



DELEGATE FEEDBACK REPORT

2020 DIGITAL CONFERENCE
13, 14 & 15 OCTOBER

Generations

WELCOME

Welcome to the delegate feedback report which has been constructed from the feedback received from attendees of the Generations Conference. This year was the first time that a FSC conference has taken a digital format and the positive feedback received is an encouraging sign for the future of hybrid events.

The aim of the flagship FSC conference is to be the best in the industry, providing informative, ground-breaking and thought-provoking content for all sectors of the financial services industry from industry experts and leading speakers.

Alongside valuable industry insights this year's themes of guardianship, sustainability and wellbeing weaved through session topics and provided an opportunity to explore the concept of kaitiaki, develop tools to improve the balance of health, social and financial wellbeing, and focus on meeting the needs of the present while not compromising the future.

A special thank you to all conference sponsors. Their support ensures that we are able to continue to produce this exceptional conference at such a high standard.

We also acknowledge and thank all conference speakers. Great content drives great conferences and the content delivered at Generations has spurred so many valuable conversations beyond just the conference. And finally, thanks to the hard working conference committee for their ongoing support and expertise.

Thank you

Richard Klipin
CEO, FSC



After months of moving dates, venues and formats, the Generations conference was finally held as a cutting-edge digital conference on October 13, 14 & 15. The digital conference utilised the latest technologies to deliver a live TV style production, combining both a television studio and multiple concurrent Zoom webinars to present a content rich programme to 1553 live viewers over three days, with breakfast, main plenary and sundowner sessions.

The main plenary provided an exceptional line up of sector, political and motivational keynote speakers including Hon Grant Robertson and Paul Goldsmith, Hon Kris Faafoi and Andrew Bayly, Dr. Siouxsie Wiles, Sinead Boucher, Jase Te Patu and industry leading lights including FMA CEO, Rob Everett and Toby Fiennes, Head of Financial System Policy and Analysis for the Reserve Bank.

The breakfast and sundowner sessions provided something for everyone in the sector, with experts providing curated content relevant to trustees and supervisors, LADUCA, FinTech, professional advice, emerging leaders, workplace saving schemes, investment and insurance. The popular Tech Alley and Pitch Perfect platforms were a highlight of the conference, showcasing the latest Kiwi industry innovations.

The final day of the conference also saw the launch of the FSC's latest research, Financial Resilience Index 3.

This report outlines the results of the evaluation survey provided to all conference participants. This feedback provides valuable qualitative and quantitative data that the FSC will use to measure our success and to help us organise future industry events for our audience.

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SPONSORS AND PARTNERS

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

PLATINUM



Trustees Executors



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DIGITAL CONFERENCE

CONFERENCE ATTENDEES



*Live attendees over 3 days

120 **SPEAKERS**

36 **SESSIONS**

TOP 5 SESSIONS

Women in Super: Generational connect or disconnect

Investment - Locking in losses: The Behaviour of Switching

Keynote - Dr Siouxsie Wiles

Panel Discussion - Is Retirement Dead?: Rethinking work, life and retirement in a post pandemic world',

Election 2020 - Political Keynote Series: The Finance Portfolio

AT THE CONFERENCE

	2017 Navigating Change	2018 Shaping Futures	2019 Towards Well Being	2020 Generations
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WHAT DID YOU THINK OF THE CONFERENCE?

Quality of presentations	83%	90%	86%	86%
Relevance of presentations	82%	90%	84%	85%
Coverage of topics	85%	78%	85%	86%
Overall Rating	82%	86%	85%	86%

DEMOGRAPHICS OF ATTENDEES

Male	69%	na	60%	59%
Female	31%	na	40%	41%

AGE GROUP

21-40	21%	19%	na	28%
41-60	66%	72%	na	60%
60+	13%	9%	na	12%

OCCUPATION

Government/Regulator	7.7%
CEO	3.8%
Executive Manager	15.4%
Manager	23.1%
Supervisor	11.5%
Adviser	15.4%
Other	23.1%

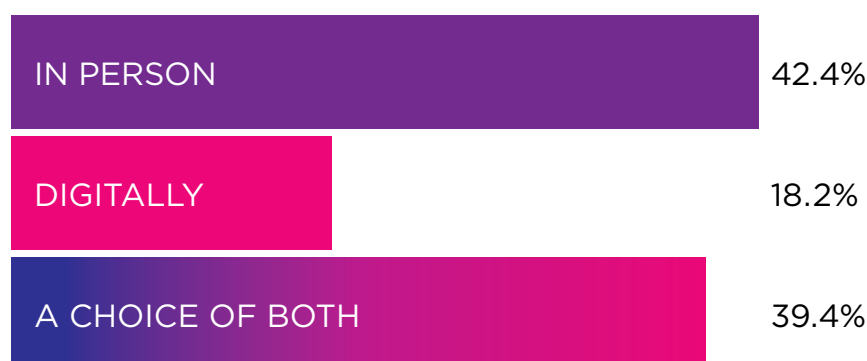
REGION

Auckland	66%
Wellington	18.8%
Rest of North Island	6.3%
South Island	4.2%

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DIGITAL CONFERENCE INSIGHTS & LOOKING AHEAD TO 2021

**WOULD YOU PREFER TO ATTEND FUTURE
FSC CONFERENCE AND EVENTS IN PERSON,
DIGITALLY OR A CHOICE OF BOTH?**



**OVERALL QUALITY RATING
OF DIGITAL PLATFORM**

88%

I liked how simple the online platform was it was great in the online format and good to be able to go back and watch any that you missed. ”



**IF YOU RECEIVED A CONFERENCE PACK, WHAT DID YOU
THINK ABOUT RECEIVING THE PACK AND CONTENTS?**

Good content. The pack was a nice selection of varied items. Already used my mask! ”

It was great. Nice to have a few treats. ”

Nice touch. Made up for not being able to hang out in the breaks, especially for those of us in our spare rooms. ”

**THE OPPORTUNITIES GAINED,
WE DISCOVERED, WITH A
DIGITAL PLATFORM**

- Accessibility of digital platform enables a wider age and geographical range of attendees
- Feasibility of digital tickets is more attractive to a wider audience including independent operators & across professional levels
- Format allows greater access to a wider range of speakers locally and internationally as they can be streamed into the event
- Continued access to presentation information post event increases value of the conference and creates an opportunity to re-package and re-use content
- Offers extended period of exposure and more opportunities for sponsorship
- Greater tracking of attendee analytics

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SESSION FEEDBACK

TOP 5 SESSIONS:

Keynote Dr Siouxsie Wiles

Women in Super:

Generational connect or disconnect

Panel Discussion – Is Retirement Dead?:

Rethinking work, life and retirement in a post pandemic world'

Election 2020 – Political Keynote Series:

The Finance Portfolio

Investment – Locking in losses:

The Behaviour of Switching



Topics were relevant and presented in an engaging way.



Out of the above I'll pick the panel discussion "Is retirement dead" as being my favourite session. Excellent panelists with obvious expertise on the topic, a great blend of explanation for stated views, humour, logic and thinking on their feet.



The 2 [main plenary] panels, the speakers were eloquent, knowledgeable and entertaining.



The keynote speakers because what they had to say really resonated with me.



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GENERAL FEEDBACK

The platform and work that has gone into putting on the event is excellent. ”

The digital option was fantastic. I really hope this is continued in future years. Normally having 3 days out of the office is disruptive to work, so being able to pick and choose what I watch while answering the odd email was great. Also, the ability to watch recordings of sessions meant that I could always catch up on a session that was on at the same time. ”

The overarching theme – kaitiakitanga – speaks volumes about our industry. So important to all Kiwis. ”

Personally I love being able to be there in person and connect with my peers, but that is not something the FSC can change or do anything about. Fingers crossed next year will be able to be held in person. If it isn't then at least we know that a 'virtual' conference works really well. ”

Ease of participation and the breadth of expertise and variety of topics and speakers. ”

I think three days was a little too much. It would also be much nicer to do an in person conference although I appreciate we could not this year due to COVID. ”

I enjoyed that you could just join the sessions you were interested in unlike a conventional conference where you have to sit through presentations that don't have any relevance or aren't of interest to you. ”

I felt the afternoon sessions were harder to focus on among other priorities – because the conference was not on for the full day I was more focused and dedicated with watching in the morning but things would often come into the day and I didn't always tune into the afternoon sessions. ”

It made it easier to move around rather than sitting back to back listening to speakers. ”

A digital conference just doesn't work (in my opinion). Not only do you miss out on the networking opportunities of a in-person event, there are just too many distractions. I ended up only attending one event for the full duration of the event. I managed to dial into about 3 others, but left due to distractions resulting from being in the office. ”

Further in depth discussions about high level issues affecting the industry. ”

The topics and how simple the online platform was. ”

Well run, good variety of topics and speakers. ”



YOUR CHOICE OF BREAKFAST SESSIONS

8.00 – 9.00

Women In Super

Generational Connect or Disconnect?

Trustees and SupervisorsAgile Supervision:
Lessons from a Global Pandemic**Insurance**Health and happiness:
Income protection and sustainability**Pitch Perfect**Innovative FinTechs showcase
their ideas**Workplace Savings**Global Investment Outlook:
In conversation with Andrew Bascand**Generations**Shared Wisdom:
Learning from our workplace family**LADUCA**If it's Broke, Fix it. An expanded view
of the NZ Risk Landscape**Professional Advice**Get In Shape: The Next Bite
of the Apple**FinTech**Sweeping changes: The role of tech in
shaping the wealth of the generation
investors

MAIN PLENARY

9.10 – 12.15

🕒 9.10 – 9.30

Welcome to the FSC Conference*Rob Flannagan, Chairman, FSC*
Richard Klipin, CEO, FSC

🕒 9.10 – 9.30

In the Spotlight*Voices of Hope*
Jazz Thornton, Co-Founder, Voices of Hope
Gen Mora, Co-Founder, Voices of Hope

🕒 9.10 – 9.30

In the Spotlight*Financial Services Council Research Launch*
Richard Klipin, CEO, FSC

🕒 9.30 – 10.20

**Election 2020:
Political Keynote Series***The Finance Portfolio*
Hon Grant Robertson, Minister for Finance
Hon Paul Goldsmith, National's spokesperson for Finance
Hosted by Heather du Plessis-Allan

🕒 9.30 – 10.20

**Election 2020:
Political Keynote Series***The Commerce Portfolio*
Hon Kris Faafoi, Commerce and Consumer Affairs Minister
Andrew Bayly, National's Spokesperson for Commerce and Revenue
Hosted by Jack Tame

🕒 9.30 – 10.00

**Election 2020:
Political Keynote Series***On the stump with James Shaw*
Hon James Shaw, Co-Leader, Green Party
Hosted by Corin Dann

🕒 10.20 – 10.40

Industry Insights*Insight from the Reserve Bank of New Zealand*
Toby Fiennes, Head of Financial System Policy and Analysis, RBNZ

🕒 10.20 – 10.40

Industry Insights*Insight from the Regulator*
Rob Everett, CEO, Financial Markets Authority

🕒 10.00 – 10.30

**Election 2020:
Political Keynote Series***In conversation with Emma Mellow*
Emma Mellow, Auckland Central Candidate, National Party

🕒 10.40 – 11.30

Main Plenary Panel 1*Changing For Good: Sustainability, Guardianship and Wellbeing*

🕒 10.40 – 11.30

Main Plenary Panel 2*Is Retirement Dead: Rethinking work, life and retirement in a post pandemic world*

🕒 10.30 – 11.30

Main Plenary Panel 3*Pundits Panel: Whats in store for the 2020 Election?*

🕒 11.30 – 11.40

Keynote Speaker*Sinead Boucher, CEO, Stuff*

🕒 11.30 – 12.15

Keynote Speaker*Dr Siouxsie Wiles, Microbiologist and Associate Professor, MNZM*

🕒 11.30 – 12.15

Keynote Speaker*Jase Te Patu, Award winning wellbeing advocate and founder of M3 Mindfulness for Children*

YOUR CHOICE OF SUNDOWNER SESSIONS

15.30 – 16.30

Generations*The Rollercoaster of Life: Tactics for wellbeing***Generations***The 'New' New Zealand: Future proofing for success***Generations***Embracing Kaitiakitanga: Being better guardians***Insurance***Accelerating the Customer Agenda. What Needs to be True?***Insurance***Data: The Game Changer***Insurance***Medical Innovations: Keeping up with the pace of change***Investment***Locking in losses: The behaviour of switching***Investment***The COVID Storm: Is there gold at the end of the rainbow?***Investment***Rise of the Machines: Losing the human touch***LADUCA***Cancer rehabilitation: Supporting life customers affected by cancer***Trustees and Supervisors***Meet the leaders: The supervisor's role in 2020 and beyond***FinTech***Digital transformation in Insurance: The people behind the technology*

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CONFERENCE THEMES

The 2020 theme, Generations, emphasised not only the responsibility that the financial services sector has to support our different generations to save, invest and retire well, but also challenged each and every one of us to be better. Better custodians for future Generations, better at supporting our teams and our customers balance their wellbeing and better at creating a sustainable future.

THEMES

Kaitiaki is the concept of **guardianship**, for the sky, the sea, and the land. We are custodians for future generations, protecting and providing for their needs.

Wellbeing is about our health, social and financial wellbeing and how we can support our teams and our customers balance their wellbeing day-to-day.

Sustainability focuses on meeting the needs of the present without compromising the ability of future generations to meet their needs.

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WINNERS



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TECH ALLEY

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PITCH PERFECT

TECH ALLEY & PITCH PERFECT showcased pioneering FinTech, InsurTech, HealthTech, EduTech and RegTech Kiwi companies working to enhance the financial services sector.

THEME :
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IN PARTNERSHIP WITH



SPONSORED BY

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DIGITAL CONFERENCE TEAM

An event like this is only possible with the hard work and effort of a team. We thank the following people for their invaluable contribution in bringing this year's conference to life.



Beth Brady



Chris Hutton



Daniel Relf



David Bishop



Donna Mason



Elena Vinton



Emma Trendall



Jennie Harrison



Kirsten Young



Kristian James



Mark Banicevich



Martin Gould



Naomi Simpson



Penny Sheerin



Richard Klipin



Robert Sloan



Rosalyn Lambert



Russell
Hutchinson



Sharon Mackay



Trecia Brown



Vanja Thomas



Yvonne Davie



Don Allerston



James Brown



Jason Roberts



Kai Dwyer

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NEW ZEALANDERS' RESILIENCE SHINING THROUGH

Launched at the Generations Conference, the latest edition of the Financial Resilience Index is a tracking survey of New Zealanders' views on five key financial resilience indicators and the research shows New Zealanders' financial resilience shining through tough times.

The latest round from the Financial Services Council's Financial Resilience Index showed that despite the last six months being one of the most challenging periods in recent history, New Zealanders have remained remarkably resilient and confident when it comes to financial matters.

The Financial Resilience Index is a major tracking survey of New Zealanders' views on five key financial resilience indicators; financial confidence, literacy and preparedness, job security and wellbeing. The key outcomes of this research, undertaken in early August, were:

- After initial uncertainty, Kiwis remained resilient throughout this unprecedented period, from the introduction of Covid-19, to living in lockdown, right through to the return to Alert Level One.
- New Zealanders continued to have incredible financial confidence, with around 72% of respondents still feeling reasonably, very or extremely confident when it came to their finances.
- Most respondents also continue to feel secure in their jobs, with around 80% of respondents feeling some level of security in their current employment. This indicates that while some sectors have been hit hard, there is not a wholesale fear of job losses.
- Overall wellbeing is getting worse, with just over 54% of respondents saying they have been adversely affected in the period between March to August, while 60% now worry about money regularly; either monthly, weekly or daily.
- There was a slight increase of 6% in people who have household investments, suggesting that there has been a small but promising change in spending habits, and a shift to saving.

The Financial Resilience Index has shown us that while the health of New Zealanders' resilience remains intact, there is an underlying anxiety about money issues, that is in turn affecting our wellbeing.

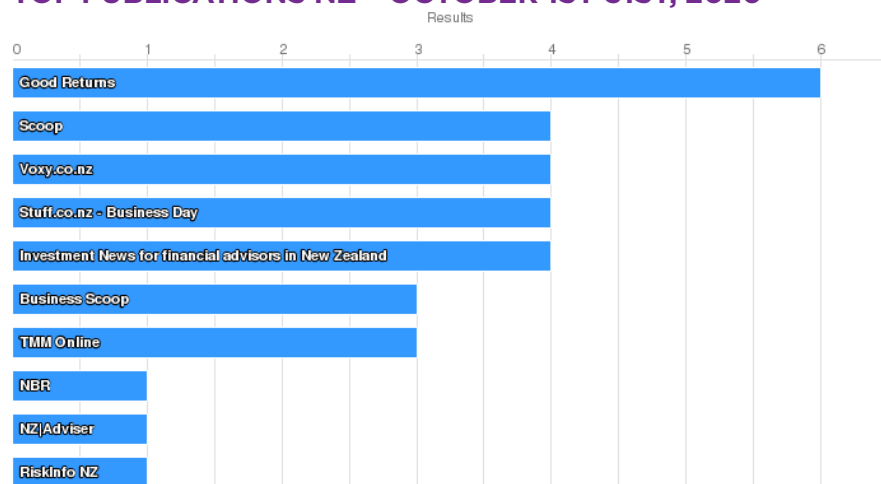
Find out more at fsc.org.nz



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MEDIA COVERAGE

TOP PUBLICATIONS NZ - OCTOBER 1ST-31ST, 2020



FSC finds New Zealanders' financial resilience shines through tough times

Good Returns - 16/10/2020

NZers resilient over finances despite underlying worries - survey

RNZ -New Zealand - 15/10/2020

New Zealanders' Financial Resilience Shines Through Tough Times

Scoop - 15/10/2020

Low understanding, high commissions challenges for life insurance industry

NBR - 14/10/2020

[FSC Conference] Robertson v Goldsmith; Fixing income protection; RBNZ update

TMM Online - 14/10/2020

Generations Lifts Off Tomorrow Morning

Scoop - 12/10/2020

Time to create a KiwiSaver hardship withdrawal 'hub'

Stuff.co.nz - Business Day - 30/10/2020

FSC enjoys a solid year of growth despite challenges

Good Returns - 29/10/2020

Which advisers will win the future?

Good Returns - 28/10/2020

'Radical' Plan to Revamp Australia's Financial Advice System

RiskInfo NZ - 27/10/2020

Rice Warner inspires FSC plan for simpler, cheaper Australian advice system

Investment News for financial advisors in New Zealand - 26/10/2020

Vale David Stevens

Investment News for financial advisors in New Zealand - 26/10/2020

Hybrid technology: how robots, digital tools and humans can bridge the financial literacy gap

Investment News for financial advisors in New Zealand - 23/10/2020

Which insurers showed most heart during the Covid crisis?

Stuff.co.nz - Business Day - 23/10/2020

Annuity Buyer Insights with Harry Stout

Annuities Genius - 22/10/2020

QInsure in Queensland Australia and FINEOS Sign Cloud HoA

picante.today - 21/10/2020

EbeneNews - UA - A radical upheaval in financial advisory rules has been launched

news.ebene-magazine.com - 20/10/2020

NZers resilient over finances despite underlying worries

climaxnewsroom.com - 18/10/2020

Insurers are concerned about the affordability of the \$ 450 million income protection market

www.corona24news.com - 18/10/2020

Gender blind KiwiSaver needs to become fairer to women

Stuff.co.nz - Business Day - 18/10/2020

Insurers fret over affordability of \$450 million income protection market

Stuff.co.nz - Business Day - 18/10/2020

[FSC Conference] The rise of the machines; Robo like a toddler

TMM Online - 16/10/2020

FSC kicks off "digital edition" of 2020 conference

NZ|Adviser - 13/10/2020

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Growing and protecting the wealth of New Zealanders