

2023 NATIONAL SECURITY PUBLIC SURVEY



GAME CHANGERS



Note: The National Security Public Survey is an independently run survey, delivered by IPSOS NZ. The information contained in the survey report is based on responses from survey participants. The inclusion of these views and opinions does not imply endorsement by agencies or the Government. The 2023 survey focused on levels of public views on national security threats and risks, and sought to understand more about how we could work together to increase resilience to them. The survey also explored the ways people receive information and how they would like to receive information on national security. The survey is one of many ways national security sector agencies are seeking to connect with New Zealanders, and insights generated through this survey help ensure our work is informed by views of the public.

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BACKGROUND & METHODOLOGY

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RESEARCH OBJECTIVES

The purpose of this survey is to explore what national security means to people living in New Zealand, to understand which hazards and threats are of most concern to them, and how we can better share information and engage with them on these topics.

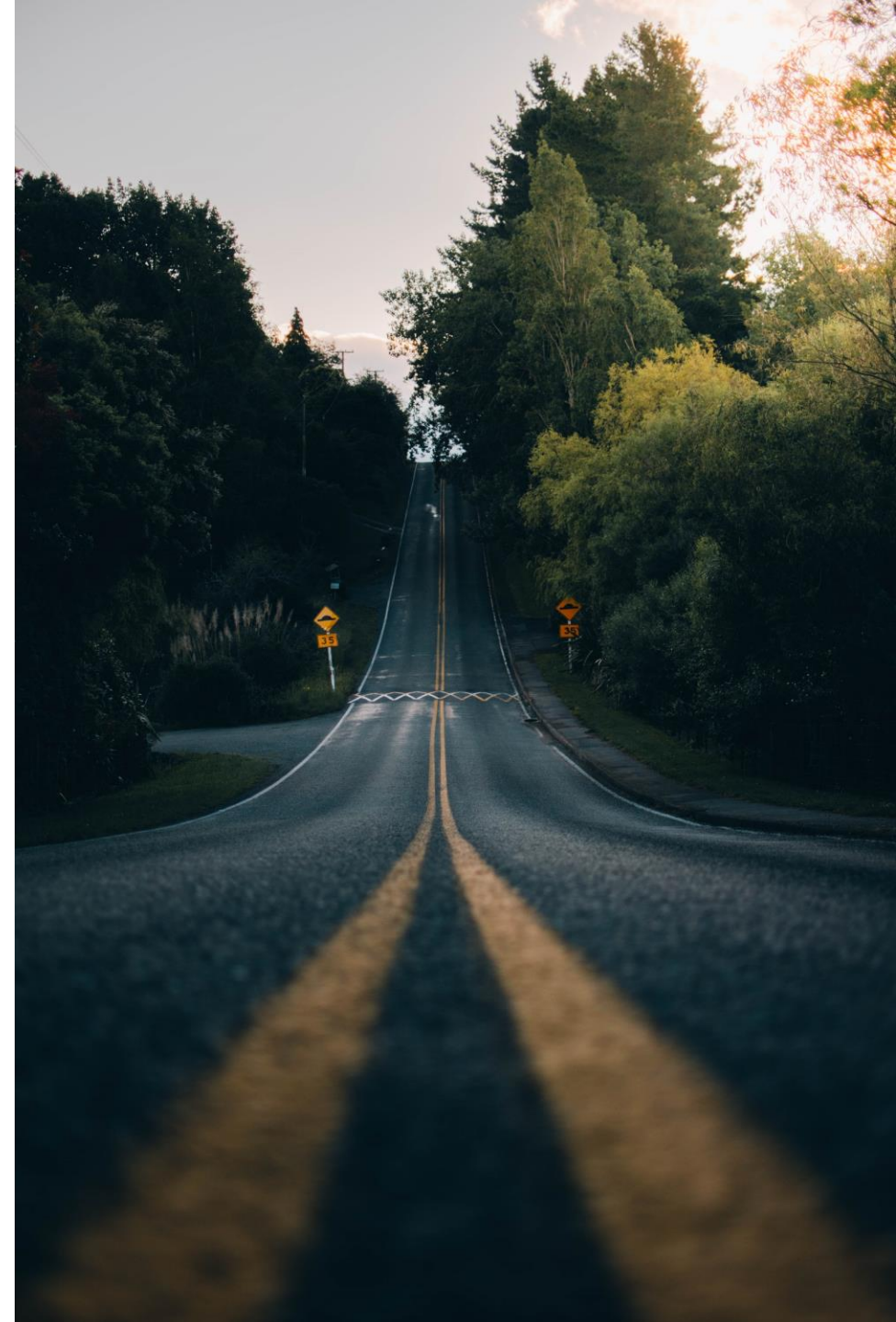
Findings from the 2022 survey informed development of the National Security Long-term Insights Briefing, the National Security Strategy and National Security Sector Reforms.

DPMC has commissioned this research for a second year as we continue to deepen our understanding of people's awareness and attitudes towards national security issues over time.

This research report presents results from the second year of surveying (2023) and compares findings to results from the 2022 survey.

The survey provides an understanding, across a nationally representative sample of 2,370 people, in relation to:

- What 'national security' means to New Zealanders and which hazards and 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 hazards and threats and what the government can do to build confidence
- What information New Zealanders would like to receive on hazards and threats



METHODOLOGY



Fieldwork dates

13 Feb–13 Apr*



Methodology

Interviews were conducted online (self-completion). Respondents were recruited from Ipsos & Ipsos partner panels**



Weighting

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



Sample achieved

n=2,370

Notes

- Fieldwork overlapped Cyclone Gabrielle (5–16 February 2023). Ipsos postponed fieldwork for a few days in the areas most affected by the cyclone – Gisborne and Hawke’s Bay regions. This event may have impacted people’s responses.
- 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=100. In the Case Studies, demographic differences are shown amongst the demographic groups that have a base size larger than n=30.
- **See Appendix 3 for further details on panels.

CONTEXT – WHAT WAS MAKING THE NEWS DURING FIELDWORK?

It is likely the media climate in which the survey was run will have impacted responses. News headlines during the survey fieldwork included Cyclone Gabrielle, the floods in Auckland & recent drugs seizures.

WEATHER

**Cyclone Gabrielle:
Thousands stranded in
Hawke's Bay**

From Checkpoint

CRIME / POLICE

**NZ authorities find tonnes of
cocaine in Pacific Ocean**

INFLATION ●

Expert warns uncertain global market means New Zealand's inflation could rise again

NEW ZEALAND / CRIME

Meth, cash seized from 'transnational organised crime cell'

NEW ZEALAND / TECHNOLOGY

Voter targeting tools could impact electoral integrity, disinformation expert says

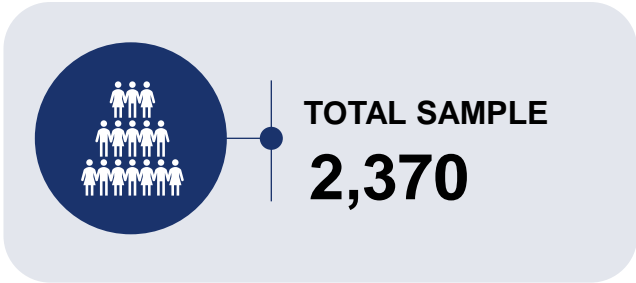
Russia-Ukraine war: Putin suspends US nuclear arms reduction treaty, could resume testing

Making Deepfakes Gets Cheaper and Easier Thanks to A.I.

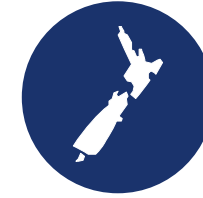
Meme-makers and misinformation peddlers are embracing artificial intelligence tools to create convincing fake videos on the cheap.

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.*



ETHNICITY			n=
NETT NZ European / Pākehā	75%	1,787	
NETT Māori	14%	443	
NETT Pacific	6%	209	
NETT Asian	15%	313	
NETT Other	3%	42	



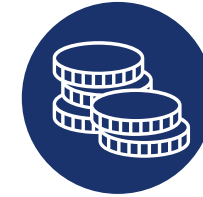
REGION			n=
Auckland	35%	836	
Waikato	9%	216	
Wellington	12%	282	
Rest of North Island	20%	481	
Canterbury	13%	310	
Rest of South Island	11%	245	



GENDER			n=
Male	49%	1,151	
Female	51%	1,219	



COUNTRY OF BIRTH			n=
New Zealand	72%	1,791	
Outside of NZ	28%	579	



HH INCOME*			n=
\$0–50k	21%	485	
\$50k–\$100k	33%	786	
\$100k+	37%	868	



AGE			n=
18–29 years	22%	690	
30–49 years	34%	776	
50–64 years	24%	500	
65+ years	20%	404	

REGENCY OF MIGRATION			n=
NETT New Migrant (<7 years in NZ)	21%	122	
NETT Established Migrant (>7 years in NZ)	79%	456	



EDUCATION*			n=
NETT None + Levels 1–3	33%	829	
NETT Levels 4–7	47%	1,106	
NETT Levels 8–10	18%	407	



URBAN vs RURAL			n=
Urban	88%	2,089	
Rural	12%	281	

Note: Fieldwork overlapped Cyclone Gabrielle (5–16 February 2023). Ipsos postponed fieldwork for a few days in the areas most affected by the cyclone – Gisborne and the Napier / Hawke’s Bay regions.

2022 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

This was a 33-market survey conducted by Ipsos on its Global Advisor online platform. Ipsos interviewed a total of 32,507 adults aged: 18–74 in the United States, Canada, Malaysia, South Africa and Türkiye; 20–74 in Thailand; 21–74 in Indonesia; and 16–74 in 27 other markets between Friday, 23 September and Friday, 7 October 2022.

The sample consisted of approximately 1,000 individuals in each of Argentina, Australia, Belgium, Brazil, Canada, Chile, mainland China, Colombia, France, Germany, Great Britain, India, Indonesia, Italy, Japan, Malaysia, Mexico, the Netherlands, Peru, Poland, Romania, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Thailand, Ukraine, the United Arab Emirates and the United States, and 500 individuals in each of Hungary, Ireland and Türkiye.

The data was weighted so that each country's sample composition best reflected 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.

In this report, where possible, we have used the Halifax Report results to compare NZ results with global market averages for perceived likelihood of threats in the next 12 months.

¹ <https://www.ipsos.com/en/halifax-report-2022-influence>

² <https://www.ipsos.com/sites/default/files/ct/news/documents/2022-11/HISF%2022%20-%20Full%20Report.pdf>



KEY FINDINGS SUMMARY

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OVERALL FINDINGS

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

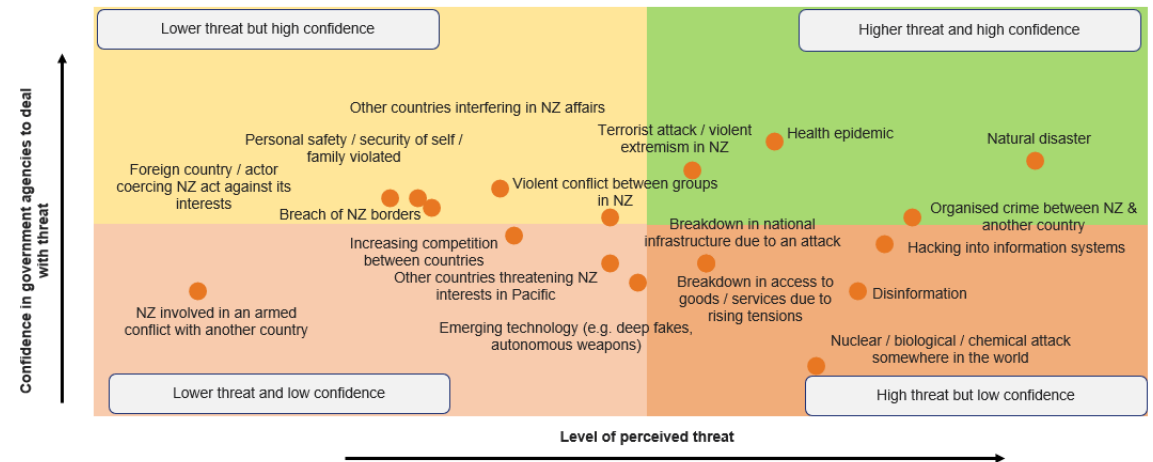
- The top hazards and threats people consider most likely to occur in the next 12 months and next 10 years in New Zealand have changed in rank order of importance compared to 2022.
- *Natural disasters* remains the number one hazard (this has seen a statistically significant increase in 2023) with more people considering it a 'very real threat' in the next 12 months.
- *Organised crime between New Zealand and another country* has also seen a statistically significant increase compared to 2022 results, to become the second threat most likely to occur in the next 12 months, up from fifth position last year.
- *Hacking into information systems* remains in third position.
- *Disinformation* has fallen two positions to fourth place since last year.
- *Nuclear / biological / chemical attack happening somewhere in the world* has seen a statistically significant increase and is now among the top-5 threats, (previously ranked in seventh position in 2022).
- 80% of New Zealanders said they feel the world has *become a more dangerous place over the last year*. Those who considered the world a more dangerous place were also statistically significantly more likely to think that all top-eight hazards and threats likely posed a real threat to New Zealand in the next 12 months.
- When asked to consider the longer-term, *Natural disasters* were also considered to be the top threat most likely in the next 10 years.
 - *A health epidemic* is something New Zealanders think will pose a real threat again in the next 10 years.
 - *Organised crime between NZ and another country, hacking and disinformation* are also considered likely real threats, both now and in the future.
 - *A nuclear / biological / chemical attack happening somewhere in the world* is a threat that is seen to be likely in the next 12 months, but not a top threat over the next 10 years.

OVERALL FINDINGS

- Perceived appropriate levels of information sharing and confidence in government agencies has seen little change since 2022.
 - Similar to last year, over a third of New Zealanders do not believe New Zealand’s national security agencies currently share enough information.
 - Over half of New Zealanders said they want more information on threats and hazards and over a third wanted to be involved in public discussion on national security.
- Confidence in government agencies’ abilities to protect or respond to threats and hazards is highest for *health epidemic*, *natural disasters* and *terrorist attacks*, and lowest for *NZ involved in armed conflict with another country* and *nuclear / biological / chemical attack somewhere in the world*.
 - *Health epidemic* has risen four places since 2022 with the **highest level of confidence** in government agencies’ ability to protect or respond to. This has been at the expense of *natural disasters*, which saw a statistically significant decrease from 1st place in 2022 to 2nd place in 2023. It is likely this result was impacted by the timing of the survey (Cyclone Gabrielle and Auckland floods).
 - Confidence in government agencies’ ability to protect or respond to *violent conflict between groups* has statistically significantly increased in 2023, while confidence in relation to *armed conflict* and *nuclear/bio/chemical attack happening somewhere in the world* is statistically significantly lower when compared to last year.
 - For threats with global benchmarks, confidence in government agencies is statistically significantly higher in New Zealand apart from *nuclear / biological attacks*.

In an analysis of level of perceived likelihood of threat versus government agencies’ ability to respond, there have been some small changes when compared with 2022 results:

- *Natural disasters* and *health epidemic* have seen declining confidence when compared with 2022 results. Although they remain in the same quadrant (higher threat, higher confidence), they no longer stand apart from other threats and hazards as areas of notable strength.
- Threats including *Hacking into information systems*, *Disinformation*, *nuclear / biological attack somewhere in the world* were seen as highly likely in the next 12 months but showed lower levels of confidence in government agencies abilities to respond.



OVERALL FINDINGS

Deep dive on Foreign Interference, Economic Security and Transnational Organised Crime

- The majority of New Zealanders believe that **the government and its agencies have full responsibility to protect against or manage** the threats of *foreign interference*, *economic security* and *transnational organised crime*. Fewer believe they are fully resourced to do so.



“Other country / countries interfering in New Zealand’s affairs (e.g. interference in general elections or relationships with other countries)”

FOREIGN INTERFERENCE

New Zealanders who mentioned that they view other countries interfering in New Zealand affairs as a threat, said so because they can see it is already happening. Other reasons mentioned included our upcoming general election and the size of our country’s population making us vulnerable to larger foreign powers.

Perceived likelihood in next 12 months

14th out of 18 threats asked

Perceived likelihood in next 10 years

14th out of 18 threats asked



“A breakdown in access to critical goods and services caused by rising tensions between countries (e.g. through restrictions on trade or other penalties)”

ECONOMIC SECURITY*

New Zealanders who stated they view a breakdown in access to critical goods and services as a threat in the next 12 months, said so because of the war in Ukraine, New Zealand’s dependency on exports / imports to and from other countries, as well as already feeling difficulties in accessing goods and services, e.g. due to COVID-19.

Perceived likelihood in next 12 months

7th out of 18 threats asked

Perceived likelihood in next 10 years

8th out of 18 threats asked



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

TRANSNATIONAL ORGANISED CRIME

New Zealanders who stated they view organised crime happening between New Zealand and another country as a threat in the next 12 months, said this because they can see it is already happening, e.g. recent drug busts.

Perceived likelihood in next 12 months

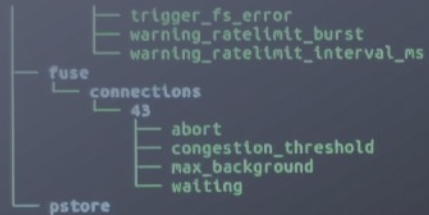
2nd out of 18 threats asked

Perceived likelihood in next 10 years

3rd out of 18 threats asked

WHAT DOES 'NATIONAL SECURITY' MEAN TO NEW ZEALANDERS?

3



159 directories, 927 files

```
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* . .
```

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

KEY FINDINGS

What does 'national security' mean to New Zealanders?

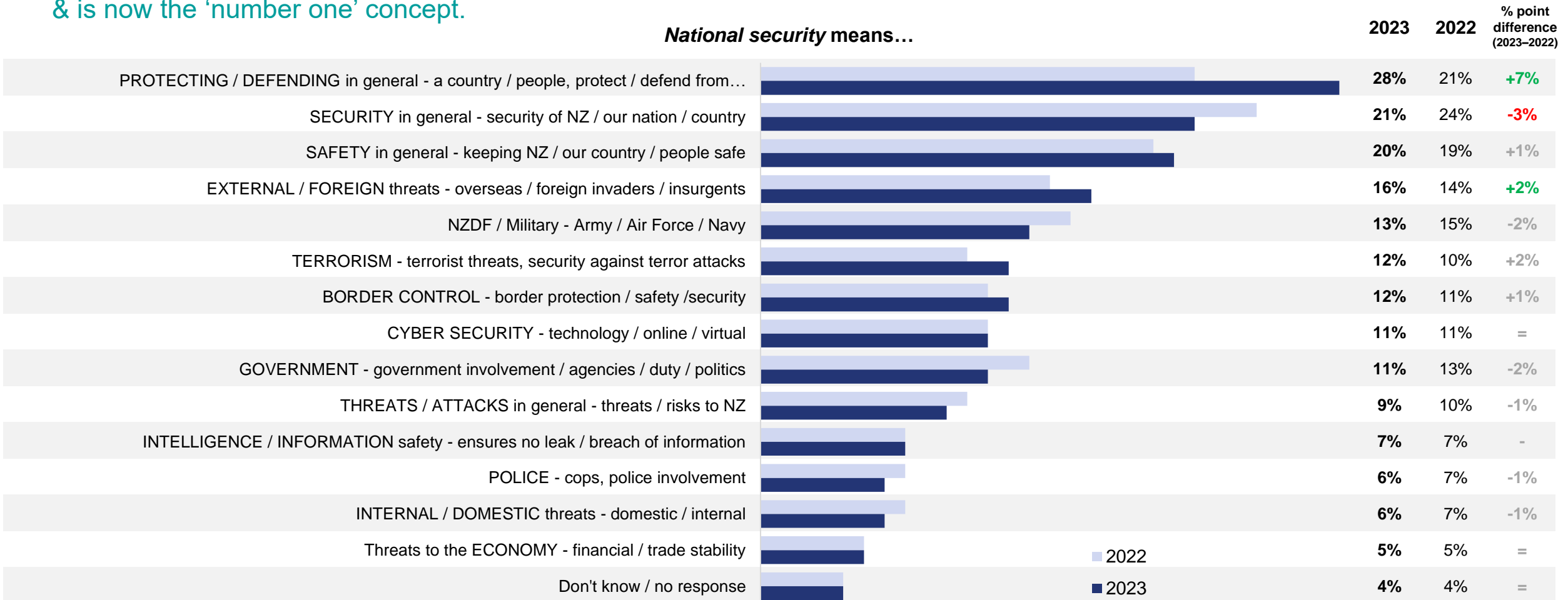
- As we saw in 2022, the majority of respondents had some concept of what 'national security' meant to them, with only 4% stating they "don't know":
 - The most commonly mentioned themes related to *protection, general security and safety*. These were followed by more specific themes such as *foreign invasion and the Defence Force*.
 - *Protection / defending NZ* has seen a statistically significant increase in mention since 2022 and is now the number one reported concept of 'national security' in people's own words.
- When provided with a list of hazards and threats (shown on screen one at a time, in a randomised order), respondents reported *natural disasters* and *organised crime* as being most likely in the next 12 months, with *hacking, disinformation and nuclear / biological / chemical attack somewhere in the world* rounding out the top 5.
 - *Organised crime* as a perceived threat in the next 12 months has risen from 5th place in 2022 to 2nd place this year.
- Regarding the longer term, the level of perceived likelihood of hazards and threats over the next 10 years is higher than the next 12 months. Exceptions to this are *natural disasters* and *organised crime*, for which the current level is perceived to be higher than the long-term one.
 - The level of perceived likelihood of hazards and threats occurring in the future has increased compared to last year.



UNDERSTANDING 'NATIONAL SECURITY'

Most respondents have a view on what *national security* means. The most common concepts are *protecting / defending NZ, NZ's security & keeping people protected & safe*. *Protection / defending NZ* has statistically significantly increased since 2022 & is now the 'number one' concept.

National security means...



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

Base: Total sample – 2023 (n=2,370), 2022 (n=1,148). Note: Responses less than 5% are not shown. Green / red indicates statistically significantly higher / lower than 2022.

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

Demographic Differences



Protecting / defending (28%)

31% Female
32% HH income \$100k+
25% Male
24% 18–29 years



Security (21%)

33% Students
32% Pacific peoples
27% 18–29 years



Safety (20%)

25% HH income \$0–\$50k
17% 18–29 years
13% Māori 18–29 years



External / foreign threats (16%)

24% 65+ years
21% 50–64 years
21% NETT Levels 8–10
19% NZ European / Pākehā
12% Māori
11% Asian
11% NETT None + Levels 1–3
10% Pacific peoples
10% 18–29 years



Terrorism (12%)

16% NETT Levels 8–10
14% NETT Levels 4–7
15% HH income \$100k+
7% 18–29 years
6% NETT None + Levels 1–3
5% Māori
2% Māori 18–29 years



Cyber security (11%)

9% NETT None + Levels 1–3
6% 18–29 years
6% Pacific peoples
5% Māori
4% Māori 18–29 years



Government (11%)

15% Female
15% Māori
8% Male
6% Asian



Threats / attacks (9%)

7% NETT None + Levels 1–3
6% 18–29 years
5% Māori
4% Pacific peoples
4% Māori 18–29 years



Intelligence / information safety (7%)

5% Male



Police (6%)

9% 18–29 years



Internal / domestic threats (6%)

9% 65+ years
9% NETT Levels 8–10
3% Māori
3% Asian
2% 18–29 years
2% Māori 18–29 years
2% NETT None + Levels 1–3



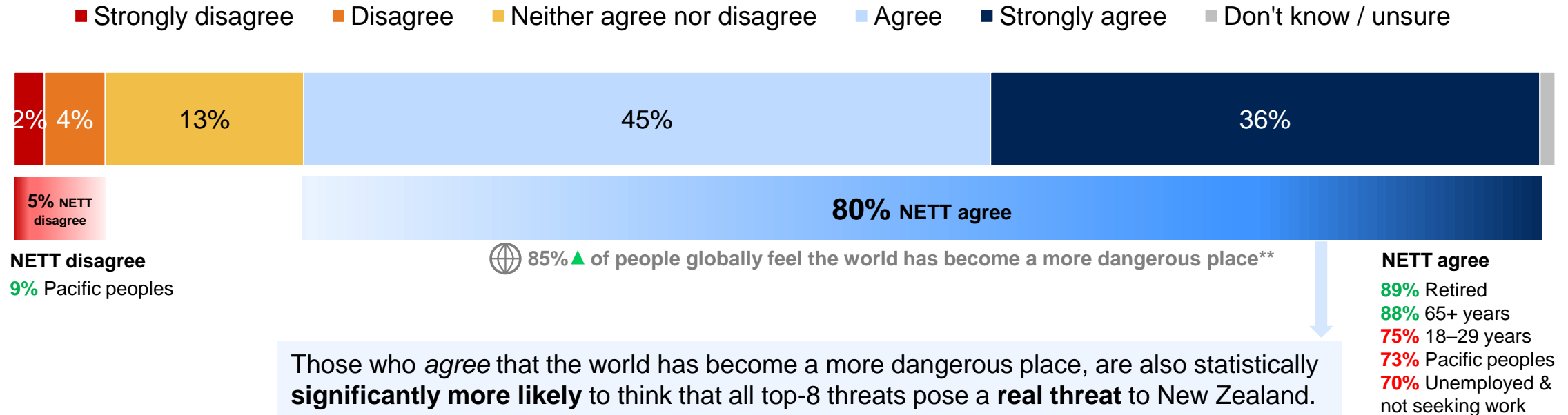
Q8: When you see the term 'National Security', what comes to mind?

Base: Total sample (n=2,370). Green / red indicates statistically significantly higher / lower than the total.

PERCEIVED LEVEL OF GLOBAL DANGER

4 in 5 New Zealanders feel *the world has become a more dangerous place*, while 5% disagree with this sentiment. However, compared to global country average results, this perception of danger is lower in New Zealand.

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



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=2,370). *Note: Statement not included in the 2022 survey, new to the 2023 questionnaire. **Note: Global country average figures are taken from the Ipsos-Halifax World Affairs global survey conducted in October 2022 (n=32,507) where applicable. Green / red indicates statistically significantly higher / lower than the total. ▲ indicates the global country average (n=32,507) figure is statistically significantly higher than NZ total sample (n=2,370) figure.

SPECIFIC QUESTION WORDING – HAZARDS & THREATS MEASURED

Respondents' views were sought on a group of potential hazards and 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:

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

Natural disaster: A major natural disaster occurring in New Zealand

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.

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. 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)

Breakdown in national infrastructure due to an attack: A breakdown in critical national infrastructure 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 HAZARDS AND THREATS – NEXT 12 MONTHS

Natural disasters & organised crime between New Zealand & another country are the top-2 most commonly perceived threats ('somewhat + very real') likely to occur in the next 12 months. The degree to which New Zealanders see these as likely has statistically significantly increased since 2022.

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

	2022 position		2022 position
1	Natural disaster	1	
2	Organised crime between NZ & another country	5	
3	Hacking into information systems	3	
4	*Disinformation	2	
5	Nuclear / biological / chemical attack somewhere in the world	7	
6	Health epidemic	4	
7	Breakdown in access to goods / services due to rising tensions	<i>new</i>	
8	Breakdown in national infrastructure due to an attack	9	
9	Terrorist attack / violent extremism in NZ	8	
10	Emerging technology (e.g., deep fakes, autonomous weapons)	10	

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

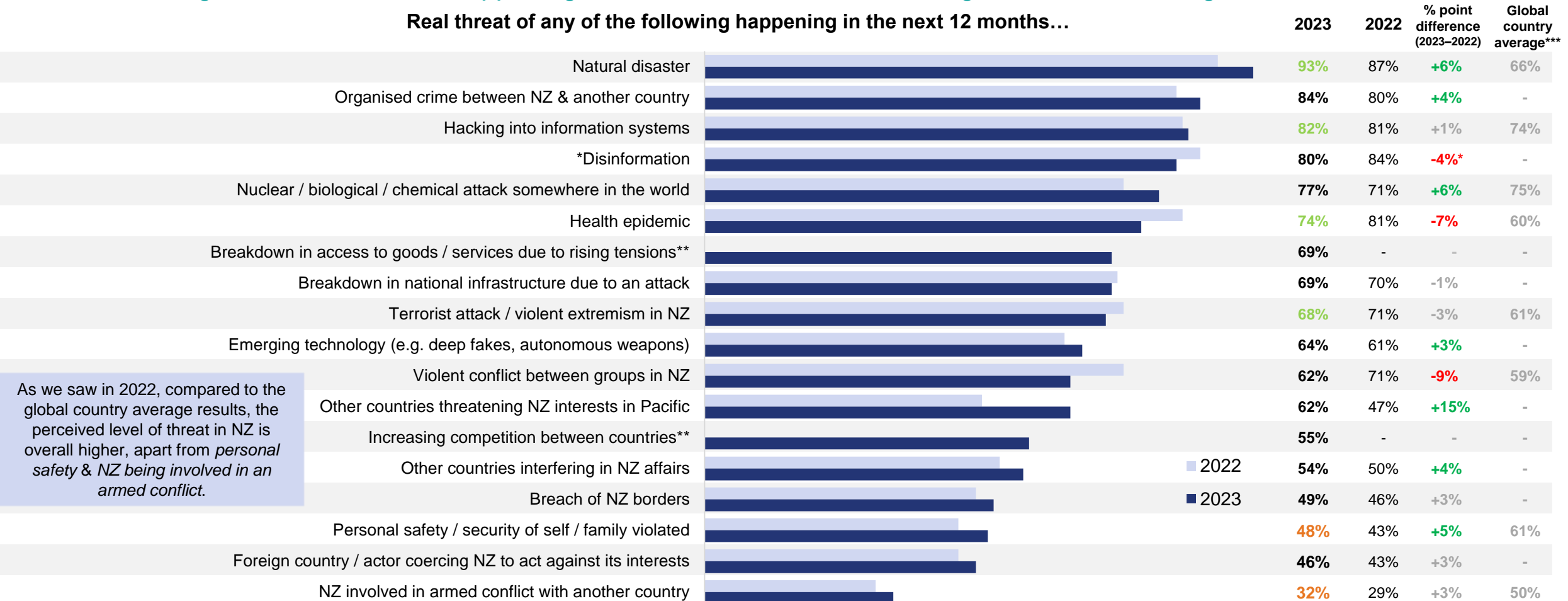
Base: Total sample – 2023 (n=2,370), 2022 (n=1,148). *Note: Disinformation has been added to the 2023 questionnaire, replacing misinformation (included in the 2022 survey).

Green / red indicates statistically significantly higher / lower scores than 2022 – see the next slide.

PERCEIVED LIKELIHOOD OF THREATS AND HAZARDS

There have been some notable changes since 2022, with increases in perceived likelihood over the **next 12 months** – *other countries threatening NZ interests in the Pacific, violent conflicts between groups in NZ, Natural disaster and a nuclear/biological/chemical attack happening somewhere in the world* showing most notable change.

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



As we saw in 2022, compared to the global country average results, the perceived level of threat in NZ is overall higher, apart from *personal safety & NZ being involved in an armed conflict*.

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

Base: Total sample – 2023 (n=2,370), 2022 (n=1,148). ***Note:** Disinformation has been added to the 2023 questionnaire, replacing misinformation (included in the 2022 survey). ****Note:** new to the 2023 questionnaire. *****Note:** Global country average figures are taken from the Ipsos-Halifax World Affairs global survey conducted in October 2022 (n=32,507) where applicable. **Note:** Hazards and threats were presented 'one at a time' on screen and randomised to reduce response order bias.

Green / red indicates statistically significantly higher / lower than 2022. Green / orange indicates statistically significantly higher / lower score than global country average.

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



THREATS AND HAZARDS IN THE NEXT 12 MONTHS

Although *natural disaster* ranks first (59%), *organised crime between NZ & other country & disinformation* are also considered to be a likely 'very real threat' by a large proportion of New Zealanders (41%).

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

		2023 Threat NETT	2022 Threat NETT	% point difference 2023–2022
Natural disaster	6% 34% 59%	93%	87%	+6%
Organised crime between NZ & another country	2% 15% 43% 41%	84%	80%	+4%
Hacking into information systems	2% 15% 46% 36%	82%	81%	+1%
*Disinformation	4% 16% 39% 41%	80%	84%	-4%
Nuclear / biological / chemical attack somewhere in the world	4% 19% 43% 34%	77%	71%	+6%
Health epidemic	3% 22% 51% 24%	74%	81%	-7%
Breakdown in access to goods / services**	3% 28% 50% 19%	69%	-	-
Breakdown in national infrastructure due to an attack	4% 28% 48% 21%	69%	70%	-1%
Terrorist attack / violent extremism in NZ	4% 28% 47% 21%	68%	71%	-3%
Emerging tech (e.g. deep fakes, autonomous weapons)	4% 31% 44% 20%	64%	61%	+3%
Violent conflict between groups in NZ	6% 32% 44% 18%	62%	71%	-9%
Other countries threatening NZ interests in Pacific	6% 32% 43% 19%	62%	47%	+15%
Increasing competition between countries**	7% 38% 42% 12%	55%	-	-
Other countries interfering in NZ affairs	7% 39% 40% 14%	54%	50%	+4%
Breach of NZ borders	9% 42% 35% 14%	49%	46%	+3%
Personal safety / security of self / family violated	9% 43% 35% 13%	48%	43%	+5%
Foreign actor coercing NZ to act against its interests	10% 44% 35% 10%	46%	43%	+3%
NZ involved in armed conflict with another country	19% 49% 24% 8%	32%	29%	+3%

■ 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 – 2023 (n=2,370), 2022 (n=1,148). *Note: Disinformation has been added to the 2023 questionnaire, replacing misinformation (included in the 2022 survey). **Note: new to the 2023 questionnaire.

Note: Hazards and threats were presented 'one at a time' on screen and randomised to reduce response order bias.

Green / red indicates statistically significantly higher / lower than 2022.

THREATS AND HAZARDS IN THE NEXT 12 MONTHS (I)

Demographic Differences



Natural disaster (93%)

95% Female

90% Male



Organised crime between NZ & another country (84%)

90% Waikato

89% 65+ years

89% Retired

78% 18–29 years

74% Māori 18–29 years



Hacking into information systems (82%)

93% 65+ years

91% Retired

87% 50–64 years

79% NETT None + Levels 1–3

77% Māori

77% Employed part-time

71% 18–29 years

66% Māori 18–29 years



Disinformation (80%)

86% 65+ years

76% NETT None + Levels 1–3

74% NETT Not in employment



Nuclear / biological / chemical attack in the world (77%)

82% Female

72% Male



Health epidemic (74%)

85% Pacific peoples

71% 18–29 years



Breakdown in national infrastructure due to an attack (69%)

77% Pacific peoples

76% Waikato

63% 18–29 years

60% Māori 18–29 years



Terrorist attack / violent extremism in NZ (68%)

77% Pacific peoples

71% Female

64% Male

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

Base: Total sample (n=2,370). Green / red indicates statistically significantly higher / lower than the total.

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

THREATS AND HAZARDS IN THE NEXT 12 MONTHS (II)

Demographic Differences



Emerging technology (64%)
74% Pacific peoples
60% NETT None + Levels 1–3



Violent conflict between groups in NZ (62%)
71% Pacific peoples
69% Female
69% Waikato
55% Male
55% Rest of South Island (excl. Canterbury)
54% NETT Levels 8–10



Other countries threatening NZ interests in Pacific (62%)
75% 65+ years
74% Retired
69% Waikato
67% 50–64 years
67% HH income \$0–\$50k
57% 30–49 years
55% Employed part-time
50% 18–29 years
50% Māori 18–29 years



Increasing competition between countries (55%)
67% Pacific peoples



Other countries interfering in NZ affairs (54%)
47% Employed part-time
46% 18–29 years
41% Māori 18–29 years



Breach of NZ borders (49%)
66% Pacific peoples
54% HH income \$0–\$50k
44% HH income \$100k+
43% 65+ years
39% NETT Levels 8–10



Personal safety of self / family violated (48%)
67% Pacific peoples
57% Māori 18–29 years
57% Asian
54% 18–29 years
54% Māori
52% Auckland
44% NZ European / Pākehā
43% 50–64 years
42% NETT Levels 8–10
41% 65+ years
38% Retired
36% Rest of South Island (excl. Canterbury)



Foreign country / actor coercing NZ to act against its interests (46%)
56% Pacific peoples
53% Asian
42% NZ European / Pākehā
37% Wellington



NZ involved in armed conflict with another country (32%)
50% Pacific peoples
41% Māori
40% 18–29 years
39% NETT Not in employment
29% NZ European / Pākehā
26% Wellington
25% 65+ years
25% Retired
24% Rest of South Island (excl. Canterbury)
20% Self-employed

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

Base: Total sample (n=2,370). Green / red indicates statistically significantly higher / lower than the total.

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



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

Natural disaster (n=323)	Organised crime between NZ & another country (n=219)	Hacking into information systems (n=202)	Disinformation* (n=226)	Nuclear / biological / chemical attack somewhere in the world (n=212)	Health epidemic (n=191)	Breakdown in access to goods / services due to rising tensions (n=186)**	Breakdown in national infrastructure due to an attack (n=187)	Terrorist attack / violent extremism in NZ (n=183)
NZ is prone to natural phenomena (80%)	Rise in criminal activities (48%)	Cyber crimes & attacks (50%)	Disinformation on COVID / extreme views (37%)	Armed conflict overseas (53%)	COVID-19 – more variants (40%)	Armed conflict overseas (51%)	Cyber crimes & attacks (47%)	It's already happening now (33%)
It's already happening now (47%)	It's already happening now (34%)	It's already happening now (44%)	It's already happening now (29%)	Tensions between foreign countries (25%)	Emergence of other diseases (29%)	Creating mutually beneficial trading relationships (46%)	It's already happening now (37%)	Risk of copycat & lone-wolf attacks (26%)
Climate change (24%)	NZ government not doing enough (9%)	Current global events (18%)	Use of social media / online platforms (28%)	It's already happening now (13%)	Residual effects of COVID-19 (19%)	It's already happening now (28%)	Current global events (16%)	Increase in extreme fringe groups in NZ (20%) / Likely to happen again (20%)
Emerging technology (e.g. deep fakes) (n=183)	Violent conflict between groups in NZ (n=184)	Other countries threatening NZ interests in Pacific (n=183)	Increasing competition between countries (n=186)**	Other countries interfering with NZ affairs (n=184)	Breach of NZ borders (n=184)	Personal safety / security (n=183)	Foreign country / actor coercing NZ to act against its interests (n=183)	NZ involved in armed conflict with another country (n=176)
Technological advances (41%)	Rise in criminal activities (25%)	Providing aid / investments in exchange for bases (54%)	Tensions between foreign countries (23%)	Foreign interference & coercion (42%)	Rise in criminal activities (18%)	Rise in criminal activities (38%)	Foreign interference & coercion (29%)	Armed conflict overseas (31%)
Cyber crimes & attacks (22%)	It's already happening now (22%)	Foreign interference & coercion (26%)	Armed conflict overseas (21%)	It's already happening now (22%)	Foreign interference & coercion (16%)	It's already happening now (26%)	Creating mutually beneficial trading relationships (18%)	Foreign interference & coercion (14%)
It's already happening now (20%)	NZ is small & vulnerable to attacks (22%)	It's already happening now (24%)	Foreign interference & coercion (15%)	Current global events (12%)	NZ is small & vulnerable to attacks (16%)	Cyber crimes & attacks (13%)	No specific reason (10%)	No specific reason (13%)

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

Base: Those who provided an answer in Q9, excluding 'don't know'. **Note:** These are the top-3 % reasons why each threat is likely to happen in the next 12 months.

Note:** Disinformation has been added to the 2023 questionnaire, replacing misinformation (included in the 2022 survey). *Note:** new to the 2023 questionnaire.

TOP-10 HAZARDS AND THREATS – NEXT 10 YEARS

A natural disaster & health epidemic remain top-ranked most likely to happen in the next 10 years. In 2023 organised crime between NZ & another country & hacking into information systems have seen a statistically significant increase - both now in the top five.

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

		2022 position			2022 position
1	Natural disaster	1	6	Nuclear / biological / chemical attack somewhere in the world	9=
2	Health epidemic	2	7	Terrorist attack / violent extremism in NZ	4
3	Organised crime between NZ & another country	5	8	Breakdown in access to goods / services due to rising tensions	new
4	Hacking into information systems	6=	9	Breakdown in national infrastructure due to an attack	8
5	*Disinformation	3	10	Emerging technology (e.g. deep fakes, autonomous weapons)	9=

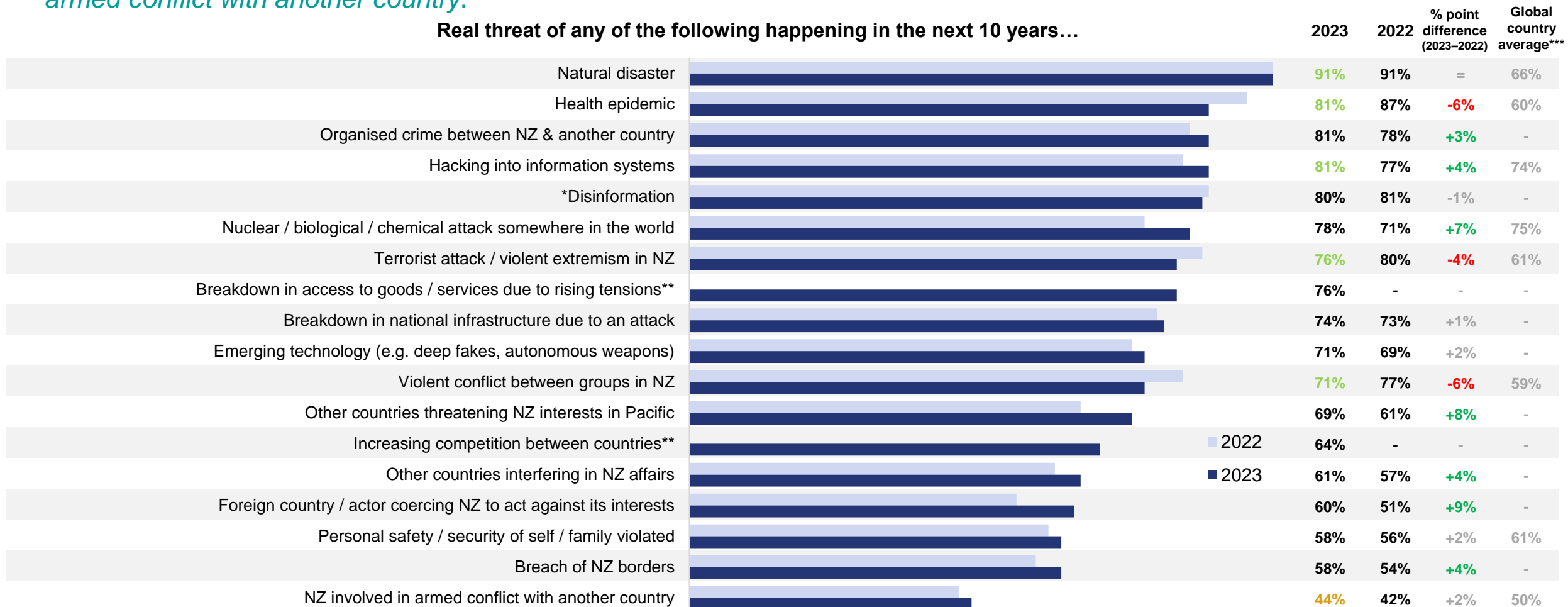
Q17: Thinking now about the future, how real do you feel the threat is of any of the following happening in the next 10 years?

Base: Total sample (n=2,370). *Note: Disinformation has been added to the 2023 questionnaire, replacing misinformation (included in the 2022 survey).

Green / red indicates statistically significantly higher / lower scores than 2022 – see the next slide.

HAZARDS AND THREATS – NEXT 10 YEARS

For most hazards and threats, the perceived likelihood over the next 10 years is similar to that over next 12 months. Compared to global country average results, the perceived level of threat in NZ is higher, apart from *NZ being involved in an armed conflict with another country*.



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 – 2023 (n=2,370), 2022 (n=1,148). ***Note:** Disinformation has been added to the 2023 questionnaire, replacing misinformation (included in the 2022 survey). ****Note:** new to the 2023 questionnaire. **Note:** Hazards and threats were presented ‘one at a time’ on screen and randomised to reduce response order bias.

*****Note:** Global country average figures are taken from the Ipsos-Halifax World Affairs global survey conducted in October 2022 (n=32,507) where applicable.

Green / red indicates statistically significantly higher / lower than 2022. Green / orange indicates statistically significantly higher / lower score than global country average.

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



TOP-5 SHORT-TERM VS LONG-TERM HAZARDS AND THREATS

Although a *health epidemic* is less likely to be seen as likely in the next 12 months, it is something that New Zealanders think will be likely again in the future. *Organised crime between NZ & another country & disinformation* are also considered likely, both now & in the future. *Natural disaster* is considered to be the most likely threat to occur in the next 12 months & 10 years.

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

Position	Next 12 months	Next 10 years
1	Natural disaster	Natural disaster
2	Organised crime between NZ & another country	Health epidemic
3	Hacking into information systems	Organised crime between NZ & another country
4	Disinformation	Hacking into information systems
5	Nuclear / biological / chemical attack somewhere in the world	Disinformation

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=2,370) **Note:** Hazards and threats were presented 'one at a time' on screen and randomised to reduce response order bias.

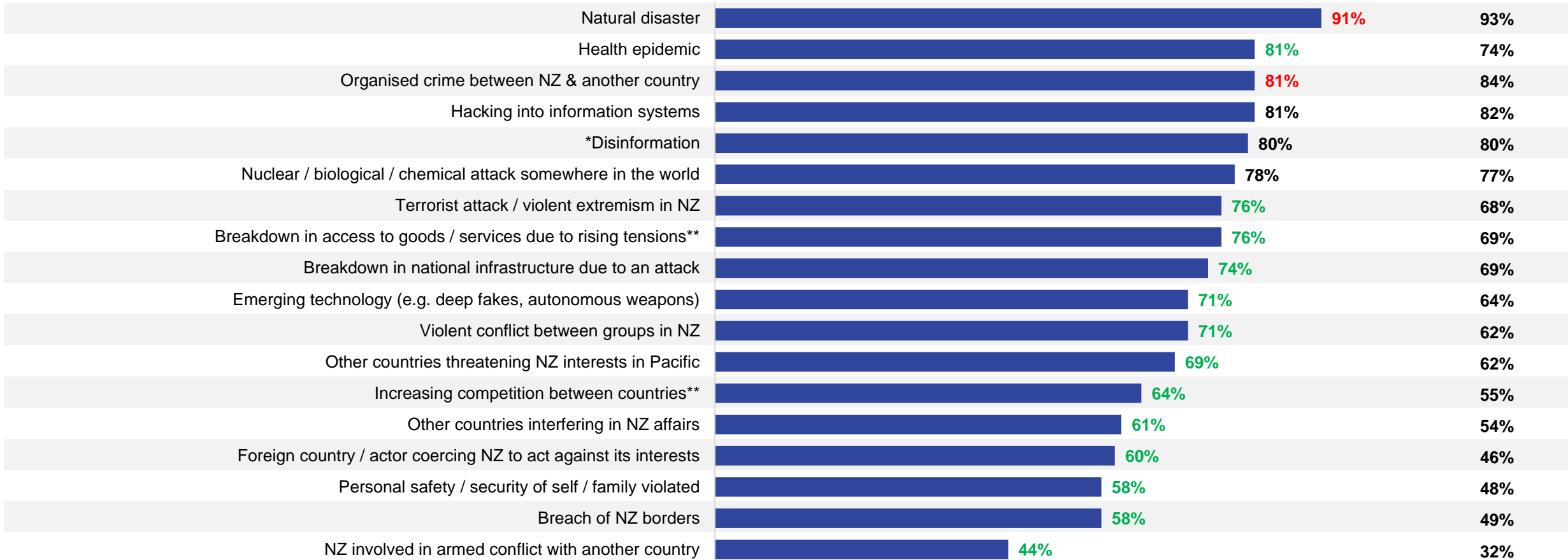
SHORT-TERM VS LONG-TERM HAZARDS AND THREATS

For most hazards and threats, the level of perceived likelihood is higher in the next 10 years than the next 12 months, with *natural disaster & organised crime* 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 12 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? / Q9: How real do you feel the threat is of any of the following happening in the next twelve months?

Base: Total sample (n=2,370). *Note: Disinformation has been added to the 2023 questionnaire, replacing misinformation (included in the 2022 survey). **Note: new to the 2023 questionnaire. Note: Hazards and 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

- FOREIGN INTERFERENCE
- ECONOMIC SECURITY
- TRANSNATIONAL ORGANISED CRIME

4

KEY FINDINGS

For the 2023 survey we explored the threats of Foreign Interference, Economic Security and Transnational Organised Crime in greater detail, to understand New Zealanders views on roles and resources in relation to these threats.

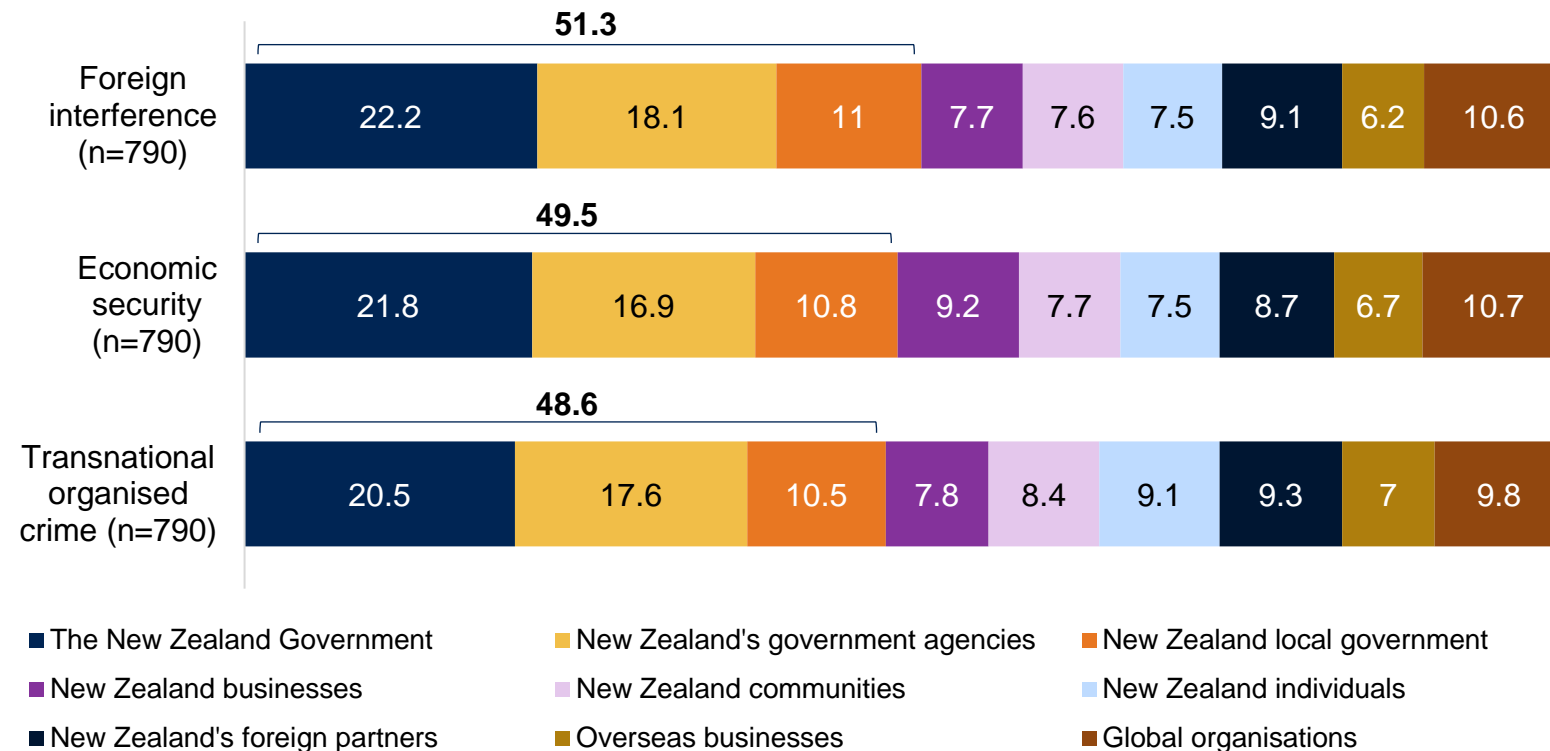
- To understand views on the perceived roles of different groups in responding to threats, we asked about three different threat types in more detail: *foreign interference*, *economic security* and *transnational organised crime*. Each survey respondent was asked at random about one of these threat types.
- The majority of people consider the government and its agencies have the most **responsibility** to protect New Zealand against *foreign interference*, *economic security* and *transnational organised crime*, while fewer believe these entities are fully **resourced** to do so.
 - However, across all three threats, the NZ government is perceived to be better resourced to protect New Zealand than global organisations, NZ or overseas businesses, communities and individuals.
 - Young adults (18-29-year-olds) are statistically significantly *less* likely to agree that the government, its agencies, global governments or the private sector have the responsibility to protect New Zealand against *foreign interference*.



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 *foreign interference*, *economic security* and *transnational organised crime*.

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, by running the analysis based on ranking and responsibility score, it 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.

That is, this a measure of 'relative share' based on the level of responsibility they assigned 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...?

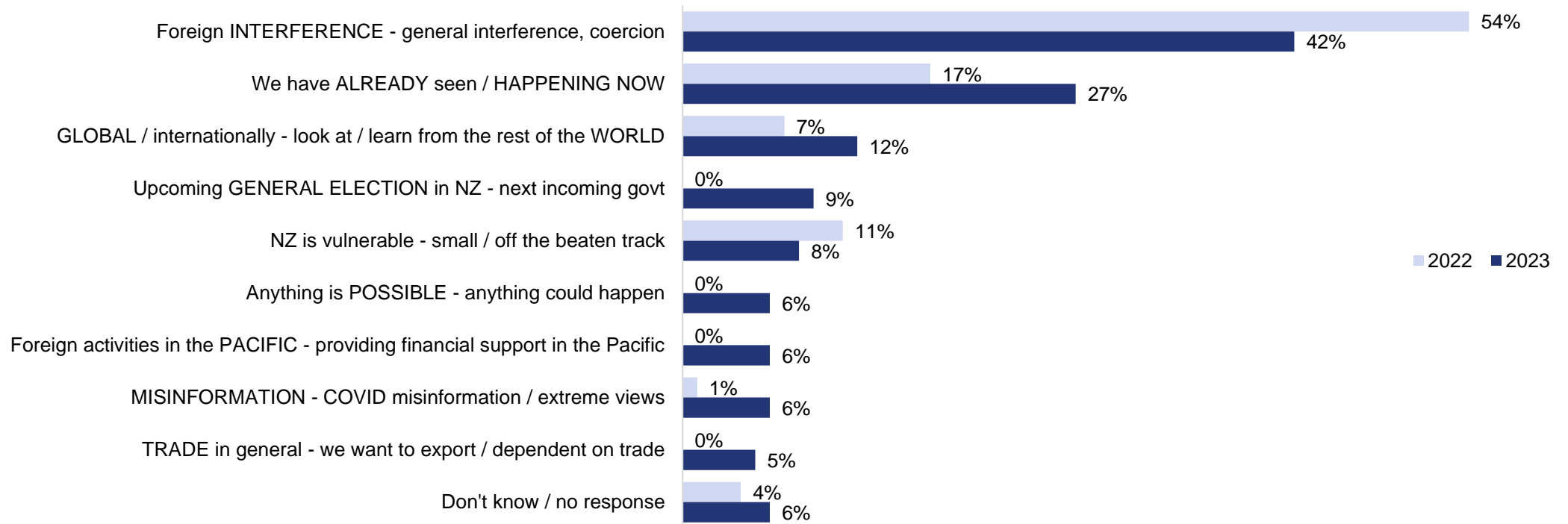
Base: Respondents asked about 'foreign interference' (n=790), 'economic security' (n=790), 'transnational organised crime' (n=790)

WHY A VERY REAL THREAT – FOREIGN INTERFERENCE



Foreign interference is stated as the main reason for the threat of other countries interfering with NZ affairs in the next 12 months. New themes emerged in responses in 2023, including *already feeling the effect of foreign interference & the upcoming election being at risk*.

Reasons for a very real threat of ‘other countries interfering with NZ affairs’ 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?

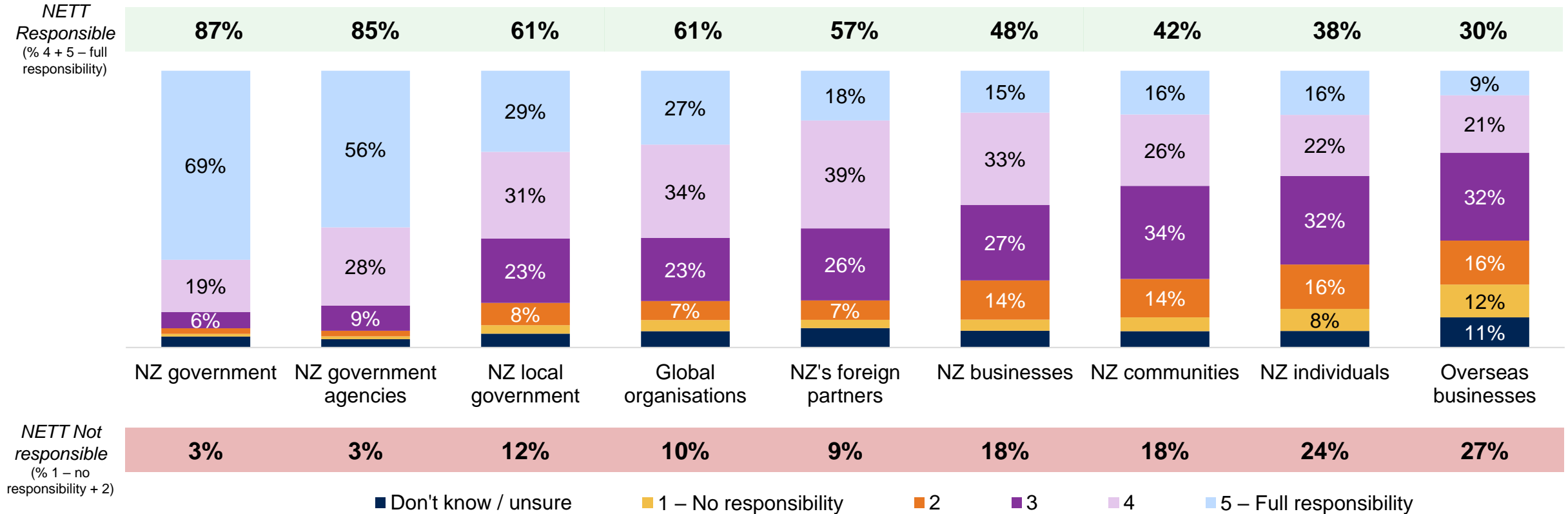
Base: Those who answered that ‘other countries interfering with New Zealand affairs’ is a ‘very real threat’ – 2023 (n=184), 2022 (n=88). Note: These are the top % reasons why ‘other countries interfering with New Zealand affairs’ is likely to happen in the next 12 months. Reasons less than 5% for 2023 not shown. Green / red indicates statistically significantly higher / lower than 2022.



ROLE TO PROTECT AGAINST – FOREIGN INTERFERENCE

New Zealanders believe that the *government & its agencies* have the most responsibility to *protect NZ against the threat of foreign interference*, while *individuals & overseas businesses* have the least responsibility.

How much responsibility does each of the following have to protect NZ and respond to **foreign interference**...



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

Base: Respondents asked about 'foreign interference' (n=790)

Note: Due to rounding there are some differences (+/- 1%) between NETT figures and more detailed breakdown of results

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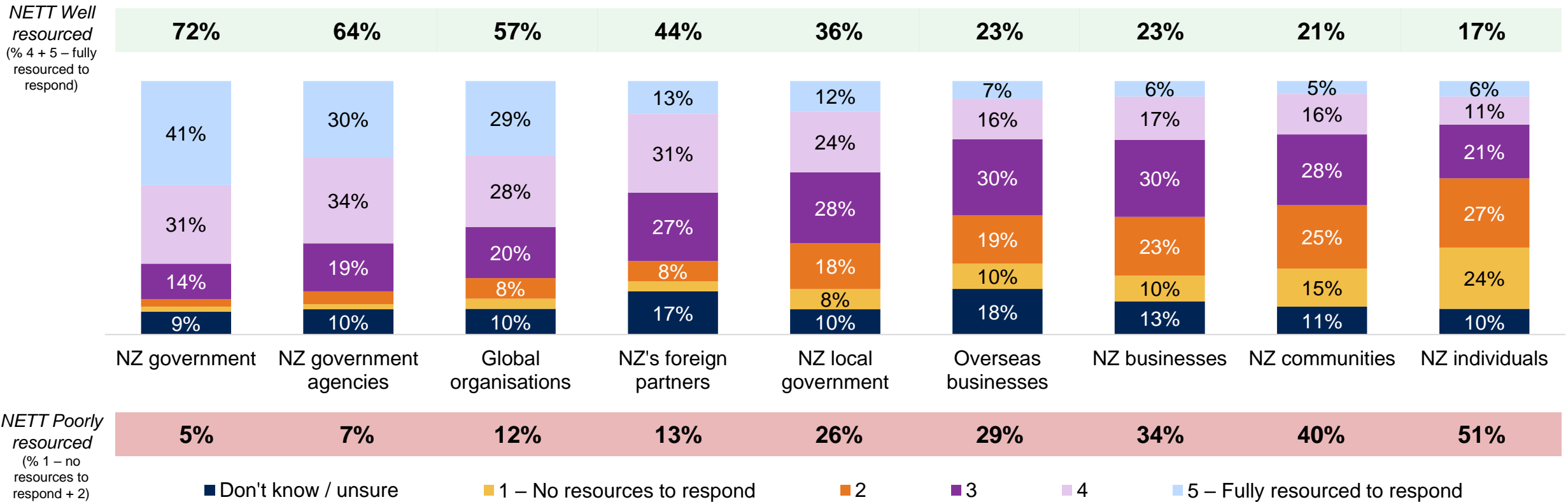


TOOLS & RESOURCES TO PROTECT AGAINST – FOREIGN INTERFERENCE



New Zealanders believe that the *government & its agencies have the tools to protect NZ against the threat of foreign interference*, while *individuals & communities are the least equipped to do so*.

Who has the tools and resources to protect NZ and respond to foreign interference



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

Base: Respondents asked about 'foreign interference' (n=790)

ROLE / TOOLS & RESOURCES TO PROTECT AGAINST – FOREIGN INTERFERENCE

Demographic Differences

Role



NZ government (87%)

95% 65+ years
81% Māori
81% NETT None + Levels 1–3
79% Rest of North Island (excl. Wellington, Auckland, Waikato)
77% 18–29 years



NZ government agencies (85%)

93% 65+ years
78% NETT None + Levels 1–3
73% 18–29 years



NZ local government (61%)

48% 18–29 years



Global organisations (61%)

53% NETT None + Levels 1–3
52% Māori
51% 18–29 years



NZ businesses (48%)

63% Retired
62% 65+ years
36% 18–29 years



NZ communities (42%)

52% Retired
30% 18–29 years



NZ individuals (38%)

50% 65+ years
50% Retired
30% 18–29 years

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

Tools & resources



NZ government (72%)

65% 18–29 years



NZ government agencies (64%)

55% 18–29 years



NZ businesses (23%)

30% Male
17% Female



NZ individuals (17%)

22% Male
13% NZ European / Pākehā
12% 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 the threat of foreign interference? / Q26: In your view, do each of the following have tools and resources to protect New Zealand and respond to foreign interference?

Base: Respondents randomly asked about 'foreign interference' (n=790). Green / red indicates statistically significantly higher / lower than the total.

WHY A VERY REAL THREAT – THREATS TO ECONOMIC SECURITY



The war in Ukraine & export trade are considered the two biggest reasons for a potential breakdown in access to goods / services due to rising tensions in the next 12 months. This threat is new to the survey in 2023.

Reasons for a very real threat of 'a breakdown in access to goods / services due to rising tensions' 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?

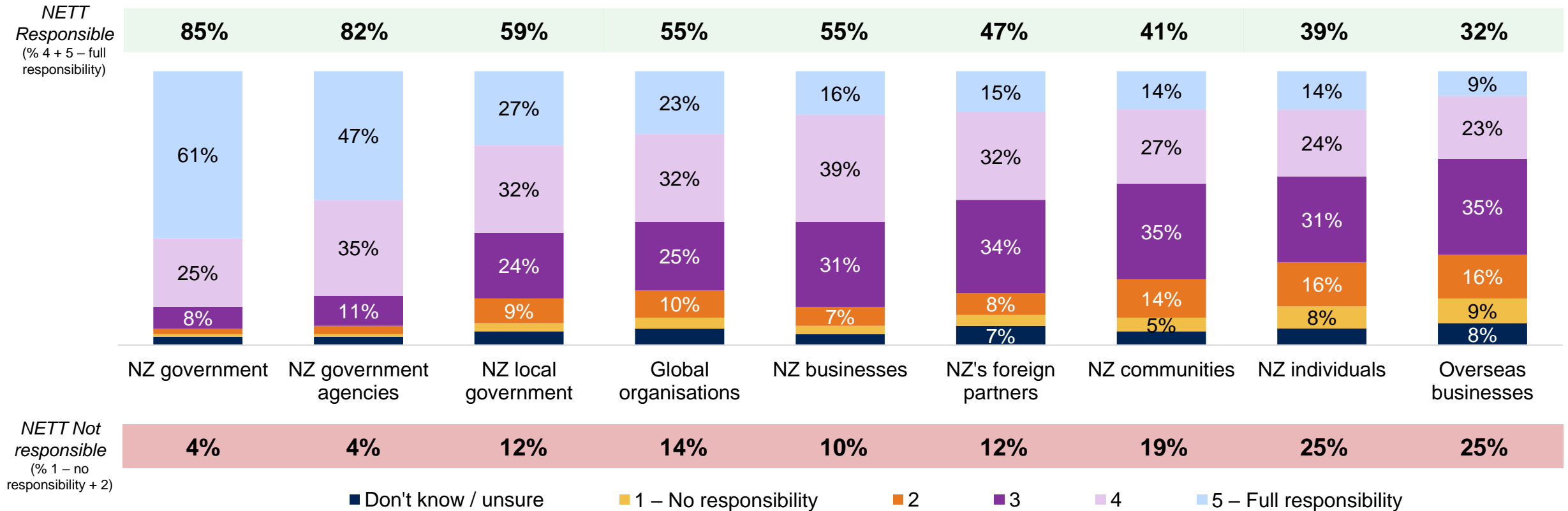
Base: Those who answered that 'a breakdown in access to goods / services due to rising tensions' is a 'very real threat' (n=186). **Note:** These are the top % reasons why 'a breakdown in goods / services due to rising tensions' is likely to happen in the next 12 months. Reasons less than 5% not shown. ***Note:** There is no comparison with 2022 as 'a breakdown in access to goods / services due to rising tensions' is a new threat in the 2023 questionnaire.

ROLE TO PROTECT – AGAINST THREATS TO ECONOMIC SECURITY



New Zealanders believe that the *government & its agencies* have the most responsibility to *protect New Zealand's economic security*, while *individuals & overseas businesses* have the least responsibility.

How much responsibility does each of the following have to protect NZ and respond to threats to our economic security...

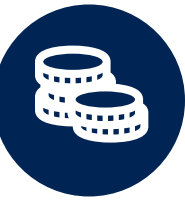


Q25: How much responsibility do you think each of the following have to protect New Zealand and respond to the threat of economic security?

Base: Respondents asked about 'economic security' (n=790)

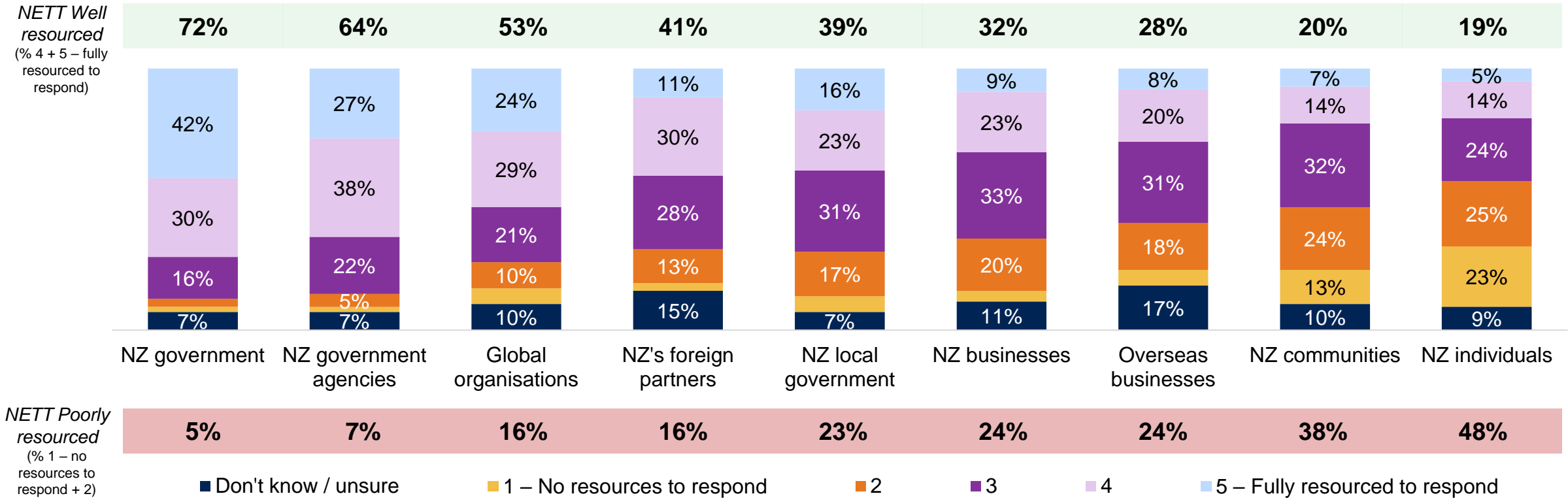
Note: Due to rounding there are some differences (+/- 1%) between NETT figures and more detailed breakdown of results

TOOLS & RESOURCES TO PROTECT – ECONOMIC SECURITY



New Zealanders believe that the *government & its agencies* have the tools to *protect NZ against the threat of economic security*, while *individuals & communities* are the least equipped to do so.

Who has the tools and resources to protect NZ and respond to threats to our economic security



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

Base: Respondents asked about 'economic security' (n=790)

Note: Due to rounding there are some differences (+/- 1%) between NETT figures and more detailed breakdown of results

ROLE / TOOLS & RESOURCES TO PROTECT – ECONOMIC SECURITY

Demographic Differences

Role



NZ government (85%)
95% 65+ years



NZ government agencies (82%)
96% 65+ years
93% Retired
76% NETT None + Levels 1–3
74% 18–29 years



NZ businesses (55%)
66% 65+ years
66% Retired
64% NETT Born outside of NZ
46% 18–29 years



NZ individuals (39%)
50% Asian

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

Tools & resources



NZ local government (39%)
51% Māori



NZ communities (20%)
29% Asian



NZ individuals (19%)
27% Asian

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 the threat of economic security? / **Q26:** In your view, do each of the following have tools and resources to protect New Zealand and respond to economic security?

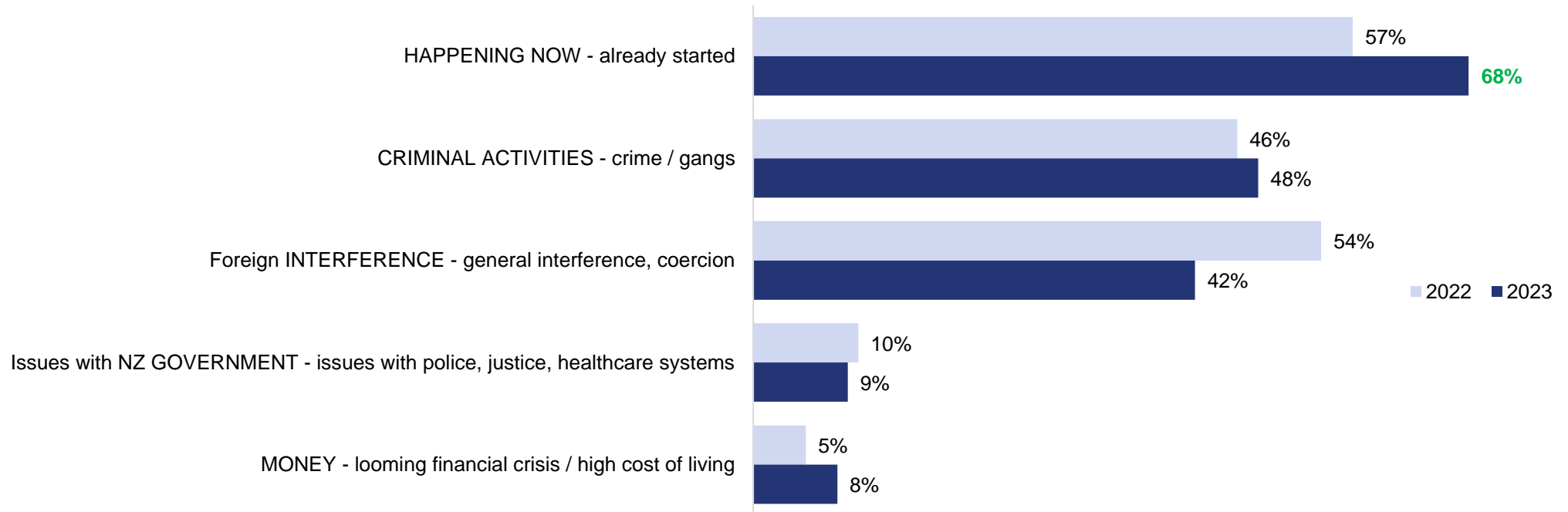
Base: Respondents randomly asked about 'economic security' (n=790). **Green / red** indicates statistically significantly **higher / lower** than the total.

WHY A VERY REAL THREAT – TRANSNATIONAL ORGANISED CRIME



When it comes to organised crime happening between NZ & another country, New Zealanders believe this criminal activity is *already happening* in the country via *crime / gangs*.

Reasons for a very real threat of ‘organised crime happening between NZ and another country’ 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?

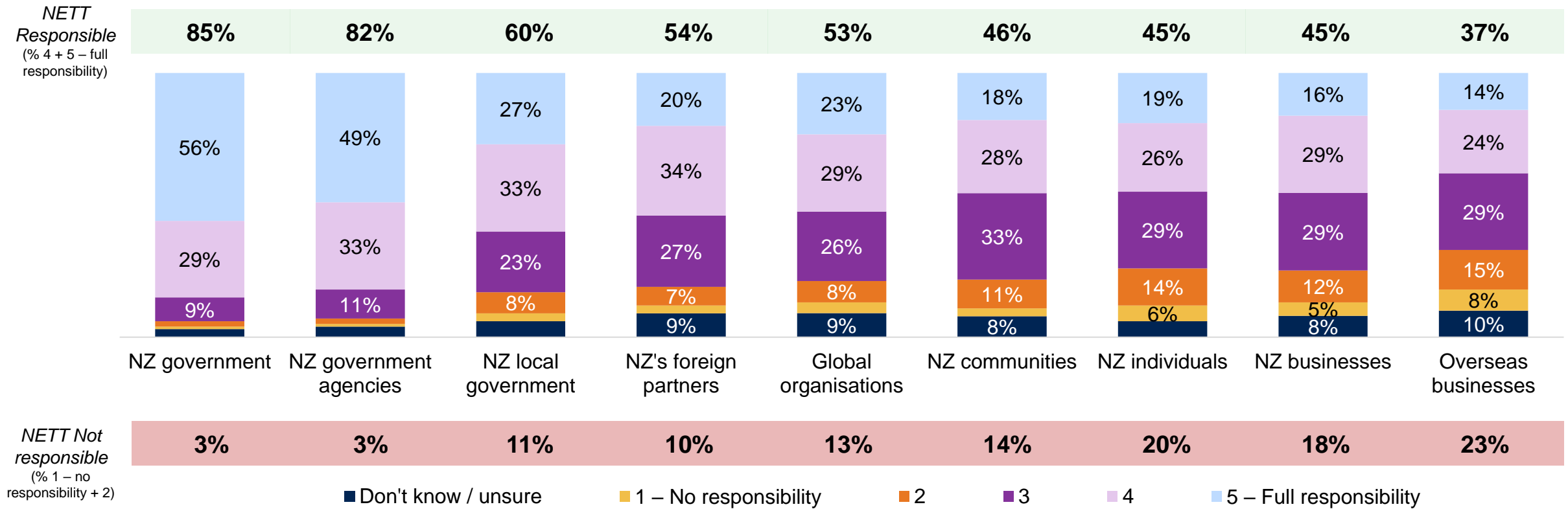
Base: Those who answered that ‘organised crime (such as the illegal movement of money, drugs or people) happening between New Zealand and another country’ is a ‘very real threat’ – 2023 (n=219), 2022 (n=119). **Note:** These are the top % reasons why ‘organised crime (such as the illegal movement of money, drugs or people) happening between New Zealand and another country’ is likely to happen in the next 12 months. Reasons less than 5% not shown. **Green / red** indicates statistically significantly **higher / lower** than 2022.

ROLE TO PROTECT AGAINST – TRANSNATIONAL ORGANISED CRIME



New Zealanders believe the *government & its agencies* have the most responsibility to *protect NZ against the threat of transnational organised crime*, while *NZ & overseas businesses* have the least responsibility.

How much responsibility does each of the following have to protect NZ and respond to transnational organised crime...



Q25: How much responsibility do you think each of the following have to protect New Zealand and respond to the threat of transnational organised crime?

Base: Respondents randomly asked about 'transnational organised crime' (n=790)

Note: Due to rounding there are some differences (+/- 1%) between NETT figures and more detailed breakdown of results

ROLE TO PROTECT AGAINST – TRANSNATIONAL ORGANISED CRIME

Demographic Differences – Role



NZ government (85%)

96% 65+ years

95% Retired

78% Māori



NZ government agencies (82%)

93% 65+ years

92% Retired

76% 18–29 years

72% Māori



NZ's foreign partners (54%)

68% 65+ years

67% Retired

42% 18–29 years



Global organisations (53%)

64% 65+ years

43% Māori



NZ communities (46%)

57% Asian



NZ individuals (45%)

36% 18–29 years



NZ businesses (45%)

61% 65+ years

61% Retired

58% Asian

53% NETT Born outside of NZ

52% Male

38% Female

33% 18–29 years



Overseas business (37%)

47% 65+ years

25% 18–29 years

Q25: How much responsibility do you think each of the following have to protect New Zealand and respond to the threat of transnational organised crime?

Base: Respondents randomly asked about 'transnational organised crime' (n=790). Green / red indicates statistically significantly higher / lower than the total.

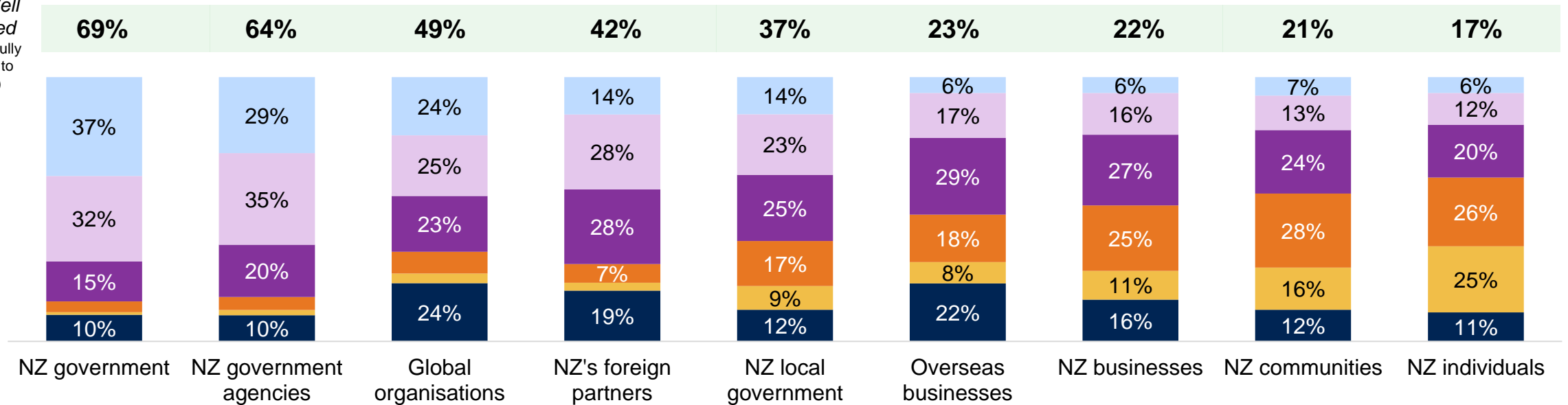
TOOLS & RESOURCES TO PROTECT AGAINST – TRANSNATIONAL CRIME



New Zealanders believe that the *government & its agencies* have the tools to *protect NZ against the threat of transnational organised crime*, while *communities & individuals* are the least equipped to do so.

Who has the tools and resources to protect NZ and respond to transnational organised crime

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 transnational organised crime?

Base: Respondents asked about 'transnational organised crime' (n=790)

Note: Due to rounding there are some differences (+/- 1%) between NETT figures and more detailed breakdown of results

TOOLS & RESOURCES TO PROTECT AGAINST– TRANSNATIONAL CRIME

Demographic Differences – Tools and resources



NZ government (69%)

79% 65+ years

62% 30–49 years



NZ local government (37%)

50% Asian

45% 18–29 years



NZ government agencies (64%)

76% 65+ years

56% 30–49 years

51% Māori



NZ businesses (22%)

29% HH income \$0–\$50k



NZ's foreign partners (42%)

50% Male

36% Female



NZ individuals (17%)

23% Males

26% Asian

12% Female

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

Base: Respondents asked about 'transnational organised crime' (n=790). **Green / red** indicates statistically significantly **higher / lower** than the total.

TRUST / CONFIDENCE & TRANSPARENCY

5

KEY FINDINGS

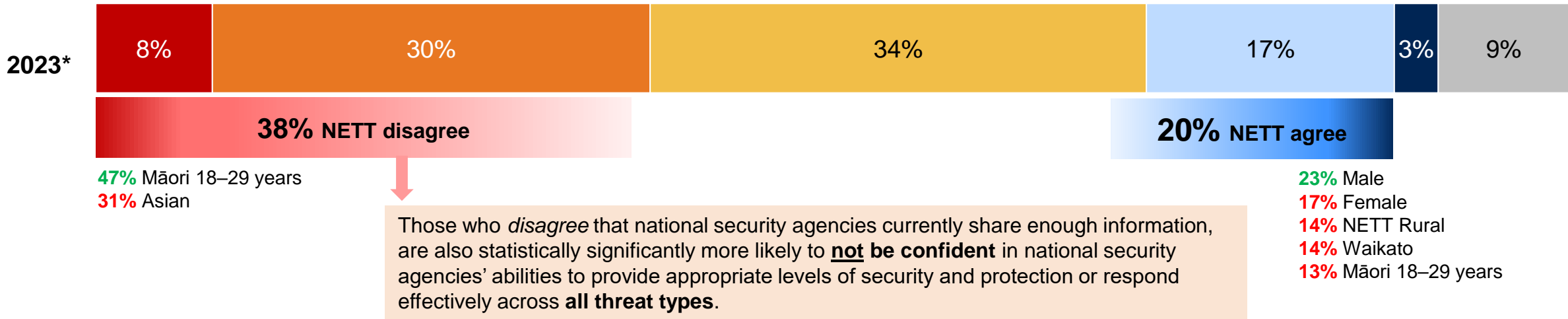
- Just 1 in 5 believe New Zealand's national security agencies share enough information about national security, with nearly double that stating that they do not.
- Confidence in government agencies' abilities to protect or respond is highest for *health epidemic, natural disasters* and *terrorist attacks*, and lowest for *increasing competition between countries* and *violent conflict between groups in NZ*.
 - In 2022 New Zealanders reported highest confidence in government agencies' ability to protect or respond to *natural disasters*.
 - In 2023, confidence in government agencies' ability to protect or respond is highest for a *health epidemic* (top ranked position)
 - As we saw in 2022, Wellingtonians and Pacific peoples report higher levels of confidence across a number of threats and hazards.
- Areas where **likelihood** over the next 12 months is perceived to be the highest, but **confidence** in government agencies' management abilities is relatively low, include: *nuclear/biological/chemical attack happening somewhere in the world, disinformation, hacking into information systems* and *breakdown in access to goods and national infrastructure*.
- *Violent conflict between groups in NZ* has moved from a high likelihood threat with low confidence in government agencies' ability to deal with it, to a lower likelihood threat with high confidence in government agencies' management abilities.
- Perceptions of how government agencies can build confidence in national security issues vary by hazard or threat; however, *responding quickly* and *keeping the public educated and informed* are again most commonly mentioned for all threats.

SHARING INFORMATION ABOUT NATIONAL SECURITY

As in 2022, two fifths (38%) do not believe NZ national security agencies *share enough information about national security with New Zealanders*. A similar proportion (43%) 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



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 – 2023 (n=2,370). *Note: Result sums to 101 due to rounding. Green / red indicates statistically significantly higher / lower than the total.

TOP-10 HAZARDS AND THREATS - CONFIDENCE IN AGENCIES

Compared to 2022, *health epidemic* has risen four places to **top** the list of hazards and threats New Zealanders are most confident in government agencies abilities to protect and respond. Confidence in government agencies' response to *natural disasters & personal safety / security* has fallen relative to 2022 results.

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

	2022 position		2022 position
1	Health epidemic 4	6	Foreign country / actor coercing NZ to act against its interests 6
2	Natural disaster 1	7	Breach of NZ borders 7
3	Terrorist attack / violent extremism in New Zealand 2	8	Violent conflict between groups in NZ 13
4	Other countries interfering in NZ affairs 5	9	Organised crime between NZ & another country 8
5	Personal safety / security of self / family violated 3	10	Increasing competition between countries <i>new</i>

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...

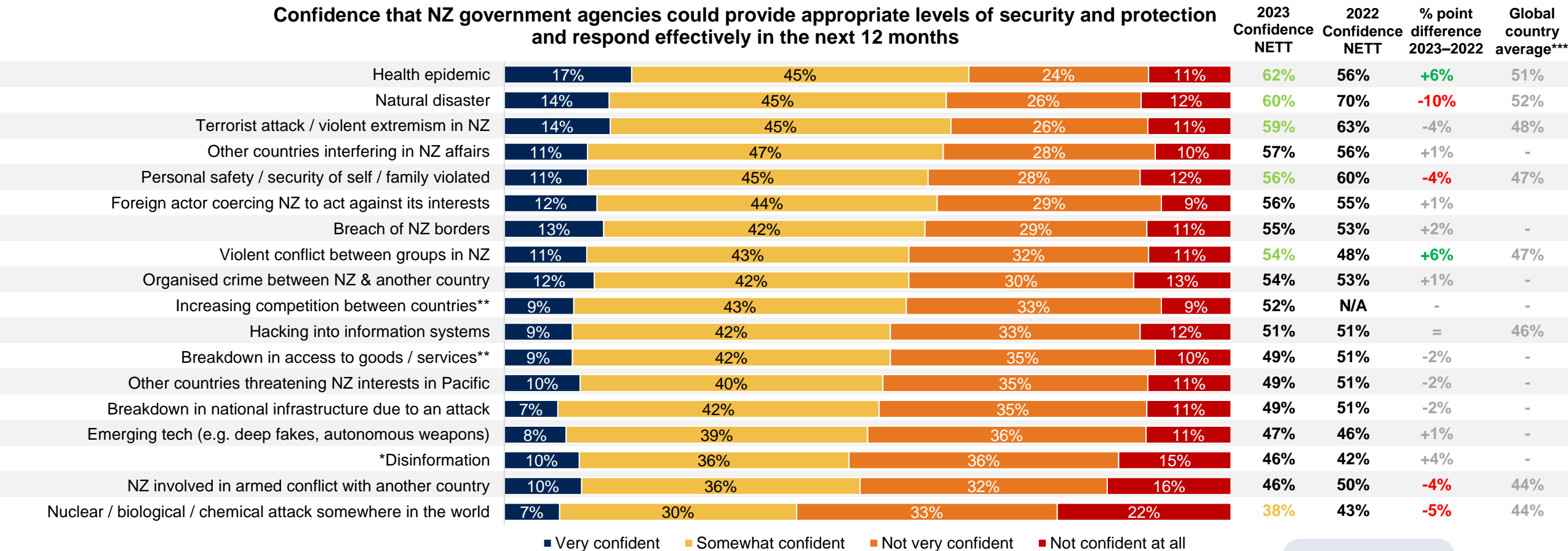
Base: Total sample (n=2,370). **Green / red** indicates statistically significantly **higher / lower** scores than 2022 – see the next slide.

HAZARDS AND THREATS - CONFIDENCE IN AGENCIES

New Zealanders are most confident in government agencies in relation to *health epidemics, natural disasters & terrorism attacks*. They are least confident regarding *nuclear / biological attack happening somewhere in the world, armed conflict with other countries & disinformation*.

Confidence for *health epidemics & violent conflict between groups in NZ* has statistically significantly increased since 2022 & has decreased for *natural disasters, personal safety, armed conflicts & nuclear / biological attacks*. Confidence to respond is higher in NZ than all applicable global benchmarks, apart from *nuclear / biological attack happening somewhere in the world*.

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 – 2023 (n=2,370), 2022 (n=1,148). ***Note:** Disinformation has been added to the 2023 questionnaire, replacing misinformation (included in the 2022 survey). ****Note:** new to 2023 survey. *****Note:** Global country average figures are taken from the Ipsos-Halifax World Affairs global survey conducted in October 2022 (n=32,507) where applicable.

Note: Hazards and threats were presented 'one at a time' on screen and randomised to reduce response order bias.

Green / red indicates statistically significantly **higher / lower** than 2022. **Green / orange** indicates statistically significantly **higher / lower** score than global country average.

Figures represent
NETT Confidence
(% very + somewhat
confident)



CONFIDENCE IN AGENCIES – SIGNIFICANT DIFFERENCES (I)

Demographic Differences



Health epidemic (62%)

71% Employed part-time
67% Female
57% NETT None + Levels 1–3
56% Male
55% Asian



Natural disasters (60%)

67% Rest of South Island (excl. Canterbury)
65% NETT New migrant
54% Auckland
48% Asian



Terrorist attack / violent extremism (59%)

66% Wellington
55% NETT None + Levels 1–3
55% Auckland
54% HH income \$0–50k
52% Asian



Other countries interfering in NZ affairs (57%)

67% Employed part-time
65% Wellington



Personal / family's safety violated (56%)

63% Retired
63% Wellington
62% 65+ years
52% 18–29 years



Foreign country / actor coercing NZ to act against its interests (56%)

69% Wellington



Breach of NZ borders (55%)

63% Wellington



Violent conflicts between groups in NZ (54%)

63% Wellington
63% NETT Levels 8–10
49% 18–29 years
49% Rest of North Island (excl. Auckland, Wellington, Waikato)



Organised crime between NZ & other countries (54%)

64% Wellington



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=2,370). Green / red indicates statistically significantly higher / lower than the total.

CONFIDENCE IN AGENCIES – SIGNIFICANT DIFFERENCES (II)

Demographic Differences



Increasing competition between countries (52%)

63% Wellington
60% Pacific peoples
56% 30–49 years
47% 65+ years
46% Retired



Breakdown in access and goods and services (50%)

59% Wellington
58% Pacific peoples



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

61% NETT Migrant <10 years
60% NETT New migrant
59% Pacific peoples
59% Full-time parent / homemaker
59% Wellington



Breakdown in national infrastructure due to an attack (49%)

58% Wellington



Emerging technology (e.g. deep fakes) (47%)

58% Pacific peoples
51% HH income \$50k–\$100k



Disinformation (46%)

57% Full-time parent / homemaker
56% Pacific peoples
55% NETT Migrant <10 years
54% Employed part-time
53% Māori
50% NETT None + Levels 1–3



Nuclear / biological attacks somewhere in the world (38%)

50% NETT Migrant <10 years
46% Pacific peoples
42% 18–29 years
35% NZ European / Pākehā
30% 65+ years
29% Retired

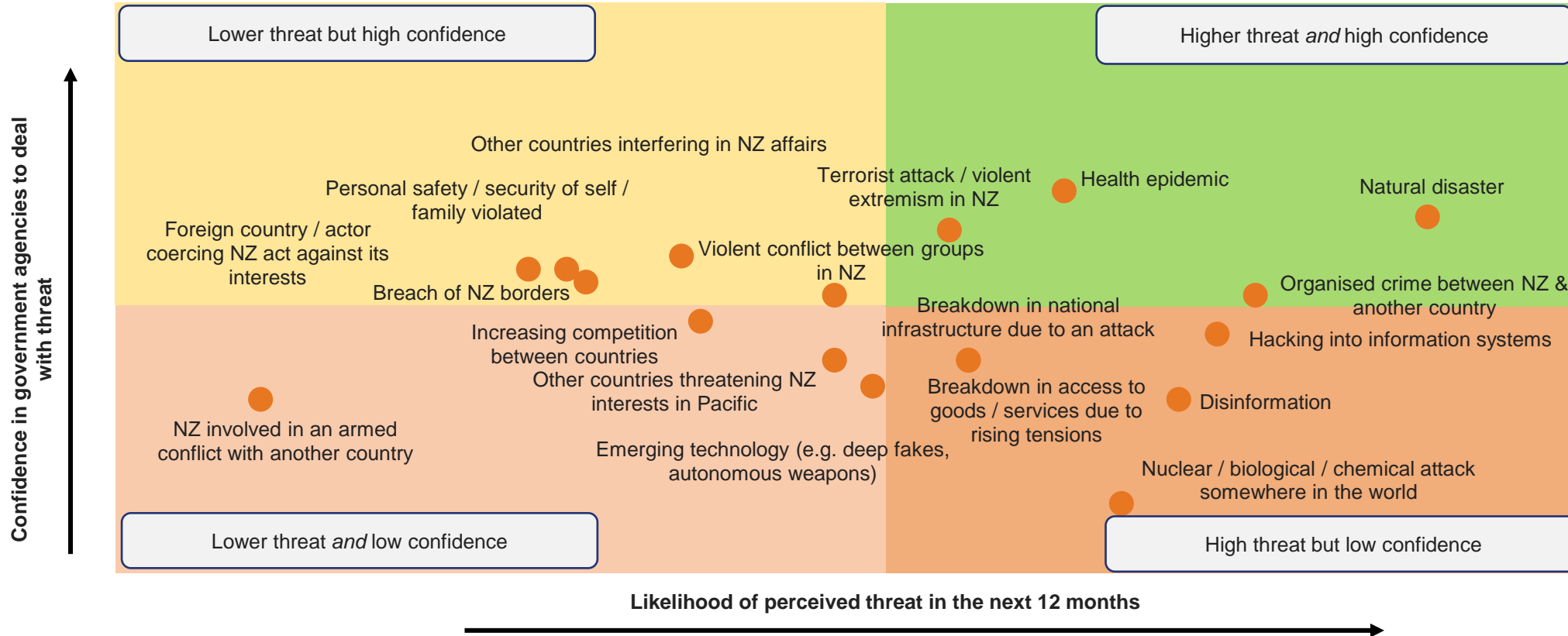


Q11: If any of the following were to happen in the next twelve months, how confident are you that New Zealand's government agencies could provide appropriate levels of security and protection and respond effectively to...

Base: Total sample (n=2,370). Green / red indicates statistically significantly higher / lower than the total.

CONFIDENCE IN GOVERNMENT BY LEVEL OF GENERAL THREAT

When confidence is overlaid with the likelihood of perceived threat in the next 12 months, *natural disasters, terrorist attacks, health epidemics & organised crime* have a high level of perceived threat but also a high level of confidence in the government's abilities. However, there are a number of areas with a perceived high likelihood of threat but low confidence in the government's abilities to protect and respond, such as *breakdown in national infrastructure, breakdown in goods / services, disinformation, hacking & nuclear/biological/chemical attack happening somewhere in the world*.



Changes in 2023

Compared to 2022, the following have moved within the higher threat & high confidence quadrant:

- Natural disaster:** Confidence in dealing with this threat has decreased since 2022
- Terrorist attack / violent extremism in NZ** Level of perceived threat has decreased slightly
- Health epidemic** Confidence in dealing with this threat has increased, while the level of perceived threat in the next 12 months has decreased somewhat.
- Violent conflict between groups in NZ** Has moved from high threat & low confidence to a lower threat & with high confidence since 2022.

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=2,370)



HOW GOVERNMENT AGENCIES CAN BUILD CONFIDENCE (I)

Perceptions on how government agencies can build confidence amongst New Zealanders vary; however, *taking action / responding quickly & keeping the public educated & informed* are most commonly mentioned.

	Total	Health epidemic	Natural disaster	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 borders
Base (n=)	1,225	120	118	108	107	143	185	123	112	108
Take action, quicker responses	17%	10%	10%	14%	17% ▼	4%	3%	30% ▲	9%	5%
Inform, communicate & educate	15%	13%	21% ▲	8% ▲	1%	3%	16%	7%	12%	5%
NZ is small / isolated & does not have the resources	11%	0%	0%	2%	0%	24%	16%	0%	6%	19%
It is out of their control – can't predict what will happen	10%	4%	14%	13%	4%	1%	17%	1%	3%	2%
Have a stronger military, increase staff	10%	1%	0%	6%	4%	31% ▲	3%	2%	2%	29%
Funding / financial assistance / resources for those in need	9%	4%	12%	5%	1%	14%	2%	4%	11%	16%
Have no confidence in government	9%	7% ▼	9%	7%	7%	1% ▼	2%	9%	9%	1% ▼
Harsher penalties & better protocols in place for emergencies	8%	1%	3%	10%	14%	0%	1%	20%	4%	3%
International alliances / relationships	8%	1%	1%	0%	0%	12%	5%	0%	0%	10%
Be prepared & more forward-thinking	7%	9%	15% ▲	3%	2%	5%	12%	0%	5%	4%
Give Police more power, arm Police & increase numbers	7%	1%	0%	12% ▲	12% ▲	0%	0%	31%	2%	0%
Have the best / latest technology & cyber security	7%	0%	0%	3%	1%	1%	0%	1%	23% ▼	1%
Eliminate extremist factions in NZ / organised crime	6%	0%	0%	13% ▲	8%	1%	0%	16% ▲	0%	0%
Expertise – have trained / experienced / special teams	5%	4%	1%	4%	1%	3%	1%	0%	11%	5%
Do a better job / learn from past experience	5%	8% ▲	12% ▲	4%	6%	1%	1%	1%	4%	1%
More staff numbers	5%	5%	0%	4%	5%	9% ▲	0%	14% ▲	4%	6%
Be honest	5%	8%	1%	2%	1%	2%	3%	0%	2%	2%
Other	11%	8%	9%	4%	13%	6%	4%	5%	5%	4%
Nothing	6%	3%	3%	2%	0%	2%	13%	5%	3%	6%
DK / NR	16%	12%	4%	16%	14%	13%	10%	10%	15%	13%

HOW GOVERNMENT AGENCIES CAN BUILD CONFIDENCE (II)

Perceptions on how government agencies can build confidence amongst New Zealanders vary; however, *taking action / responding quickly & keeping the public educated & informed* are most commonly mentioned.

	Total	*Disinformation	Organised crime	Security affected by emerging technology	Other countries interfering in NZ affairs	Foreign country / actor coercing NZ to act against its interests	Breakdown in critical infrastructure	Other countries threatening NZ interests in Pacific	Breakdown in access to goods / services due to rising tensions**	Increasing competition between countries**
Base (n=)	1,225	126	114	107	103	105	107	106	105	110
Take action, quicker responses	17%	12%	22%	10%	11%	12%	9%	14%▲	8%	3%
Inform, communicate & educate	15%	21%	6%	11%	9%	3%	13%	3%	8%	4%
NZ is small / isolated & does not have the resources	11%	0%	2%	7%	6%	4%	2%	15%	11%	14%
It is out of their control – can't predict what will happen	10%	9%	10%	7%	2%	4%	5%	6%	6%	4%
Have a stronger military, increase staff	10%	0%	0%	3%	2%	5%	1%	8%	0%	15%
Funding / financial assistance / resources for those in need	9%	2%	10%	6%	0%	3%	6%	2%	3%	1%
Have no confidence in government	9%	5%▼	3%▼	3%▼	7%	9%	8%	3%	6%	9%
Harsher penalties & better protocols in place for emergencies	8%	5%	26%	7%▲	2%	1%	2%	1%	1%	1%
International alliances / relationships	8%	3%	0%	5%	11%	11%	0%	20%	7%	8%
Be prepared & more forward-thinking	7%	0%	1%	2%▼	1%	3%	8%	1%	4%	1%
Give Police more power, arm Police & increase numbers	7%	0%	11%	1%	0%	1%	1%	1%	0%	0%
Have the best / latest technology & cyber security	7%	8%	1%	14%	8%	1%	10%	0%	0%	0%
Eliminate extremist factions in NZ / organised crime	6%	1%	26%	1%	1%	0%	0%	0%	0%	1%
Expertise – have trained / experienced / special teams	5%	3%	0%	11%	2%	2%	8%	1%	0%	3%
Do a better job / learn from past experience	5%	1%	2%	1%	1%	3%	3%	1%	2%	1%
More staff numbers	5%	0%	4%	1%	0%	2%	0%	0%	1%	0%
Be honest	5%	13%	1%	3%	10%	1%	4%	2%	1%	0%
Other	11%	3%	8%	9%	15%	8%	5%	7%	7%	8%
Nothing	6%	3%	0%	1%	4%	3%	4%	4%	5%	7%
DK / NR	16%	8%	5%	16%	15%	13%	15%	14%	15%	18%

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 threat?

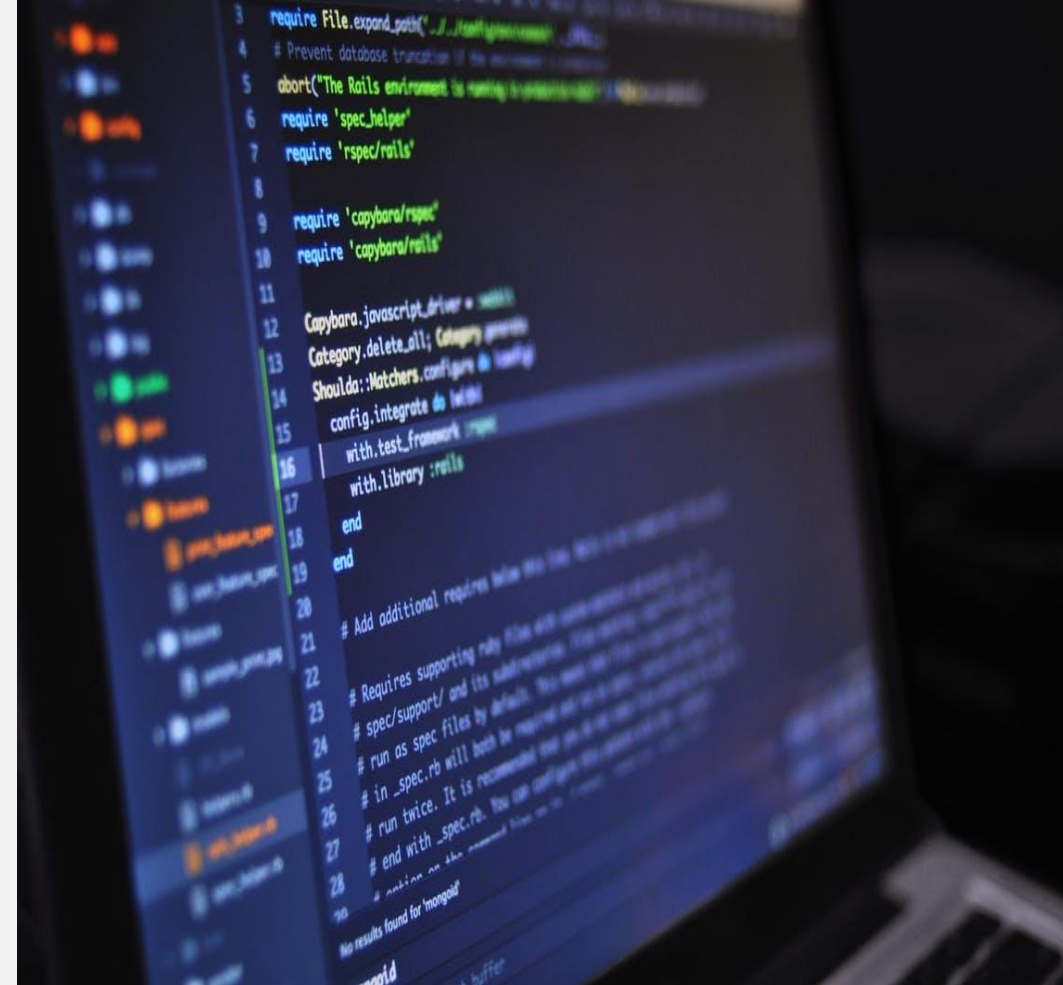
Base: Those who are not confident at all in the government (n=1,225). Note: Responses less than 5% for the total are not shown. *Note: Disinformation has been added to the 2023 questionnaire, replacing misinformation (included in the 2022 survey). **Note: Threat not included in the 2022 survey, new to the 2023 questionnaire. Green / red indicates statistically significantly higher / lower than the total. ▲ / ▼ indicates statistically significantly higher / lower than 2022.

CURRENT & FUTURE ENGAGEMENT

6

KEY FINDINGS

- Just under half of New Zealanders report they are not very knowledgeable about national security and that they don't know where to go to find information about national security.
- However, well over half (61%) are interested in *finding out more*, and over a third (36%) would like to *be involved in public discussion* on the topic.
- Overall, people would like more information on those hazards and threats they perceive as most likely in the next 12 months. Compared to 2022 results, interest in information on threats and hazards has increased overall.
- *News media* (in particular online newspapers, live TV and radio) and *websites* were the most preferred channels for receiving information on national security. *Social media* also featured relatively highly.



INFORMATION ON NATIONAL SECURITY

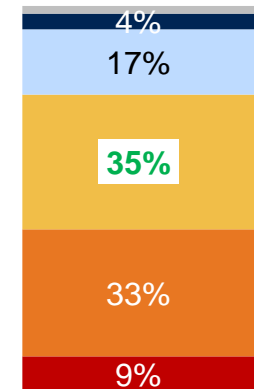
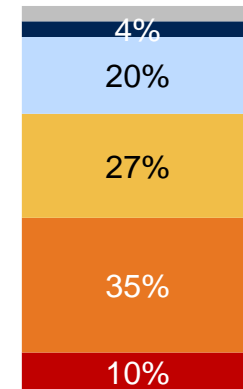
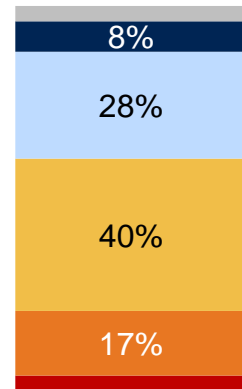
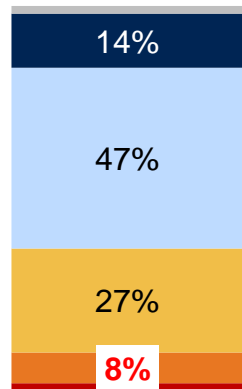
The majority of New Zealanders are interested in knowing more about national security. 1 in 3 are keen to be involved in public discussions. Nearly half of New Zealanders don't know where to obtain information about national security, nor do they feel knowledgeable about national security issues.

Agreement with statements...

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

NETT
% strongly
agree +
agree

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 that I am knowledgeable about national security issues

NETT
% disagree
+ strongly
disagree

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 – 2023 (n=2,370), 2022 (n=1,148). Green / red indicates statistically significantly higher / lower than 2022.

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 threats, challenges and opportunities (61%)

70% Asian
67% NETT Levels 8–10
65% HH income \$100k+
56% 50–64 years
55% NETT None + Levels 1–3
55% HH income \$0–\$50k
54% Employed part-time



I would like to have a say or be more involved in public discussions on national security (36%)

44% NETT Levels 8–10
42% Asian
39% Employed full-time
30% Retired
30% Employed part-time
30% Canterbury



I know where to go to find information about national security (25%)

28% Male
21% Female



I feel that I am knowledgeable about national security issues (21%)

32% NETT Levels 8–10
29% Male
27% Wellington
13% Female

NETT Disagree (Strongly disagree + disagree)



I am interested in knowing more about national security threats, challenges and opportunities (10%)

4% Asian



I would like to have a say or be more involved in public discussions on national security (20%)

12% Asian



I know where to go to find information about national security (44%)

53% Māori 18–29 years
51% Female
50% 18–29 years
48% HH income \$100k+
37% Male
36% 65+ years
35% Asian



I feel that I am knowledgeable about national security issues (41%)

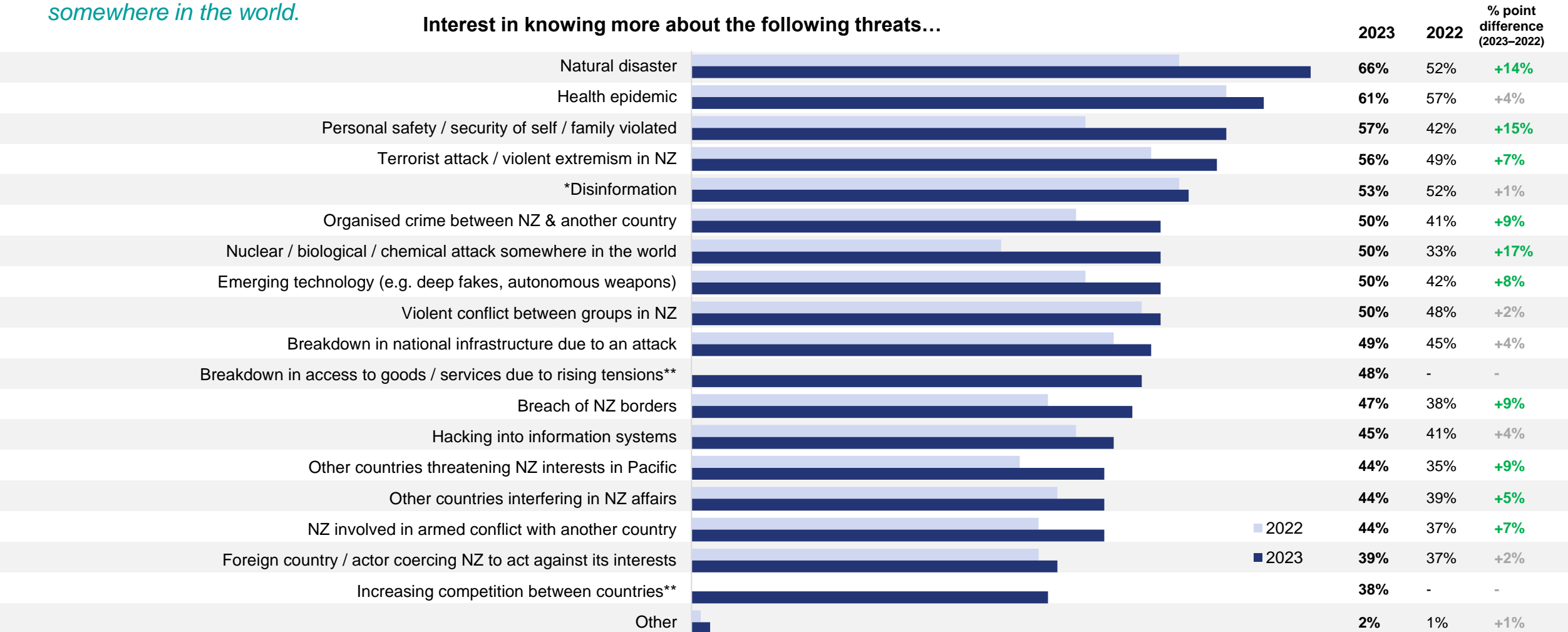
55% Māori 18–29 years
51% Female
49% 18–29 years
37% NETT Born outside of NZ
36% NETT Levels 8–10
35% 65+ years
31% Male



THREATS AND HAZARDS - MORE INFORMATION SOUGHT OVERALL

Respondents are much more interested in knowing more about **all** types of threats and hazards compared to last year. There has been increased interest especially in knowing more about *natural disasters, personal safety of self / family & a nuclear / biological / chemical attack happening somewhere in the world.*

Interest in knowing more about the following threats...



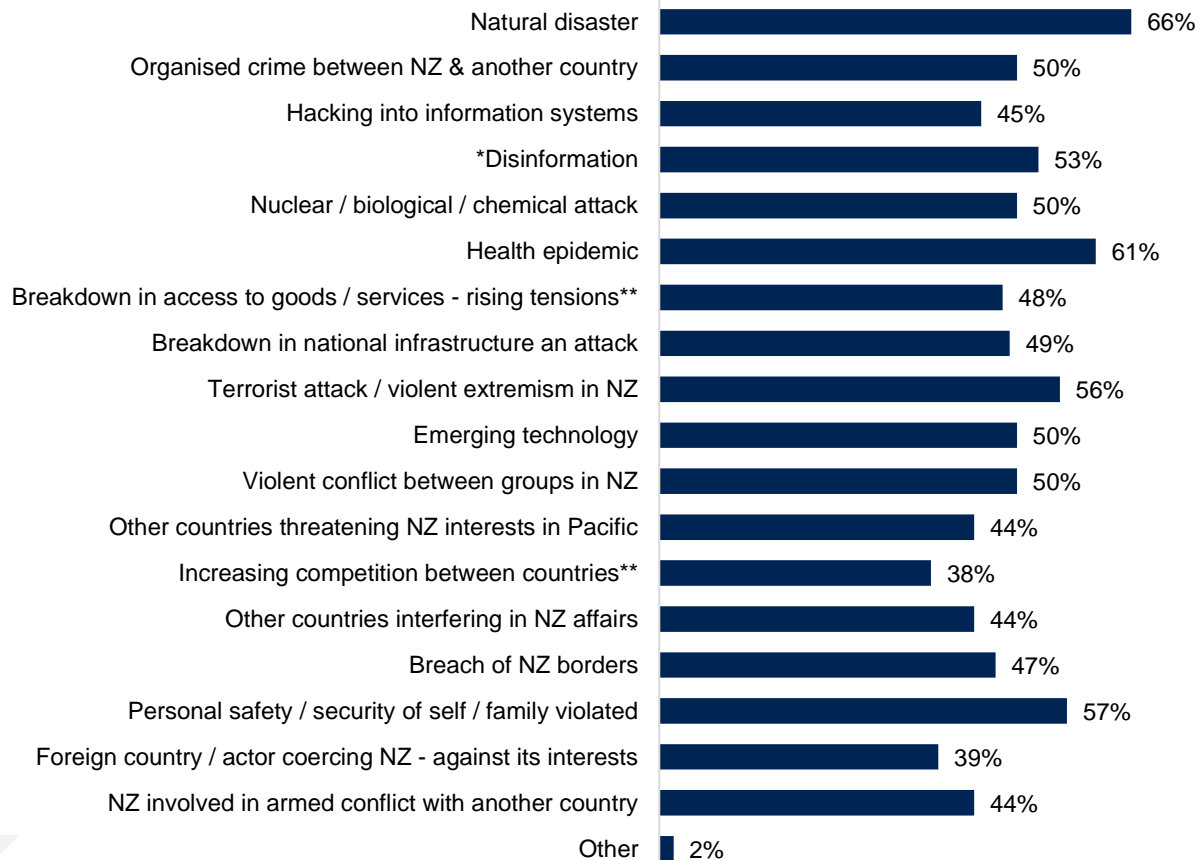
Q21: Which of the following threats are you interested in knowing more about?

Base: Those who indicated they were interested in knowing more about national security in Q20 (n=1,444). *Note: Disinformation has been added to the 2023 questionnaire, replacing misinformation (included in the 2022 survey). **Note: new to the 2023 survey. Green / red indicates statistically significantly higher / lower than 2022.



THREATS AND HAZARDS - SEEKING MORE INFORMATION

Threats and Hazards interested in knowing more about



Demographic Differences



Natural disaster (66%)

74% 50–64 years
72% Female
72% Born outside of NZ
60% Male



Health epidemic (61%)

70% NETT Not in employment
56% Employed full-time
54% 18–29 years



Personal safety (57%)

65% NETT Not in employment
64% 50–64 years
63% Born outside of NZ
49% 18–29 years



Terrorist attack / violent extremism (56%)

66% NETT Not in employment
62% Female
51% Male



Disinformation (53%)

66% Retired
65% HH income \$0–\$50k
65% 65+ years
48% 30–49 years
47% 18–29 years
44% Pacific peoples
43% Asian



Organised crime (50%)

63% Retired
61% 65+ years
58% 50–64 years
45% Employed full-time
44% HH income \$100k+
43% 30–49 years



Nuclear / biological / chemical attack somewhere in the world (50%)

59% NETT Not in employment
55% Female
46% Male



Emerging technology (50%)

57% HH income \$0–\$50k
44% 18–29 years



Violent conflict between groups in NZ (50%)

62% 65+ years
59% HH income \$0–\$50k
40% 18–29 years
39% Asian



Breakdown in national infrastructure due to an attack (49%)

60% 50–64 years
57% HH income \$0–\$50k
57% NETT Not in employment
56% 65+ years
39% 18–29 years

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=1,444). *Note: Disinformation has been added to the 2023 questionnaire, replacing misinformation (included in the 2022 survey). **Note: Threat not included in the 2022 survey, new to the 2023 questionnaire. Green / red indicates statistically significantly higher / lower than the total.

THREATS AND HAZARDS – PREFERRED INFORMATION FORMAT

Websites & news media are still the most preferred formats for receiving information about threats and hazards. Compared with 2022, there has been a statistically significant increase across most threats and hazards as to the formats respondents want their information on national security.

	Total	Natural disaster	Organised crime	Hacking	*Disinformation	Nuclear, biological or chemical attack	Health epidemic	Break-down in access to goods / services**	Break-down in critical infrastructure	Terrorist attack / act of extremism	Security affected by emerging technology	Violent conflict between groups in NZ	Other countries threatening NZ interests in Pacific	Increasing competition between countries**	Other countries interfering in NZ affairs	Breach of NZ borders	Personal safety / security of self & family members	Foreign country / actor coercing NZ to act against its interests	Armed conflict with another nation
Base (n=)	1,444	943	722	643	747	726	869	682	687	812	714	709	633	543	620	682	802	565	647
Websites	76%	67%	54%	56%	59%	59%	68%	56%	57%	58%	56%	56%	52%	57%	54%	56%	54%	54%	58%
News media (e.g. giving interviews)	67%	62%▲	56%▲	57%	55%	61%	62%▲	59%	58%▲	62%▲	53%	60%▲	61%▲	59%	59%▲	57%	43%▲	61%	64%▲
Social media (e.g. Facebook, Twitter, etc.)	52%	45%▲	31%	31%▲	35%	36%▲	46%▲	34%	31%	36%▲	32%▲	37%▲	27%	32%	30%▲	33%	34%▲	28%	35%
E-newsletters / email updates	49%	32%	28%	29%	30%	26%▲	35%▲	31%	30%	28%	27%	29%	28%	29%	28%	29%	32%	27%	28%
Online videos	47%	32%▲	25%▲	24%▲	28%	30%▲	32%▲	26%	24%	27%▲	29%	26%	26%	23%	24%	25%	25%	25%	27%
Printed information / guides (e.g. brochures, information sheets)	46%	25%	19%	19%	24%	21%▲	35%▲	23%	20%	19%	21%	19%	16%	19%	17%	16%	25%	16%	16%
Helplines to call / email for questions or support	45%	33%	14%	17%	20%	21%	33%	19%	20%	27%▲	15%	20%	14%	15%	13%	15%	35%	14%	18%
Advertising / information campaigns	39%	31%	22%	23%	25%	25%	33%▲	26%	29%	24%	23%	22%	21%	21%	22%	24%	22%	22%	26%
Academic / other independent research papers	33%	15%	14%	15%	23%	17%	25%	14%	16%	15%	18%	15%	18%	19%	19%	13%	12%	19%	15%
In person meetings	28%	12%	7%	7%	11%	8%	10%	7%	9%▲	9%	9%▲	11%	8%	7%	5%	7%	22%	8%	6%
Virtual meetings	21%	9%	7%	6%	8%	7%	11%	6%	7%	7%	7%	7%	6%	7%	6%	7%	11%	7%	6%
Don't know / not sure	7%	1%	2%	4%	3%	3%	2%	3%	3%	2%	4%	2%	2%	4%	4%	3%	3%	4%	4%
Other	2%	1%	1%	1%	0%	1%	1%	0%	1%	1%▼	1%	1%	0%	1%	1%	0%	1%	1%	0%

Rank 1 Rank 2 Rank 3



Q22: And in what format would you prefer for information on <EACH THREAT TYPE>?

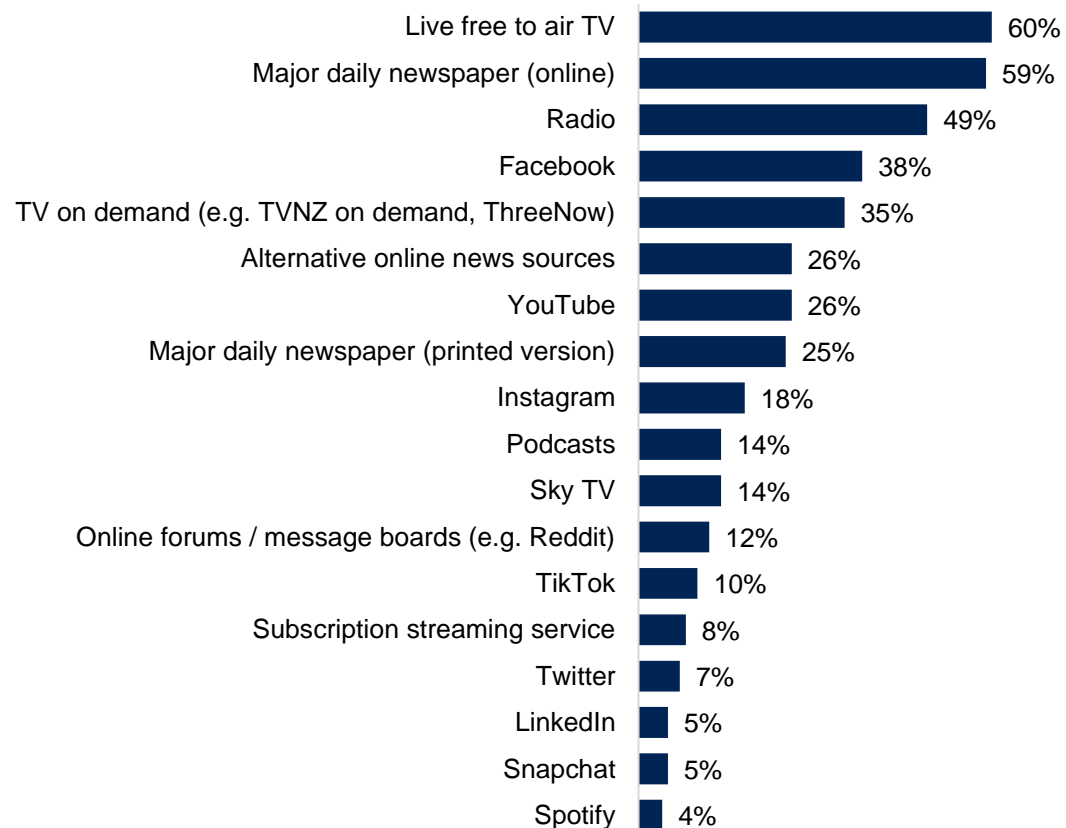
Base: Those who indicated they were interested in knowing more about national security in Q20 (n=1,444). *Note: Disinformation has been added to the 2023 questionnaire, rather than misinformation (as was included in 2022). **Note: ew to the 2023 survey.

▲ / ▼ indicates statistically significantly higher / lower score than 2022

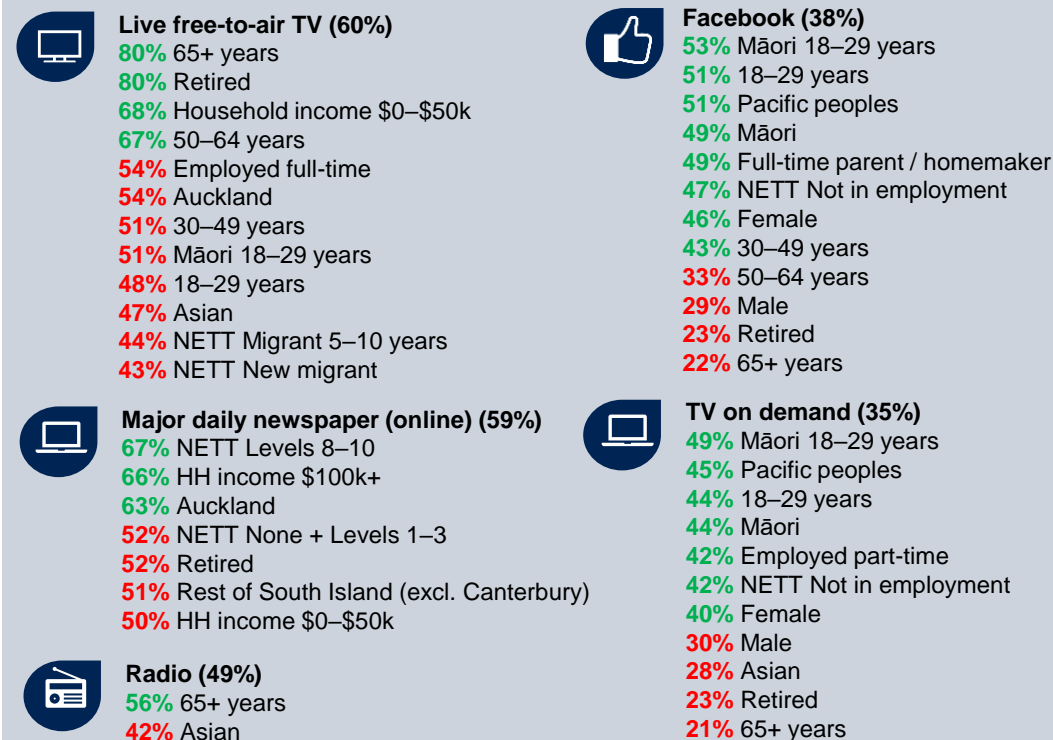
PREFERRED INFORMATION CHANNELS

New Zealanders prefer to receive information about threats via *online newspapers & free-to-air TV*. That said, there are notable demographic differences - suggesting a range of channels are required to reach a broad range of people.

Preferred information channels*



Demographic Differences – Top-5 preferred channels



Q24: Where would you like to receive information about the threats we have discussed during this survey?

Base: Total sample (n=2,370). Green / red indicates statistically significantly higher / lower than the total. *Note: Results not directly comparable to 2022 as we did not ask the previous question asking how respondents receive information prior to them being asked to indicate their preferred information channel. The removal of the "information channels used" question may have caused participants to respond differently.

APPENDIX 1 – CHANGES TO SURVEY SINCE 2022

9

CHANGES TO SURVEY SUMMARY

Since 2022, a some changes have been made to the survey, primarily to shorten the survey length & keep issues timely & relevant.

- **Two** new threats have been added to the list of national security threats presented to respondents:
 - These threats have been indicated using two asterisks ** throughout the report
- The threat of **mis**information has been changed to **dis**information – reflecting a change in the academic literature which distinguishes between unintentionally (*misinformation*) and deliberately (*disinformation*) spreading false information.
- A new question with a global average benchmark was added asking respondents the extent to which they feel the world has become a more dangerous place over the last year.
- Respondents were **no longer asked** to identify which threats or hazards posed the greatest risk to themselves and their family / community / workplace / New Zealand as a whole.
- To understand the perceived role of different groups in responding to threats, respondents were asked about three different threat types in more detail. These threats changed from those asked in 2022 which were: *misinformation*, *cyber attacks* and *terrorism*, to **foreign interference**, **economic security** and **transnational organised crime**. The intention is to continue to “deep dive” on three threats each survey period rather than monitor over time.
- To reduce overall survey length, respondents were **no longer asked** what the role of the general public is in helping to protect New Zealand from and respond to threats.

ADDITIONS OR WORDING CHANGES IN SURVEY

Question (in order of questionnaire):	Change(s) from 2022:
<p>9: 'How real do you feel the threat is of any of the following happening in the next twelve months? Please select one for each of the following statements.'</p>	<ul style="list-style-type: none"> • Statement 10 wording changed from 'The spread of misinformation in New Zealand about topics of public importance (e.g. climate change, pandemic response) to <i>'The spread of disinformation (deliberately sharing false information to mislead or cause harm) in New Zealand (e.g. about vaccines, elections, climate change)'</i> • Statement 17 added: <i>'A breakdown in access to critical goods and services caused by rising tensions between countries (e.g. through restrictions on trade or other penalties)'</i> • Statement 18 added: <i>'Increasing competition between countries that negatively impacts how New Zealand protects its interests internationally and that may lead to military conflict'</i>
<p>20: 'Thinking again about all the threats we have covered so far, do you agree or disagree with each of the following statements? Please select one response per statement.'</p>	<ul style="list-style-type: none"> • Statement 2 wording changed from 'I am interested in knowing more about national security <i>threats, challenges and opportunities</i>' to 'I am interested in knowing more about national security' • Statement 6 added: <i>'Over the last year, I feel the world has become a more dangerous place'</i>
<p>24: 'Where would you like to receive information about the threats we have discussed during this survey? Please select all that apply'</p>	<p>Question 24 wording changed from 'And where would you like to receive information about the threats we have discussed during this survey?' to 'Where would you like to receive information about the threats we have discussed during this survey?' Note that the word 'and' was removed because of the removal of question 23.</p>

DELETED QUESTIONS IN SURVEY

Question (in order of questionnaire)	Change(s) from 2022:
13: 'If these were to happen in the next twelve months, which of the following do you think poses the greatest threat to <u>you and your family</u> ?'	Question removed
14: 'If these were to happen in the next twelve months, which of the following do you think poses the greatest threat to <u>your community</u> ?'	Question removed
15: 'If these were to happen in the next twelve months, which of the following do you think poses the greatest threat to <u>New Zealand as a whole</u> ?'	Question removed
16: 'If these were to happen in the next twelve months, which of the following do you think poses the	Question removed
18: 'Are there any other threats not listed in the previous question that you think there is a very real chance of happening in the next 10 years? Please describe as much detail as possible'	Question removed
19: 'In what ways can the public help to protect New Zealand from, and respond to, these threats?'	Question removed
23: 'Which of the following do you access, read or listen to on a regular basis (at least three times a week)? Please select all that apply'	Question removed

SECTION 4 ROLES & RESOURCES: DIFFERENT THREAT TYPES ASKED IN 2023

This year, 3 new threat types were introduced in the survey to understand the perceived role of different groups in responding to threats: *foreign interference*, *economic security* and *transnational organised crime*. Last year respondents were asked about *misinformation*, *cyber attacks* and *terrorism*. These were replaced with new threat types for the 2023 survey. Respondents were randomly selected to answer one of three threat types for subsequent questions 25 and Q26.

2022

2023

Threat name	Definition
Misinformation	the spread of misinformation about topics of public importance (e.g. climate change, pandemic response)
Cyber attacks	some person, organisation or country hacking into either a public, private or personal information system for criminal or espionage purposes
Terrorism	a terrorist attack or act of violent extremism taking place in New Zealand

Threat name	Definition
Foreign interference	other country / countries interfering in New Zealand's affairs (e.g. interference in general elections or relationships with other countries)
Economic security	a breakdown in access to critical goods and services caused by rising tensions between countries (e.g. through restrictions on trade or other penalties)
Transnational organised crime	organised crime (such as the illegal movement of money, drugs or people) happening between New Zealand and another country

APPENDIX 2 – PANEL DETAILS

10

PANEL DETAILS



Methodology

Interviews were conducted online (self-completion). Respondents were recruited from Ipsos & Ipsos partner panels.

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 research panels and from non-panel sample sources (river sampling).

Panel respondents are recruited from actively managed research panels (not a just a 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).

A blend of 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 (77%) and river sampling of non-panel sources (23%).

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You act better when you are sure.

**THANK
YOU**

GAME CHANGERS

