



Marketing Brief

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| Date: | 7 th February 2022 |
| Brand: | Te Ara Ahunga Ora Retirement Commission |
| Project: | Review of Retirement Income Policies 2022 |
| Project sponsor: | Dr Suzy Morrissey with Comms lead by Anika |
| Marketing Specialist: | Lyndsey |

Background

This is a reverse brief to consolidate the outline provided [here](#). The purpose to provide focus and clarity for marketing support to deliver on the objectives of RRIP Comms strategy particularly the connection to public engagement.

Key Points:

Discussion with Anika prioritized overarching messaging. There will be on-going comms through stakeholder and media which marketing will support through website and CRM. This brief is to define an approach for hero communications across paid, owned and earned channels.

Business Goal

The RRIP is an opportunity to elevate the dialogue around retirement and for Te Ara Ahunga Ora to increase visibility amongst stakeholders, the public and Government. Historic reviews have had mixed feedback and 2022 intention is to be more focused and purposeful in our approach.

The overarching objective should be linked to our SOI and Purpose

‘Empowering the people of NZ on their journeys to a better retirement’

Our purpose drives the importance of engagement with both stakeholders and the public – ensuring our work evaluates and recommends the most potent policy mix to Government coupled with information and inspiration to guide NZers to retirement.

Trusted Information - Government is receptive to recommendations which are evidence based. NZers understand and have confidence in NZ Super long term



Informed Advocacy – Public awareness and understanding of retirement issues is raised with focus on established audiences with highest need for protection and support into retirement

Effective Collaboration – Stakeholders (media, academics and subject matter experts) contribute to the report and feel valued.

Reflect Te Tiriti in our public engagement

Relative Outputs

- 1) Conduct or commission robust research to address the various topics in the ToR
- 2) Reflect the organisation's commitment to Te Tiriti in the research, and report
- 3) Prepare a Report that provides sophisticated consideration of retirement income policy issues [in Plain English](#) and contributes to the debate regarding NZ Super and other matters.

Marketing Objectives

(What is it and how does this brief contribute to its success)

Objective 1:

Advance the conversation from the perception of NZ Super as a high cost to NZ to one of high value

- **Strategy : Reframe the dialogue around the value of protecting retirees with Super as an enabler of their contribution to whanau, community and NZ.**
 - Create simple, engaging content that can be promoted across multiple channels
 - Enhance media engagement by partnering with targeted and influential media outlet e.g. RE News
- **Measured by TRA Consumer Monitor**
 - Pre-measure to be established – awareness that NZ Super exists; understanding of NZ Super (entitlements; payments/ transfer value) and perception (NZ Super is unaffordable long term; NZ Super will be even more essential long term etc.) – Jo / Suzy to write qs.
 - Post measure in December
 - Agree to measure this on-going
 - Suzy also conducting sentiment research on Super vs. 10 years ago. Ready in May. Will provide strong base for media .

Objective 2:



Link Policy research and dialogue to Te Ara Ahunga Ora Fin Cap programmes

Strategy: Leverage Sorted as an owned channels sharing and housing valuable retirement planning content

- Build further content into Money Week focused on retirement
- Utilise Sorted channels, tools and content to engage the public
- Promote surviving retirement game (with some adjustments) to students and teachers (Sorted in Schools – need to check if this exists within MME)
- Connect to Sorted output in Stakeholder engagement through owned channels e.g. ‘We might think that retirement is boring...but Sorted retirement tools have run over 40,000 calculations in the past 12 months etc. etc.

Measures:

- Increase use of retirement calculator by 15% (establish baseline from year prior)
- Increase views of retirement guide and content by 15% (establish baseline from year prior)
- National Strategy stakeholder engagement measures

Objective3:

Lift the profile of Te Ara Ahunga Ora Retirement Commission across identified audiences

Strategy: Increase visibility of the brand and retirement commissioner

- **Using a consistent look and feel aligned to our new brand strategy vs. a stand-alone identity from previous reviews**

Measures: by TRA Consumer Monitor awareness

- a. NB This will be very low!
- b. Increase web traffic to Te Ara Ahunga Ora channels

Target audience

Primary Consumer Marketing Audience

NZ Public- under 45s

Stakeholder Audiences driven through comms and policy with support from marketing to create and manage assets

- Govt – Ministers, officials
- Industry groups: e.g. Age Concern,
- Nat Strat stakeholders – wider base, as



- NZ Media, commentators and influencers on retirement income

Channel Strategy to be developed further with Together:

PROFILE & AGENDA SHAPING

Build awareness of 2-3 hero messages to lift profile and visibility – focus on value of Super not its ‘cost’

Words/sentiment to avoid

- ‘Cost’ and the actual \$ cost

BRAND Te Ara Ahunga Ora.

Likely channels paid social ads; owned and earned channels to drive broad reach.

Media Objective: Mass reach and views with targeting supplementing key groups

Timing: April into mid-May, ahead of public submissions opening

Link to Te Ara Ahunga Ora webpage

Recommend the following:

A) PREPARE – FEB-MAR

- Website ready
- CRM list cleans
- Start media engagement – value of the work we will be undertaking
- CTA for What does retirement look like for Māori
- Set up benchmarking for research
- Write creative briefs – these need to be refined and clear to achieve goals
- Sorted Money Week planning
- Brief Together

B) TOES IN THE WATER - APR-MAY



- Stakeholder engagement via Nat Strat
- On-going media engagement – building out topics and using prepared content
- Sorted content promotion focus on retirement, savings and advising of the review
- Produce content for key public engagement promotion

C) DIVE IN – JUN -AUG

- Shape papers for publishing
- On-going media engagement – building out topics and using prepared content
- Media partnership to drive awareness / push Super Power content with media

D) D) WRAP UP – SEP-NOV

- Complete report and recommendations including design
- Key findings in media?

Jobs to Do

This table shows the specific elements each medium needs to consider.

| TACTIC | Elements |
|---------------------------|---|
| VISUAL IDENTITY | Opportunity to use and extend the new Te Ara Ahunga Ora brand collateral and create a halo effect for our brands. Need to resolve co-branding between Sorted and Te Ara Ahunga Ora? |
| WEBSITE | Homepage content block, hero evolving messaging and publish papers |
| COMMS SUPPORT | Support via CRM |
| CREATIVE / CONTENT | Define priorities and key messaging to create engaging and informative video content Dovetail promotion of Sorted retirement planner and creation of new blogs, money week content into calendar |
| MEDIA PARTNERSHIPS | Brief and collaborative with Together to establish best use of budget across channels and to drive media partnership opportunity |



| TACTIC | Elements |
|-------------------|---|
| PAID MEDIA | Build into Sorted and Money Week plan |
| SUPPORT | Allocate budget to paid search for RRIP |

Considerations & Key Dates

Research – need to define benchmark questions asap to access the Monitor with sufficient time – questions to be finalised by late March

Brand and Communications – do not cannibalise messaging – need to layout FSC, Money Week and RRIP activity alongside a broad calendar to make sense!

Key messages

(2-3 maximum) –

- PRIORITY 1: Super Powers NZ / NZ's Super Power
- PRIORITY 2: Retirement planning is always worth starting...?
- PRIORITY 3: Te Ara Ahunga Ora

Single minded proposition

As NZ's population (and we all age), we should not think of this as a burden or cost. Think of the Super Powers of our retirees. Super powers them to live support whanau, communities and live with dignity.

Shine a light on the retirees of today