

TOWARDS WELLBEING

FINANCIAL · PURPOSE · SOCIAL · HEALTH

DELEGATE FEEDBACK REPORT
2019 CONFERENCE



Financial Services Council.
Growing and protecting the wealth of New Zealanders



WELCOME

Welcome to the feedback report which has been constructed from the feedback received from attendees of the Towards Wellbeing conference. This year for the first time we had a conference web app which helped push and collect feedback from delegates.

We set out to include a line-up of experts in their field speakers and have the best content. The months of planning and organising that went on behind the scenes delivered both, and this wouldn't be possible without the support of our members, speakers, sponsors, organisers and attendees.

Whilst the core of the conference focussed on financial services, the theme this year was wellbeing. This focus gave us a chance to talk about our own wellbeing, what that means to us as an industry, and what it means to us as individuals.

A special note of thanks to all this year's sponsors. Without their support we wouldn't be able to produce such a high-class event on the scale and standards that are now expected.

Thank you.



Rob Flannagan
Chairman



Richard Klipin
Chief Executive
Officer





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We thank our sponsors for their generous support and we would like to acknowledge their contribution below.

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TECH ALLEY



THOUGHT LEADERSHIP HUB





INTRODUCTION

Towards Wellbeing was the third joint Financial Services Council and WorkPlace Savings NZ conference, which took place on 11 and 12 September in Auckland.

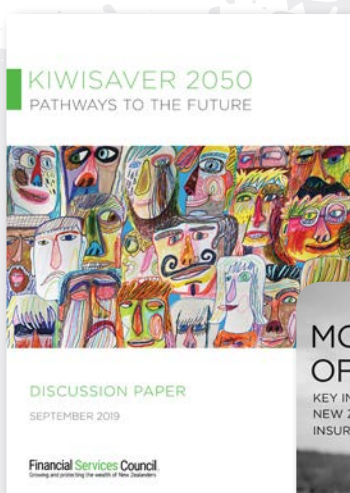
There were over 600 attending over the two days, including guest speakers Hon. Grant Robertson, Hon. Kris Faafoi and Hon. Paul Goldsmith. Also speaking and taking part in speaking engagements and debates were regulators Rob Everett, Chief Executive of the Financial Markets Authority and many industry specialists.

This year we brought back TechAlley and Pitch Perfect to the conference, showcasing the best in New Zealand FinTech, EduTech, RegTech and InsurTech. Pitch Perfect took place ahead of conference with participants from Tech Alley and the winners took their place on the Main Platform and pitched to the main conference audience.

There were two key launches at the conference, the first was the FSC Kiwisaver discussion paper “Kiwisaver 2050: Pathways to the future” which looks at the opportunities that Kiwisaver presents us as an industry in the future. The second was “Moments of Truth: Key insights into the New Zealand life insurance industry.”

We were proud to support Voices of Hope, our conference charity, and raised over \$15,000 during the conference.

This report outlines the results of an evaluation survey completed by delegates who attended the conference to measure how the conference was received by attendees, and help us organise future events for the industry.



\$15,000 was raised
over the two days





AT CONFERENCE

Over the two days of the conference, we had just over 600 people through the doors, a huge 50% increase on the previous conference. The target audience were those working in or with the financial services sector across New Zealand and this year about 45% of those attending were female. We also invited emerging leaders, where members were given the opportunity to extend a complimentary conference ticket to those up and coming in their organisations.

Delegates in the feedback survey rated the conference at a consistently high rate with all areas rated at 85% and above. The communications over the event were rated at 90%.

Delegate numbers over the last three conferences:

2019
615

2018
393

2017
309



86%

Speakers



84%

Sessions



90%

Communications



85%

Conference overall





Speakers



86%
in 2019



84%
in 2017

SPEAKER FEEDBACK

WHAT DELEGATES SAID ABOUT THE SPEAKERS



I was immensely inspired by Mike King, Banquer, and the ladies from Voices of Hope.

Great speakers and sessions. The journalists did a great job facilitating the conversations and panels.

Rob Everett was direct, but necessarily so. His presentation was unambiguous and high standard.

Speakers were well selected and offered a range of views on panels.

I enjoyed Rob Everett and following panel discussion. Mike King was great as well.

Speakers have been awesome.

I enjoyed Mike King most.

Listening to some fantastic speakers on very topical issues and loved the wellbeing theme.

Rob Everett and his straight talking. Many of the speakers were awesome. The journalists facilitating were great. Mike King was fantastic.

The international speakers you had were excellent, bringing invaluable perspective eg. Steven Findlay and Jeremy Cooper.





Sessions



84%
in 2019



82%
in 2017

TOPIC FEEDBACK

WHAT DELEGATES SAID ABOUT THE TOPICS



Great content and speakers, topical, and relevant now. It had all the things we should be talking about as an industry.

“ The Restricted Schemes session was the most relevant session [...for me]. It was very informative. ”

“ My favourite session was the debate about KiwiSaver. ”

“ The panels were very insightful and honest. ”

“ The panel discussions - having them run by professional media people like Jack Tame made them so much more valuable. ”

“ The panels on the future of Kiwisaver, diversity and responsible investing. ”

“ The wellbeing focus was refreshing. I had my doubts about it for a professional conference but was very pleasantly surprised. ”

“ Panel 3: Diversity, Leadership and Change was a great discussion. ”

“ The conduct and culture panel, was the best by far. ”





Conference overall



85%
in 2019



82%
in 2017

DELEGATE EXPERIENCE

WHAT DELEGATES SAID ABOUT THE CONFERENCE



Congratulations on another superb conference.
Looking forward to next year's already!

“ I really appreciated the way Maori language week was embraced and I enjoyed the networking opportunities. ”

“ Engaging line up of speakers, great flow, well facilitated. ”

“ Great presentations & presenters. Well organised event. ”

“ The dinner was lots of fun. ”

“ The atmosphere was great. ”

“ The organisation of the event was flawless. ”

“ Level of professionalism was very high. ”

“ Well planned and executed, ran very smoothly. ”

“ I always enjoy the networking opportunities this event brings. ”

“ Pullman was an excellent venue. Staff worked hard and special thanks to conference committee and FSC team. ”

“ A good, thought-provoking couple of days.
The coffee ordering feature on the app was great. ”





CONFERENCE: TOP THEMES

Delegates in the feedback survey rated the conference at a consistently high rate with all areas rated at 85% and above. The communications over the event were rated at 90%.

GUEST SPEAKERS

This year we had a number of guest speakers and they were well received. Much of the feedback indicated that Mike King, New Zealander of the Year and Kendall Flutey, young New Zealander of the Year, were very inspirational and something that delegates would like to see repeated at future conferences.

Steven Findlay and Jeremy Cooper were also invited to speak at the conference and their expertise and insight from other jurisdictions were thought provoking and brought an international perspective to their panels.

FSC UPDATES

A number of people indicated that they would like to know more about the FSC and what goes on from year to year. Other than conference and specific touch points, it seems that many would like to hear more from us to know what's going on and what we've been doing.

NETWORKING

The networking opportunities are appreciated but the length of the sessions limited it a little, along with the lack of space in some areas. Space and shorter sessions would encourage more networking.

ENVIRONMENTAL

Many of the speakers mentioned green initiatives, the climate and recycling in their sessions. This came through in the feedback, that delegates would like to see a more environmentally friendly conference, which the FSC plans to develop further through initiatives such as this year's event app which meant we reduced paper waste.





WHAT COULD BE IMPROVED

With the conference continuing to grow both in size and quality every year, expectations also rise. The FSC continues to evolve the conference to make each one relevant to every person that attends, giving everyone something to take away from the event.

We look at everything from location, the catering capabilities, the sizes of rooms, the speakers, the presentations, the sponsors...everything.

18.1%

of responses mentioned the catering and food arrangements:

Somewhere to sit down and eat on the first day would have been useful. It was a bit awkward.

Lack of access to water was an issue. None on the tables during the sessions nor on the deck after the food service.

Greater variety and more vegan food please.

Lunches that require knives and forks are awkward when there are no tables to sit at. A bit more variety at morning teatime would be nice.

15.9%

of responses mentioned the seating and space:

Having tables in the main auditorium worked really well last year. The seats were too close together this year.

The breakout area was quite crowded, and it was challenging to get to the food.

The venue felt cramped on day one. The breakout room for insurance session had a giant pillar in the middle, which stifled most people's view. Maybe consider an alternate venue if numbers continue to increase.





WHAT COULD BE IMPROVED

6.8%

of responses mentioned the environment:

Ditch the paper that ultimately ends up in a bin.

There's a real waste of resources.
All this paper will go in the bin.



6.8%

of responses mentioned specific speakers:

The male speaker at the Women in Super breakfast was a disappointment. I had incorrectly assumed there would be a female speaker. He was negative, didn't read the audience, and seemed in contradiction to a lot of the other messages from the conference.

Don't have politicians hijack the session and use it for political grandstanding and government bashing. It was disgraceful.



6.8%

of responses mentioned diversity:

Sponsor young Maori and pasifika final year high school students, finance majors and some working in the industry to attend. Bring diversity in and broaden outreach horizons.

Include younger people, they relate differently to technology, attitude, social interaction. What we do or don't do now affects them.
Equally, a pacific and Maori voice would be good.

The diversity panel wasn't very diverse. The panel about NZ's place in the world had two kiwis and three Australians. Maybe a balance of some more kiwis would have been more appropriate.



Do the mahi
Mana-tangata
Tae ana ki
Kaumatua
Aroha





Financial Services Council.

AWARDS

2019

EMERGING LEADER AWARD

WINNER: MARK BANICEVICH, PARTNERS LIFE

This award recognises a young industry professional who has demonstrated outstanding commitment, achievement and passion in the New Zealand Financial Services industry in the last 12 months.



LICENSED INDEPENDENT TRUSTEE OF THE YEAR AWARD

WINNER: TIM MCGUINNESS

This award recognises a Licensed Independent Trustee who has demonstrated innovation, performance and respect within the industry.



TEAM OF THE YEAR AWARD

WINNER: PARTNERS LIFE MARKETING TEAM

This award is open to any team operating in the financial services sector in New Zealand.



IMPROVING CONSUMER OUTCOMES AWARD

WINNER: BNZ

This award recognises products, services or campaigns that improve consumer outcomes. It is open to all facets of the industry, and must include innovation or disruption.





Financial Services Council.

AWARDS

2019

GOVERNANCE AWARD

WINNER: FSC CONDUCT & CULTURE COMMITTEE

This award recognises excellence in governance for those operating in the financial services industry of New Zealand.



INNOVATION AND WELLBEING AWARD

WINNER: AIA

This award recognises excellence by an organisation focussed on the wellbeing of clients, staff and the NZ community as well as on the broader diversity and inclusion initiatives.



CHAIRMAN'S AWARD FOR SERVICE TO THE INDUSTRY

WINNER: SUSAN BASILE

This award recognises an outstanding individual who has significantly contributed to the advancement, promotion and improvement of the Financial Services industry in New Zealand over the span of their career.



SPECIAL LEADERSHIP AWARD

WINNER: WORKPLACE SAVINGS NZ

This award reflects the leadership, foresight and courage of the WSNZ Council to help create a strong and single industry voice for the financial services sector.



THE HIGHLIGHTS

VIP COCKTAIL FUNCTION
AND LAUNCH OF KIWISAVER 2050



THE HIGHLIGHTS

THE GALA AWARDS DINNER



THE HIGHLIGHTS

CONFERENCE EXHIBITORS



THE HIGHLIGHTS

TECH ALLEY EXHIBITORS



THE CONFERENCE TEAM

An event like this only comes together with the hard work and effort of a team. We thank the following people for their invaluable support and contribution to making this conference our best so far.



Mark Banicevich



David Bishop



Joe Bishop



Mark Daniels



Yvonne Davie



Jenn Dobinson



Rob Flannagan



Brynlea Hunter-Morpeth



Russell Hutchinson



Chris Hutton



Richard Klipin



Elaine Linnell



Emma Mellow



Barry Read



Haydee Stroud



Vanja Thomas





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