

He Rautaki-ā-motu mō te Āheitanga Ahumoni

the **national strategy.** for Financial Capability

NS.

Getting ready for Money Month
August 2024





What we'll cover today

- About Money Month 2024
- Resources and support for your campaign
- Guest speakers on how they took part last year
- Break-out session to share ideas

What is Money Month?



Money Month is an annual public awareness and engagement campaign that anyone who's helping New Zealanders improve their financial wellbeing can get behind.

The evolution of Money Month



2022

“Just wondering”



2023

“Pause. Get sorted.”



2024

“Pause. Get sorted.”

We’re building on the success!
New assets available May.

Money Month Campaign 2023

Campaign theme:

Pause. Get sorted.

Campaign intent:

Engage the nation to take a moment, reflect and take charge of their finances.

Desired response:

New Zealanders take action to help grow their money and build resilience.

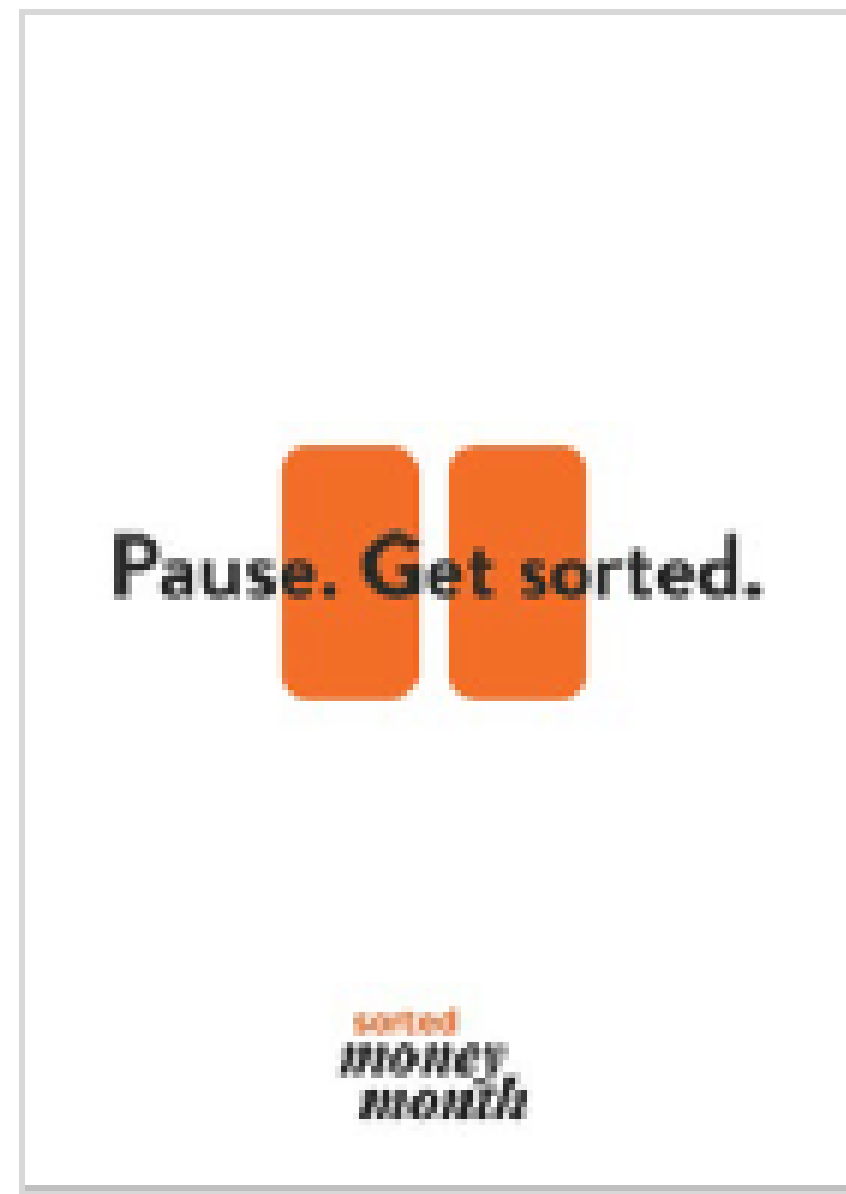


Pause. Get sorted.

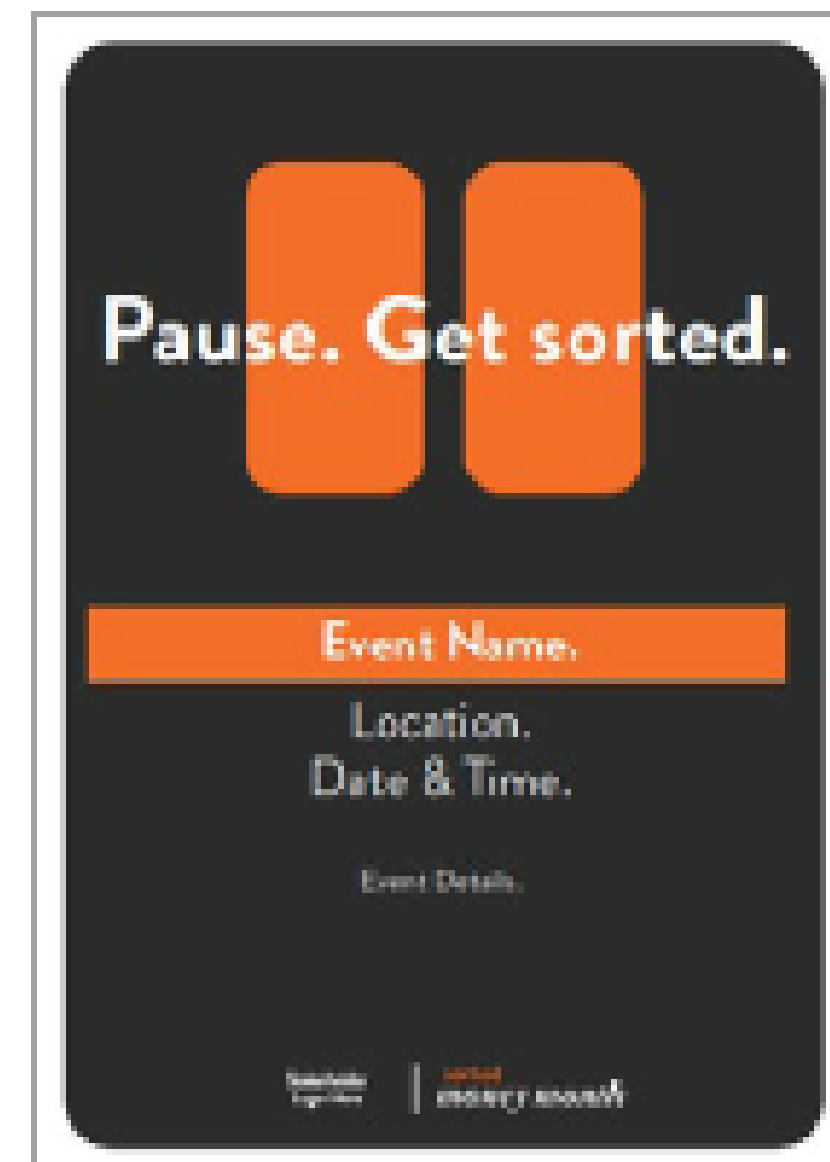
Money Month Campaign 2023

Campaign assets for our partners to use:

Hero messaging



Event promotions

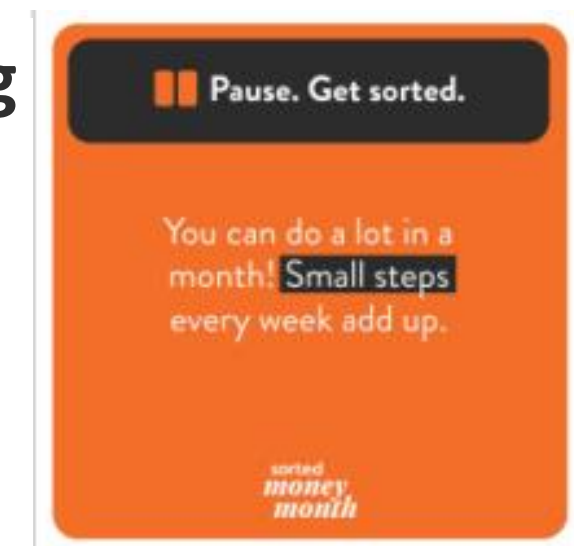


Social tips

KiwiSaver



Budgeting



Debt



Saving



Money Month Campaign 2023

EDMs

Promote the campaign and all the Events.
Email series to support consumers with tools and content around Debt, Savings, KiwiSaver and Budgeting..

WEBSITE

Tailored a user experience based on the consumer needs and promote Money Month content and all the great events across the month.

PR

We worked closely with our research team and media to create rich content journalists were interested in featuring in the news.

sorted
money month

COMMUNITY FUND

Provided a fund for community groups and not-for-profits to fund Money Month initiatives that best supports their communities.

SOCIAL MEDIA

Always on Paid and Organic social media promoted practical tips and stories to our core audiences.

GIVEAWAYS

Encouraging engagement and ongoing interaction with the Sorted brand throughout the month of August.

SORTED WEBINARS

Four free webinars running weekly on key money topics to keep consumers engaged.

OUT-OF-HOME

Programmatic digital outdoor using high reaching and impactful screens across main markets NZ wide to deliver brand awareness



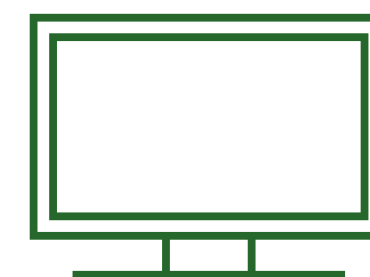
NS Money Month Campaign 2023



58 Events held by partners



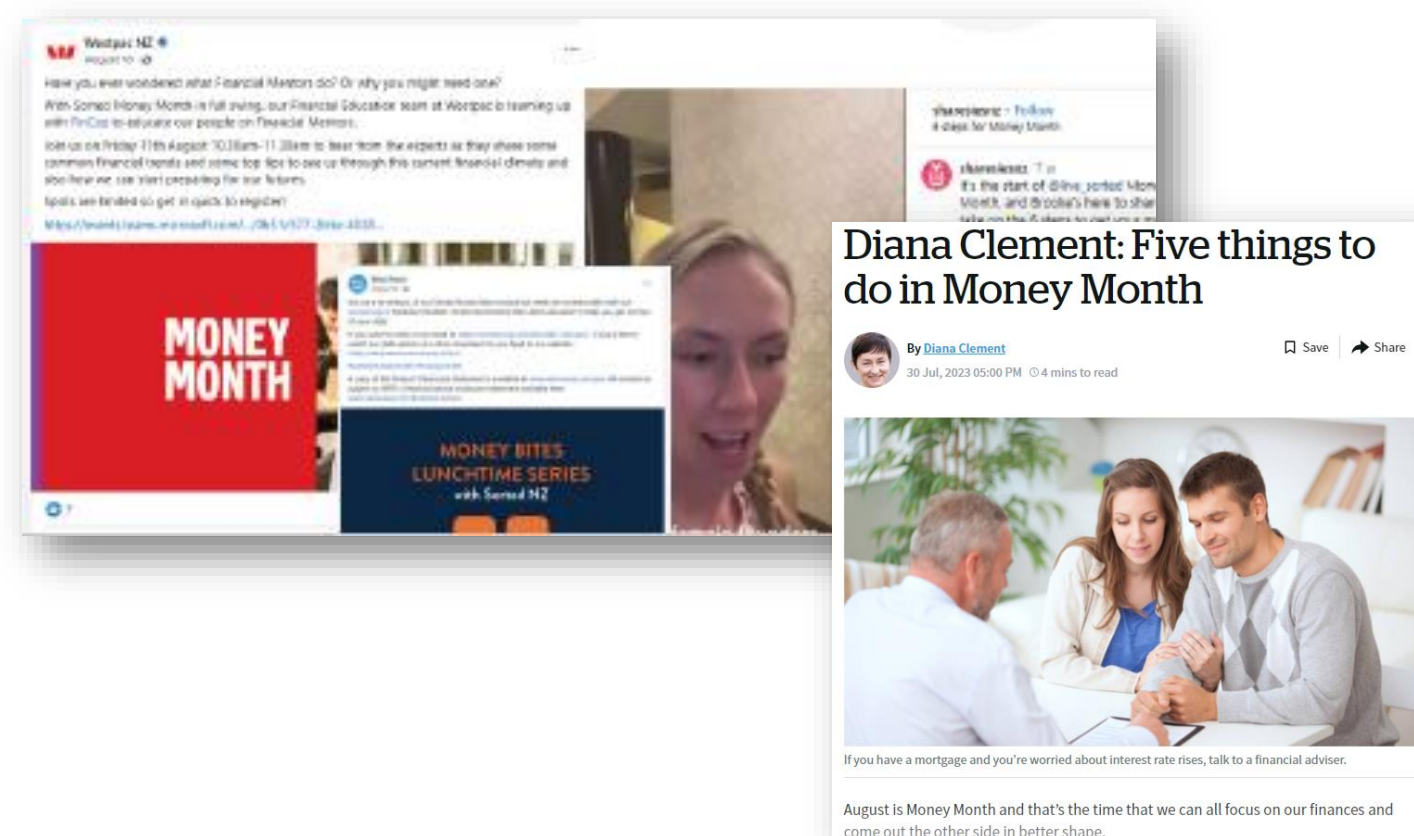
170 Social posts by partners



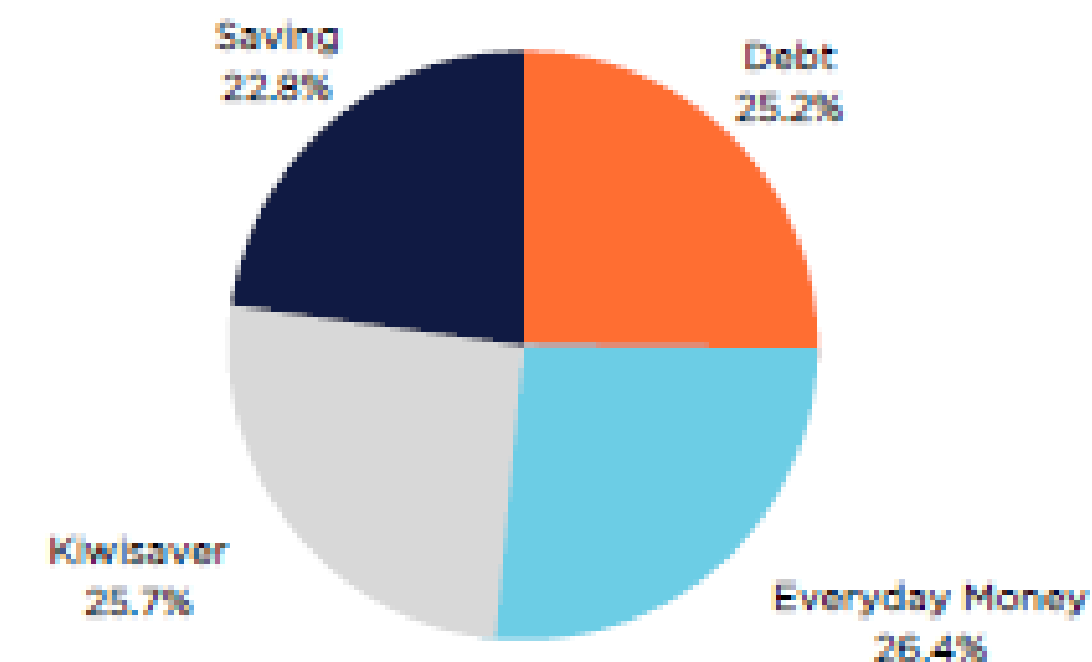
1.4m video views on YouTube



83 NZ media mentions



210k sessions on sorted.org.nz with engagement on all 4 topic areas



Money Month Campaign 2024

We'll retain **Pause. Get Sorted.**

We'll retain **a month.** 1-31 August 2024.

Updated tips in English and Te Reo for:

- Everyday money
- Savings
- Debt
- KiwiSaver



New tip focus areas:

- Insurance
- Investing

More funding for Community initiatives.

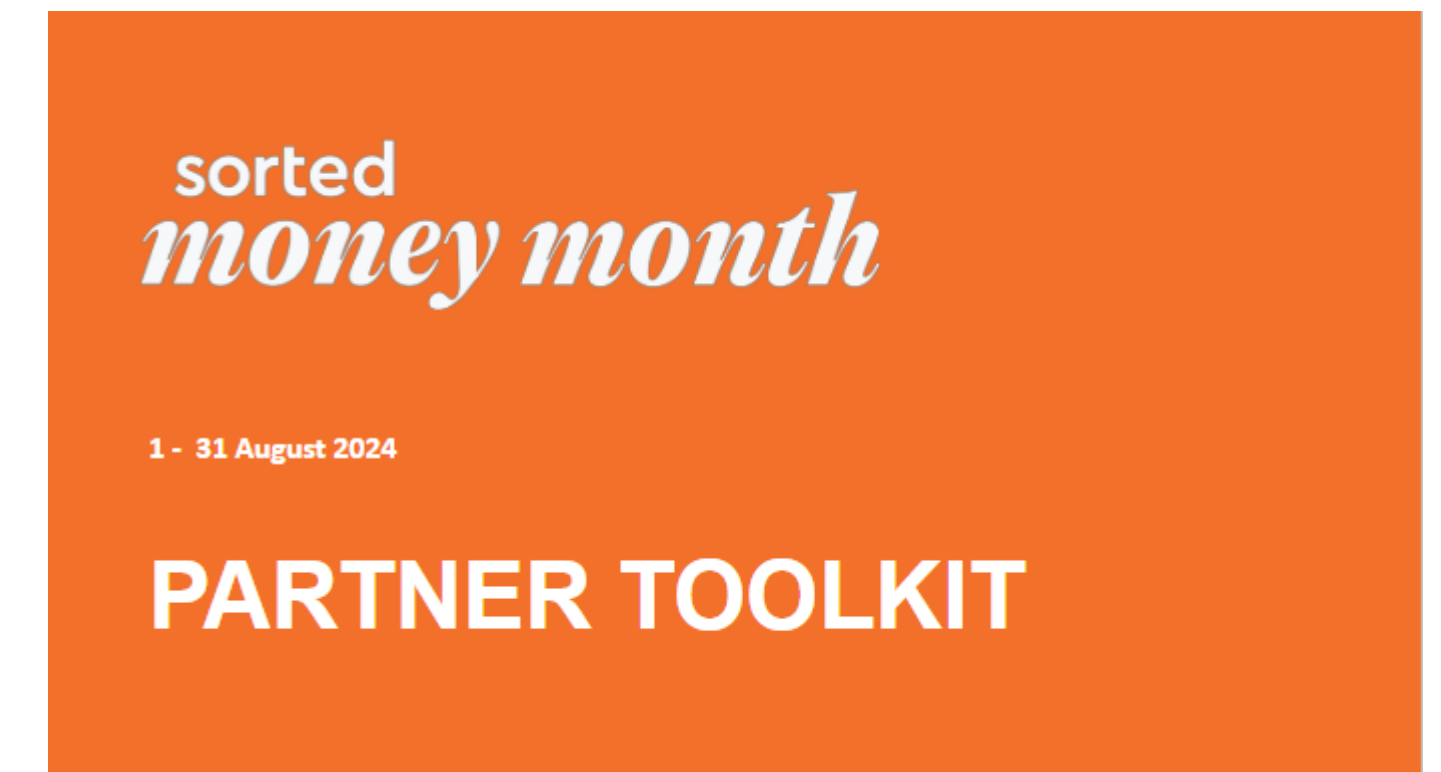
Refreshed campaign look and feel.

More communication on messaging in the lead up to the campaign.

How we'll support you this Money Month

Partner resources available in May

- Sorted Money Month logos.
- Pause. Get Sorted. Logos.
- Zoom/Teams backgrounds, AV screens.
- Customisable social media assets and posters for your events.
- Social media assets - tips for 6 topics in both English and Te Reo.
- Partner guide and instructions on how to use/customise the resources.



www.retirement.govt.nz/sorted-money-month

How we'll support you this Money Month

Our commitment to you

- Regular emails and info page on retirement.govt.nz
- Partner guide available now, resources and toolkit available in May (*updated for 2024*).
- Virtual workshop in June sharing tips on how to use the resources.
- Page on sorted.org.nz to promote your events.
- Community fund – boosted by Women in Super this year.
- Follow up survey to ensure we meet your needs and continue to optimise.

www.retirement.govt.nz/sorted-money-month

\$10,000 Community Fund

\$10,000 pool available in May – boosted by Women in Super

- For partners with a passion to take part but limited resources.
- Enables not-for-profit partners to support their communities.
- Apply for a share of the fund via a simple form and provide a photo of your initiative at the end. (should take 5 minutes).
- Fund grants of under \$1,000 available.
- \$5,000 earmarked to support financial wellbeing of women thanks to Women in Super sponsorship.

Key dates

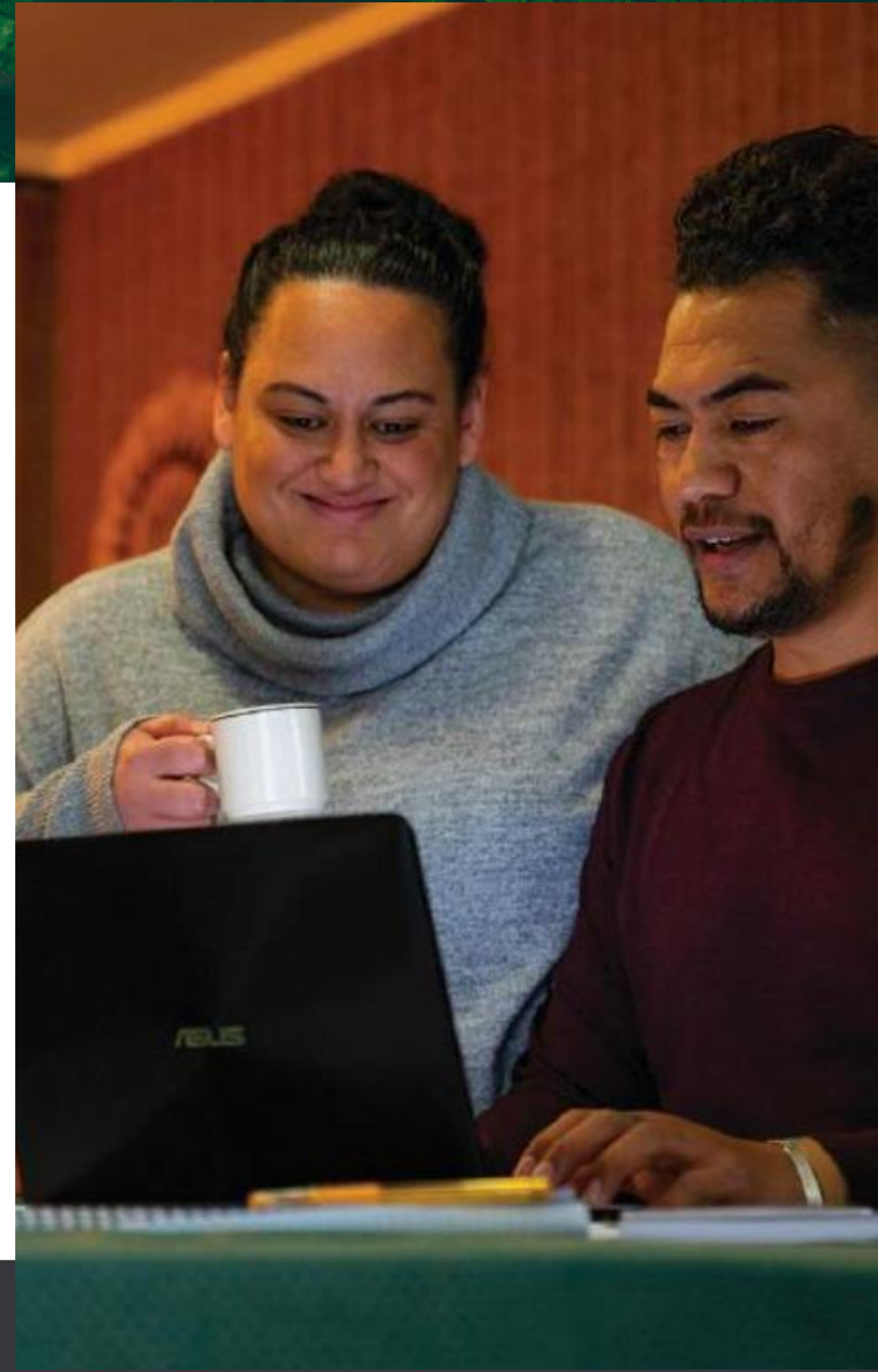
- **1 May – 10 June:** applications open
- **17 June:** successful applicants notified



Promoting your Money Month events

We'll promote your events via a calendar on sorted.org.nz

- Plan your event and share it with your audience and local community.
- Tell us about your event (from May onwards).
- We will promote on sorted.org.nz



Activity ideas – some successful initiatives have included:

Use giveaways

- Book giveaway - cheap eats cookbook
- Free soup or sausage sizzle
- Free coffee and financial wellbeing sessions
- Prize draw (food vouchers etc)

Host a webinar

- Could be on a topic such as: investing, saving, debt management, insurance
- Or to support life events such as: buying a house, having a baby, moving out of home

Run a workshop

- Cooking on a budget
- Plant a vege garden
- How to stretch your dollar
- Save money on your power
- Mortgage advice and tips

Leverage media

- Tik tok money tips
- Facebook and Instagram money tips
- Join your local radio station – a giveaway might help

Partner up

- Join forces with your local bank to run an event
- Run an event/workshop with local school or church
- Partner with supermarket for giveaways



10-minute breakout session

We want to hear from you!

1. What Money Month/Week activity do you think has worked well or hasn't worked to support NZers in the past?
2. What other sorts of activity could we do to support NZers this year (especially considering the current environment)?

<https://forms.office.com/r/HA9caxcbfe>

Load this form and nominate a scribe from your group.

Breakout session ideas

Q1. What Money Month/Week activity do you think has worked well to support NZers in the past?

Worked well

1. Raffles free basket of food
2. make sure nothing is confronting, keep it light, they are terrified they are going to ask something they won't want to answer, setting safe spaces
3. client struggle with shopping, so gave away food bags which included all food and recipe for meals x4 per week
4. free soup, it was very cold, free soup works well to start conversations and good links to free services, promoted at local libraries
5. going into the prisons, doing lunch time activities
6. separate themes per week (simple fin wellbeing topics), coffee group, talks through the local libraries (downside = people think they are getting/receiving financial advice), can provide lists/contacts, but often do not make recommendations
7. Food bags with cheap recipes and all the ingredients in were well received and gave inspiration and a free meal.
8. talked to Year 13s (important stage - buying first cars, leaving home).
9. Had a workshop in a couple of schools. We had a really good response, students took flyers home and shared with parents, some parents contacted that they needed some help. Found they knew little about differences in interest rates etc. A little information, slowly was better. Just reached out to schools - knocked on the door.
10. Held a webinar with CEO alongside KiwiBank (budgeting) and Partners life (insurance) - on financial planning. Had good success, over 100 attending. Webinars are low cost and can do them yourself, so they're a good option if you have an email database. Safe space for people to ask questions on chat, can have an expert there. Reduces anxiety.

Hasn't worked well

- send money tips (during Covid). Gave away shopping bags
- too much info, needs to be bite sized pieces, easy, accessible to understand

Breakout session ideas

Q2. What other sorts of activity could we do to support NZers this year (especially considering the current environment)?

Ideas we could focus on for Money Month 2024

- help with debt
- Food and debt should be the focus. Food is getting extremely expensive and wages / benefit is not keeping up with the cost of inflation.
- Cheap / seasonal food education along with how to cook it is always well received and practical - helping people NOW and helping them also in the FUTURE.
- Debt is getting out of hand and unmanageable for most - Buy Now Pay Later is adding to this burden, with it being so easy to get multiple accounts and multiple purchases (also available for food and alcohol now). They have so many purchases and costs coming out that they can't keep up.
- People are falling back onto kiwisaver hardship applications as they cannot see a way out without doing this. Will not be a good thing when they hit retirement age.
- Measuring impacts - how do people measure whether people are actually changing behaviour.
- Have a change report. Measures over 2 years, whether they have got another high interest loan.
- My Money Kete online programme - a 6 monthly report has shown great findings. fortnightly email, discuss simple financial literacy, building a community. Talk about cheap recipes, how to save money.



Questions / pātai?

Feel free to reach out to with any questions on getting involved –
we're here to support

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