



2024 NATIONAL RISKS PUBLIC SURVEY NATIONAL SECURITY THREATS



GAME CHANGERS





REPORT CONTENTS

1.	<u>Background & Methodology</u>	3
2.	<u>Key Findings Summary</u>	10
3.	<u>What Does 'National Security Mean to New Zealanders?'</u>	14
4.	<u>Roles & Resources</u>	31
5.	<u>Trust / Confidence & Transparency</u>	46
6.	<u>Current & Future Engagement</u>	56
7.	<u>Appendix 1 – Changes to Survey</u>	65
8.	<u>Appendix 2 – Panel Details</u>	68



BACKGROUND & METHODOLOGY

1



RESEARCH OBJECTIVES – NATIONAL SECURITY THREATS

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:

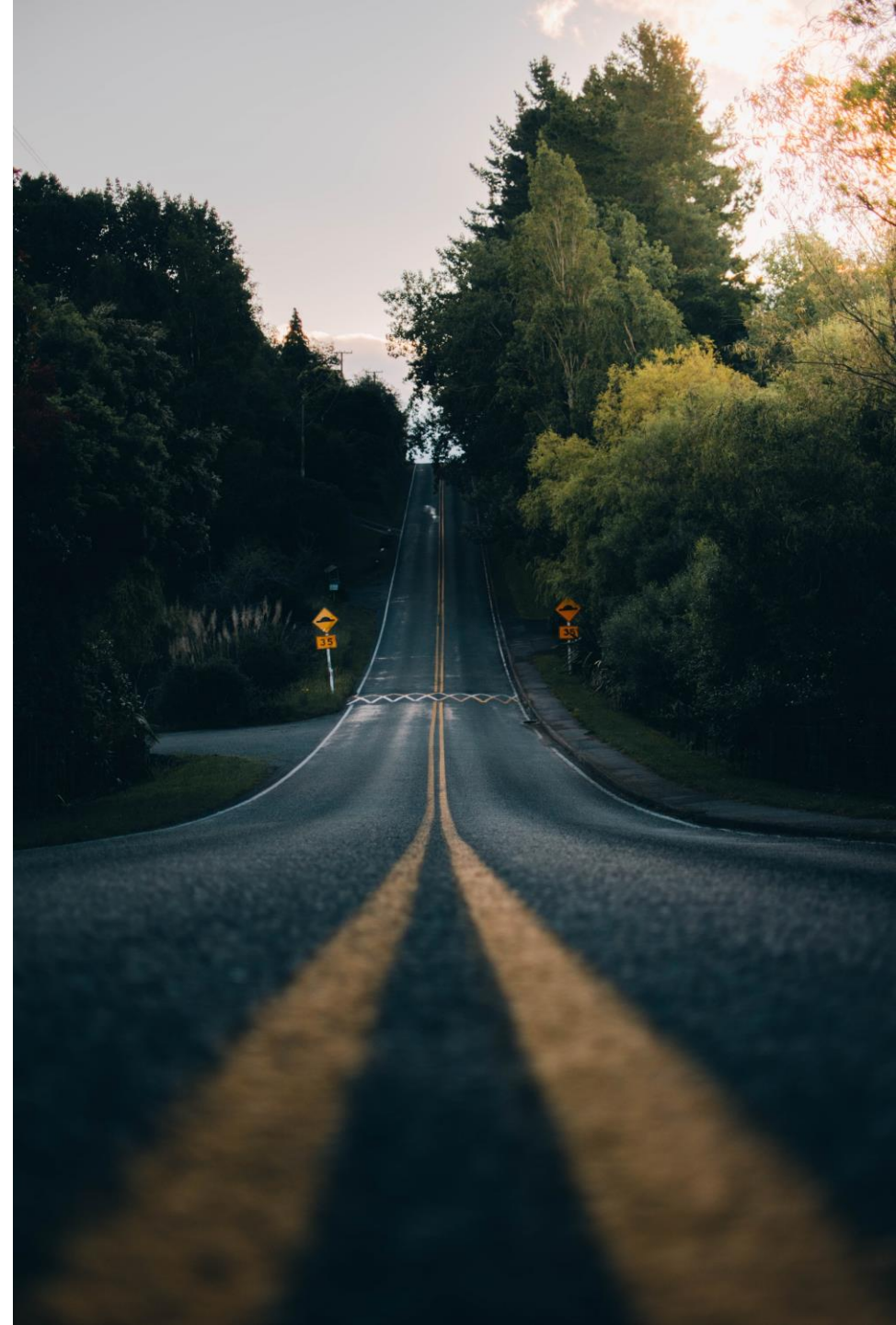
- New Zealanders' awareness of National Risks, including the public's perceived likelihood and concern related to these over the short (next 12 months) and long term (next 10 years).
- Public confidence in government agencies' abilities to protect and respond.
- Opportunities to build confidence, share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

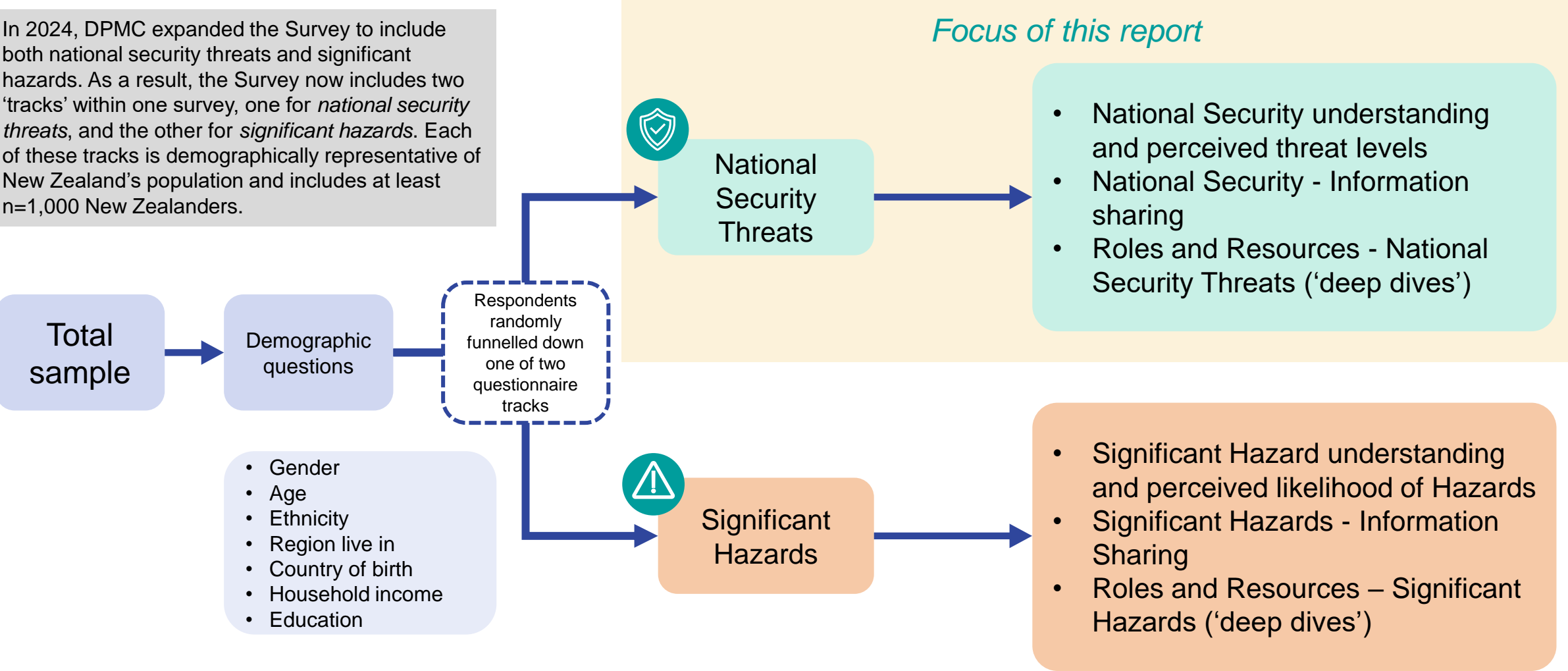
This report provides information across a nationally representative sample of 1,172 people, in relation to:

- What 'national security' means to New Zealanders, and which threats they see as most likely, now (next 12 months) and in the future (next 10 years).
- The level of confidence New Zealanders have in the government's ability to manage threats and what the government can do to build confidence.
- What information New Zealanders would like to receive on threats.



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 – THREATS



Fieldwork dates

19th February–14th
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

n=1,172

*Notes

- Fieldwork overlapped the Port Hills wildfire in Christchurch of early February 2024. This event may have impacted people's responses, especially in the South Island.
- 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 main 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 conflict.

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.*



TOTAL SAMPLE
1,172



GENDER			n=
Male	49%	540	
Female	50%	625	



AGE			n=
18–29 years	22%	325	
30–49 years	34%	369	
50–64 years	25%	273	
65+ years	20%	205	



URBAN vs RURAL			n=
Urban	87%	1,021	
Rural	13%	151	



ETHNICITY			n=
NETT NZ European / Pākehā	75%	881	
NETT Māori	13%	196	
NETT Pacific	6%	97	
NETT Asian	15%	179	
NETT Other	2%	16	



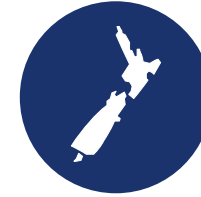
COUNTRY OF BIRTH			n=
New Zealand	73%	878	
Outside of NZ	27%	294	



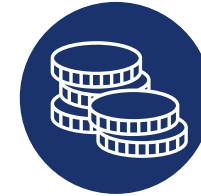
REGENCY OF MIGRATION			n=
NETT New Migrant (<7 years in NZ)	16%	49	
NETT Established Migrant (>7 years in NZ)	84%	244	



EMPLOYMENT STATUS			n=
Employed full-time	48%	565	
Employed part-time	13%	153	
Self employed	6%	65	
Not in employment	11%	137	
Retired	17%	180	
Student	5%	72	



REGION			n=
Auckland	33%	401	
Waikato	10%	109	
Wellington	10%	121	
Rest of North Island	21%	251	
Canterbury	14%	165	
Rest of South Island	11%	125	



HH INCOME			n=
\$0–50k	23%	266	
\$50k–\$100k	29%	343	
\$100k+	39%	450	



EDUCATION			n=
NETT None + Levels 1–3	31%	379	
NETT Levels 4–7	48%	555	
NETT Levels 8–10	20%	223	



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](#)¹ or view the full report [here](#)².

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.

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

² https://www.ipsos.com/sites/default/files/ct/news/documents/2023-11/HISF%202023_FINAL%20NZ%20version.pdf





KEY FINDINGS SUMMARY

2





OVERALL FINDINGS – NATIONAL SECURITY THREATS

Perceived global danger & threats to New Zealand in the short and longer term

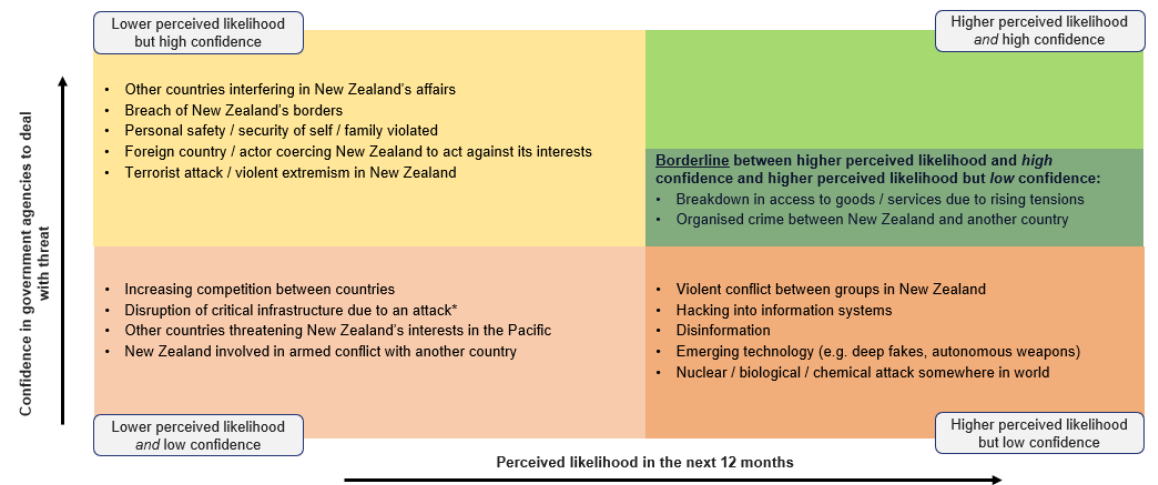
- Consistent with 2023 results, 80% of New Zealanders said they felt the world has become a *more dangerous place over the last year*.
- Also similar to 2023 results, *Organised crime, hacking into information systems and disinformation* are perceived as the three most likely threats in the next 12 months.
- There has been a significant increase in public perceptions of *emerging technology* as a threat, up from 64% in 2023 to 78% in 2024, mostly due to technology advancements. While remaining the lowest ranking threat, *New Zealand being involved in armed conflict with another country* also increased significantly (+7 percentage points since 2023) due to conflict and tensions overseas. Also increased in 2024 are *increasing competition between countries* (+4 percentage points), again due to foreign tension, and *disinformation* (+3 percentage points), which New Zealanders say they are already seeing / feeling the effects of.
- When asked to consider the longer-term (next 10 years), *hacking, organised crime, disinformation and emerging technology* are the four highest ranked threats (with 81-83% of respondents selecting each). The current top-5 threats in the next 12 months are consistent with the top-5 threats in the next 10 years.
- With the exception of the top-3, the level of perceived likelihood for the remaining threats is significantly higher in the next 10 years than the next 12 months.



OVERALL FINDINGS – NATIONAL SECURITY THREATS

- As in previous years, only 20% of New Zealanders agree New Zealand’s national security agencies currently share enough information about national security with the public.
- 62% of New Zealanders want more information on national security threats and over a third want to be involved in public discussion on national security.
- Confidence in government agencies’ abilities to protect or respond to 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* with between 54% and 56% feeling confident.
- New Zealanders are least confident in government agencies’ ability to protect or respond to threats regarding *nuclear / biological attack happening somewhere in the world, emerging technology, armed conflict with other countries* and *disinformation*.
- Confidence in government agencies’ ability to protect and respond to a *breakdown in access to goods / services* has statistically significantly increased since 2023 and has decreased for *terrorist attacks, hacking* and *emerging technology*.

- In an analysis of the level of perceived likelihood of threat *versus* confidence in government agencies’ abilities to respond:
 - Five threats seen to have higher likelihood, but lower relative confidence in government agencies’ abilities include: *violent conflict between groups in New Zealand, hacking, disinformation, emerging technology* 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 manage** the threats of *increased competition between countries*, *disruption of critical infrastructure* and *emerging technology*. Fewer believe they are fully resourced to do so.



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

INCREASED 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

11th out of 16 threats surveyed

Perceived likelihood in next 10 years

11th out of 16 threats surveyed



“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)”

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

9th out of 16 threats surveyed

Perceived likelihood in next 10 years

7th out of 16 threats surveyed



“New Zealand and/or New Zealanders’ security being affected by emerging technology (e.g. artificial intelligence, deep fakes, autonomous weapons)”

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

4th out of 16 threats surveyed

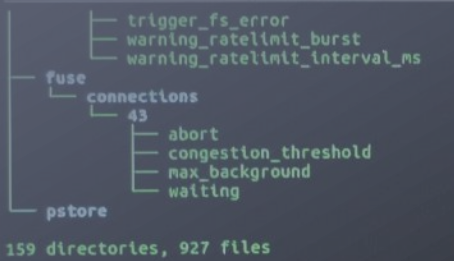
Perceived likelihood in next 10 years

4th out of 16 threats surveyed



WHAT DOES 'NATIONAL SECURITY' MEAN TO NEW ZEALANDERS?

3



```

EAFNOSUPPORT 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...
+0..0..
+0..0..
+0+..+
+*00+ . 5
oBo* .
+oBo* .
  
```

```

CPU[|||||||||||||||||||||||||||||100.0%] Tasks: 151
Mem[|||||||||||||||||||||631M/973M] Load aver
Swp[|||||||||||||432M/1022M] MemFree: 0%
  
```

PID	USER	PRI	NI	VIRT	RES	SHR	S
55531	netcon1	39	19	23992	2568	2300	R 15.5
55705	netcon1	39	19	23992	2576	2344	R 15.5
47651	netcon1	20	0	65012	31712	2704	R 11.0
4826	netcon1	20	0	655M	25200	11900	S 11.0





KEY FINDINGS

What does 'national security' mean to New Zealanders?

- As in previous surveys, most respondents had some concept of what 'National Security' means to them, with only 4% stating they "don't know":
 - The most commonly mentioned themes related to general concepts such as: *protection, general security and safety*. These were followed by more specific concerns such as *foreign invasion and border control*.
 - *Protection / defending New Zealand* has seen a statistically significantly decrease in mention since 2023 (back to levels seen in 2022), as has *general safety and terrorism*.
- When provided with a list of National Security Threats (shown on screen one at a time, in a randomised order), respondents reported they see *organised crime between New Zealand and another country* as the most likely threat to New Zealand in the next 12 months, with *hacking into information systems, disinformation, emerging technology and nuclear / biological attack somewhere in the world* rounding out the top 5.
- When considering the longer term (next 10 years), the same five threats are also seen as the most likely and of concern.





UNDERSTANDING TERMS: 'NATIONAL SECURITY'

Most New Zealanders had a view on what *National Security* means. The most common mentions centre around *keeping New Zealanders protected & safe* and *the overall security of New Zealand and its people*.

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

	2024	2023	2022	% point difference (2024-2023)
Protecting / defending in general - a country / people, protect / defend from	24%	28%	25%	-4%
Security in general - security of NZ / our nation / country	22%	21%	22%	+1%
Safety in general - keeping NZ / our country / people safe	17%	20%	19%	-3%
External / foreign threats - overseas / foreign invaders / insurgents	15%	16%	14%	-1%
Border control - border protection / safety / security	14%	12%	11%	+2%
Government - government involvement / agencies / duty / politics	13%	11%	13%	+2%
NZDF / Military - Army / Air Force / Navy	13%	13%	15%	-
Cyber security - technology / online / virtual	11%	11%	11%	-
Threats / attacks in general - threats / risks to NZ	10%	9%	10%	+1%
Terrorism - terrorist threats, security against terror attacks	9%	12%	10%	-3%
Intelligence / information safety - ensures no leak / breach of information	7%	7%	7%	-
Police - cops, police involvement	5%	6%	7%	-1%
Threats to the economy - financial / trade stability	5%	5%	5%	-
Don't know / no response	4%	4%	4%	-

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

Base: Total sample – 2024 (n=1,172), 2023 (n=2,370), 2022 (n=1,148). Note: Responses less than 5% are not shown. Don't know / no response is the exception. Green / red indicates statistically significantly higher / lower than 2023.





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

Demographic Differences



Protecting / defending (24%)

33% Wellington
32% Canterbury



Security (22%)

30% 18–29 years



Safety (17%)

26% Pacific peoples*
24% Asian
9% NETT Not in employment



External / foreign threats (15%)

22% 50–64 years
9% Employed part time
8% 18–29 years
7% NETT Not in employment
6% Students*



Border control (14%)

7% Asian



NZDF / military (13%)

19% Māori



Cyber security (11%)

17% 50–64 years
6% NETT None + Levels 1–3
5% 18–29 years
3% Students*
1% Pacific peoples*



Terrorism (9%)

14% Wellington
13% Born overseas
13% NETT Levels 8–10
5% 18–29 years



Intelligence / information safety (7%)

11% NETT Rest of SI
4% Auckland



Police (5%)

9% Rest of North Island
(excl. Wellington, Auckland
and Waikato)
1% Auckland



Threats to the economy (5%)

10% Wellington



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

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

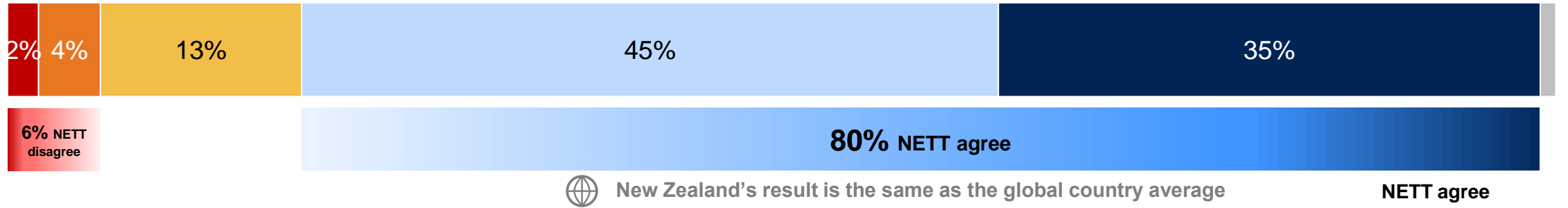


PERCEIVED LEVEL OF GLOBAL DANGER

As per results in 2023, 4 in 5 New Zealanders feel *the world has become a more dangerous place*, while 6% disagree.

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

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



2023
80% NETT agree

69% NETT Not in employment

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 – 2024 (n=1,172), 2023 (n=2,370). Green / red indicates statistically significantly higher / lower than the total.





SPECIFIC QUESTION WORDING – NATIONAL SECURITY THREATS

Respondents' views were sought on 16 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. 'Artificial intelligence' was added to the description of Emerging technology in 2024.

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



TOP-10 NATIONAL SECURITY THREATS – NEXT 12 MONTHS

Organised crime between New Zealand & another country, hacking into information systems and disinformation are the top-3 most commonly perceived threats ('somewhat + very real') likely to occur in the next 12 months.

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

- | | | | |
|----|---|----|--|
| 1 | Organised crime between NZ & another country | 6 | Breakdown in access to goods / services due to rising tensions |
| 2= | Hacking into information systems | 7 | Violent conflict between groups in NZ |
| 2= | Disinformation | 8 | Terrorist attack / violent extremism in NZ |
| 4 | Emerging technology (e.g., deep fakes, autonomous weapons) | 9 | Disruption of critical infrastructure due to an attack* |
| 5 | Nuclear / biological / chemical attack somewhere in the world | 10 | Other countries threatening NZ interests in the Pacific region |

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

Base: Total sample – 2024 (n=1,172). *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 SECURITY THREATS

Since 2023, there have been increases in perceived likelihood over the next 12 months for – threats from *emerging technology, increasing competition between countries, disinformation and NZ involved in an armed conflict.*

As we saw in 2023, compared to global country average results, the perceived likelihood of threats in NZ is overall higher, apart from *personal safety & NZ being involved in an armed conflict.*

Real threat of any of the following happening in the next 12 months...		2024	2023	2022	% point difference (2024–2023)	Global country average**
Organised crime between NZ & another country		84%	84%	80%	-	-
Hacking into information systems		83%	82%	81%	+1%	74%
Disinformation		83%	80%	84%	+3%	-
Emerging technology (e.g. deep fakes, autonomous weapons)		78%	64%	61%	+14%	-
Nuclear / biological / chemical attack somewhere in the world		76%	77%	71%	-1%	71%
Breakdown in access to goods / services due to rising tensions		68%	69%	-	-1%	-
Violent conflict between groups in NZ		65%	62%	71%	+3%	-
Terrorist attack / violent extremism in NZ		64%	68%	71%	-4%	63%
Disruption of critical infrastructure due to an attack*		63%	69%	70%	-6%	-
Other countries threatening NZ interests in Pacific		61%	62%	47%	-1%	-
Increasing competition between countries		59%	55%	-	+4%	-
Other countries interfering in NZ affairs		53%	54%	50%	-1%	-
Breach of NZ borders		48%	49%	46%	-1%	-
Foreign country / actor coercing NZ to act against its interests		48%	46%	43%	+2%	-
Personal safety / security of self / family violated		47%	48%	43%	-1%	63%
NZ involved in armed conflict with another country		39%	32%	29%	+7%	49%

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

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

Base: Total sample – 2024 (n=1,172), 2023 (n=2,370), 2022 (n=1,148). *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: Global country average figures are taken from the Ipsos-Halifax World Affairs global survey conducted in October 2023 (n=23,220) where applicable. Note: Threats were presented 'one at a time' on screen and randomised to reduce response order bias.

Green / red indicates statistically significantly higher / lower than 2023. Green / orange indicates statistically significantly higher / lower score than global country average.

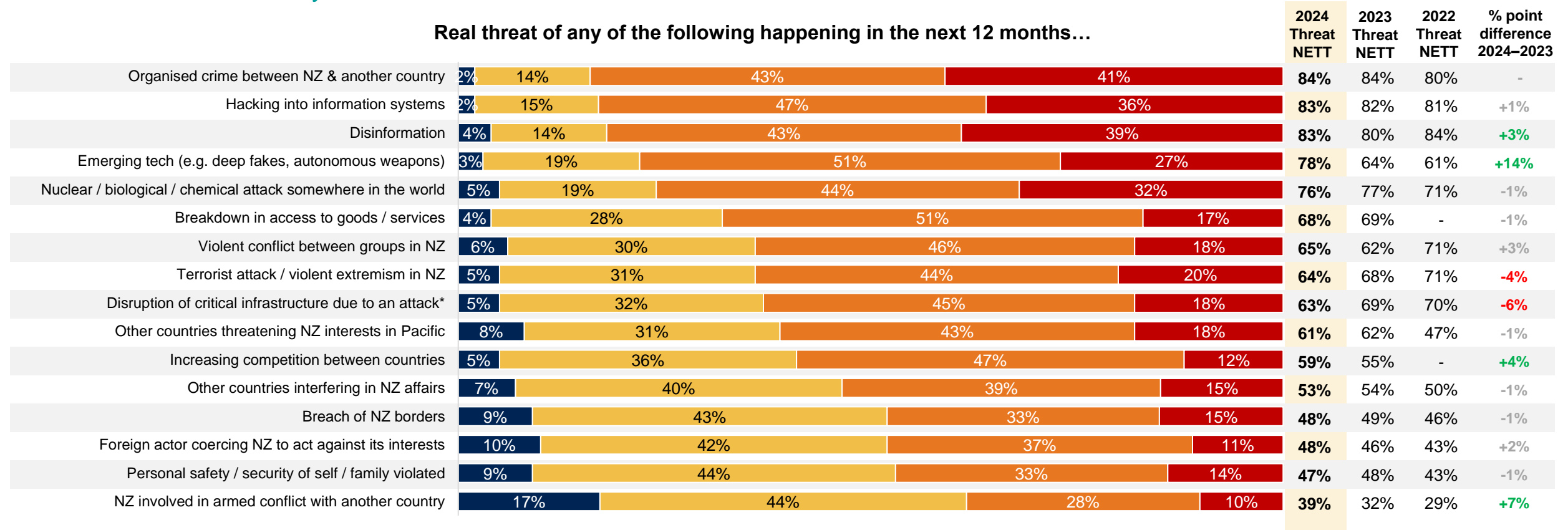




NATIONAL SECURITY THREATS IN THE NEXT 12 MONTHS

Organised crime between NZ & other country, hacking into information systems & disinformation are considered to be likely in the next 12 months by more than 80% of New Zealanders.

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



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

NETT figures represent very real + somewhat real threat

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

Base: Total sample – 2024 (n=1,172), 2023 (n=2,370), 2022 (n=1,148). *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: Threats were presented 'one at a time' on screen and randomised to reduce response order bias.

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





THREATS – PERCEIVED LIKELIHOOD IN THE NEXT 12 MONTHS (I)

Demographic Differences



Organised crime between NZ & another country (84%)

92% Retired 73% 18–29 years
90% 65+ years



Hacking into information systems (83%)

92% Retired 70% 18–29 years
91% 65+ years
89% 50–64 years



Disinformation (83%)

78% Auckland
75% Rural



Emerging technology (78%)

86% Rest of SI (excl. Canterbury)
73% 18–29 years
70% Canterbury



Nuclear / biological / chemical attack in the world (76%)

84% Māori 71% Male
82% HH income \$0–\$50k 70% 18–29 years
80% Female



Breakdown in access to goods / services (68%)

60% 18–29 years
59% Canterbury



Violent conflict between groups in NZ (65%)

75% NETT Pacific peoples* 58% Male
71% Female 57% NETT Levels 8–10
70% NETT None + Levels 1–3 57% HH income \$100k+



Terrorist attack / violent extremism in NZ (64%)

75% Māori
52% Canterbury

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

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

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



THREATS – PERCEIVED LIKELIHOOD IN THE NEXT 12 MONTHS (II)

Demographic Differences



Disruption of critical infrastructure due to an attack** (63%)

73% NETT Māori

56% 18–29 years

50% Students*



Foreign country / actor coercing NZ to act against its interests (48%)

60% NETT Pacific peoples*

60% NETT Māori

54% Auckland



Other countries threatening NZ interests in Pacific (61%)

70% 65+ years

51% 18–29 years

69% Retired

50% Canterbury



Personal safety of self / family violated (47%)

64% NETT Pacific peoples*

43% NETT NZ European / Pākehā

62% NETT Asian

36% Retired

54% Auckland

34% 65+ years

26% Rest of SI (excl. Canterbury)



Other countries interfering in NZ affairs (53%)

68% NETT Māori



Breach of NZ borders (48%)

65% NETT Pacific peoples*

57% NETT Māori

56% Rest of NI (excl. Wellington, Auckland, Waikato)

38% Canterbury

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



NZ involved in armed conflict with another country (39%)

58% NETT Pacific peoples*

53% NETT Māori

49% NETT Not in employment

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

Base: Total sample (n=1,172). *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.



TOP-3 REASONS WHY RATED AS A 'VERY REAL THREAT'

Organised crime between NZ & another country (n=114)	Hacking into information systems (n=107)	Disinformation (n=117)	Nuclear / biological / chemical attack somewhere in the world (n=110)	Breakdown in access to goods / services due to rising tensions (n=92*)	Disruption of critical infrastructure due to an attack** (n=92*)	Terrorist attack / violent extremism in NZ (n=96*)	Emerging technology (e.g. deep fakes) (n=98*)
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%)	Growing tension overseas (36%)	Dependent on trade with other countries (48%)	NZ is small & vulnerable to attacks (30%)	Have already seen / from past experience / happening now (45%)	Technological advances (53%)
Rise in criminal activities (46%)	Cyber crimes & attacks (41%)	Use of social media / online platforms (22%)	Armed conflict overseas (35%)	Growing tensions overseas (44%)	Cyber crimes & attacks (26%)	Extreme fringe groups (20%)	Have already seen / from past experience / happening now (28%)
Likely to happen again (9%)	Current global events (14%)	Lack of critical thinking (16%)	Have already seen / from past experience / happening now (25%)	Armed conflict overseas (31%)	Have already seen / from past experience / happening now (24%)	Likely to happen again (18%)	Cyber crimes & attacks (15%)
Other countries threatening NZ interests in Pacific (n=89*)	Increasing competition between countries (n=89*)	Other countries interfering with NZ affairs (n=87*)	Breach of NZ borders (n=92*)	Personal safety / security (n=90*)	Foreign country / actor coercing NZ to act against its interests (n=87*)	NZ involved in armed conflict with another country (n=88*)	Violent conflict between groups in NZ (n=96*)
Providing aid / investments in exchange for bases (69%)	Tensions between foreign countries (35%)	Foreign interference & coercion (49%)	NZ is small & vulnerable to attacks (30%)	Rise in criminal activities (35%)	Foreign interference & coercion (42%)	Armed conflict overseas (30%)	NZ is small & vulnerable to attacks (31%)
Have already seen / from past experience / happening now (30%)	Foreign interference & coercion (26%)	Have already seen / from past experience / happening now (27%)	Rise in criminal activities (19%)	Have already seen / from past experience / happening now (19%)	Dependent on trade (23%)	Growing tension overseas (28%)	Issues with police / justice system (23%)
Corruption / political lobbying (16%)	Dependent on trade with other countries / NZ is small & vulnerable to attack (14%)	Issues with government / NZ is small & vulnerable to attack (10%)	Have already seen / from past experience / happening now (19%)	Issues with police / justice system (12%)	NZ is small & vulnerable to attacks (16%)	Foreign interference & coercion (17%)	Rise in criminal activities (19%)

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 'very real threat' at Q9. **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). ****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.

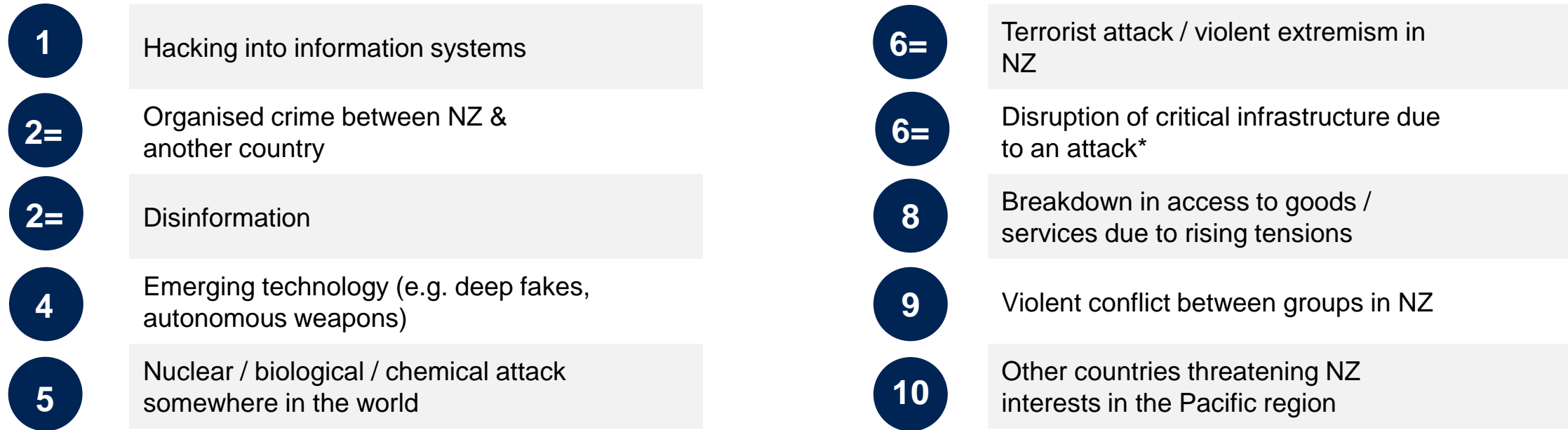




TOP-10 NATIONAL SECURITY THREATS – NEXT 10 YEARS

Hacking into information systems, organised crime between NZ & another country, disinformation and emerging technology are the top-ranked most likely threats of concern in the next 10 years.

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



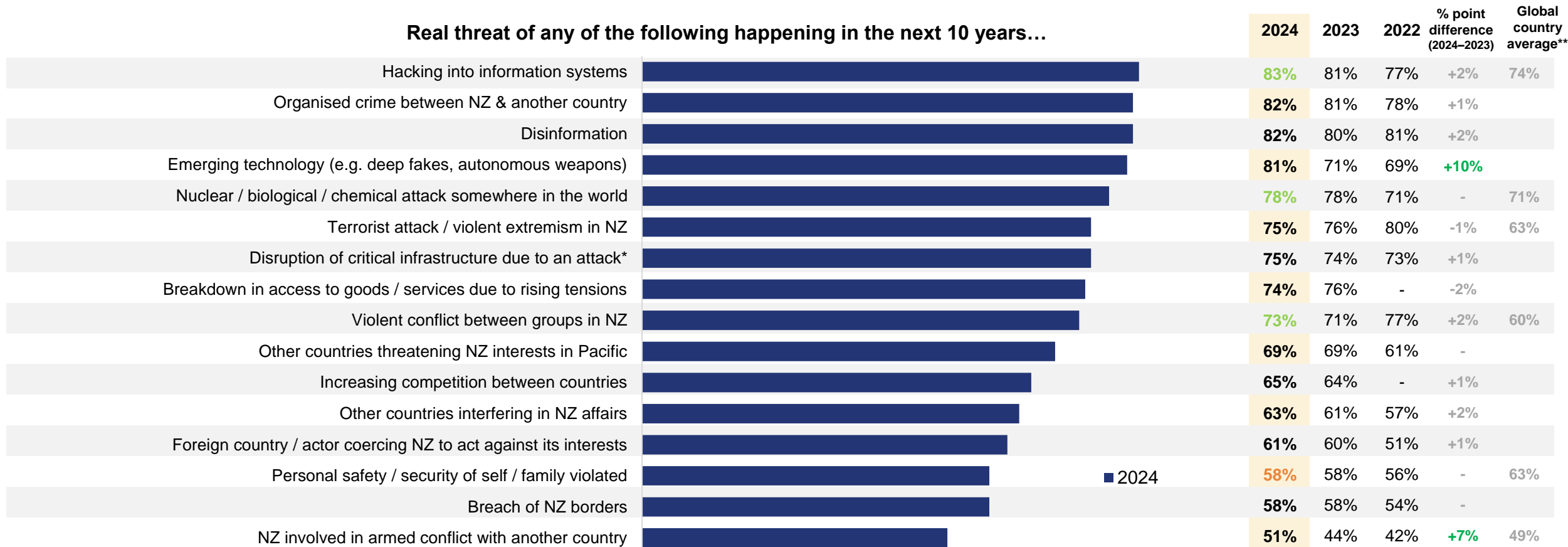
Q17: Thinking now about the future, how real do you feel the threat is of any of the following happening in the next 10 years?

Base: Total sample - 2024 (n=1,172). *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 – NEXT 10 YEARS

For most threats, the perceived likelihood over the next 10 years is similar to perceived levels over next 12 months.



■ 2024

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

Q17: 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 – 2024 (n=1,172), 2023 (n=2,370), 2022 (n=1,148). *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: Global country average figures are taken from the Ipsos-Halifax World Affairs global survey conducted in October 2023 (n=23,220) where applicable. These figures represent how real do respondents feel the threat is of any of the following happening in the next twelve months, whereas this question is about the next 10 years. Note: Threats were presented 'one at a time' on screen and randomised to reduce response order bias.

27 – Green / red indicates statistically significantly higher / lower than 2023. Green / orange indicates statistically significantly higher / lower score than global country average.





TOP-5 SHORT-TERM VS LONG-TERM NATIONAL SECURITY THREATS

Organised crime between NZ & another country, hacking into information systems, disinformation, emerging technology and nuclear / biological / chemical attack somewhere in the world are also considered likely, both now and in the future.

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

Position	Next 12 months	Next 10 years
1	Organised crime between NZ & another country	Hacking into information systems
2=	Hacking into information systems	Organised crime between NZ & another country
2=	Disinformation	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

Q9: How real do you feel the threat is of any of the following happening in the next twelve months? / **Q17:** 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 (n=1,172). **Note:** Threats were presented 'one at a time' on screen and randomised to reduce response order bias.



SHORT-TERM VS LONG-TERM THREATS

For most threats, the level of perceived likelihood is higher for the next 10 years than the next 12 months, with *hacking into information systems, organised crime between NZ & another country* and *disinformation* the exceptions.

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

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

		Next 10 years	Next 12 months
Hacking into information systems	83%	83%	
Organised crime between NZ & another country	82%	84%	
Disinformation	82%	83%	
Emerging technology (e.g. deep fakes, autonomous weapons)	81%	78%	
Nuclear / biological / chemical attack somewhere in the world	78%	76%	
Terrorist attack / violent extremism in NZ	75%	64%	
Disruption of critical infrastructure due to an attack*	75%	63%	
Breakdown in access to goods / services due to rising tensions	74%	68%	
Violent conflict between groups in NZ	73%	65%	
Other countries threatening NZ interests in Pacific	69%	61%	
Increasing competition between countries	65%	59%	
Other countries interfering in NZ affairs	63%	53%	
Foreign country / actor coercing NZ to act against its interests	61%	48%	
Personal safety / security of self / family violated	58%	47%	
Breach of NZ borders	58%	48%	
NZ involved in armed conflict with another country	51%	39%	

Q17: 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: How real do you feel the threat is of any of the following happening in the next twelve months?

Base: Total sample (n=1,172). Note: 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. Green / red indicates statistically significantly higher / lower than 'next 12 months'.

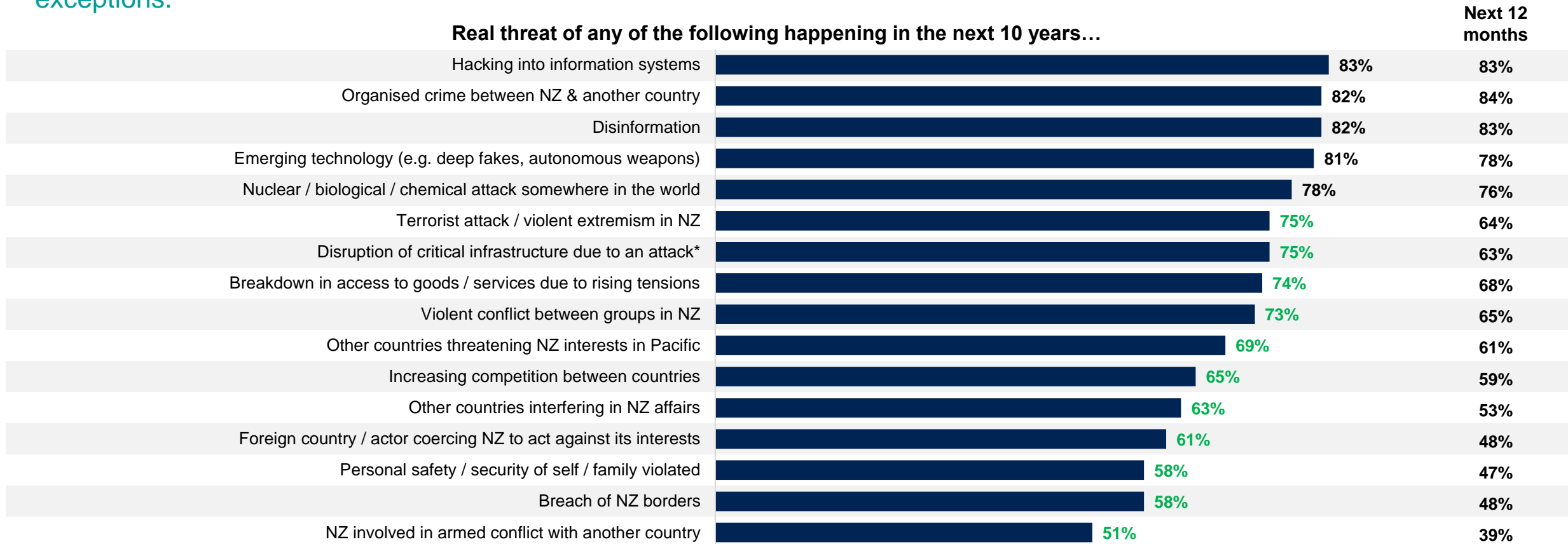




SHORT-TERM VS LONG-TERM NATIONAL SECURITY THREATS

For most threats, the level of perceived likelihood is higher in the next 10 years than the next 12 months, with *hacking into information systems, organised crime between NZ and another country and disinformation* being exceptions.

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



Q17: 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:** How real do you feel the threat is of any of the following happening in the next twelve months?

Base: Total sample - 2024 (n=1,172). ***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:** Threats were presented 'one at a time' on screen and randomised to reduce response order bias.

Green / red indicates statistically significantly higher / lower than 'next 12 months'.





ROLES & RESOURCES

- INCREASED COMPETITION BETWEEN COUNTRIES
- DISRUPTION OF CRITICAL INFRASTRUCTURE (DUE TO ATTACK)
- EMERGING TECHNOLOGY

4



KEY FINDINGS

- To understand public views on the perceived **roles** of different groups in responding to threats, we asked about three different threats in more detail: *increasing competition between countries*, *disruption of critical infrastructure (due to attack)* and *emerging technology*. Each survey respondent was asked about one of these threat types.
- The majority of people consider the Government and its agencies have the most **responsibility** to protect New Zealand against *increasing competition between countries*, *disruption of critical infrastructure*, and *emerging technology*, but fewer believe they are **fully resourced** to do so.
- However, across all three threats, the NZ Government (central and local) is perceived to be more resourced to protect New Zealand than Global organisations, NZ or Overseas Businesses, Communities and Individuals.

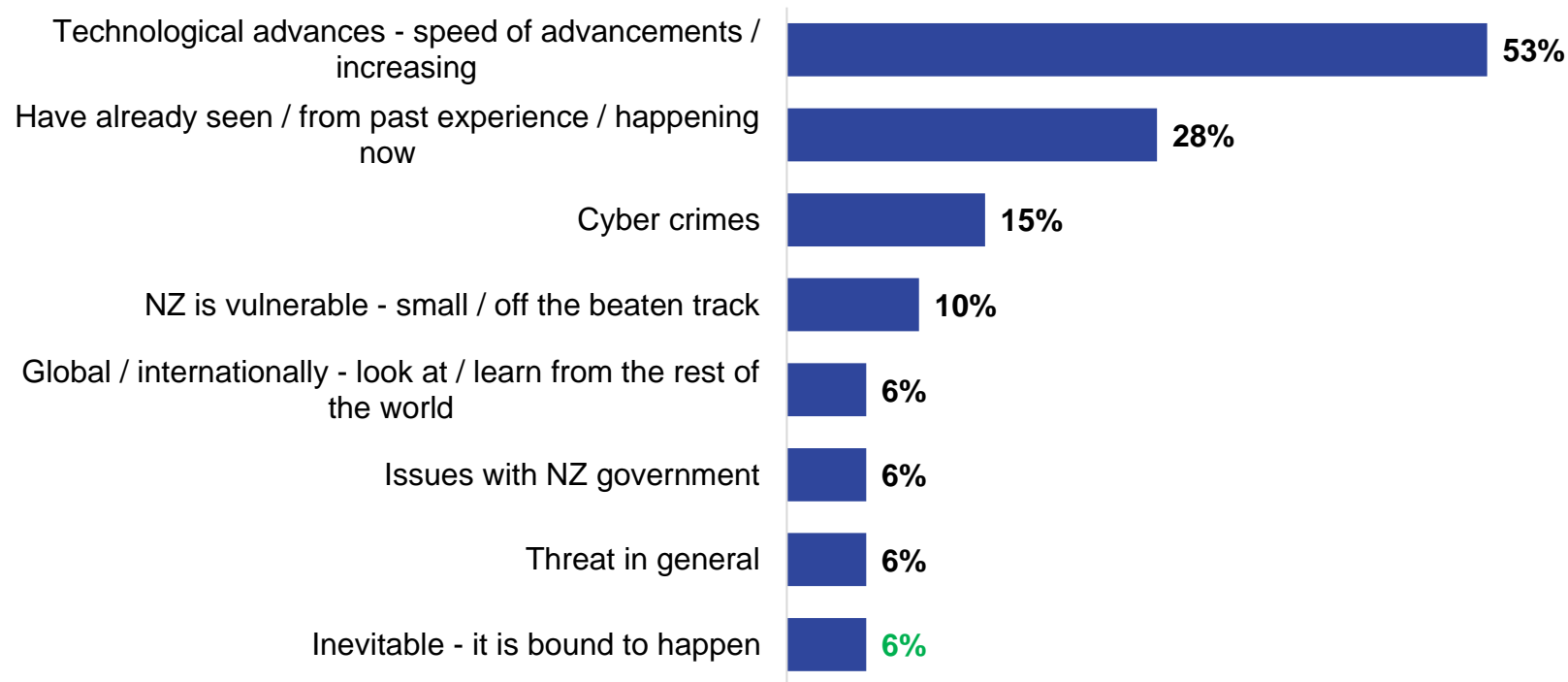




WHY A VERY REAL THREAT – EMERGING TECHNOLOGY

Technological advances was the main reason cited for seeing *emerging technology* as a ‘very real threat’ in the next 12 months, followed by *already seen to be happening* in New Zealand also 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.

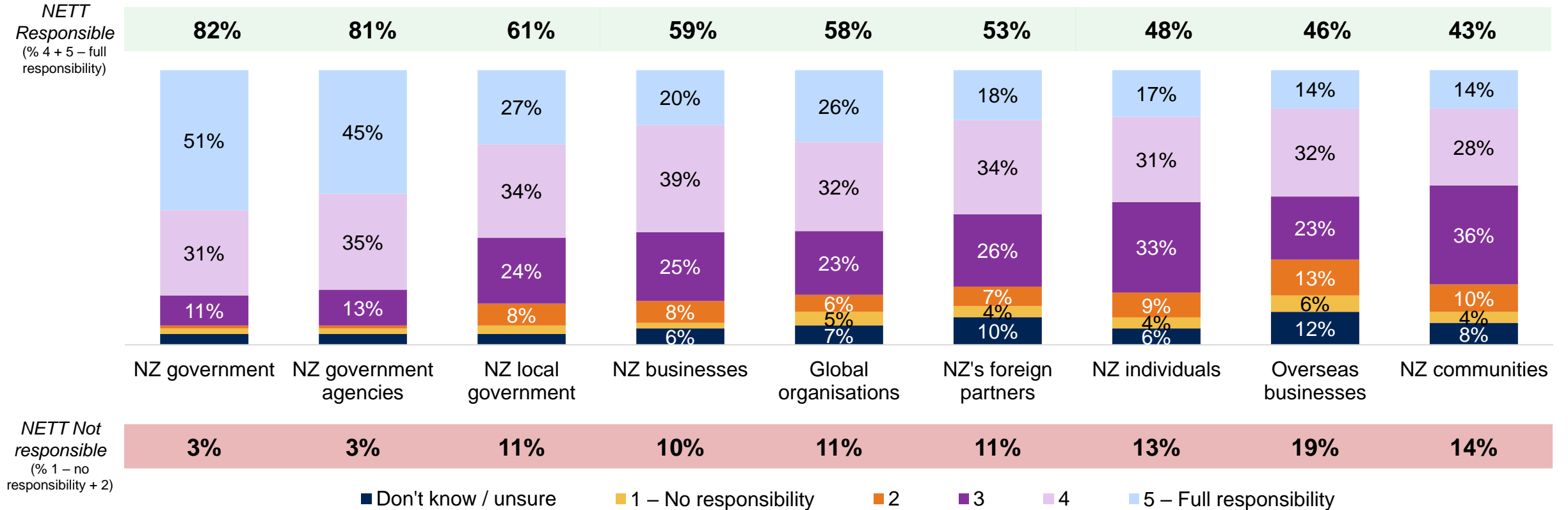
***Caution:** Low base size, results indicative only (50 ≤ n < 100). **Green / red** indicates statistically significantly **higher / lower** than 2023.



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.



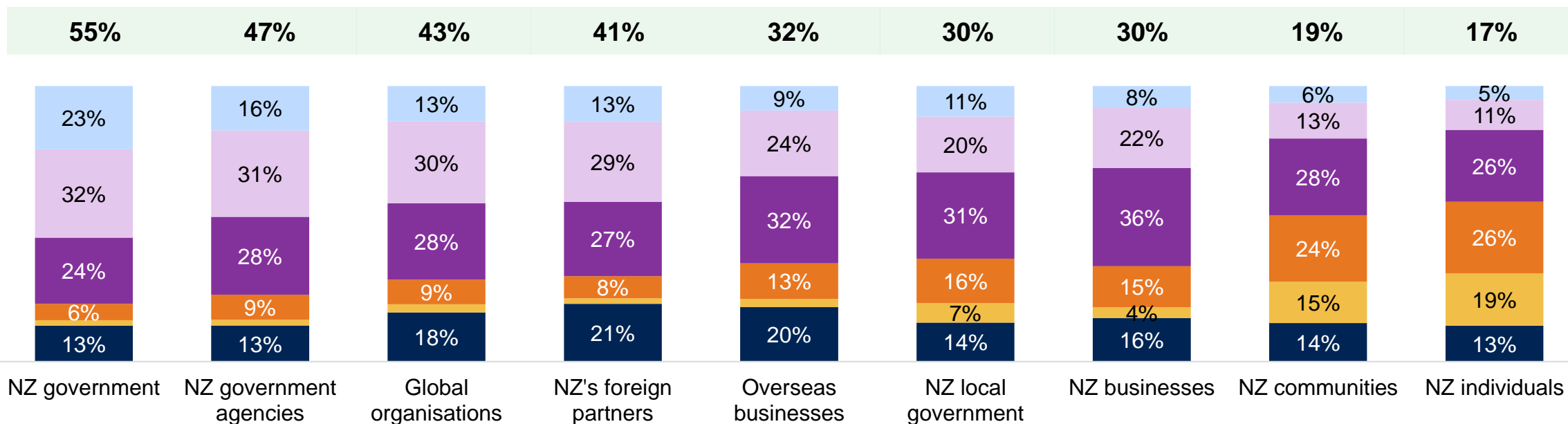
TOOLS & RESOURCES TO PROTECT AGAINST – EMERGING TECHNOLOGY



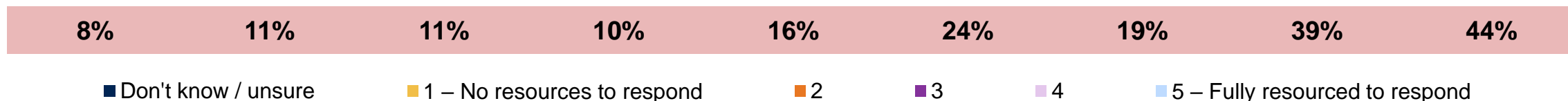
New Zealanders believe that the *Government* and its agencies have more tools to *respond to emerging technology*, while *individuals and communities* are the least equipped to do so.

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).

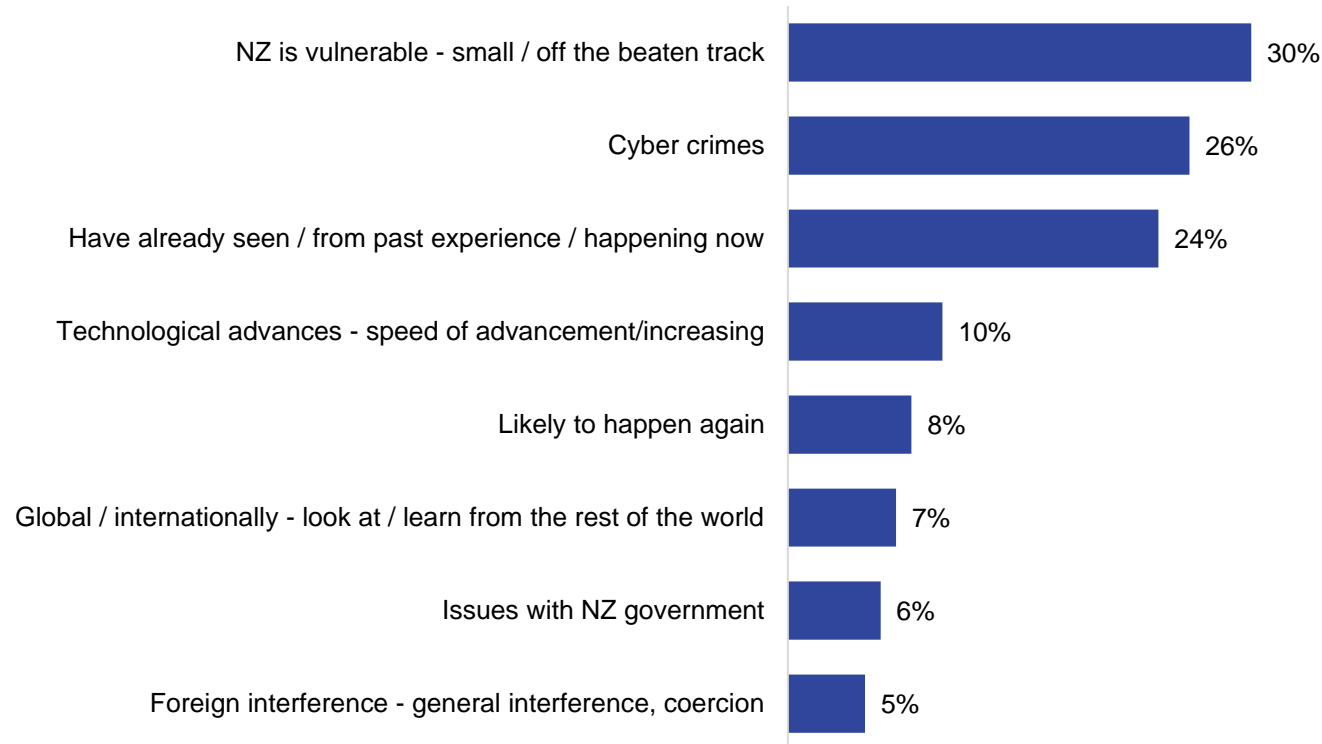


WHY A VERY REAL THREAT – CRITICAL INFRASTRUCTURE (ATTACK)

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.

This threat was reworded in survey in 2024.

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.

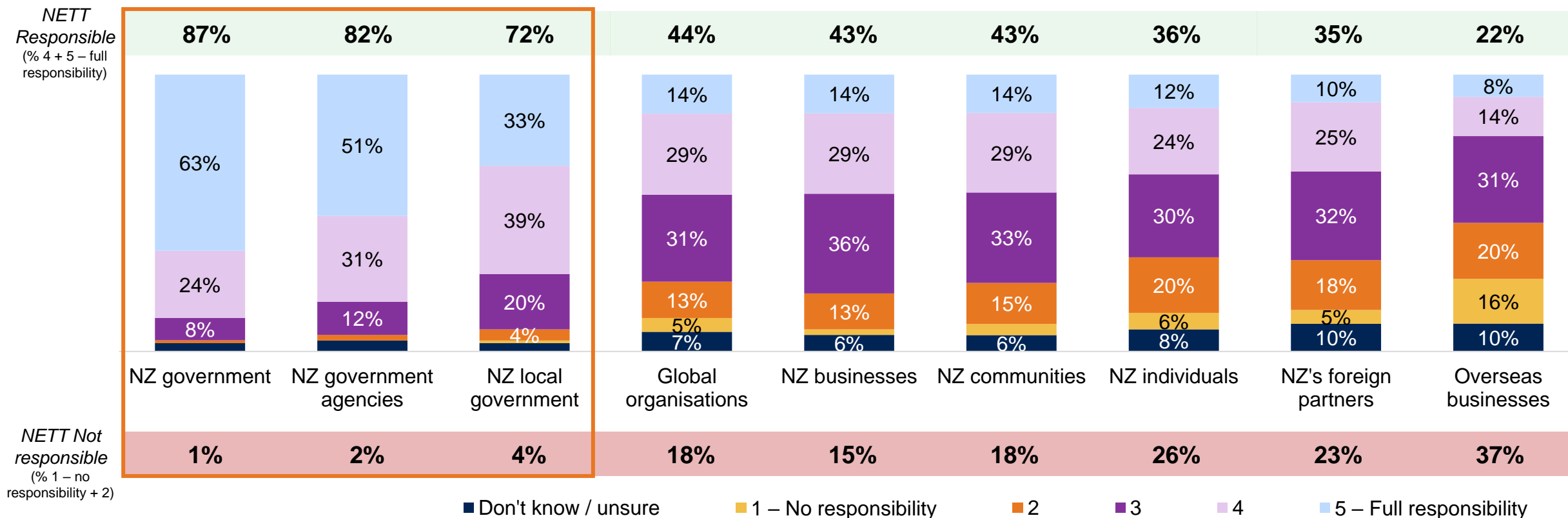


ROLE TO PROTECT AGAINST – CRITICAL INFRASTRUCTURE (ATTACK)



New Zealanders believe that the *Government & 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.

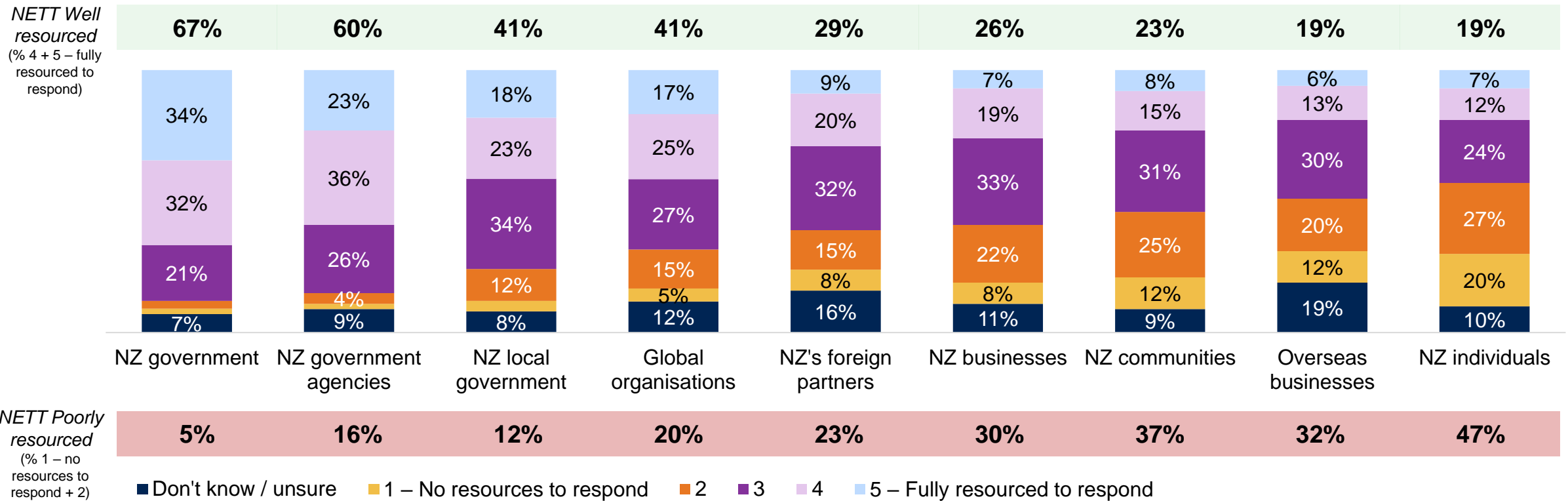




TOOLS & RESOURCES TO PROTECT AGAINST – CRITICAL INFRASTRUCTURE (ATTACK)

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).

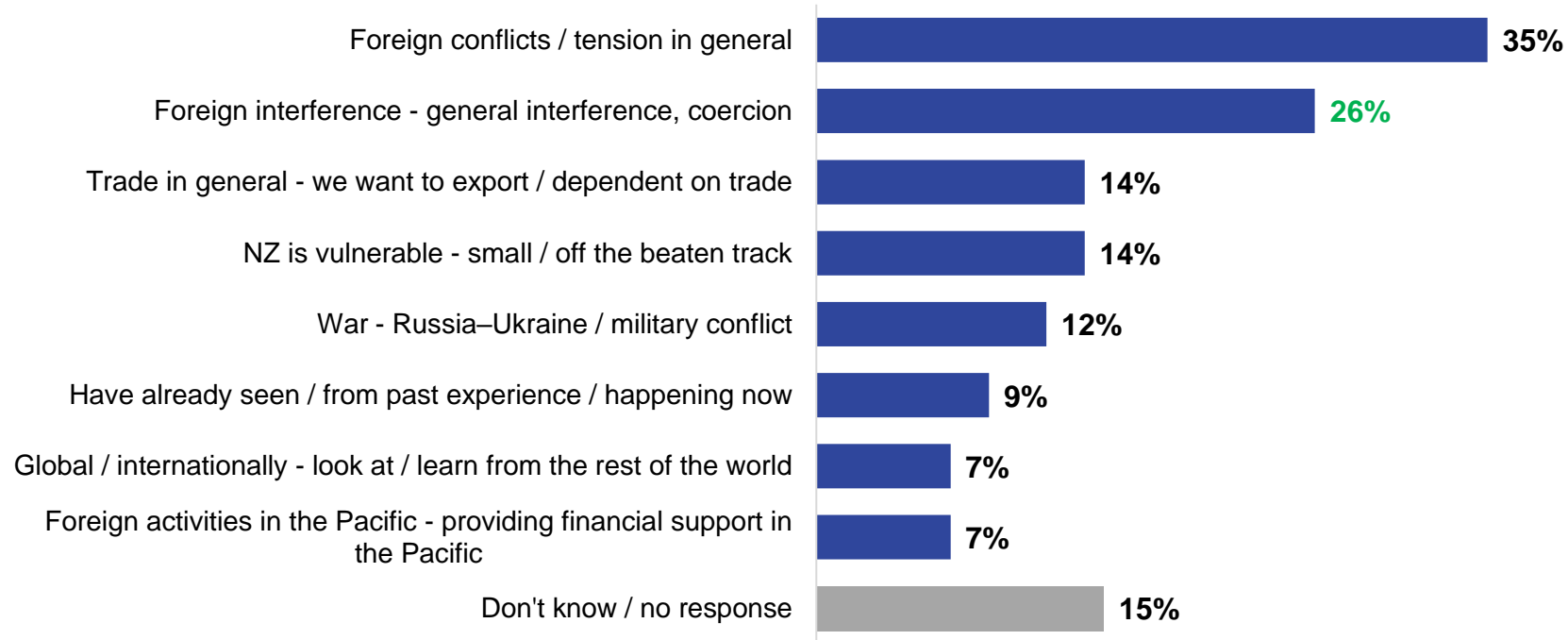


WHY A VERY REAL THREAT – INCREASING COMPETITION BETWEEN COUNTRIES



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.

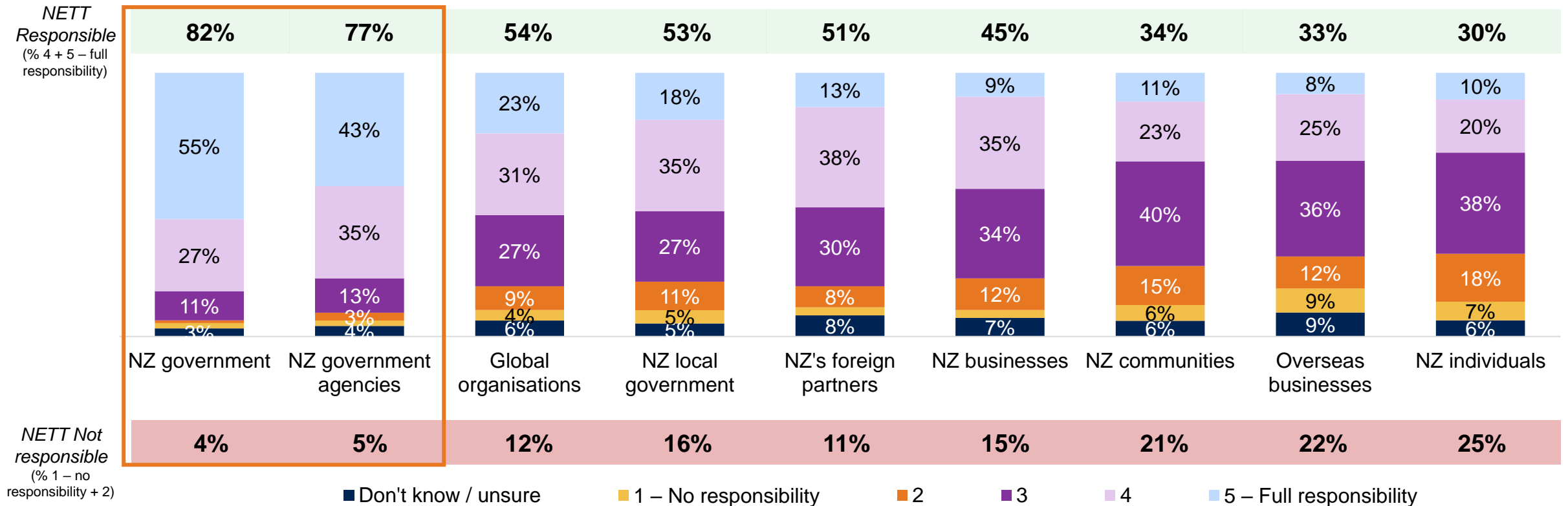


ROLE TO PROTECT AGAINST – INCREASING COMPETITION BETWEEN COUNTRIES



New Zealanders believe the *Government & 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?

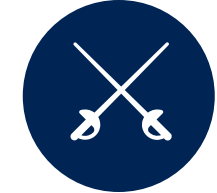


Q25: How much responsibility do you think each of the following have to protect New Zealand and respond to the threat of increasing competition between countries?

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.



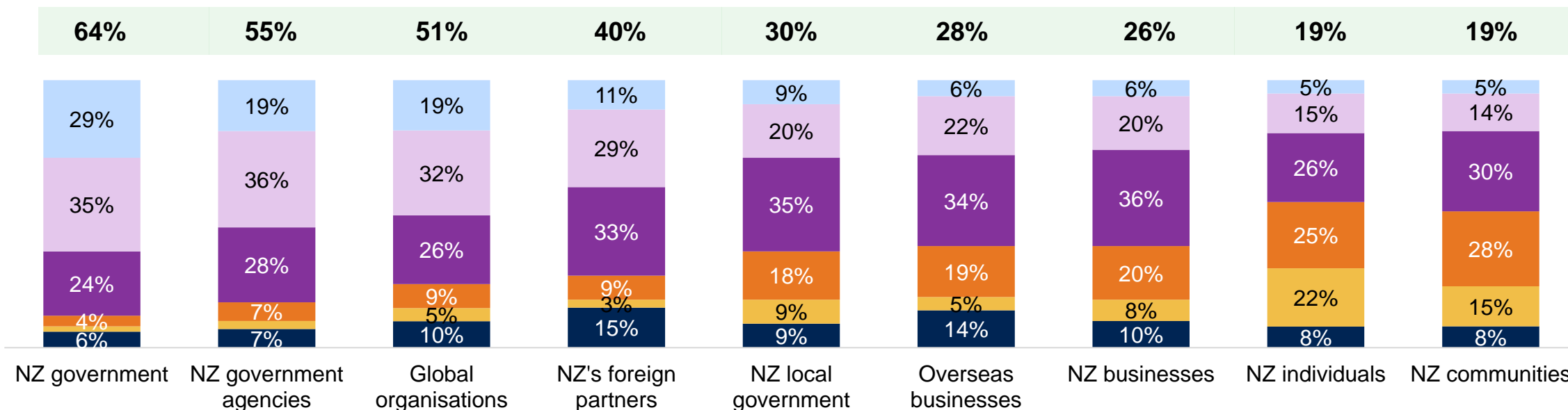
TOOLS & RESOURCES TO PROTECT AGAINST – INCREASING COMPETITION BETWEEN COUNTRIES



New Zealanders believe that the *Government & its agencies* have the tools to *protect NZ against increasing competition between countries* (as does *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?

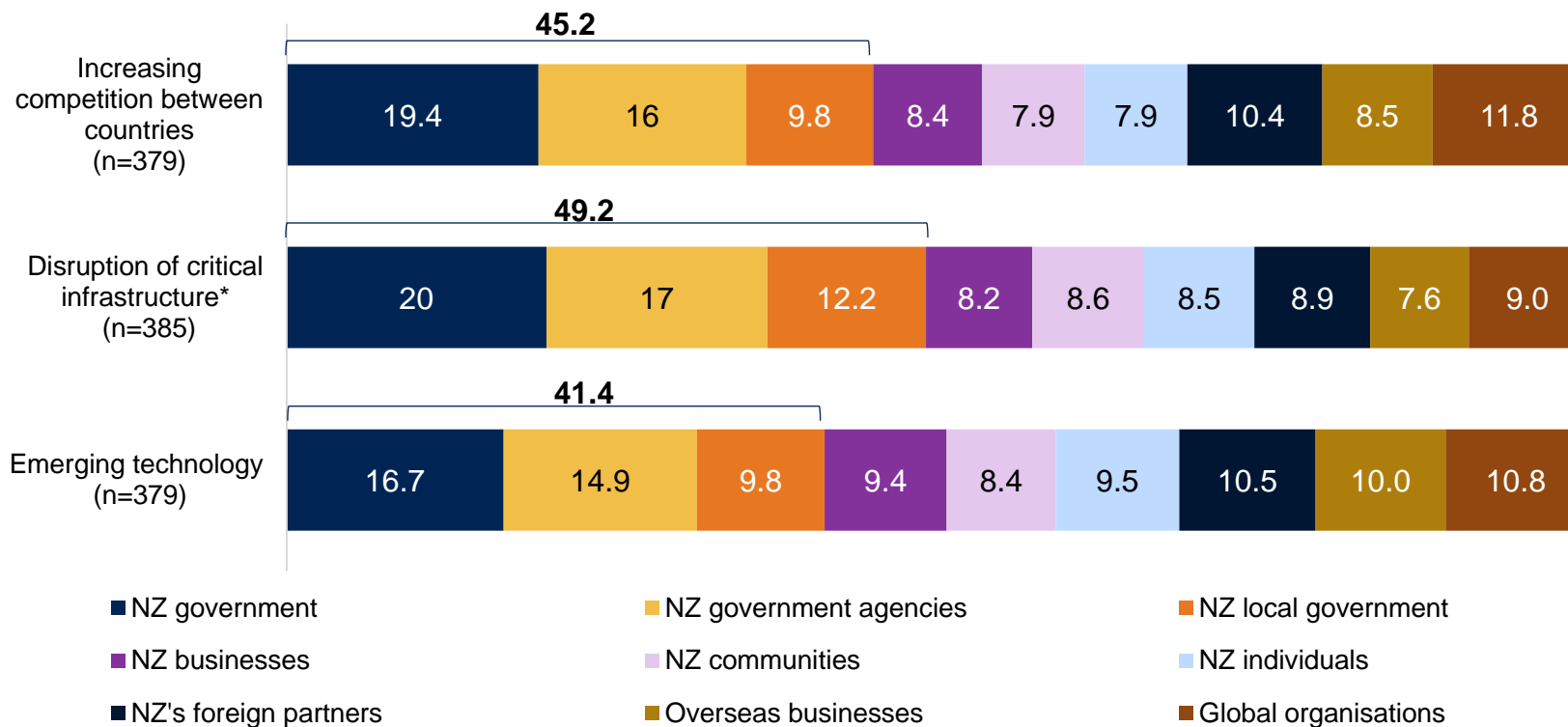
Base: Respondents randomly asked about increasing competition between countries (n=379). **Green / red** indicates statistically significantly **higher / lower** than the total.



SUMMARY – SHARE OF RESPONSIBILITY TO RESPOND BY THREAT

The New Zealand Government and its agencies (both central and local) are seen as having the greatest responsibility to respond to the threats of *increased competition between countries*, *disruption of critical infrastructure (due to attack)* and to a lesser extent for *emerging technology*.

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

Base: Respondents asked about emerging technology (n=379), disruption of critical infrastructure (n=385), increasing competition between countries (n=379). *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

- Consistent with 2023 survey findings, **just 1 in 5 believe New Zealand's national security agencies share enough information** about national security, with nearly double that stating that they do not.
- **Confidence in government agencies'** ability to protect or respond 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*.
- Confidence is lowest for *nuclear / biological attack happening somewhere in the world, emerging technology, armed conflict with other countries* and *disinformation*.
- Areas where **likelihood over the next 12 months** is perceived to be the highest but **confidence** in government agencies' is relatively low, include: *violent conflict between groups in New Zealand, hacking into information systems, disinformation, emerging technology* and *nuclear / biological / chemical attack somewhere in world*.
- Perceptions of **how government agencies can build confidence vary by threat**; however, *taking action / responding quickly* and *keeping the public educated & informed* are the most commonly mentioned ways that government agencies can build confidence



SHARING INFORMATION ABOUT NATIONAL SECURITY

As in previous years, two fifths (39%) believe NZ national security agencies do not share *enough information about national security with New Zealanders*. A similar proportion (41%) either don't know or are undecided.

NZ national security agencies currently share enough information about national security with New Zealanders

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



29% Asian

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

NZ national security agencies currently share enough information about national security with New Zealanders	
Year	Agree
2024	20%
2023	20%
2022	20%

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

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: Result sums to 99 due to rounding. Green / red indicates statistically significantly higher / lower than the total.

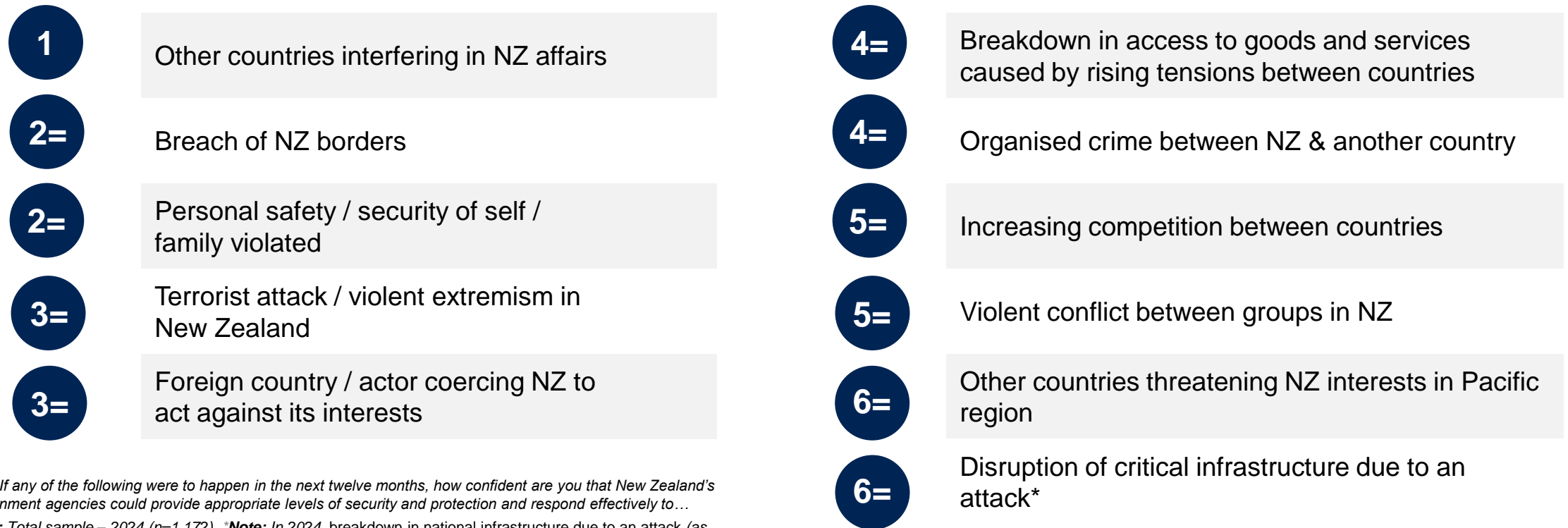




TOP-10 NATIONAL SECURITY THREATS - CONFIDENCE IN AGENCIES

New Zealanders are most confident in government agencies' abilities to protect and respond to *other countries interfering in NZ affairs, breach of NZ borders and personal safety / being violated*.

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



Q11: 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...

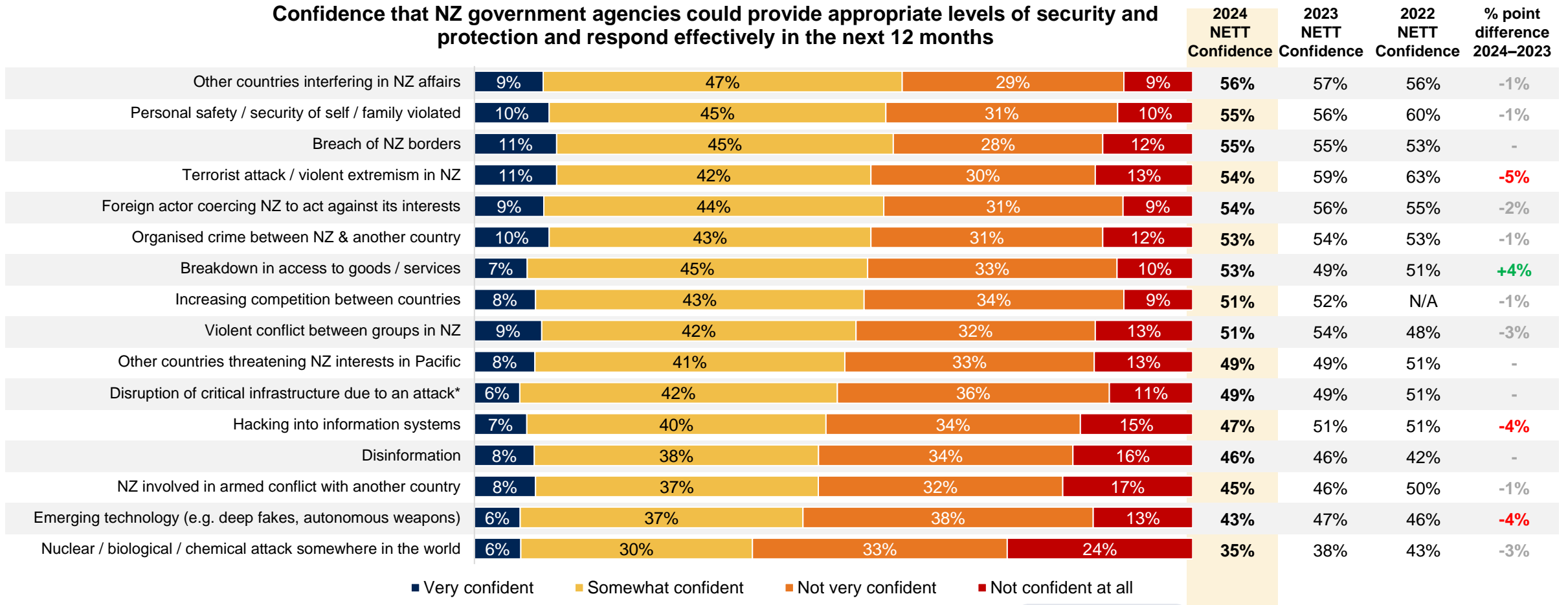
Base: Total sample – 2024 (n=1,172). ***Note:** In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack.



THREATS – CONFIDENCE IN AGENCIES

New Zealanders are most confident in government agencies in relation to *other countries interfering in NZ affairs, personal safety / being violated and breach of NZ borders*. They are least confident regarding *nuclear / biological attack somewhere in the world, emerging technology and armed conflict with other countries*. Confidence for *breakdown in access to goods / services* has significantly increased since 2023 and has decreased for *terrorist attacks, hacking and emerging technology*.

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



Q11: 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 – 2024 (n=1,172), 2023 (n=2,370), 2022 (n=1,148). **Note:** 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. **Green / red** indicates statistically significantly **higher / lower** than 2023.

Figures represent NETT Confidence (% very + somewhat confident)





CONFIDENCE IN AGENCIES – SIGNIFICANT DIFFERENCES (I)

Demographic Differences



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



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



Violent conflicts between groups in NZ (51%)

56% Employed full-time



Other countries threatening NZ interests in the Pacific (49%)

62% NETT Pacific peoples*

55% 30–49 years

41% 50–64 years

34% Self-employed*



Q11: 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 (n=1,172). Green / red indicates statistically significantly higher / lower than the total. *CAUTION: Low base size, results indicative only (50 ≤ n < 100).



CONFIDENCE IN AGENCIES – SIGNIFICANT DIFFERENCES (II)

Demographic Differences



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



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*



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

- 31% Self-employed*



Emerging technology (43%)

- 58% NETT Pacific peoples*
- 36% 50–64 years
- 33% Rest of SI (excl. Canterbury)



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

- 49% NETT Pacific peoples*



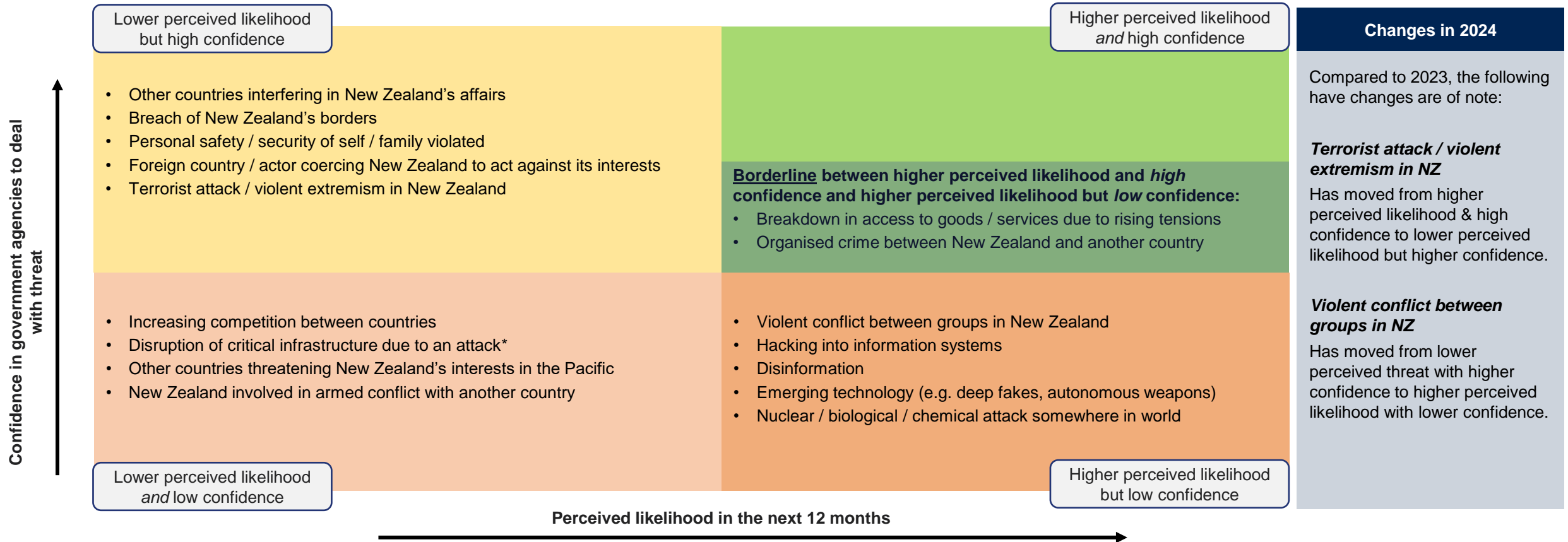
Q11: If any of the following were to happen in the next twelve months, how confident are you that New Zealand's government agencies could provide appropriate levels of security and protection and respond effectively to...

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



CONFIDENCE IN GOVERNMENT BY LEVEL OF GENERAL THREAT

When confidence is overlaid with the perceived likelihood in the next 12 months, *breakdown in access to goods / services due to rising tensions* and *organised crime between NZ & another country* have a high level of both perceived likelihood and confidence in the government's abilities. However, there are threats with a perceived high likelihood of threat but lower confidence in the government, e.g. *violent conflict between groups in New Zealand, hacking into information systems, disinformation, emerging technology* and *nuclear / biological / chemical attack*.



Q9: How real do you feel the threat is of any of the following happening in the next twelve months? / Q11: 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 (n=1,172). *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 (I)

Consistent with previous survey results, *taking action / responding quickly* and *keeping the public educated & informed* are most commonly mentioned ways that government agencies can build confidence when it comes to national security 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 (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 (II)

Consistent with previous survey results, *taking action / responding quickly* and *keeping the public educated & informed* are most commonly mentioned ways that government agencies can build confidence when it comes to national security 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 (n=615). Note: Responses less than 5% for the total are not shown. *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. ▲ / ▼ indicates statistically significantly higher / lower than 2023.





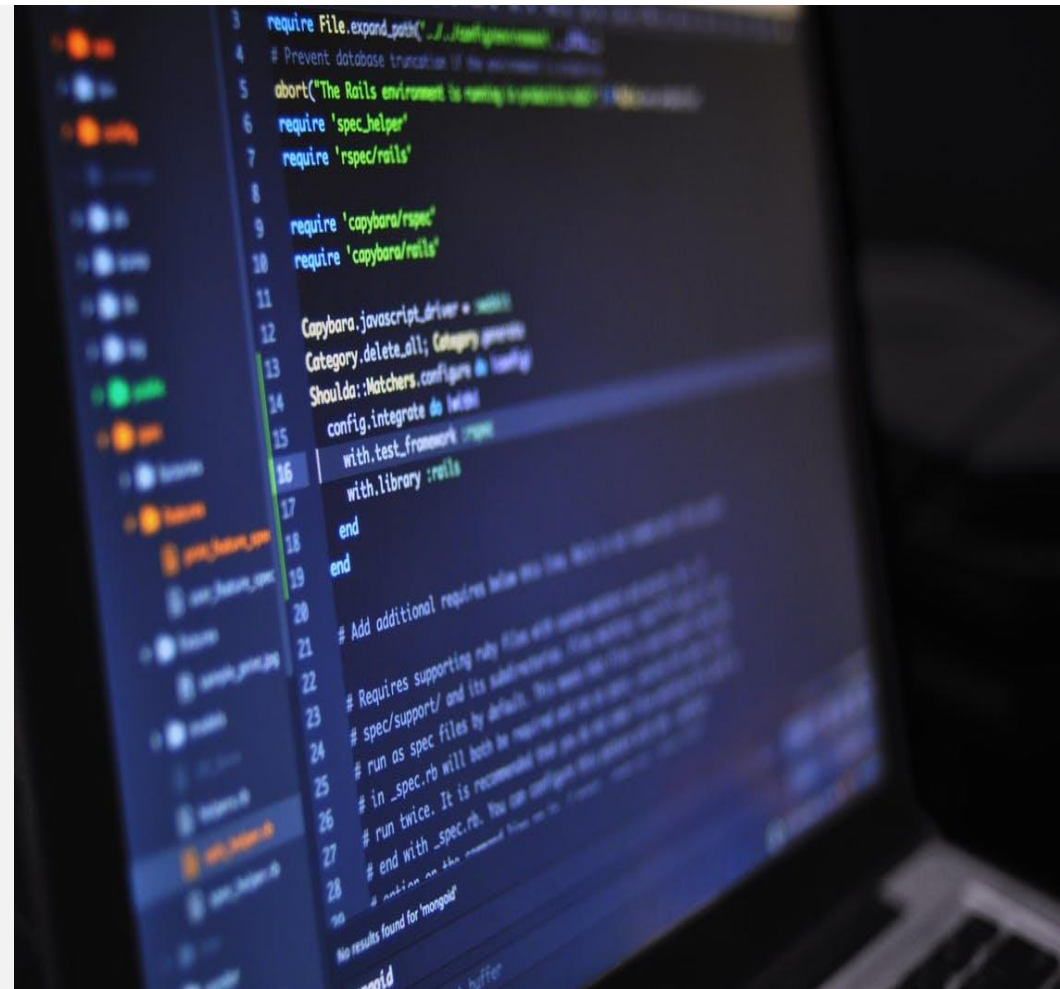
CURRENT & FUTURE ENGAGEMENT

6



KEY FINDINGS

- Consistent with previous survey results, only a fifth of New Zealanders feel knowledgeable about national security or know where to find information about national security.
- Well over half (62%) are interested in *finding out more* and over a third (35%) would like to *be involved in public discussion* on the topic. These findings are also consistent with previous years.
- Overall, people would like more information on those threats they perceive as most likely to occur in the next 12 months.
- Compared to 2023 results, interest in information on national security threats remains the same.
- The type of information New Zealanders would prefer to receive 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 work.*





INFORMATION ON NATIONAL SECURITY

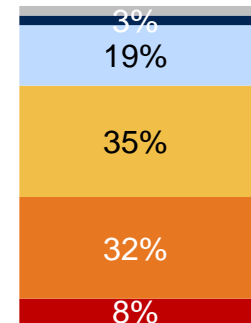
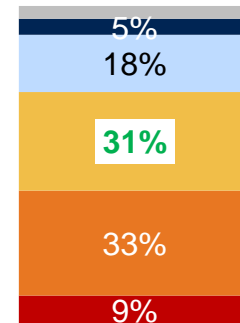
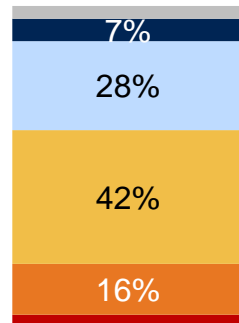
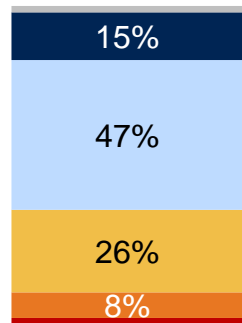
Well over half of New Zealanders are interested in knowing more about national security and 1 in 3 are keen to be involved in public discussions. Around 40% of New Zealanders don't know where to find information about national security, nor do they feel knowledgeable about national security issues.

Agreement with statements...

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

NETT
% strongly
agree +
agree

2024	62%	35%	22%	22%
2023	61%	36%	25%	21%
2022	59%	39%	25%	22%



I am interested in knowing more about national security

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

I know where to go to find information about national security

I feel I am knowledgeable about national security issues

NETT
% disagree
+ strongly
disagree

2024	10%	19%	42%	40%
2023	10%	20%	44%	41%
2022	14%	19%	46%	44%

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 – 2024 (n=1,172), 2023 (n=2,370), 2022 (n=1,148). Green / red indicates statistically significantly higher / lower than 2023. 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 overseas
54% HH income \$0–\$50k



I would like to have a say or be more involved in public discussions on national security (35%)
49% Asian
41% Born overseas
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% Asian
29% 30–49 years
18% Female
16% 50–64 years
9% Rest of South Island (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% Māori



I would like to have a say or be more involved in public discussions on national security (19%)
26% Retired
13% Born overseas



I know where to go to find information about national security (42%)
50% 18–29 years
48% Female
36% Male
34% Asian



I feel that I am knowledgeable about national security issues (40%)
49% Female
49% 18–29 years
30% Male





THREATS – SEEKING MORE INFORMATION OVERALL

Just under half of New Zealanders are interested in more about information on a *full range of threats & significant hazards facing NZ*. Interest in knowing more about *disinformation, emerging technology* and *disruption in national infrastructure due to an attack* have increased compared to 2023 results.

Interest in knowing more about the following threats...

	2024	2023	2022	% point difference (2024–2023)
Disinformation	58%	53%	52%	+5%
Emerging technology (e.g. deep fakes, autonomous weapons)	58%	50%	42%	+8%
Personal safety / security of self / family violated	57%	57%	42%	-
Terrorist attack / violent extremism in NZ	55%	56%	49%	-1%
Disruption of critical infrastructure due to an attack*	54%	49%	45%	+5%
Hacking into information systems	50%	45%	41%	-5%
Information on the full range of threats & significant hazards facing NZ**	49%	-	-	-
Violent conflict between groups in NZ	49%	50%	48%	-1%
Breakdown in access to goods / services due to rising tensions	49%	48%	-	+1%
Organised crime between NZ & another country	48%	50%	41%	-2%
Nuclear / biological / chemical attack somewhere in the world	48%	50%	33%	-2%
Breach of NZ borders	47%	47%	38%	-
Other countries threatening NZ interests in Pacific	44%	44%	35%	-
NZ involved in armed conflict with another country	44%	44%	37%	-
Other countries interfering in NZ affairs	43%	44%	39%	-1%
Foreign country / actor coercing NZ to act against its interests	39%	39%	37%	-
Increasing competition between countries	39%	38%	-	+1%
Other	2%	2%	1%	-

Q21: Which of the following threats are you interested in knowing more about?

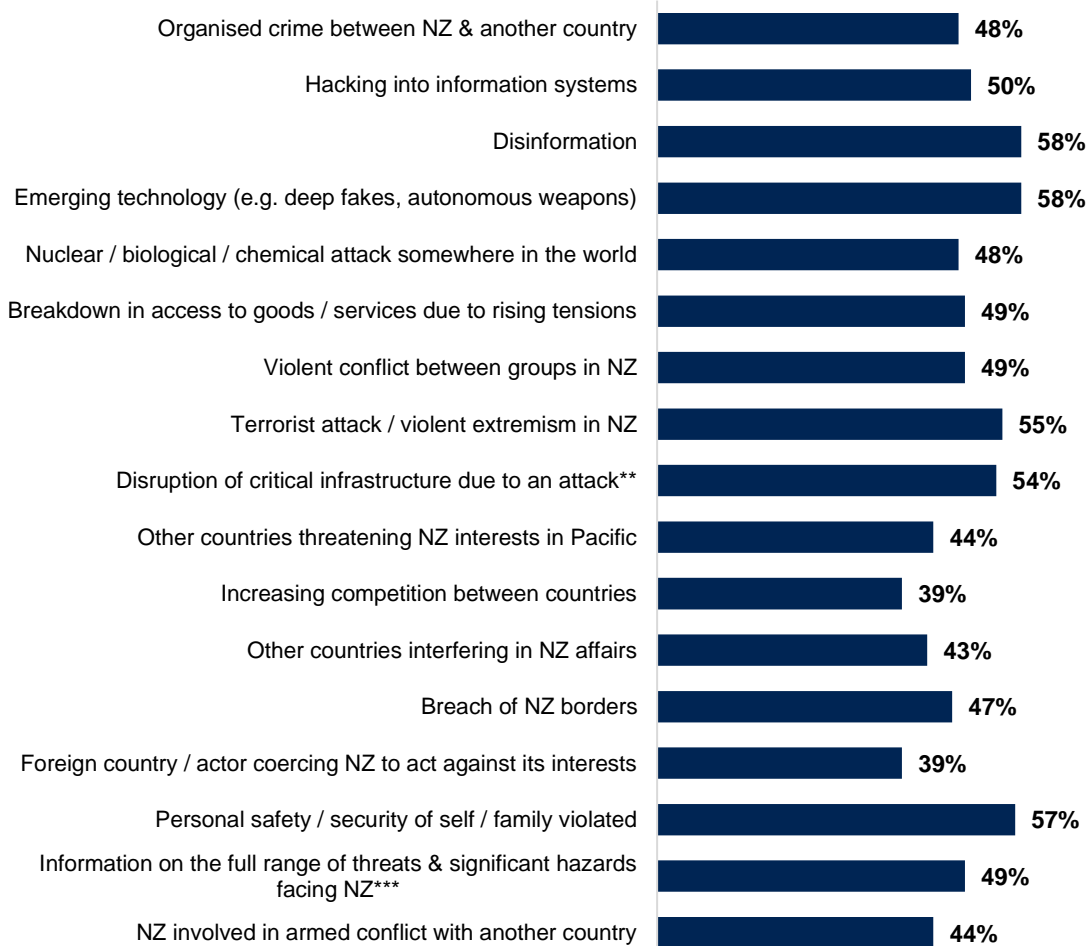
Base: Those who indicated they were interested in knowing more about national security in Q20 – 2024 (n=721), 2023 (n=1,444), 2022 (n=671). ***Note:** In 2024, breakdown in national infrastructure due to an attack (as included in the 2023 survey) was changed to disruption of critical infrastructure due to an attack. ****Note:** New to 2024 survey. **Green / red** indicates statistically significantly higher / lower than 2023.





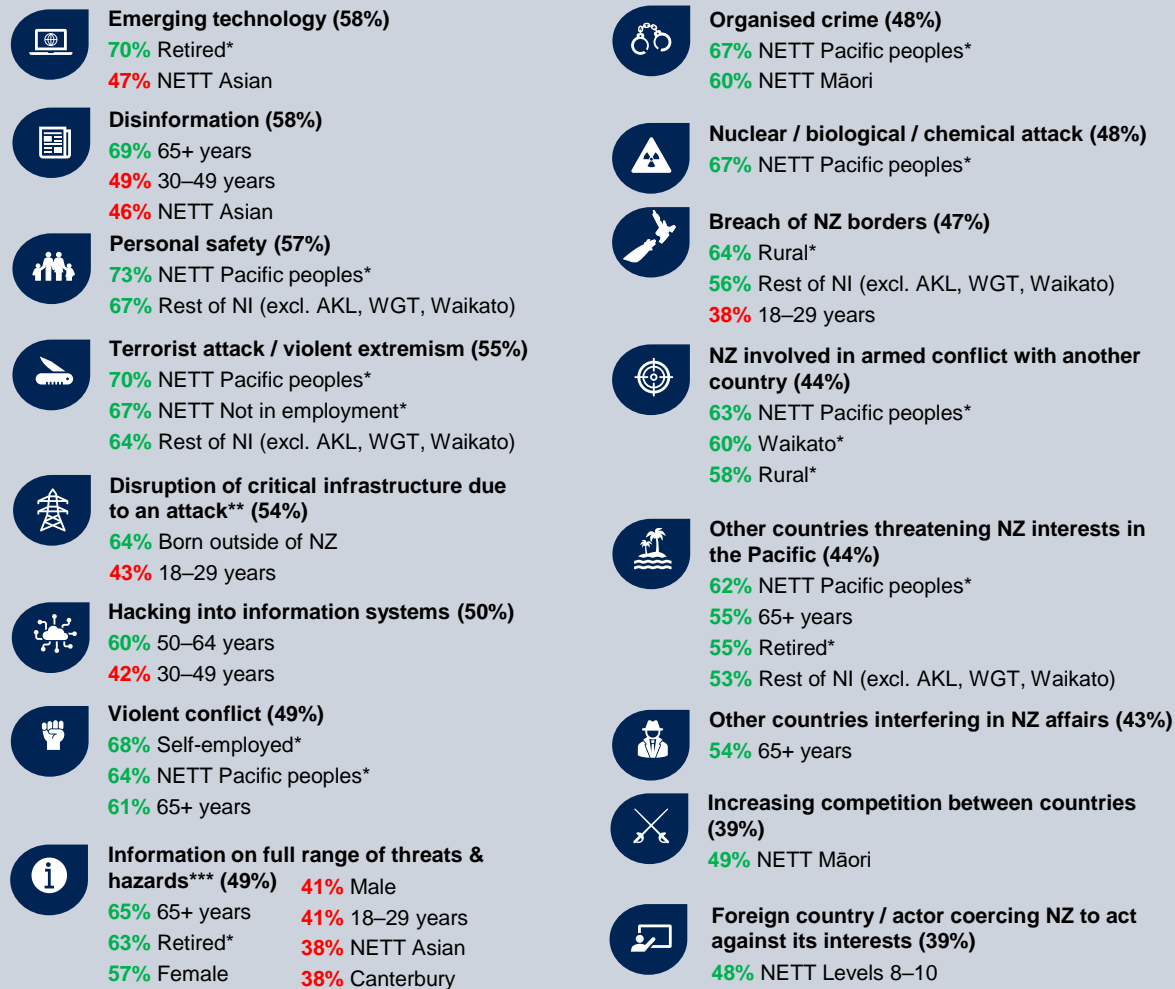
NATIONAL SECURITY THREATS – SEEKING MORE INFORMATION

Threats interested in knowing more about...



ORDERED FROM HIGHEST TO LOWEST LEVEL OF PERCEIVED THREAT

Demographic Differences



Q21: Which of the following threats are you interested in knowing more about?

Base: Those who indicated they were interested in knowing more about national security in Q20 (n=721). Green / red indicates statistically significantly higher / lower than the total.

*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.

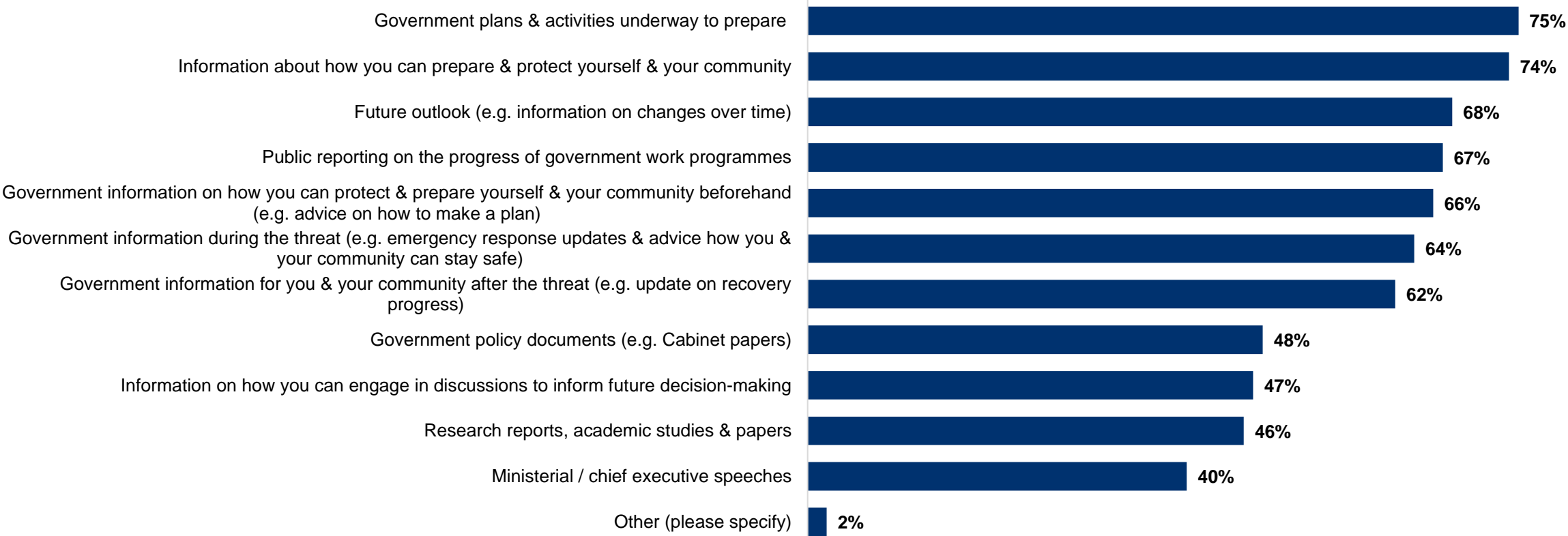




THREATS – PREFERRED INFORMATION FORMAT (TOTAL LEVEL)

The type of information New Zealanders would prefer to receive on national security threats focuses on *government communications around plans to prepare for the threat, how individuals & communities can prepare, future outlook of the threat as well as public reporting regarding the progress of the governments work on this threat.*

What type of information would you prefer to receive on _____ ?



Q21a: 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)

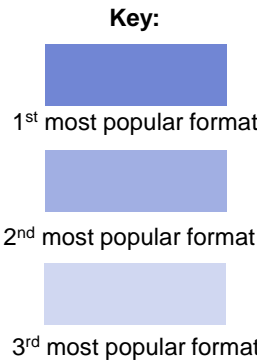




THREATS – PREFERRED INFORMATION FORMAT (I)

The type of information New Zealanders would prefer to receive on significant 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 formats for *terrorism and hacking* threats.

	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 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 hazards in Q21 (n=694)

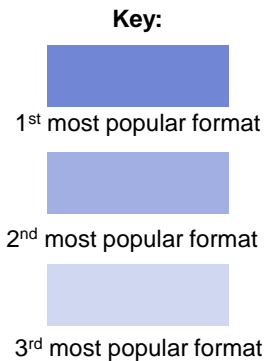




THREATS – PREFERRED INFORMATION FORMAT (II)

For disruption of critical infrastructure (due to attack), the public are interested in information about how they can prepare and protect from this threat – prior to, during and after such an 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 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.



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"> ▪ Statements removed and moved to the equivalent question for the hazards track respondents (Q9h): ‘Another major health epidemic breaking out in New Zealand’ and ‘A major natural disaster occurring in New Zealand’ . ▪ Statement wording changed: ‘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)’. ▪ Statement wording changed: ‘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)’.
Q21: ‘Which of the following threats are you interested in knowing more about?’	Answer option added: ‘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>?’	New question added
Q22: ‘And in what format would you prefer for information on <INSERT RESPONSE FROM Q21>?’	Question removed
Q24: ‘Where would you like to receive information about the threats we have discussed during this survey?’	Question removed

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
YOU**

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