



15 October 2024

[Redacted]

Dear [Redacted]

Thank you for your request made under the Official Information Act 1982 (OIA), transferred to Inland Revenue from The Treasury on 3 October 2024. You requested the following:

Inland Revenue Briefing Note BN2024/303: Personal Income Tax 31 July communications plan

Information being released

The document you have requested is enclosed. Where information is withheld, the OIA grounds for withholding the information is outlined in the document.

Right of review

If you disagree with my decision on your OIA request, you can ask an Inland Revenue review officer to review my decision. To ask for an internal review, please email the Commissioner of Inland Revenue at: commissionerscorrespondence@ird.govt.nz.

Alternatively, under section 28(3) of the OIA, you have the right to ask the Ombudsman to investigate and review my decision. You can contact the office of the Ombudsman by email at: info@ombudsman.parliament.nz.

If you choose to have an internal review, you can still ask the Ombudsman for a review.

Publishing of OIA response

We intend to publish our response to your request on Inland Revenue's website (ird.govt.nz) as this information may be of interest to other members of the public. This letter, with your personal details removed, may be published in its entirety. Publishing responses increases the availability of information to the public and is consistent with the OIA's purpose of enabling more effective participation in the making and administration of laws and policies and promoting the accountability of officials.

Thank you again for your request.

Yours sincerely

[Redacted signature]

Pip Knight
Service Leader, Marketing & Communications



Briefing note

Reference: BN2024/303

Date: 23 July 2024

To: Revenue Advisor, Minister of Finance -Emma Grigg
Revenue Advisor, Minister of Revenue – Angela Graham
Private Secretary, Minister of Revenue – Helen Kuy

Copy to: Peter Mersi, Commissioner
David Carrigan, Deputy Commissioner
Mike Cunnington, Deputy Commissioner
Joanne Petrie, Executive Support Advisor to the Commissioner
Governance & Ministerial Services

From: Marketing and Communications

Subject: **Personal Income Tax 31 July communications plan**

Purpose

1. To provide an update to the Minister of Finance and the Minister of Revenue on the external communications plan for the launch of the Personal Income Tax Changes (PIT).
2. When referencing PIT, this includes the changes to the Independent Earner Tax Credit (IETC), Minimum Family Tax Credit (MFTC), In Work Family Tax Credit (IWTC) and Paid Parental Leave (PPL).

Background and context

3. This update only covers external communications. For the internal communications, Inland Revenue will be preparing a range of education material, including online-guides, and training sessions to ensure staff can effectively support customer queries via calls, web mails, or in-person.

Activity from 31 July is outlined in the following table. Current and completed activity can be found in the second table further below.

When – Delivered/In market	What – Channel/tactic	Who - Audience	Why – Purpose
31 July	Webpages will be updated with the relevant changes	Personal Income Tax Threshold campaign landing page and include changes to IETC, MFTC, IWTC and PPL	Webpages will change from ‘changes coming’ to ‘current state’.
31 July	E-subscription article	~35,000 customers who are subscribed to the digital newsletter(s) from IR. Mostly tax agents and businesses.	Notify these customers that the Budget 24 PIT changes are live. Links to the website.
1 August	Secondary tax video. This video can be found on our website, via search and will also be pushed out to relevant customers on social media.	Individuals with secondary income	Update the secondary tax explainer video to include new thresholds.
Ongoing until end of August.	Search advertising	Tailored search ads for PIT, MFTC, IWTC, PPL, IETC, TTC, Secondary Tax, Employers	To ensure Individuals and employers are aware of the changes and are directed to relevant information for their needs for the current tax year.
Ongoing until end of August	Targeted social media will continue until the end of August (LinkedIn and Facebook)	Using custom audience lists to: <ul style="list-style-type: none"> • IWTC audience • MFTC audience • IETC audience • PPL audience • Secondary tax audience 	Tailored updates about the changes and links them to find out more on the dedicated website www.ird.govt.nz/income-tax-changes
March – April 2025	External Website – end of the tax year	Income earners & employers	What happens at the end of the tax year with the new thresholds. How is my tax calculated. For employers: introducing corresponding ESCT, PIE, FBT, DWT items that go live 1 April 2025.
March – April 2025	Search advertising	Income earners & employers	As above.

March – April 2025	Social media	Custom audiences & targeting for Income earners & employers	As above.
March – April 2025	Direct marketing (email/letter)	Employers	Introducing corresponding ESCT, PIE, FBT, DWT items that go live 1 April 2025 and what they need to do.
March – April 2025	Digital advertising and explainer video (TBC)	Income earners	What happens at the end of the tax year with the new thresholds. How is my tax calculated.
March & April	E-subscription articles	~35,000 customers who are subscribed to the digital newsletter(s) from IR Mostly tax agents and businesses	Introducing corresponding ESCT, PIE, FBT, DWT items that go live 1 April 2025 and what they may need to do.

Currently in market and completed activity

When – Delivered/In market	What – Channel/tactic	Who – Audience	Why – Purpose
30 May	Website – Alert Banner and Update section of the Homepage to include a reference to the Budget announcement and link to the Beehive website	Customers	To ensure people landing on our website were aware of the Budget announcement and where to go for more information.
30 May	Tax agent subscription newsletter & news item update <i>manually delayed to ensure it can be released after the announcement</i>	Tax agents	To ensure tax agents know about the Budget announcement.
30 May	Social media generic post directing customers to the Beehive website All social channels	Customers	General awareness about the proposed changes pointing customers to the Beehive page.
31 May	Email to payroll software providers	Payroll Software providers	To ensure they're aware of the changes required.
4 June after enactment	New sections on the website and update to alerts & Update page Includes:	Tax agents, all individuals, Families	To provide information about all the changes enacted and to link people to relevant content www.ird.govt.nz/income-tax-changes

	<ul style="list-style-type: none"> New FamilyBoost section Personal Income Tax Threshold campaign landing page and include changes to IETC, MFTC, IWTC and PPL 	<p>ECE providers</p> <p>Other interested stakeholders</p> <p>Employers</p>	
4 June	Social media post about the budget announcement	Anyone who follows our Facebook and LinkedIn channels	To ensure we're letting customers know about changes that will impact them.
4 June	Front of House slides in our branches These will get updated at each relevant stage i.e. 31 July	Anyone using our front of house services	To provide key messaging on the changes to people who use our front of house services. This will include clear URL's on where they need to go for more information.
4 June	Call/webinar with Payroll Software providers	Payroll Software providers	To hear more about the changes they're required to make for PIT and to answer any question they may have.
5 June	Website – Homepage promotional tile	Individuals and employers	To direct people who have come organically to our website to the dedicated landing page: www.ird.govt.nz/income-tax-changes
20 June	Tax agent cohort and key stakeholder group meeting(s)	Tax agents	What's been announced, what they need to know and where to go for more information.
21 June	Search advertising	Tailored search ads for PIT, MFTC, IWTC, PPL, IETC, TTC, Secondary Tax, Employers	To ensure Individuals and employers are aware of the changes and are directed to relevant information for their needs for the current tax year.
24 June	Updates to payroll service providers	Payroll service providers	IR340/341 PAYE tax tables and IR330 Tax code declaration issued to payroll solution providers to support their testing needs.
1 July	Native social media post	All income earners Personal Income Tax	Personal Income Tax thresholds are changing from 31 July. What you do or don't need to do.
1 July	Targeted social media (LinkedIn and Facebook)	Using customers audience to: IWTC audience MFTC audience IETC audience PPL audience Secondary	Tailored updates about the changes and links them to find out more on the dedicated landing page: www.ird.govt.nz/personal-income-tax-threshold-changes

9 July	Direct marketing (email or letter) to tailored tax code customers	Tailored tax code customers	Explaining that we've recalculated their TTC and they'll receive a new certificate and their employer will be informed – directs customers to the landing page.
9 July	Direct marketing (email or letter) to employers	Employers	Confirming what to do if you have a software provider or not and touches on the April consequential changes as well as FBT changes – directs customers to the landing page.
17 July	Bus.govt.nz newsletter	Employers	Providing key messages to employers through MBIE's newsletter channel.
22 July	Website updates – new PAYE tables added to the webpage	Employers who don't use payroll software	Ensures they have the tables available before the 31 July date.
22 July	Social media post (Facebook and LinkedIn)	Employers	Reminder about the changes coming from 31 July and provides a link to the new PAYE tables plus the campaign landing page: ird.govt.nz/income-tax-changes
22 July	Website links and PDF documents updated	Customers who need to use relevant forms	IR330, IR340, IR341, IR356, IR320 and IR271 published with PIT updates and their supporting content pages.

Pip Knight

Service Leader Marketing and Communication

s 9(2)(a)