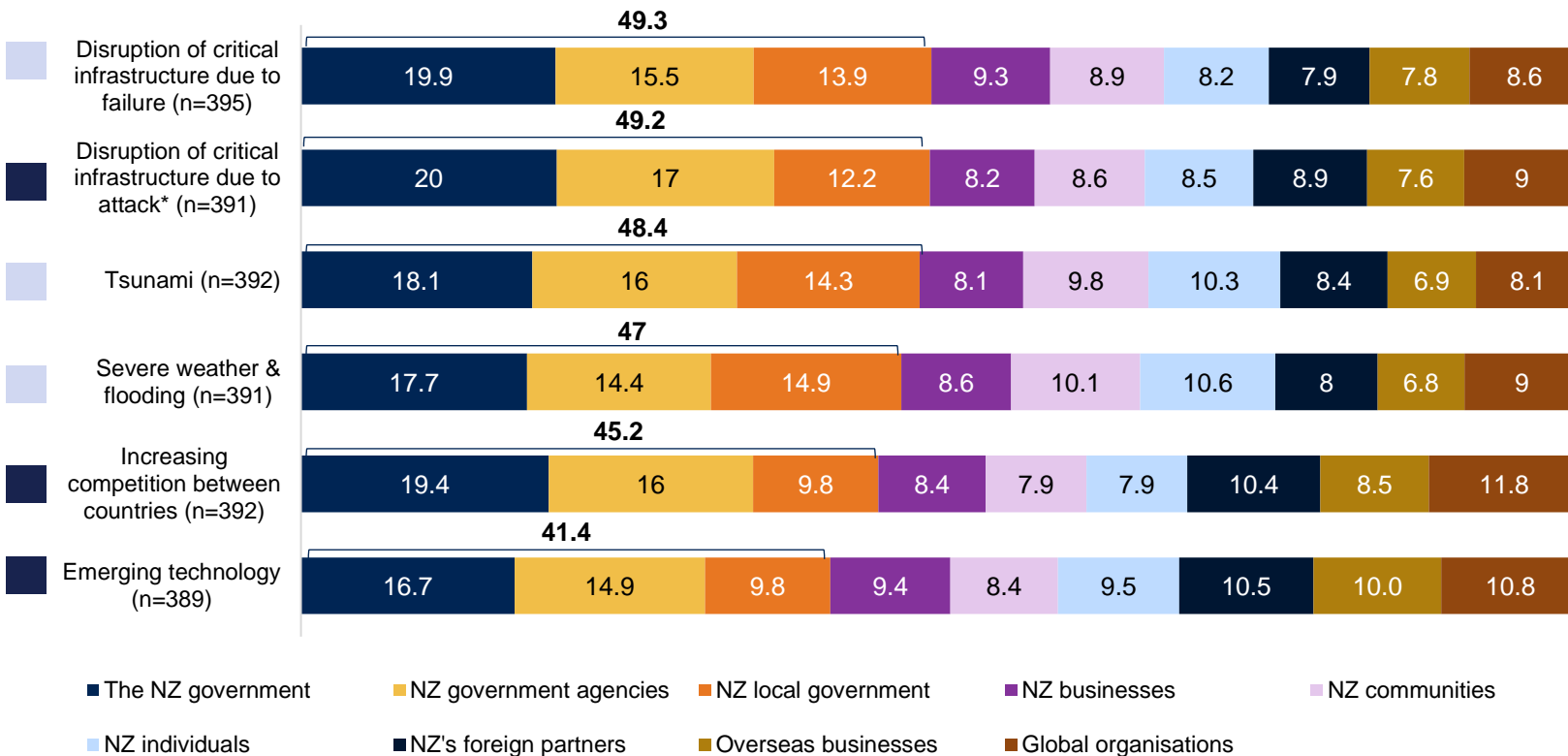
Q25: How much responsibility do you think each of the following have to protect New Zealand and respond to emerging technology? / Q26: In your view, do each of the following have tools and resources to protect New Zealand and respond to emerging technology?

Base: Respondents randomly asked about 'emerging technology' (n=389). Green / red indicates statistically significantly higher / lower than the total. \*CAUTION: Low base size, results indicative only (50 ≤ n < 100).

# SUMMARY – SHARE OF RESPONSIBILITY TO RESPOND – COMBINED

The *Government* (both central and local) and *its agencies* are seen as having the greatest responsibility to protect New Zealand and respond across the suite of National Risks explored in more detail as part of the 2024 survey.

How much responsibility do you think each of the following have to protect New Zealand and respond to the threat of...?

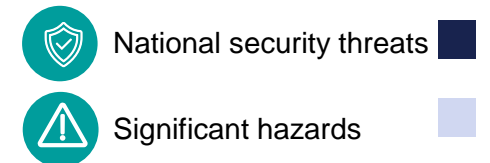


This calculation is based on Ipsos' approach to calculating a brand's share of brand desire (awareness, closeness, and performance) in the market. While it was not designed for this purpose, running the analysis based on ranking and responsibility score allows us to estimate the share of 'full responsibility' in the same way.

To calculate the share of responsibility, we have looked at the level of responsibility assigned to each actor by each respondent, as well as the rank, by taking into account the amount of responsibility each respondent assigned each actor in comparison to others.

**As such, this a measure of 'relative share' based on the level of responsibility they assigned to an actor individually and how that compares to the responsibility they assigned to each of the other actors.**

These details have been used to calculate a *relative share of 'full responsibility'* by actor.



Q25 / Q25h: How much responsibility do you think each of the following have to protect New Zealand and respond to the threat / hazard of...?

Base: Respondents asked about disruption of critical infrastructure due to failure (n=395), disruption of critical infrastructure due to attack (n=391), tsunami (n=392), severe weather and flooding (n=391), increasing competition between countries (n=392), emerging technology (n=389). \*Note: In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.



# TRUST / CONFIDENCE & TRANSPARENCY

# 5

# KEY FINDINGS

- **Only a third and a fifth of New Zealanders believe** New Zealand's government agencies **share enough information on Significant Hazards or National Security respectively.**
- **Confidence in government agencies' abilities to protect or respond to** National Security Threats is highest for *other countries interfering in NZ affairs, breach of NZ borders, personal safety / being violated, terrorist attack / violent extremism and foreign country / actor coercing NZ to act against its interests.* The top-3 Significant Hazards New Zealanders are most confident in government agencies' abilities are *wildfires, major food-safety incident, earthquakes and pests & diseases.*
- **For National Security Threats,** the areas where **likelihood** over the next 12 months is perceived to be the highest but **confidence** in government agencies' management abilities is lower, include: *violent conflict between groups in New Zealand, hacking into information systems, disinformation, emerging technology and nuclear / biological / chemical attack somewhere in world.*
- **For Significant Hazards,** areas where **likelihood** over the next 12 months is perceived to be the highest, but **confidence** in government agencies' management abilities is lower, include: *drought, volcanic activity, disruption of critical infrastructure due to failure and financial crisis.*
- Perceptions of what New Zealand's government agencies could do to **build confidence** in relation to National Security or Significant Hazards vary by specific threat or hazard; however, *taking action / responding quickly and informing & educating the public* are most commonly mentioned in response to how government agencies can build confidence.



# SHARING INFORMATION ABOUT NATIONAL RISKS

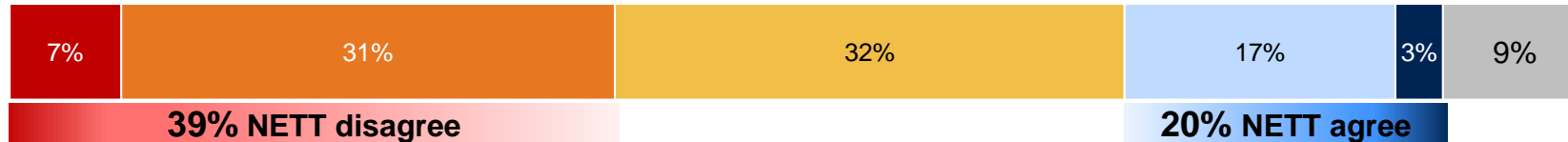
Only a third and a fifth of New Zealanders believe New Zealand's government agencies share enough information on Significant Hazards or National Security. Those who believe government agencies do not share enough information are more likely to lack confidence in government agencies' abilities to provide protection and response across all National Risks.

## NZ government agencies currently share enough information about *National Risks* (both threats and hazards) with New Zealanders

■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree ■ Don't know / unsure



### Threats\*

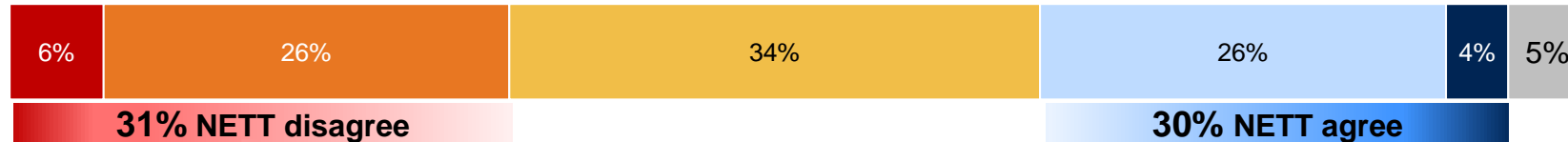


NETT Disagree  
29% NETT Asian

NETT agree  
25% 30–49 years  
24% Male  
16% Female  
14% 50–64 years



### Hazards\*



NETT Disagree  
43% Bay of Plenty  
41% Rural  
24% Born outside of NZ  
23% NETT Asian

NETT agree  
40% NETT Asian  
37% NETT Born outside of NZ  
36% HH income \$100k+  
35% Male  
25% Female

Those who *disagree* that government agencies currently share enough information, are also statistically significantly more likely to **not be confident** in government agencies' abilities to provide appropriate levels of security and protection or respond effectively across **all hazard AND threat types**.

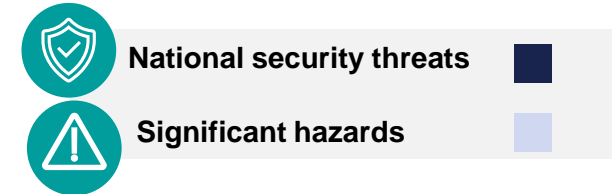
Q20 / Q20h: Thinking again about all the threats we have covered so far, do you agree or disagree with each of the following statements?

Base: Total sample – threats (n=1,172), hazards (n=1,178). \*Note: Results sum to 99 (threats) and 101 (hazards) due to rounding. Green / red indicates statistically significantly higher / lower than the total.

# TOP-10 THREATS & HAZARDS – CONFIDENCE IN AGENCIES

The top-3 threats New Zealanders are most confident that government agencies can respond to are *other countries interfering in NZ affairs, breach of NZ borders and personal safety / being violated*. The top-3 hazards are *wildfires, food-safety incident, earthquakes and pests & diseases*.

**Confidence that NZ government agencies could provide appropriate levels of security and protection and respond effectively to in the next 12 months**



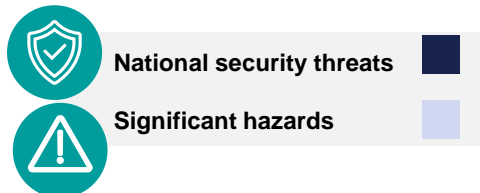
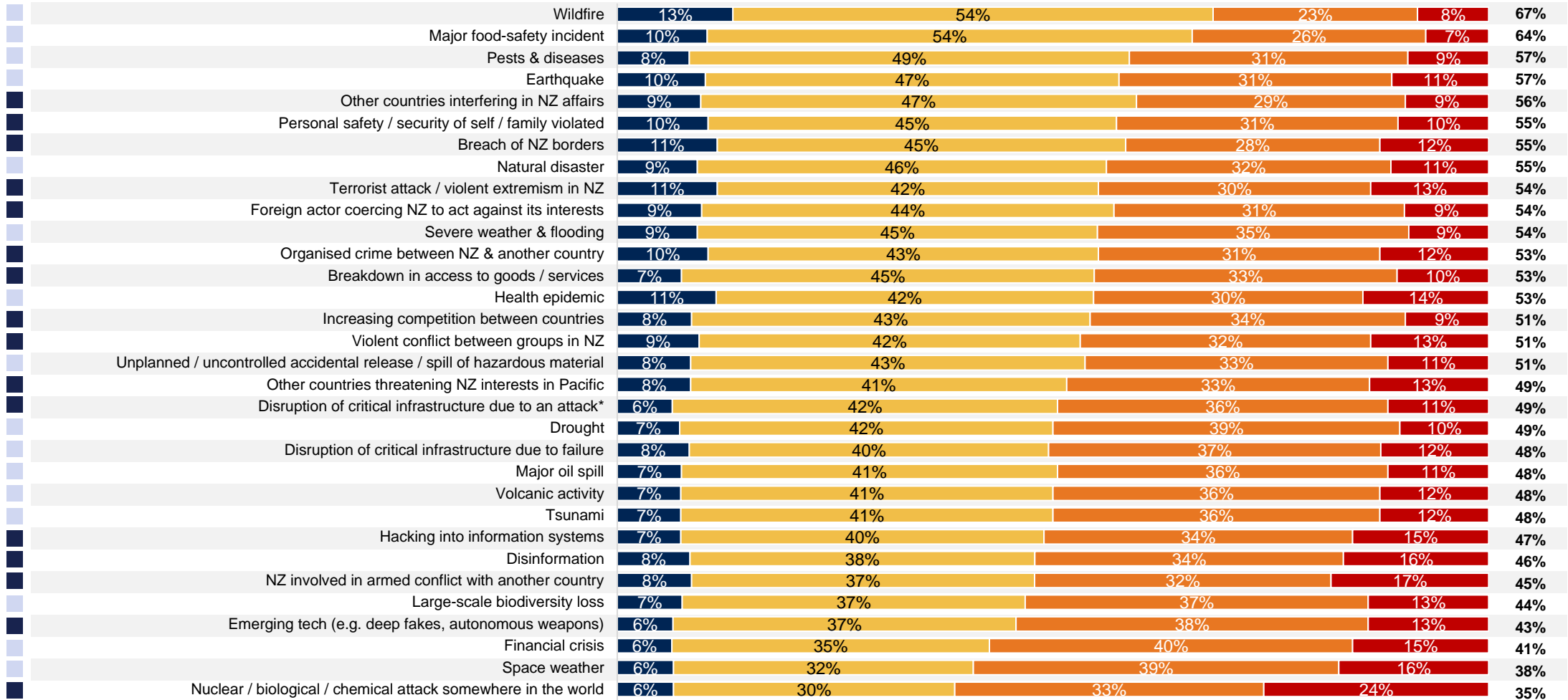
**Q11 / Q1h:** If any of the following were to happen in the next twelve months, how confident are you that New Zealand's government agencies could provide appropriate levels of security and protection and respond effectively to...  
**Base:** Total sample – threats (n=1,172), hazards (n=1,178). **\*Note:** In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.

# NATIONAL RISKS – CONFIDENCE IN AGENCIES – COMBINED

Figures represent NETT Confidence  
(% very + somewhat confident)

## Confidence that NZ government agencies could provide appropriate levels of security and protection and respond effectively in the next 12 months to...

2024  
NETT Confidence



Very confident Somewhat confident Not very confident Not confident at all

Q11 / Q11h: If any of the following were to happen in the next twelve months, how confident are you that New Zealand's government agencies could provide appropriate levels of security and protection and respond effectively to...

Base: Total sample – threats (n=1,172), hazards (n=1,178). Note: Threats and hazards were presented 'one at a time' on screen and randomised to reduce response order bias. \*Note: In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.



# CONFIDENCE IN AGENCIES – SIGNIFICANT DIFFERENCES (I)

## Demographic Differences



**Wildfire (67%)**  
73% 50–64 years



**Major food-safety incident (64%)**  
54% Rural



**Pests & diseases (57%)**  
64% 50–64 years  
51% 18–29 years  
47% Rural



**Other countries interfering in NZ affairs (56%)**  
71% NETT Pacific peoples\*  
47% NETT Māori  
34% Self-employed\*



**Personal / family's safety violated (55%)**  
46% NETT Māori  
39% Self-employed\*



**Breach of NZ borders (55%)**  
45% Rest of SI (excl. Canterbury)  
39% Self-employed\*



**Terrorist attack / violent extremism (54%)**  
61% 30–49 years  
45% 50–64 years



**Severe weather & flooding (54%)**  
59% Employed full-time  
45% Retired



**Organised crime between NZ & other countries (53%)**  
45% NETT Levels 8–10  
42% Wellington



**Breakdown in access to goods & services (53%)**  
66% NETT Pacific peoples\*  
63% NETT Not in employment  
59% 30–49 years  
45% NETT Levels 8–10  
43% 65+ years



National security threats



Significant hazards



Q11 / Q11h: If any of the following were to happen in the next twelve months, how confident are you that New Zealand's government agencies could provide appropriate levels of security and protection and respond effectively to...

Base: Total sample – threats (n=1,172), hazards (n=1,178). \*Caution: Low base size, results indicative only (50 ≤ n < 100). Green / red indicates statistically significantly higher / lower than the total.

# CONFIDENCE IN AGENCIES – SIGNIFICANT DIFFERENCES (II)

## Demographic Differences



**Violent conflicts between groups in NZ (51%)**  
56% Employed full-time



**Unplanned / uncontrolled accidental release / spill of hazardous material (51%)**  
58% Male  
46% Female  
45% 18–29 years



**Other countries threatening NZ interests in the Pacific (49%)**  
62% NETT Pacific peoples\*  
55% 30–49 years  
41% 50–64 years  
34% Self-employed\*



**Disruption of critical infrastructure due to an attack\*\* (49%)**  
60% NETT Pacific peoples\*  
58% Rural  
56% 30–49 years  
56% Rest of NI (excl. Auckland, Wellington, Waikato)  
41% 50–64 years  
41% NETT Levels 8–10



**Disruption of critical infrastructure due to failure (48%)**  
59% NETT Pacific peoples / Waikato



**Major oil spill (48%)**  
61% Waikato  
55% Born outside of NZ  
42% 18–29 years



**Tsunami (48%)**  
59% Waikato



**Hacking into information systems (47%)**  
59% NETT Pacific peoples\*  
54% 30–49 years  
54% Rest of NI (excl. Auckland, Wellington, Waikato)  
39% 50–64 years  
33% Self-employed\*



**Disinformation (46%)**  
61% NETT Pacific peoples\*  
38% NETT Levels 8–10  
37% Rest of SI (excl. Canterbury)  
33% Self-employed\*



National security threats



Significant hazards



**Q11 / Q11h:** If any of the following were to happen in the next twelve months, how confident are you that New Zealand's government agencies could provide appropriate levels of security and protection and respond effectively to...

**Base:** Total sample – threats (n=1,172), hazards (n=1,178). **\*Caution:** Low base size, results indicative only (50 ≤ n < 100). **\*\*Note:** In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack. **Green / red** indicates statistically significantly **higher / lower** than the total.

# CONFIDENCE IN AGENCIES – SIGNIFICANT DIFFERENCES (III)

## Demographic Differences



**NZ involved in armed conflict with another country (45%)**

**31%** Self-employed\*



**Large-scale biodiversity loss (44%)**

**55%** NETT Asian

**54%** Born outside of NZ

**34%** Rural



**Emerging technology (43%)**

**58%** NETT Pacific peoples\*

**36%** 50–64 years

**33%** Rest of SI (excl. Canterbury)



**Financial crisis (41%)**

**47%** Male

**36%** Female

**28%** Employed part-time



**Nuclear / biological attacks somewhere in the world (35%)**

**49%** NETT Pacific peoples\*



National security threats



Significant hazards

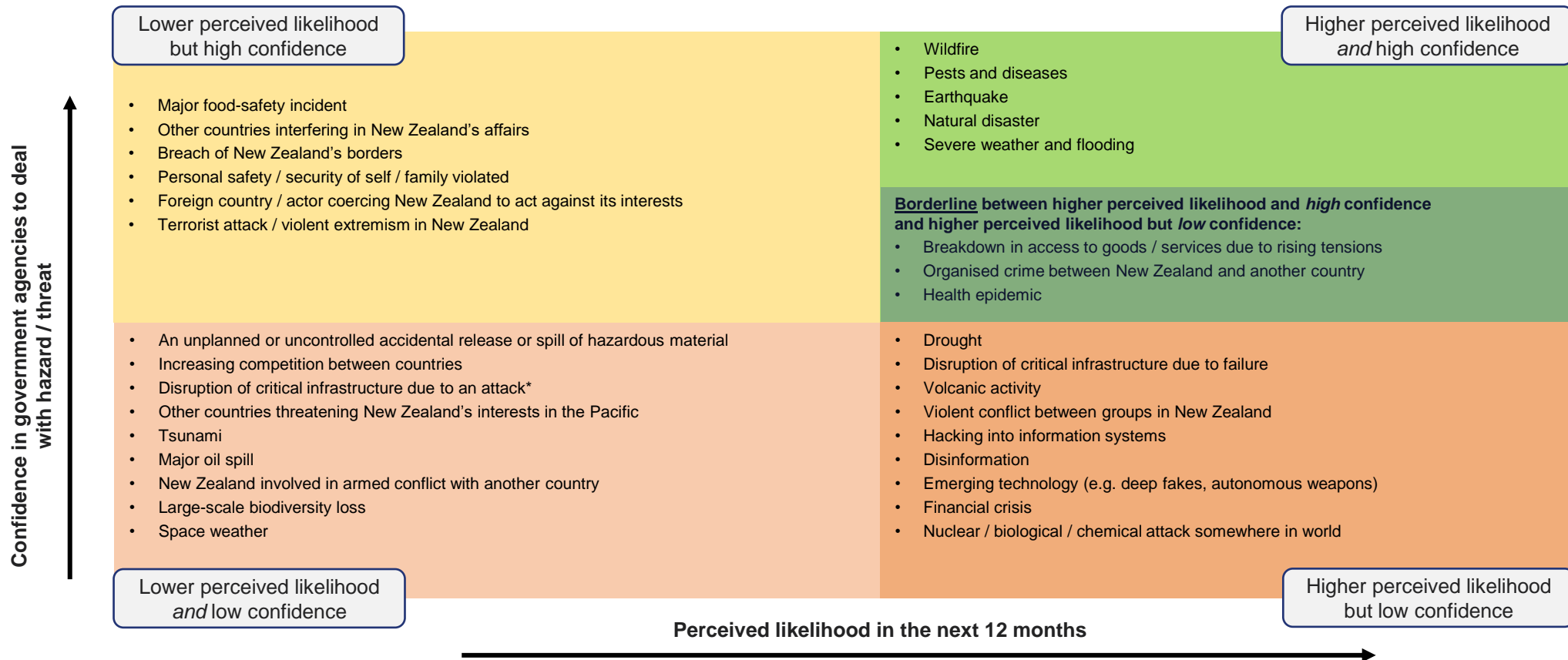


Q11 / Q11h: If any of the following were to happen in the next twelve months, how confident are you that New Zealand's government agencies could provide appropriate levels of security and protection and respond effectively to...

Base: Total sample – threats (n=1,172), hazards (n=1,178). \*Caution: Low base size, results indicative only (50 ≤ n < 100). Green / red indicates statistically significantly higher / lower than the total.

# CONFIDENCE IN GOVERNMENT AGENCIES BY PERCEIVED LIKELIHOOD

When confidence is overlaid with the likelihood of perceived threat in the next 12 months, *wildfires, pests & diseases, earthquakes, natural disaster* and *severe weather & flooding* have a high level of perceived likelihood but also a high level of confidence in the government agencies. However, there are a number of Risks with a perceived high likelihood, but lower confidence, such as *disinformation, emerging technology, financial crisis* and *nuclear / biological / chemical attack somewhere in world*.



Q9 / Q9h: How real do you feel the threat is of any of the following happening in the next twelve months? // Q11 / Q11h: If any of the following were to happen in the next twelve months, how confident are you that New Zealand's government agencies could provide appropriate levels of security and protection and respond effectively to...

Base: Total sample – threats (n=1,172), hazards (n=1,178). \*Note: In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.



# HOW GOVERNMENT AGENCIES CAN BUILD CONFIDENCE – THREATS (I)

Taking action / responding quickly and informing & educating the public are most commonly mentioned in response to how government agencies can build confidence amongst New Zealanders regarding threats.

	Total	Terrorist attack / violent extremism in NZ	Violent conflict between groups in NZ	Armed conflict with another nation	Nuclear / biological / chemical Attack	Personal safety / security of self & family members	Hacking	Breach of NZ's borders	Disinformation
Base (n=)	615	64*	61*	74*	94*	63*	61*	64*	63*
Take action, quicker responses	16%	13%	18%	4%	5%	17%	9%	3%	16%
Inform, communicate & educate	14%	17%	4%	5%	7%	5%	16%	5%	17%
It is out of their control – can't predict what will happen	12%	8%	13%▲	2%	16%	5%	14%▲	5%	8%
Have a stronger military, increase staff	12%	9%	7%	29%	6%	5%	0%	32%	0%
NZ is small / isolated & does not have the resources	11%	5%	0%	21%	13%	0%	5%	9%	0%
International alliances / relationships	10%	1%	0%	20%	9%	0%	1%	7%	0%
Funding / financial assistance / resources for those in need	8%	5%	3%	4%▼	1%	7%	10%	11%	1%
Have no confidence in government	8%	7%	10%	2%	3%	8%	6%	3%	3%
Harsher penalties & better protocols in place for emergencies	8%	3%	10%	0%	0%	11%	2%	3%	9%
Be prepared & more forward-thinking	7%	5%	0%	5%	10%	1%	0%	5%	4%
Give Police more power, arm Police & increase numbers	6%	6%	14%	0%	0%	25%	0%	2%	0%
Have the best / latest technology & cyber security	6%	0%	0%	0%	1%	3%	21%	1%	1%
More staff numbers	6%	3%	12%	7%	1%	14%	2%	6%	0%
Better security	5%	6%	0%	1%	1%	3%	10%	2%	0%
Be honest	5%	1%	2%	3%	1%	2%	9%▲	2%	12%
Border control	5%	3%	0%	1%	2%	1%	4%	15%	0%
Expertise – have trained / experienced / special teams	5%	0%	2%	4%	2%	2%	4%	2%	4%
Other	8%	1%	9%	1%	8%	8%	3%	4%	0%
Nothing	5%	2%	0%	7%	16%	5%	0%	4%	2%
DK / NR	14%	4%▼	6%	4%▼	5%	9%	9%	8%	10%

Q12: And what could New Zealand's government agencies do to make you feel more confident in their security / protection against, or response to the following?

Base: Those who are not confident at all in the government regarding threats (n=615). Note: Responses less than 5% for the total are not shown. \*Caution: Low base size, results indicative only (50 ≤ n < 100). Green / red indicates statistically significantly higher / lower than the total. ▲ / ▼ indicates statistically significantly higher / lower than 2023.







# HOW GOVERNMENT AGENCIES CAN BUILD CONFIDENCE – THREATS (II)

Taking action / responding quickly and informing & educating the public are most commonly mentioned in response to how government agencies can build confidence amongst New Zealanders regarding threats.

	Total	Organised crime	Security affected by emerging technology	Other countries interfering in NZ affairs	Foreign country / actor coercing NZ to act against its interests	Disruption of critical infrastructure due to an attack*	Other countries threatening NZ interests in Pacific	Breakdown in access to goods / services due to rising tensions	Increasing competition between countries
Base (n=)	615	60**	63**	62**	63**	63**	62**	63**	60**
Take action, quicker responses	16%	15%	7%	8%	20%	2%	9%	9%	5%
Inform, communicate & educate	14%	5%	15%	10%	9%	14%	10%	6%	8%
It is out of their control – can't predict what will happen	12%	7%	5%	6%	7%	5%	10%	10%	3%
Have a stronger military, increase staff	12%	1%	2%	2%	6%	0%	10%	0%	6%
NZ is small / isolated & does not have the resources	11%	3%	10%	0%	5%	7%	15%	3%	8%
International alliances / relationships	10%	5%	0%	10%	13%	2%	24%	12%	3%
Funding / financial assistance / resources for those in need	8%	5%	4%	4%	0%	11%	16%▲	2%	3%
Have no confidence in government	8%	5%	3%	14%	13%	3%	3%	4%	2%
Harsher penalties & better protocols in place for emergencies	8%	16%	8%	2%	4%	5%	0%	0%	4%
Be prepared & more forward-thinking	7%	0%	2%	3%	5%	7%	3%	5%	6%
Give Police more power, arm Police & increase numbers	6%	10%	3%	0%	1%	0%	0%	0%	0%
Have the best / latest technology & cyber security	6%	1%	17%	4%	0%	9%	0%	1%	0%
More staff numbers	6%	5%	2%	3%	0%	0%	1%	0%	3%
Better security	5%	0%	10%	5%	0%	11%	2%	0%	3%
Be honest	5%	1%	3%	6%	5%	2%	2%	2%	1%
Border control	5%	15%	0%	0%	1%	1%	0%	2%	3%
Expertise – have trained / experienced / special teams	5%	8%▲	8%	4%	2%	3%	3%	2%	1%
Other	8%	6%	2%	3%▼	6%	7%	2%	9%	10%
Nothing	5%	4%	4%	0%	1%	1%	0%	3%	2%
DK / NR	14%	9%	8%	16%	10%	17%	9%	13%	29%

Q12: And what could New Zealand's government agencies do to make you feel more confident in their security / protection against, or response to the following?

Base: Those who are not confident at all in the government regarding threats (n=615). Note: Responses less than 5% for the total are not shown. \*Note: In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack. \*\*Caution: Low base size, results indicative only (50 ≤ n < 100). Green / red indicates statistically significantly higher / lower than the total. ▲ / ▼ indicates statistically significantly higher / lower than 2023.





# HOW GOVERNMENT AGENCIES CAN BUILD CONFIDENCE – HAZARDS (I)

There are a range of perceptions on how government agencies can build confidence amongst New Zealanders; however, *being prepared & alert* and *being more informed / educated* are most commonly mentioned.

	Total	Health epidemic	Natural disaster	Earthquake	Tsunami	Volcanic activity	Drought	Wildfire	Disruption of critical infrastructure due to failure
Base (n=)	540	84*	45**	44**	73*	63*	42**	33**	58*
Be prepared / plan / be on the alert	22%	5%	32%	18%	16%	18%	26%	14%	16%
Inform / communicate / educate / clarity	19%	5%	8%	20%	23%	21%	14%	9%	11%
No confidence in government	16%	23%	4%	9%	6%	7%	6%	8%	13%
Take action / control	15%	9%	9%	19%	1%	8%	17%	7%	15%
Emergency services / systems / equipment in general	12%	3%	12%	21%	21%	10%	0%	37%	8%
Funding / financial assistance / resources	10%	7%	9%	5%	1%	2%	14%	9%	16%
It is out of their control	10%	2%	7%	7%	14%	14%	10%	4%	4%
Safety / protection	9%	1%	3%	6%	12%	6%	7%	0%	5%
Do a better job / learn from past experiences / events	7%	8%	12%	5%	9%	4%	1%	6%	5%
Better infrastructure	7%	0%	5%	3%	3%	0%	8%	0%	33%
Expertise / knowledge / provide the necessary skilled people	7%	3%	3%	2%	3%	7%	7%	7%	4%
Laws / rules / regulations / penalties in general	6%	2%	2%	4%	1%	0%	2%	0%	0%
Have back-ups / use alternatives	6%	0%	0%	0%	2%	1%	16%	0%	8%
The economy / employment in general	6%	4%	0%	0%	0%	0%	0%	0%	0%
Support the people of NZ	5%	5%	4%	8%	0%	4%	5%	3%	0%
Other	11%	6%	5%	7%	2%	9%	11%	13%	12%
Nothing	5%	0%	5%	3%	3%	3%	3%	0%	4%
DK / NR	14%	6%	13%	16%	7%	15%	3%	14%	6%

Q12h: And what could New Zealand's government agencies do to make you feel more confident in their security / protection against, or response to the following?

Base: Those who are not confident at all in the government regarding hazards (n=540). Note: Responses less than 5% for the total are not shown. \*Caution: Low base size, results indicative only (50 ≤ n < 100). \*\*Caution: Very low base size, results indicative only (n < 50). Green / red indicates statistically significantly higher / lower than the total.





# HOW GOVERNMENT AGENCIES CAN BUILD CONFIDENCE – HAZARDS (II)

There are a range of perceptions on how government agencies can build confidence amongst New Zealanders; however, *being prepared & alert* and *being more informed / educated* are most commonly mentioned.

	Total	Large-scale biodiversity loss	Pests & diseases	Severe weather & flooding	Financial crisis	Major oil spill	Space weather	Unplanned / uncontrolled accidental release / spill of hazardous material	Major food-safety incident
Base (n=)	540	77*	35**	31**	91*	56*	99*	50*	34**
Be prepared / plan / be on the alert	22%	6%	9%	3%	11%	19%	26%	18%	8%
Inform / communicate / educate / clarity	19%	10%	8%	3%	9%	25%	19%	10%	5%
No confidence in government	16%	15%	12%	14%	18%	18%	9%	11%	7%
Take action / control	15%	5%	2%	16%	9%	18%	6%	8%	12%
Emergency services / systems / equipment in general	12%	0%	0%	19%	0%	7%	1%	5%	3%
Funding / financial assistance / resources	10%	12%	10%	17%	7%	5%	2%	4%	4%
It is out of their control	10%	4%	4%	4%	9%	0%	7%	4%	2%
Safety / protection	9%	14%	0%	6%	4%	10%	2%	7%	9%
Do a better job / learn from past experiences / events	7%	1%	8%	6%	4%	4%	1%	2%	0%
Better infrastructure	7%	0%	0%	11%	1%	1%	3%	0%	0%
Expertise / knowledge / provide the necessary skilled people	7%	4%	3%	3%	1%	8%	1%	9%	7%
Laws / rules / regulations / penalties in general	6%	8%	8%	9%	5%	9%	0%	15%	8%
Have back-ups / use alternatives	6%	2%	0%	0%	2%	2%	13%	0%	0%
The economy / employment in general	6%	0%	5%	0%	21%	0%	2%	2%	11%
Support the people of NZ	5%	1%	3%	9%	3%	0%	1%	2%	3%
Other	11%	7%	5%	13%	5%	5%	7%	0%	9%
Nothing	5%	2%	6%	0%	0%	0%	9%	4%	6%
DK / NR	14%	7%	5%	4%	16%	9%	12%	15%	18%

Q12h: And what could New Zealand's government agencies do to make you feel more confident in their security / protection against, or response to the following?

Base: Those who are not confident at all in the government regarding hazards (n=540). Note: Responses less than 5% for the total are not shown. \*Caution: Low base size, results indicative only (50 ≤ n < 100). \*\*Caution: Very low base size, results indicative only (n < 50). Green / red indicates statistically significantly higher / lower than the total.

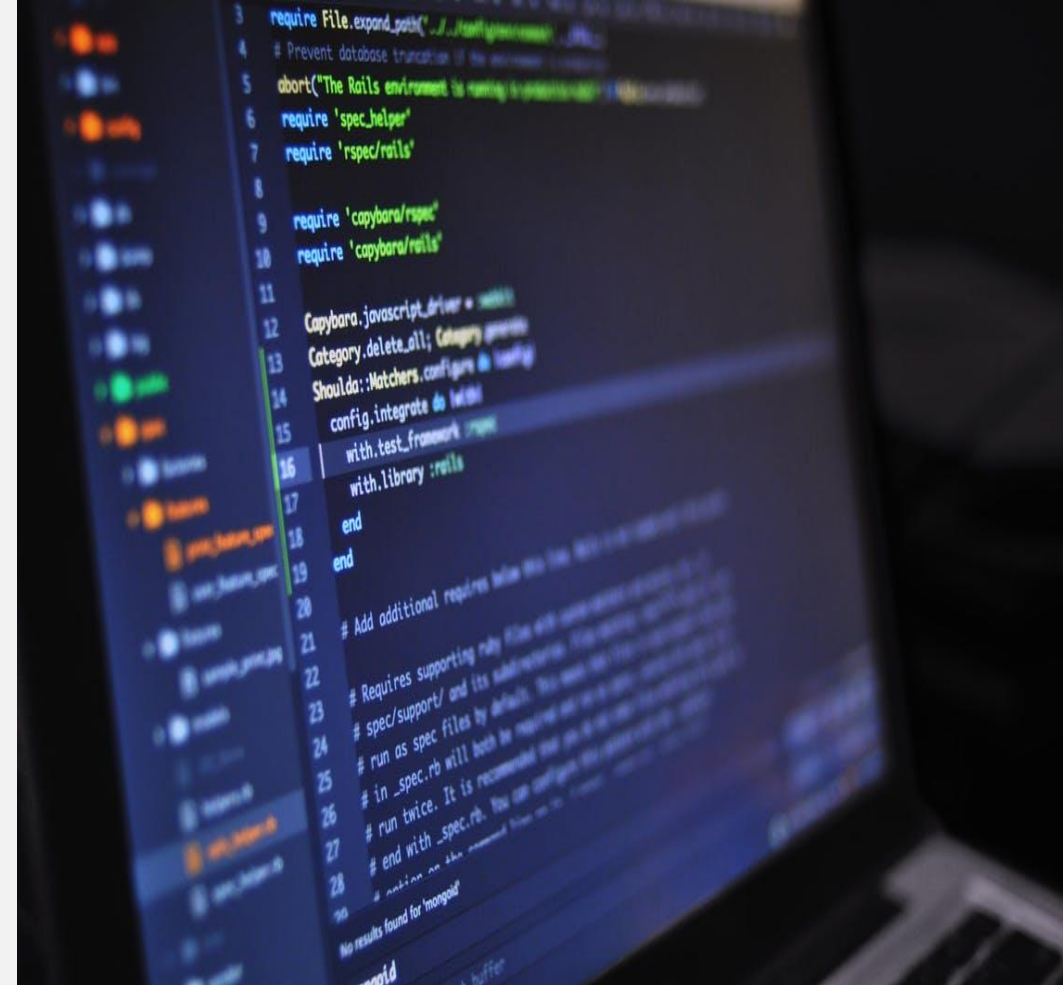


# CURRENT & FUTURE ENGAGEMENT

6

# KEY FINDINGS

- Around 40% of New Zealanders state they do not feel very knowledgeable about National Security and over a third don't know where to find information about National Security (35%).
- Just under 40% of New Zealanders state they feel they are knowledgeable about Significant Hazards, with just under half (48%) knowing where to find information about Significant Hazards.
- **Well over half of New Zealanders are interested in *finding out more about National Security and Significant Hazards***, and over a third would like to *be involved in public discussion* on both of these.
- People would also like more information on National Risks they see as most likely in the next 12 months.
- The type of information New Zealanders would prefer to receive focus on government communications *around plans to prepare & information on how individuals & communities can prepare; public reporting regarding the progress of the government work, specific information about the National Risk as well as information regarding the hazard event recovery.*



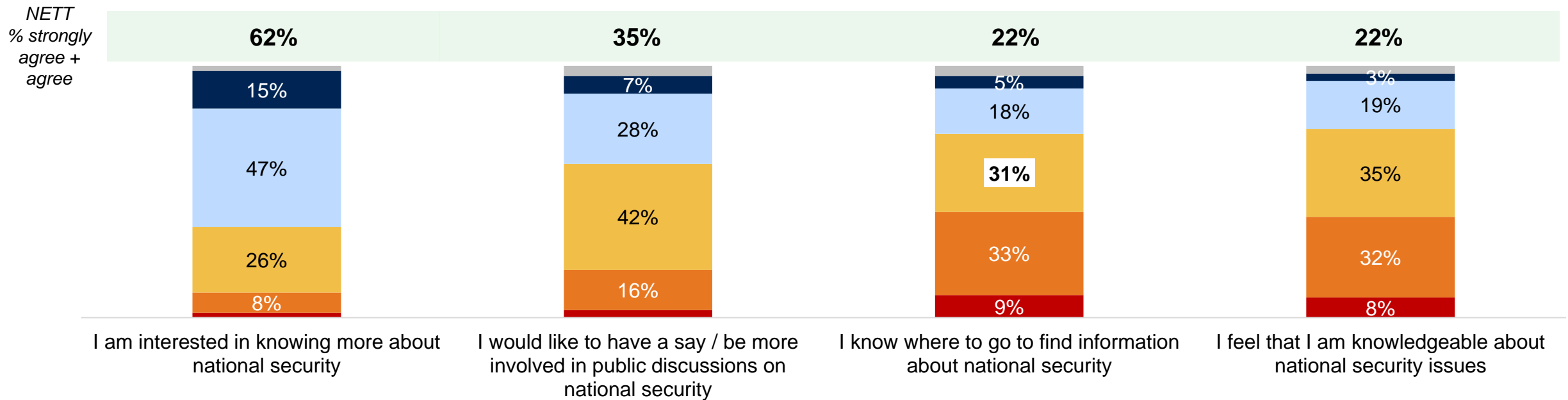


# INFORMATION ON NATIONAL SECURITY

Most New Zealanders are interested in knowing more about National Security and 1 in 3 are keen to be involved in public discussions. Around 40% of New Zealanders don't know where to find information about National Security, nor do they feel knowledgeable about National Security.

## Agreement with statements...

■ Don't know / unsure ■ Strongly agree ■ Agree ■ Neither agree nor disagree ■ Disagree ■ Strongly disagree



NETT % disagree + strongly disagree

Q20: Thinking again about all the threats we have covered so far, do you agree or disagree with each of the following statements?

Base: Total sample (n=1,172). Note: Due to rounding there are some differences (+ / - 1%) between NETT figures and more detailed breakdown of results.





# INFORMATION ON NATIONAL SECURITY – STATISTICALLY SIGNIFICANT DIFFERENCES

## Demographic Differences

### NETT Agree (Strongly agree + agree)



I am interested in knowing more about national security (62%)

69% Born outside of NZ  
54% HH income \$0–\$50k



I would like to have a say / be more involved in public discussions on national security (35%)

49% NETT Asian  
41% Born outside of NZ  
40% Employed full-time  
27% NETT None + Levels 1–3  
23% 65+ years  
21% Retired



I know where to go to find information about national security (22%)

31% NETT Asian  
29% 30–49 years  
18% Female  
16% 50–64 years  
9% Rest of SI (excl. Canterbury)



I feel that I am knowledgeable about national security issues (22%)

28% Employed full-time  
29% Male  
16% Female  
13% Retired

### NETT Disagree (Strongly disagree + disagree)



I am interested in knowing more about national security (10%)

16% NETT Māori



I would like to have a say / be more involved in public discussions on national security (19%)

26% Retired  
13% Born outside of NZ



I feel that I am knowledgeable about national security issues (40%)

49% Female  
49% 18–29 years  
30% Male



I know where to go to find information about national security (42%)

50% 18–29 years  
48% Female  
36% Male  
34% NETT Asian



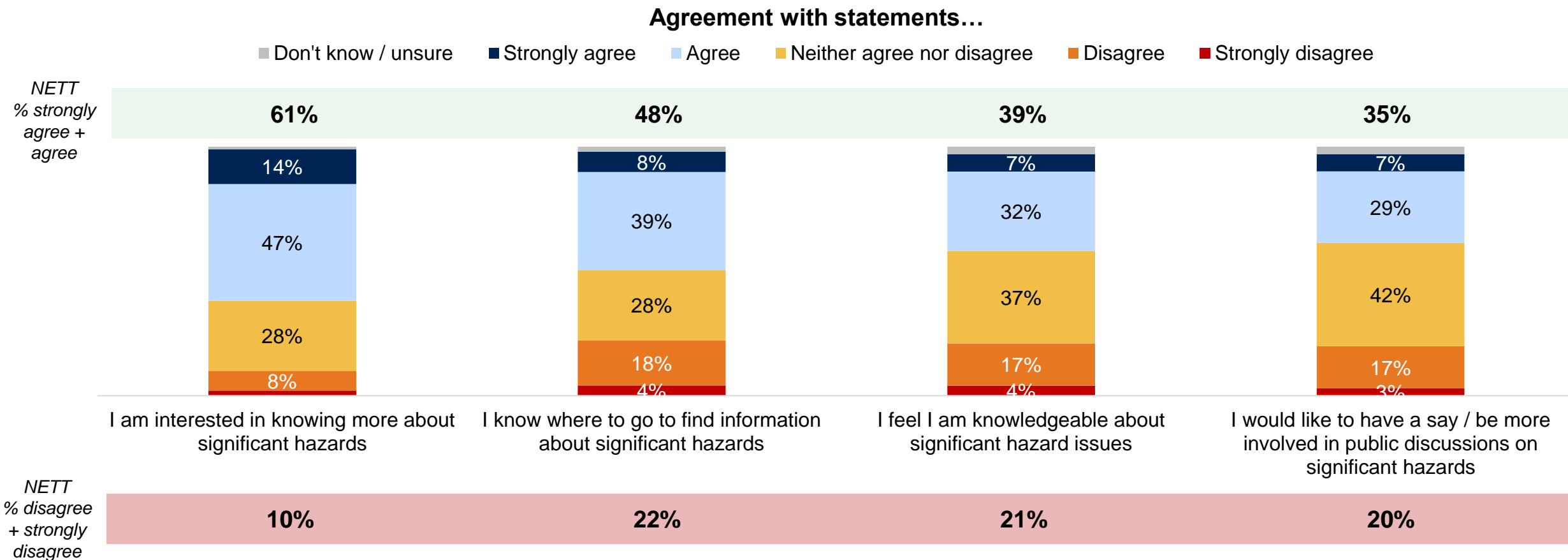
Q20: Thinking again about all the threats we have covered so far, do you agree or disagree with each of the following statements?

Base: Total sample (n=1,172). Green / red indicates statistically significantly higher / lower than the total.



# INFORMATION ON SIGNIFICANT HAZARDS

Two out of three New Zealanders are interested in knowing more about Significant Hazards. Just under half of New Zealanders know where to find information about Significant Hazards.



**Q20h:** Thinking again about all the significant hazards we have covered so far, do you agree or disagree with each of the following statements?

**Base:** Total sample (n=1,178). **Note:** Due to rounding there are some differences (+ / - 1%) between NETT figures and more detailed breakdown of results.







# INFORMATION ON SIGNIFICANT HAZARDS – STATISTICALLY SIGNIFICANT DIFFERENCES

## Demographic Differences

### NETT Agree (Strongly agree + agree)



**I am interested in knowing more about significant hazards (61%)**

**71%** NETT Asian  
**70%** Born outside of NZ  
**70%** NETT Levels 8–10  
**53%** 50–64 years / NETT None + Levels 1–3  
**49%** NETT Not in employment  
**40%** Full-time parent / homemaker\*



**I know where to go to find information about significant hazards (48%)**

**58%** NETT Levels 8–10  
**53%** HH income \$100k+  
**41%** 18–29 years  
**37%** NETT Not in employment  
**31%** Full-time parent / homemaker\*



**I feel that I am knowledgeable about significant hazard issues (39%)**

**47%** NETT Levels 8–10  
**46%** Male / HH income \$100k+  
**33%** Female  
**30%** Wellington  
**29%** NETT Not in employment  
**22%** Full-time parent / homemaker\*



**I would like to have a say / be more involved in public discussions on significant hazards (35%)**

**43%** NETT Māori  
**29%** NETT None + Levels 1–3  
**25%** NETT Not in employment  
**14%** Full-time parent / homemaker\*

### NETT Disagree (Strongly disagree + disagree)



**I know where to go to find information about significant hazards (22%)**

**30%** Employed part-time  
**28%** 18–29 years



**I feel that I am knowledgeable about significant hazard issues (21%)**

**28%** 18–29 years  
**25%** Female  
**16%** Male  
**14%** 65+ years  
**12%** Retired



**I would like to have a say / be more involved in public discussions on significant hazards (20%)**

**43%** Full-time parent / homemaker\*  
**31%** NETT Not in employment  
**15%** Born outside of NZ



**Q20h:** Thinking again about all the significant hazards we have covered so far, do you agree or disagree with each of the following statements?

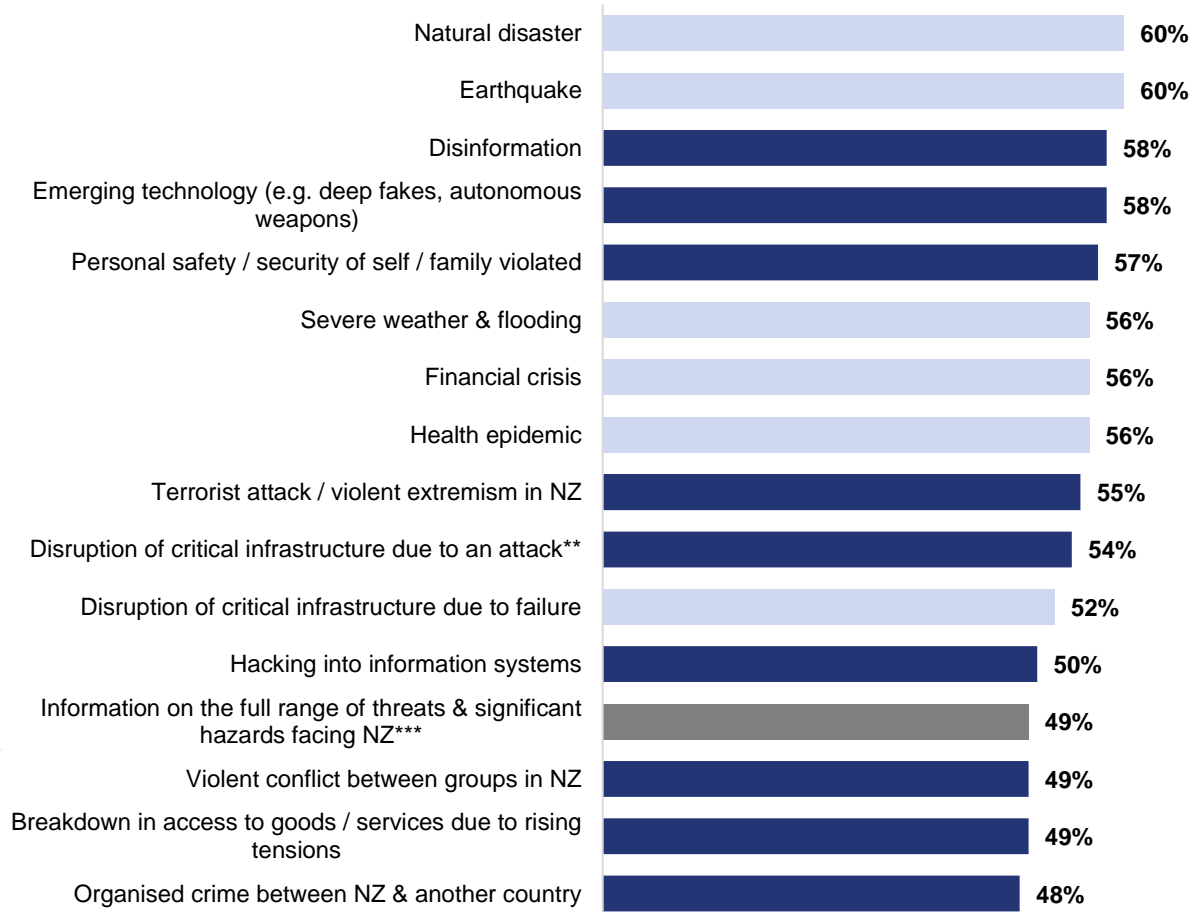
**Base:** Total sample (n=1,178). \***CAUTION:** Low base size, results indicative only (50 ≤ n < 100). **Green / red** indicates statistically significantly **higher / lower** than the total.

# NATIONAL RISKS – SEEKING MORE INFORMATION

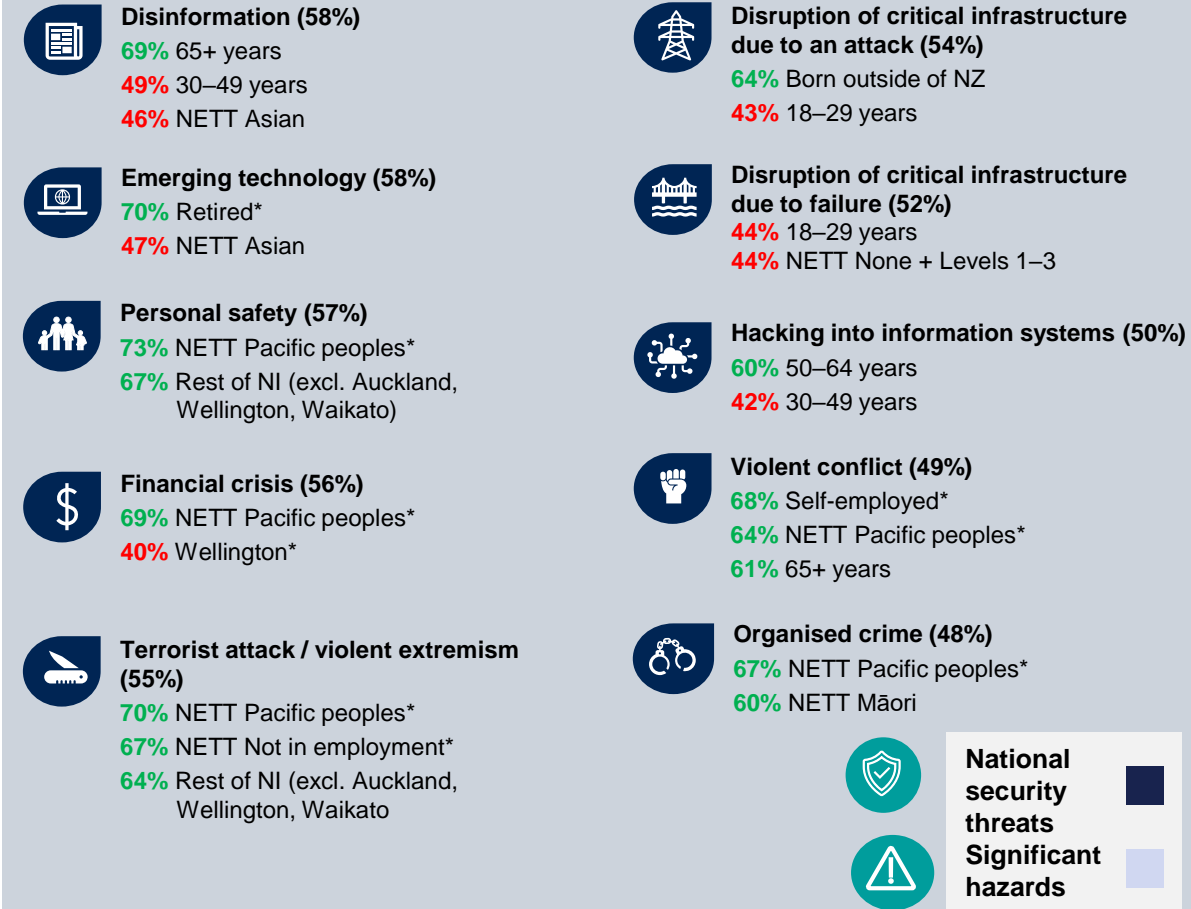
The Risks New Zealanders would like to know more about are somewhat similar to their perceptions of higher levels of likelihood – *natural disasters (general), earthquakes, disinformation and emerging technology.*

## Interest in knowing more about the following threats / hazards...

ORDERED FROM HIGHEST TO LOWEST LEVEL OF INTEREST



## Demographic Differences



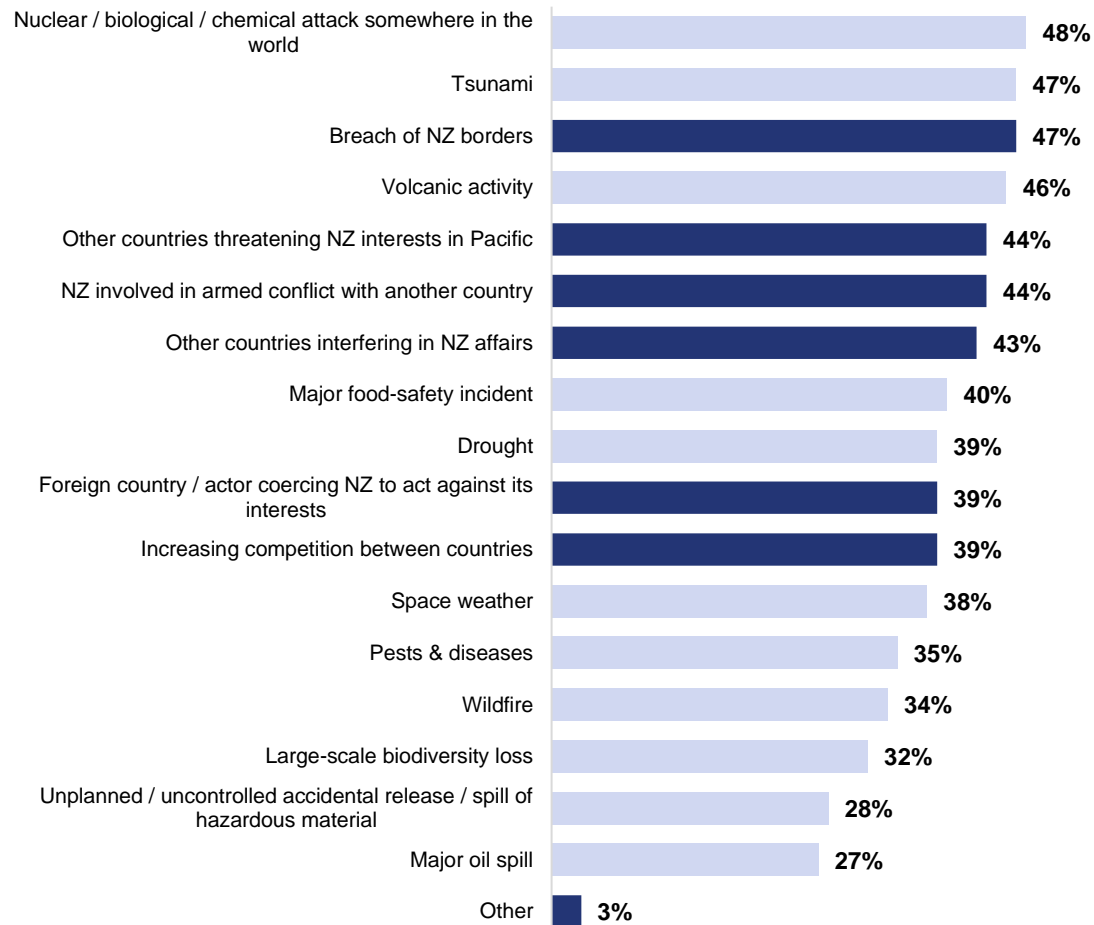
Q21 / Q21h: Which of the following threats / significant hazards are you interested in knowing more about?

Base: Those who indicated they were interested in knowing more about threats / hazards at: Q20 (n=721), Q20h (n=721). \*Caution: Low base size, results indicative only (50 ≤ n < 100).

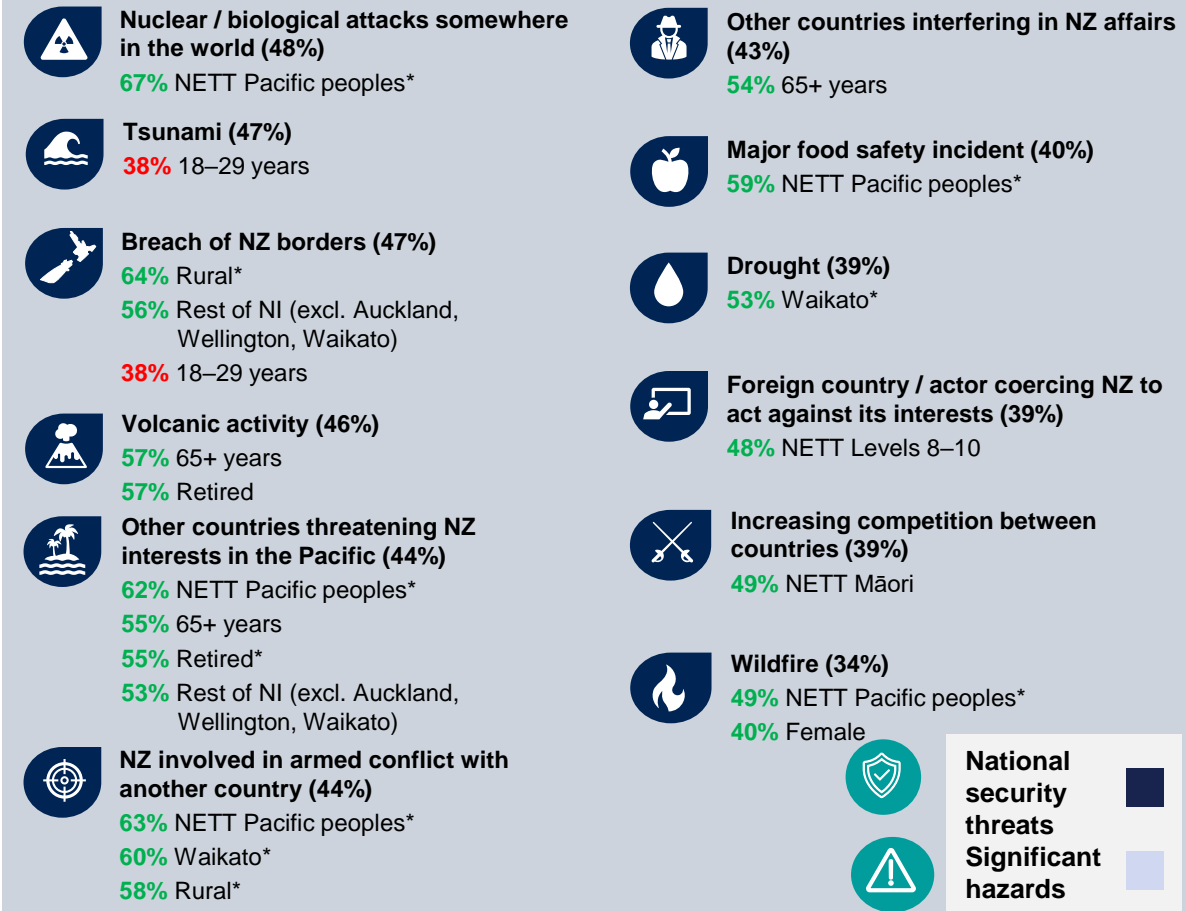
\*\*Note: In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack. \*\*\*Note: New to 2024 survey. Green / red indicates statistically significantly higher / lower than the total.

# NATIONAL RISKS – SEEKING MORE INFORMATION

## Interest in knowing more about the following threats / hazards



## Demographic Differences





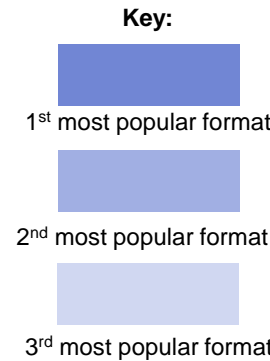
Q21 / Q21h: Which of the following threats / significant hazards are you interested in knowing more about?

Base: Those who indicated they were interested in knowing more about threats / hazards at: Q20 (n=721), Q20h (n=721). \*Caution: Low base size, results indicative only (50 ≤ n < 100).  
Green / red indicates statistically significantly higher / lower than the total.

# NATIONAL RISKS – PREFERRED INFORMATION FORMAT (TOTAL LEVEL)

The type of information New Zealanders would prefer to receive focuses on *government communications around plans to prepare for the threat, how individuals & communities can prepare, future outlook of the threat and public reporting regarding the progress of the governments work on this threat.* The type of information New Zealanders would prefer to receive on hazards focuses on *government communications around plans to prepare for the hazard, and information prior and during the hazard and information regarding hazard event recovery.*

	 National security threats	 Significant hazards
Base (n=)	694	687
Government plans & activities underway to prepare	75%	77%
Information about how you can prepare & protect yourself & your community	74%	50%
Future outlook, e.g. information on changes over time	68%	68%
Public reporting on the progress of government work programmes	67%	64%
Government information on how you can protect & prepare yourself & your community beforehand (e.g. advice on how to make a plan)	66%	76%
Government information during the threat / hazard (e.g. emergency response updates & advice on how you & your community can stay safe)	64%	77%
Government information for you & your community after the threat / hazard (e.g. update on recovery progress)	62%	73%
Government policy documents (e.g. Cabinet papers)	48%	42%
Information on how you can engage in discussions to inform future decision-making	47%	42%
Research reports, academic studies & papers	46%	50%
Ministerial / chief executive speeches	40%	34%
Other	2%	2%



**Q21a / Q21h\_a:** What type of information would you prefer to receive on <RESPONSE FROM Q21 / Q21h>?  
**Base:** Those who indicated they were interested in knowing more about threats / hazards at: Q21 (n=694), Q21h (n=687)

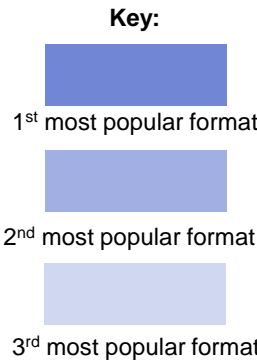




# THREATS – PREFERRED INFORMATION FORMAT (I)

The type of information New Zealanders would prefer to receive on threats focus on *government* communications around *plans to prepare for the threat, future outlook of the threat, as well as public reporting regarding the progress of the government’s work on this threat*. Information around *how you can protect & prepare for and information during the event* are preferred for *terrorism and hacking*.

	Terrorist attack / violent extremism in NZ	Violent conflict between groups in NZ	Armed conflict with another nation	Nuclear / biological / chemical attack	Personal safety / security of self & family members	Hacking	Breach of NZ's borders	Disinformation
Base (n=)	122	123	123	123	122	120	123	123
Government plans & activities underway to prepare	55%	62%	62%	64%	53%	59%	64%	51%
Information about how you can prepare & protect yourself & your community	N/A	N/A	N/A	N/A	70%	N/A	N/A	N/A
Future outlook, e.g. information on changes over time	48%	51%	46%	53%	40%	51%	42%	45%
Public reporting on the progress of government work programmes	45%	42%	45%	40%	38%	48%	49%	52%
Government information on how you can protect & prepare yourself & your community beforehand (e.g. advice on how to make a plan)	56%	N/A	N/A	N/A	N/A	68%	N/A	N/A
Government information during the threat (e.g. emergency response updates & advice on how you & your community can stay safe)	55%	N/A	N/A	N/A	N/A	65%	N/A	N/A
Government information for you & your community after the threat (e.g. update on recovery progress)	54%	N/A	N/A	N/A	N/A	57%	N/A	N/A
Government policy documents (e.g. Cabinet papers)	32%	31%	32%	32%	25%	33%	32%	34%
Information on how you can engage in discussions to inform future decision-making	19%	24%	32%	25%	38%	30%	26%	31%
Research reports, academic studies & papers	23%	25%	33%	25%	24%	35%	24%	41%
Ministerial / chief executive speeches	24%	20%	35%	29%	17%	19%	22%	29%
Other	1%	1%	1%	1%	1%	0%	1%	2%



**Q21a:** And what type of information would you prefer to receive on <RESPONSE FROM Q21>?  
**Base:** Those who indicated they were interested in knowing more about significant threats in Q21 (n=694)

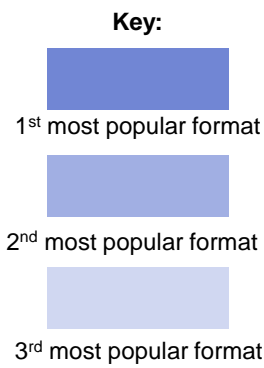




# THREATS – PREFERRED INFORMATION FORMAT (II)

The type of information New Zealanders would prefer to receive on threats focus on *government* communications around *plans to prepare for the threat, how to prepare & protect for the threat, the future outlook on the threat and public reporting regarding the progress of the government’s work on this threat*. For *disruption of critical infrastructure*, information is needed around how the public can *prepare & protect from this threat – prior to, during and after the event*.

	Organised crime	Security affected by emerging technology	Other countries interfering in NZ affairs	Foreign country / actor coercing NZ to act against its interests	Disruption of critical infrastructure due to an attack*	Other countries threatening NZ interests in Pacific	Breakdown in access to goods / services due to rising tensions	Increasing competition between countries
Base (n=)	122	125	122	122	123	123	124	122
Government plans & activities underway to prepare	51%	57%	63%	56%	52%	67%	64%	62%
Information about how you can prepare & protect yourself & your community	53%	58%	54%	N/A	N/A	N/A	74%	N/A
Future outlook, e.g. information on changes over time	44%	59%	49%	46%	47%	52%	51%	52%
Public reporting on the progress of government work programmes	48%	47%	57%	49%	48%	53%	52%	53%
Government information on how you can protect & prepare yourself & your community beforehand (e.g. advice on how to make a plan)	N/A	N/A	N/A	N/A	67%	N/A	N/A	N/A
Government information during the threat (e.g. emergency response updates & advice on how you & your community can stay safe)	N/A	N/A	N/A	N/A	62%	N/A	N/A	N/A
Government information for you & your community after the threat (e.g. update on recovery progress)	N/A	N/A	N/A	N/A	52%	N/A	N/A	N/A
Government policy documents (e.g. Cabinet papers)	31%	37%	37%	40%	35%	41%	30%	30%
Information on how you can engage in discussions to inform future decision-making	29%	34%	35%	32%	34%	35%	36%	42%
Research reports, academic studies & papers	33%	33%	34%	32%	30%	37%	36%	35%
Ministerial / chief executive speeches	32%	28%	31%	31%	30%	32%	38%	30%
Other	0%	0%	4%	0%	0%	0%	1%	1%



Q21a: And what type of information would you prefer to receive on <RESPONSE FROM Q21>?

Base: Those who indicated they were interested in knowing more about significant threats in Q21 (n=694). \*Note: In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.

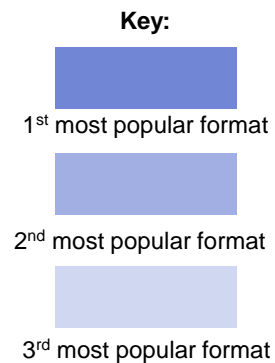




# SIGNIFICANT HAZARDS – PREFERRED INFORMATION FORMAT (I)

The type of information New Zealanders would prefer to receive on hazards focus on *government* communications around *plans to prepare for the hazard, information prior and during the hazard* and information regarding *hazard recovery*. Information around *the future outlook of the hazard* and *public reporting of the work* is preferred for *wildfire threats*.

	Health epidemic	Natural disaster	Earthquake	Tsunami	Volcanic activity	Drought	Wildfire	Disruption of critical infrastructure due to failure
Base (n=)	123	130	132	120	120	119	109	125
Government plans & activities underway to prepare	70%	67%	61%	67%	54%	60%	58%	60%
Government information during the hazard (e.g. emergency response updates & advice on how you & your community can stay safe)	72%	59%	64%	60%	67%	69%	N/A	65%
Government information on how you can protect & prepare yourself & your community beforehand (e.g. advice on how to make a plan)	69%	58%	57%	65%	64%	66%	N/A	58%
Government information for you & your community after the hazard (e.g. update on recovery progress)	54%	56%	54%	55%	57%	54%	N/A	57%
Future outlook, e.g. information on changes over time	45%	48%	34%	40%	51%	46%	53%	42%
Public reporting on the progress of government work programmes	52%	46%	34%	43%	41%	47%	53%	55%
Information about how you can prepare & protect yourself & your community	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Research reports, academic studies & papers	39%	34%	29%	30%	33%	26%	30%	27%
Information on how you can engage in discussions to inform future decision-making	26%	20%	27%	26%	28%	25%	28%	28%
Government policy documents (e.g. Cabinet papers)	36%	28%	18%	21%	22%	23%	26%	25%
Ministerial / chief executive speeches	26%	18%	13%	18%	20%	17%	18%	21%
Other	1%	0%	1%	1%	2%	2%	1%	0%



Q21h\_a: And what type of information would you prefer to receive on <RESPONSE FROM Q21h>?

Base: Those who indicated they were interested in knowing more about significant hazards in Q21h (n=687)



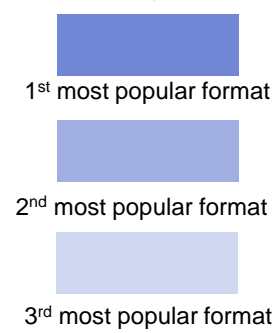


# SIGNIFICANT HAZARDS – PREFERRED INFORMATION FORMAT (II)

The type of information New Zealanders would prefer to receive on hazards focus on *government* communications around *plans to prepare for the hazard*; however, for a *financial crisis* they would prefer information about *protection & preparation*.

	Large-scale biodiversity loss	Pests & diseases	Severe weather & flooding	Financial crisis	Major oil spill	Space weather	An unplanned / uncontrolled accidental release / spill of hazardous material	Major food-safety incident
Base (n=)	118	114	127	133	109	120	109	118
Government plans & activities underway to prepare	60%	60%	63%	53%	62%	64%	59%	56%
Government information during the hazard (e.g. emergency response updates & advice on how you & your community can stay safe)	N/A	59%	63%	N/A	N/A	62%	60%	N/A
Government information on how you can protect & prepare yourself & your community beforehand (e.g. advice on how to make a plan)	N/A	56%	60%	N/A	N/A	63%	62%	N/A
Government information for you & your community after the hazard (e.g. update on recovery progress)	N/A	62%	57%	N/A	N/A	55%	60%	N/A
Future outlook, e.g. information on changes over time	62%	56%	51%	45%	47%	58%	42%	56%
Public reporting on the progress of government work programmes	59%	54%	44%	45%	51%	49%	51%	52%
Information about how you can prepare & protect yourself & your community	N/A	N/A	N/A	62%	N/A	N/A	N/A	N/A
Research reports, academic studies & papers	52%	46%	28%	30%	43%	39%	33%	44%
Information on how you can engage in discussions to inform future decision-making	38%	35%	20%	28%	38%	26%	37%	36%
Government policy documents (e.g. Cabinet papers)	34%	34%	22%	30%	37%	31%	36%	30%
Ministerial / chief executive speeches	31%	26%	14%	25%	32%	23%	32%	32%
Other	0%	2%	3%	1%	1%	1%	2%	1%

Key:



Q21h\_a: And what type of information would you prefer to receive on <RESPONSE FROM Q21h>?

Base: Those who indicated they were interested in knowing more about significant hazards in Q21h (n=687)





# APPENDIX 1 – CHANGES TO SURVEY SINCE 2023

# 8

# CHANGES TO SURVEY SUMMARY

Since 2023, a few changes have been made to the survey:

- Respondents are now assigned to one of the two ‘tracks’ – one track is about *national security threats* and the other track is about *significant hazards*. Questions are identical but asked in the context of a different list (either a *threats* list or a *hazards* list). The total survey sample is split between both tracks.
- The statements ‘Another major health epidemic breaking out in New Zealand’ and ‘A major natural disaster occurring in New Zealand’ have been **moved** from the list of *national security threats* asked to the respondents in the *threats track* and have been re-classified as *significant hazards* which are now asked of the respondents who answer the *hazards track*.
- In the *threats track*, the following statements have been **re-worded**:
  - ‘New Zealand and / or New Zealanders’ security being affected by emerging technology (e.g. artificial intelligence, deep fakes, autonomous weapons’ now includes ‘artificial intelligence’ as an example.
  - ‘A breakdown in national infrastructure due to a malicious attack (e.g. cyber attack on transport system) has been changed to ‘Disruption of New Zealand’s critical infrastructure (e.g. water, transport, energy, telecommunications) due to a malicious attack (e.g. cyber attack on transport system)’.
- The question ‘Which of the following threats are you interested in knowing more about?’ now has an **additional answer option** ‘Information on the full range of threats and significant hazards facing New Zealand’.
- The question ‘And what type of information would you prefer to receive on x?’ was **added**.
- The questions ‘And in what format would you prefer for information on x?’ and ‘Where would you like to receive information about the threats we have discussed during the survey?’ have been **removed**.



# ADDITIONS / WORDING CHANGES IN SURVEY – THREATS TRACK

Question (in order of questionnaire):	Change(s) from 2023:
Q9: ‘How real do you feel the threat is of any of the following happening in the next twelve months?’	<ul style="list-style-type: none"> <li>▪ <b>Statements removed and moved to the equivalent question for the hazards track respondents (Q9h):</b> ‘Another major health epidemic breaking out in New Zealand’ and ‘A major natural disaster occurring in New Zealand’ .</li> <li>▪ <b>Statement wording changed:</b> ‘New Zealand and / or New Zealanders’ security being affected by emerging technology (e.g. deep fakes, autonomous weapons)’ to ‘New Zealand and / or New Zealanders’ security being affected by emerging technology (e.g. artificial intelligence, deep fakes, autonomous weapons)’.</li> <li>▪ <b>Statement wording changed:</b> ‘A breakdown in national infrastructure due to a malicious attack (e.g. cyber attack on transport system) to ‘disruption of New Zealand’s critical infrastructure (e.g. water, transport, energy, telecommunications) due to a malicious attack (e.g. cyber attack on transport system)’.</li> </ul>
Q21: ‘Which of the following threats are you interested in knowing more about?’	<b>Answer option added:</b> ‘Information on the full range of threats and significant hazards facing New Zealand’
Q21a: ‘And what type of information would you prefer to receive on <INSERT RESPONSE FROM Q21>?’	<b>New question added</b>
Q22: ‘And in what format would you prefer for information on <INSERT RESPONSE FROM Q21>?’	<b>Question removed</b>
Q24: ‘Where would you like to receive information about the threats we have discussed during this survey?’	<b>Question removed</b>



# ADDITIONS / WORDING CHANGES IN SURVEY – HAZARDS TRACK

## Question (in order of questionnaire):

## New questions:

All questions asked of respondents in the 2023 version of the survey (which are now referred to as questions in the *threats track*) and that were not removed have been **replicated to an equivalent question specific to the list of significant hazards** asked only of respondents who were shown the *hazards track*. Half of the sample were asked these questions. The hazards track asks the same questions as the threats track, but in relation to the list of hazards:

- *Another major health epidemic breaking out in New Zealand*
- *A major natural disaster occurring in New Zealand*
- *A major earthquake resulting in strong and violent ground shaking in New Zealand*
- *A major tsunami (a series of large, damaging waves) in New Zealand*
- *Significant volcanic activity (including release of gases, ash, lava emissions and / or an eruption) in New Zealand*
- *An extended period of drought (unusually dry weather conditions or below normal rainfall) in New Zealand*
- *An uncontrolled wildfire in a rural or urban environment in New Zealand*
- *Disruption of New Zealand’s critical infrastructure (e.g. water, transport, energy, telecommunications) due to human error or a natural hazard*
- *A significant reduction in the number and variety of plants and animals in New Zealand caused by humans, natural hazard or disease*
- *An outbreak of agricultural or environmental pests and diseases (e.g. an outbreak of fruit-flies) in New Zealand*
- *A severe weather event (e.g. strong winds, heavy rain, snow, landslides and / or flooding) in New Zealand*
- *A financial crisis (e.g. failure of a major bank, insurer or stock market) causing disruption to New Zealand’s financial system*
- *A space weather event that causes disruption or damage to New Zealand’s information and communications, power grids and / or global navigation systems*
- *An unplanned or uncontrolled accidental release or spill of hazardous material (e.g. corrosive, explosive, toxic or radioactive material) in New Zealand*
- *A major food-safety incident posing a risk to public health in New Zealand and / or trade with other countries*

- **Q8h:** ‘When you see the term “National Risk” what comes to mind?’
  - **Q9h:** ‘How real do you feel the threat is of any of the following happening in the next twelve months?’
  - **Q10h:** ‘And why do you think there is a very real threat of the following happening in the next twelve months?’
  - **Q11h:** ‘If any of the following were to happen in the next twelve months, how confident are you that New Zealand’s government agencies could provide appropriate levels of security and protection and respond effectively to:’
  - **Q12h:** ‘And what could New Zealand’s government agencies do to make you feel more confident in their security / protection against, or response to the following?’
  - **Q17h:** ‘Thinking now about the future, how real do you feel the threat is of any of the following happening in the next 10 years?’
  - **Q20h:** ‘Thinking again about all the significant hazards we have covered so far, do you agree or disagree with each of the following statements?’
  - **Q21h:** ‘Which of the following significant hazards are you interested in knowing more about?’
  - **Q21h\_a:** And what type of information would you prefer to receive on <INSERT RESPONSE FROM Q21h>?’
  - **Q25h:** The next couple of questions are about ‘<INSERT SIGNIFICANT HAZARD NAME>’
  - **Q26h:** In your view, do each of the following have tools and resources to protect New Zealand and respond to <INSERT SIGNIFICANT HAZARD NAME FROM Q25h>?’
- These questions have ‘h’ on the end of the numbers to indicate that these are equivalent questions of the threats track for the hazards track.



# APPENDIX 2 – PANEL DETAILS

# 9

# PANEL DETAILS



## Methodology

Interviews were conducted online (self-completion). Respondents were recruited from Ipsos, Ipsos-partner panels and river sampling.

The purpose of this research is to help the national security sector understand New Zealanders' attitudes and opinions relating to national security risks, challenges and opportunities. In order to achieve this objective, we conducted an online survey using a sample of respondents from both research panels and non-panel sample sources (river sampling).

Panel respondents are recruited from actively managed research panels (not a just lists or databases of individuals). They are individuals who have volunteered to take part in market research surveys. The panels are created and managed for long-term use and access, and extensively profiled to efficiently target respondents.

This research used a blend of reputable online panels (Ipsos iSay and Consumer Link), which ensures better representation and reach than a single source. River sampling was also used to recruit respondents who are not members of online panels, which is particularly useful for harder-to-reach demographics (e.g. young males).

River sampling uses in-app rewards to encourage respondents to take part in surveys. River sampling recruits respondents in real time from in-app- and in-browser-based advertisements on gaming / social sites or reward and loyalty programme sites. Respondents are rewarded by the app / site from which they were recruited (for example, they may receive extra lives from a gaming site if recruited from a gaming site).

Blending panel suppliers and non-panel sources (river sampling) allowed us to reduce online panel biases by reaching people who are not online panel members. The sample comprised a blend of high-quality online panel samples (81%) and river sampling of non-panel sources (19%).

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

**THANK  
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