

Meat Board of Namibia

External Stakeholder Perception Survey

Survey Report

August 2017

Submitted by



PO Box 86321 Eros
1 Jan Jonker Street, Windhoek
Tel: 061-254 810, Fax: 061-252 715
karen@bia.com.na



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1. INTRODUCTION AND BACKGROUND

The Meat Board of Namibia (MBN), founded in 1935, facilitates the export of livestock, meat and processed meat products to importing countries. All major stakeholders of the Namibian meat industry are represented on the Board. It is adequately equipped to assist the meat and livestock trade with relevant information and technical and administrative support.

For the third time, the Meat Board expressed the need to embark on a stakeholder perception and corporate reputation study as they want to understand the perceptions and opinions of its board members, producers and other industry stakeholders and what affect the more recent activities and implementations had on the corporate reputation of the Board.

The study also included a customer satisfaction component to assess what the stakeholders thought of the service they are receiving from the Meat Board.

The MBN has realised that the level of satisfaction of its stakeholders will greatly contribute towards achieving its goals and measuring the effectiveness of its recent programmes.

2. EXECUTIVE SUMMARY: SUMMARISED KEY FINDINGS

This report contains the findings of MBN's external stakeholder perception survey and describes the survey methodology, presents its results and recommends actions identified by survey respondents.

Definition and objectives

A stakeholder perception and corporate reputation survey is a questionnaire-based quantitative tool, most often used by organisations to increase their understanding of the knowledge, attitudes, perceptions, interests and experiences of their stakeholders.

Findings are used to make improvements in the delivery of programmes and/or services. Stakeholder surveys can be very helpful in generating critical information required for performance management and for creating and sustaining organisational change.

Corporate reputation can be defined as a long-term combination of various outsiders' assessments about what the organisation is, how well it meets its commitments and conforms to stakeholders' expectations, and how effectively its overall performance fits with its socio political environment.

The survey was commissioned to meet the following objectives:

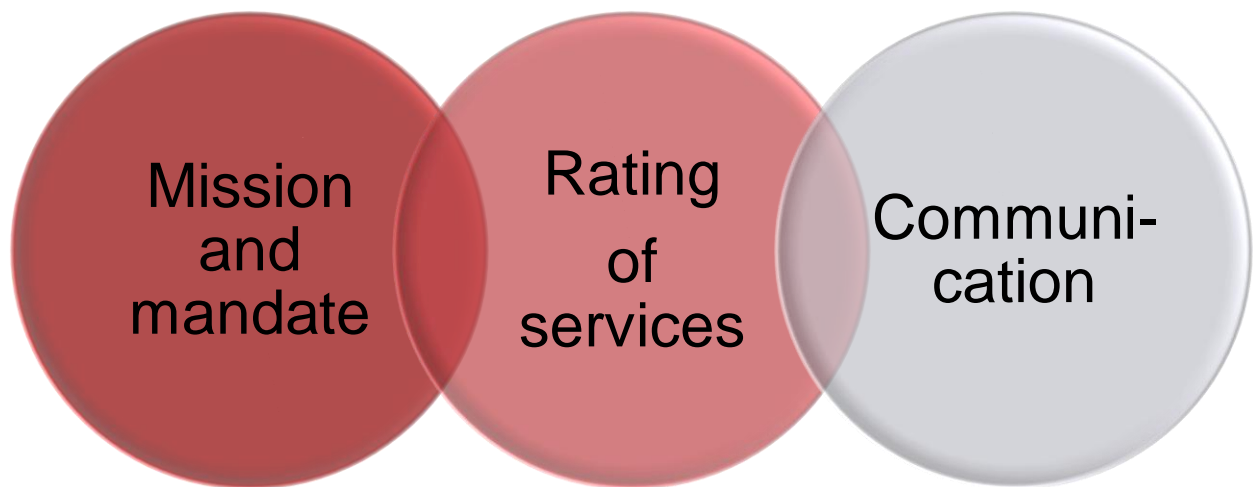
To **measure, clarify** and **identify** the awareness of the functions of MBN, the level of satisfaction of the various stakeholders with the activities and programmes of MBN and to establish reasons for any areas which can contribute to a lower level of satisfaction about MBN.

The study has placed emphasis on major components as follows:

- ◆ To determine level of awareness of MBN's role and functions amongst stakeholders;
- ◆ To gauge the level of understanding by various stakeholder groups about the operations of MBN;
- ◆ To assess general corporate reputation of MBN amongst its stakeholders;
- ◆ To determine the perception on MBN's ability to meet its mandate;
- ◆ To assess stakeholders' level of satisfaction with MBN;
- ◆ To assess management of MBN and to determine whether they have a clear vision of the future;

- To determine expectations of stakeholders of what MBN should focus on;
- To attain a better understanding of the perceptions MBN is fostering amongst stakeholders;
- To obtain comments from stakeholders on areas where possible improvement is needed.

In order to cover the above aspects, the results are split into the following categories:



➤ **Result analysis**

Most questions were posed as rating scales from 1 to 5 or 1 to 10. Results are presented either as percentage ratings in frequency tables or as mean index scores.

Scores have the advantage of being weighted where “very good” responses weigh more heavily than “good” or “average” and “very poor” responses weigh the least.

Another advantage is that it makes comparison easier. A disadvantage of scores however is that it does not indicate how many respondents have given a rating of extremes i.e “very good” or “very poor”.

On a rating scale of 1 to 5 points the midpoint is 3 (60%) – this means that any replies below a score of 3 (60%) need attention and should be focused on.

On a 10-point scale (which is not as perfectly balanced because there is no true midpoint) scores lower than 6 (60%) are on the negative side and need attention and scores exceeding 6

(60%) are on the positive side. In such a case it would be useful to look at outliers; for example if one issue scored far lower or higher than the average.

Various replies have been given as verbatim in order to ensure that the full meaning and context of the answers is fully captured.

For some of the results, the respondents have been split into 2 categories as follows:

1. Stakeholder type:

	No. of interviews
Commercial Farmer	131
Communal Farmer	53
Stakeholders	18
Government / Ministries	6

2. Main type of farming:

	No. of interviews
Cattle	135
Sheep	33
Not farming/not answered	20
Others: Game/guests/hunting or a combination	12
Goat	6
Crop	2

Summarised Findings

The most important findings are summarised below; more detailed replies can be seen in the detailed section of this report.

- The most profound finding throughout the survey is the fact that especially commercial producers tend to be fairly negative about the meat industry as a whole – new markets and a higher demand are needed, prices are too low to cover the operational costs etc. Farmers/producers are frustrated mainly about stagnating prices of their meat, limited markets for their livestock and the sheep marketing scheme.
- Secondly, it was found that there is a continuous need for information sharing by the Meat Board. The Meat Board should be more visible and producers are looking for more engagement and support from the Board's management and employees. Generally, producers would want more support from the Meat Board. Communal producers often

mentioned that they need some kind of mentoring and assistance. Maintaining animal health is a critical area where communal farmers seem to be lacking knowledge.

- Some respondents interviewed are of the opinion that the interaction with government might hinder MBN to achieve its mission. The Board's vision and mission differ from the government's; even the approach and strategies to enhance the industry differs.
- In terms of the belief whether MBN is achieving its mission, an overall average score of 5.7 out of 10.0 is better than in the previous survey (5.4), however it reveals that in general stakeholders have some doubts on whether MBN is currently achieving its mission. Commercial farmers/producers seem to be most critical with a score of 5.1 and ratings from communal farmers resulted in a score of 7.0. The sheep farmers are least convinced that MBN will achieve its mission with a score of 4.2 out of a maximum of 10.0.
- Stakeholders rated the following functions within MBN's résumé the lowest:

"To contribute to an increase in sheep and cattle production" with an overall average score of 2.8, followed by "To identify opportunities for value addition/ business opportunities in the meat industry" with a score of 2.9.
- In terms of the level of satisfaction with the overall service delivery, an overall mean score of 6.1 out of a maximum of 10.0 has been received compared to 5.9 in the 2015 survey and 6.2 in the 2013 survey. General stakeholders appear to be most satisfied with the service from MBN whereas commercial farmers interviewed are most critical. As a main concern, it was mentioned that the Meat Board is seemingly serving the producers too little but rather focuses on processors and government.
- 28% of the respondents are very satisfied with the overall service that they receive from MBN and gave a rating of 8, 9 and 10.
- In terms of the ease to engage or do business with the Meat Board, it appears that respondents are averagely satisfied which results in a score of 3.5 out of 5. General stakeholders find it the easiest to engage with the MBN followed by communal farmers, compared to Government and ministries who seem to find it rather difficult to engage, followed by commercial farmers.
- Generally, respondents find the staff of MBN friendly, respectful, helpful and willing to assist. An area to focus on is that commercial producers gave a slightly lower rating for the staff giving professional information & advice (3.6).

- Respondents seem to value “the service associated with selling of ear tags and stock brands on a cost-recovery basis” which resulted in a score of 3.9 out of 10.0.
- Mentoring of communal & upcoming commercial farmers resulted in an overall average score of 3.0 which is indicative that the need is currently not being met satisfactorily.
- 55% (59% in the 2015 survey) of the respondents feel that FAN Meat (Farm Assured Namibian meat) sufficiently and efficiently demonstrates the advantages of buying Namibian.
- 11% (18% in the 2015 survey) of the respondents never feel sufficiently informed by the MBN about the meat industry and future trends etc., 60% sometimes and 27% agreed that they always feel sufficiently informed.
- 12% (16% in the 2015 survey) of the respondents indicated that they are never satisfied with the level of interaction and commitment of the management team of MBN, 51% sometimes and 21% agreed that they are always satisfied.
- 59% of the respondents prefer to have information from MBN communicated to them via email followed by 27% who prefer to be informed via radio and 25% who prefer the Meat Board newsletter and an equal percentage who want to have information via the presence of MBN on farmers’ days. Social Media does not seem to be very popular amongst most stakeholders interviewed with only 7% (4% in the 2015 survey) choosing it as their preferred medium.
- 49% of all respondents are convinced that they would have direct access to the senior management of MBN if required, 18% are of the opposite opinion and 33% were not able to provide a reply.
- In general, respondents seem to feel more informed compared to previous surveys and the marketing activities done by MBN have been rated between 3.3 and 3.8 out of 5.0.
- The weekly prices (via email) seem to be appreciated mostly whereas stakeholders interviewed value the interaction on Facebook the least.

3. COMPARATIVE TRENDS WITH 2015 SURVEY

In 2013 and 2015 BIA conducted a similar survey for the Meat Board and although some areas questioned differ from the previous survey, some of the major trends from the two surveys can be summarised below as follows:

- ◆ More emphasis should be placed on local development and exploring new markets for livestock and meat. A free market system is the most appropriate vehicle to lead the meat industry to optimisation.
- ◆ Generally, the functions of MBN were rated fairly positive by those respondents who are familiar with them.
- ◆ Government intervention into the mandate of MBN, taking the focus out of their mission is seen as a threat.
- ◆ A further threat in the meat industry is seen by the fact that prices are too controlled, too low and do not cover the increasing costs of running a farming operation. The meat industry needs to be consolidated. Producers expressed a need to review the marketing system in order to increase the demand of meat and meat products.
- ◆ Stakeholders believing in MBN's ability to achieve its mission resulted in a total score of 5.7 revealing some doubts in whether MBN is currently achieving its mission. The score in the survey conducted in 2015 for the same question was 5.4 out of a maximum of 10.0.
- ◆ In the 2015 survey, a score of 5.9 out of 10.0 was achieved for the rating on the level of satisfaction with the overall service delivery of MBN compared to 6.1 in the current survey.
- ◆ Throughout the survey, it can be interpreted that some communication interventions have taken place since the previous survey as a substantially higher number of stakeholders were able to provide answers or ratings to various questions compared to the previous surveys. However on some issues, there still seems to be a lack of clarity to what the mandate and functions of the Meat Board is and therefore it is possible that the Meat Board is blamed on issues which do not fall within their mandate.
- ◆ Due to the above, it is still important that continuous interaction and engagement is required and the Meat Board still becomes more visible to producers. Increased information sharing would instil trust in MBN.

4. METHODOLOGY

During the first phase preparatory discussions were held with MBN. The questionnaire was designed to suit the different stakeholder groups.

In the questionnaire a mix of quantitative and qualitative approach was used to ensure that the reasons behind the closed-ended questions (quantitative) were fully explored. The qualitative approach was especially appropriate in cases where more in-depth exploration of “*why*” questions was required. It set the context for more elaboration and description of answers from the respondents on quantitative answers given.

Special care was taken to firstly include all necessary and vital information and secondly to keep the questionnaire as short as possible as our experience shows that unnecessary lengthy interviews have a negative impact on the results as well as future surveys. Since a similar survey was conducted in 2013 and 2015 already, it was attempted to keep some questions unchanged while some questions/sections were adapted to the current situation of the industry.

The draft questionnaire was submitted to MBN for their input, changes were made and the final questionnaire was approved by MBN.

The questionnaire was set up via a web-based tool and a link was emailed to all prospective respondents, who could complete the questionnaire and email it back to us. This electronic methodology has the advantage that many farmers are out during the day and can then complete the questionnaire at a time most suitable to them.

However, especially the communal farmers do not all have access to the internet and are better reachable via telephone. Therefore, interviews with them were mostly conducted telephonically.

The final sample size was as follows:

	Sample Quota	Completed interviews
Commercial Farmer	100	131
Communal Farmer	60	53
Stakeholders	38	18
Government / Ministries		6
Total	198	208

Stakeholders interviewed consisted of important industry players from the following categories:

- ♦ Abattoirs, Producer/agricultural unions, Meat processors and Producer support industries.

After detailed quality checks were performed on all questionnaires, the data was captured electronically and analyzed by a marketing specialist.

5. DETAILED FINDINGS

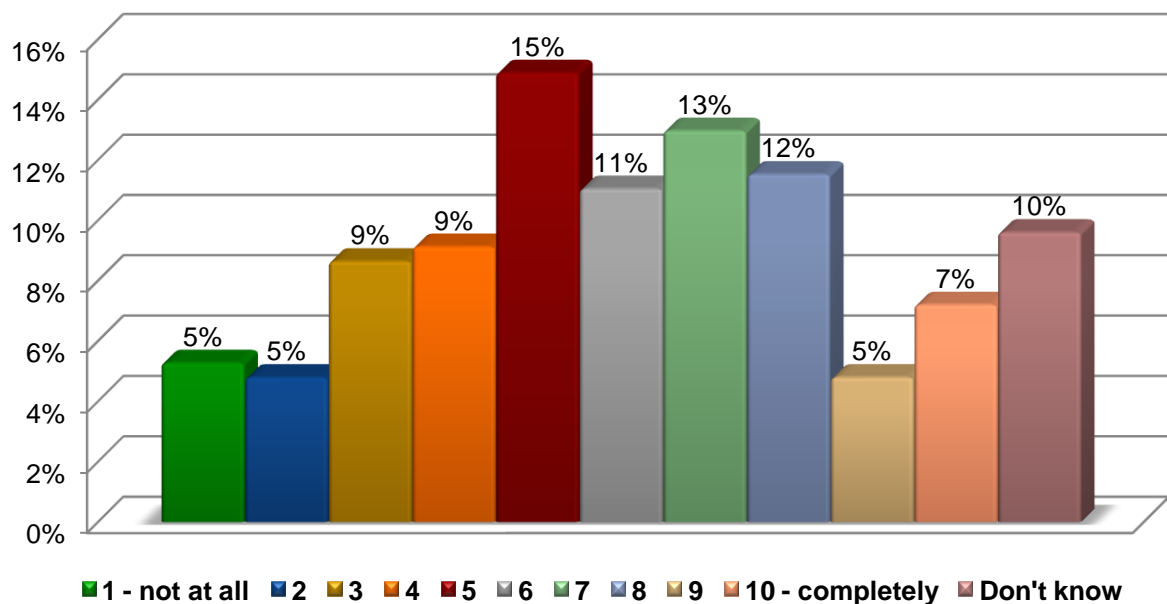
5.1 Mission and Mandate

The findings will be reported separately for each stakeholder category. Some questions were the same on all questionnaires irrelevant of stakeholder grouping and some questions were applicable for certain stakeholder groups only, and are reported as such.

Mission of the Meat Board

The mission statement of the Meat Board is: ***to promote a conducive environment for sustainable livestock production, market growth and diversification for livestock, meat and meat products; and to maintain standards and quality assurance by way of appropriate regulatory intervention.***

- ♦ To what extent is the Meat Board achieving its mission?

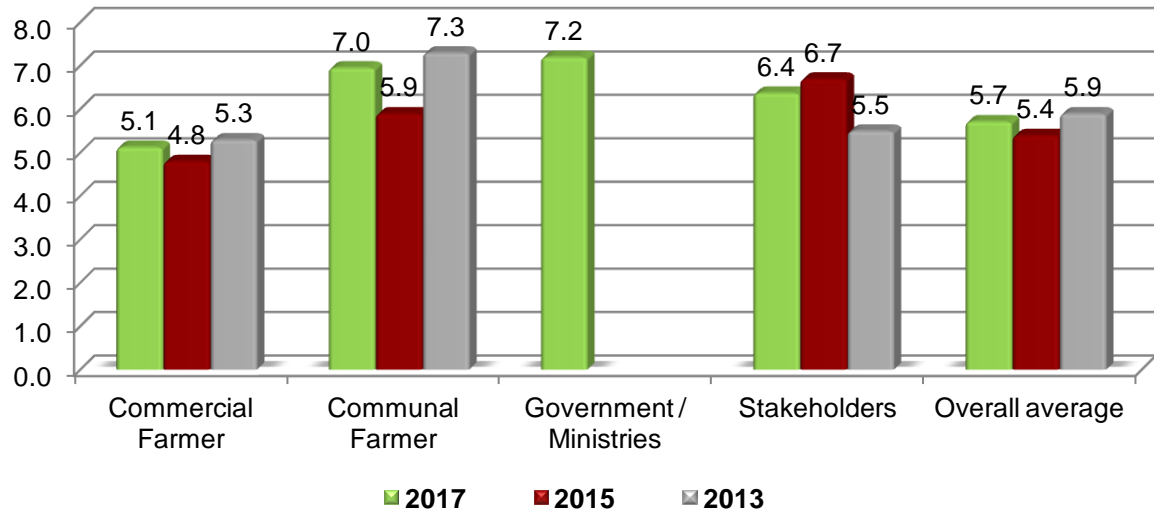


24% (rating 8, 9 and 10) of the respondents indicated their strong belief that MBN is achieving their mission, and 19% (rating from 1 to 3) indicated that they are very doubtful. The remaining 48% of the respondents gave a rating between 4 and 7, indicating that their rating is averagely.

10% of respondents indicated that do not have sufficient knowledge about MBN to be able to rate it's ability to achieve its mission.

In the chart below the perception of each of the stakeholder groups interviewed in terms of MBN achieving its mission has been converted into weighted mean scores as follows:

MBN achieving its mission



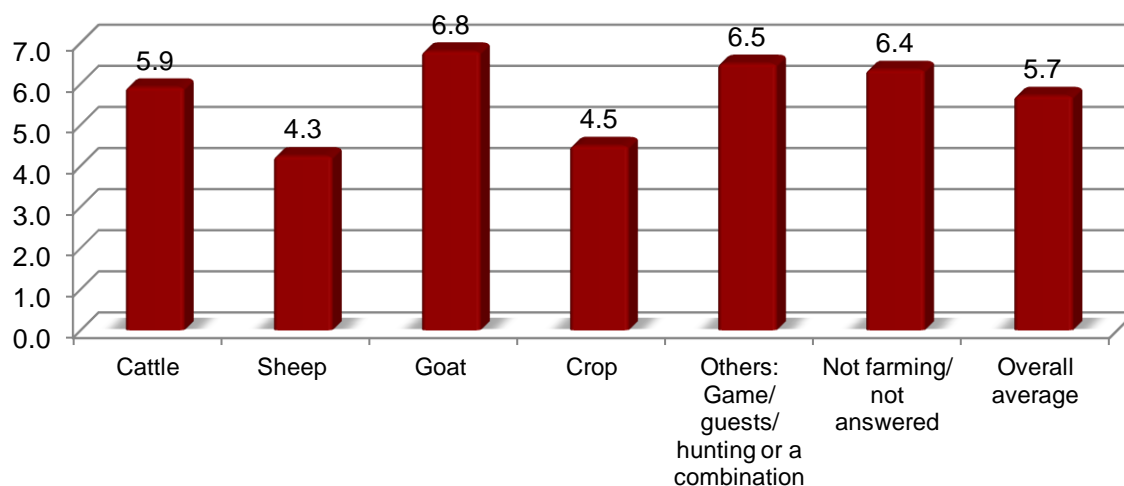
The overall average score of 5.7 is better than in the previous survey (5.4), however it reveals that in general stakeholders still have some doubts in whether MBN is currently achieving its mission.

Commercial farmers/producers seem to be most critical with a score a 5.1. This is also reflected in the comments provided in the next section.

Ratings from communal producers interviewed have resulted in a score of 7.0, depicting stronger confidence that MBN is achieving its mission than the commercial producers and industry stakeholders.

Segmenting the results into the stakeholder groups interviewed according to their type of farming activities shows results as follows:

MBN achieving its mission



The goat farmers (n=6) interviewed are most convinced that MBN will achieve its mission compared to the sheep farmers who seem to be most doubtful, resulting in a low score of 4.3.

Cattle farmers who contribute most strongly to the results with a sample of 135, have provided a fairly average rating - 5.9 out of 10.0.

Challenges

In some of the comments it is obvious that respondents confuse Meatco and the Meat Board and that the comments they make relate to Meatco. However it shows that respondents do not always know what the exact functions of the Meat Board entail, which supports the fact that enhancing information sharing is needed.

Furthermore, it needs to be mentioned that the comments are given as provided by the respondents (verbatim) and therefore some repetitions are possible.

The biggest challenges, the Meat Board is facing in achieving its mission were named by the survey respondents as follows:

Commercial Farmers	
Government influence / interference/ parastatal connection.	6
New markets	2
The trust of the producer; new markets; negativity towards the board.	1
Poor support from government.	1
To look at the interest of the producer.	1
1. GRN interference. 2. Decline in commercial livestock production.	1
Stabilize the market in regard to marketing and pricing	1
1. Small stock marketing scheme is a catastrophe.	1

2. Even with FAN meat and beef export etc. Nam beef prices are far below international prices because GRN takes too big a slice of exported beef income. MBN is of no support to negotiate with GRN to rectify this.	
To create a stable environment for beef producers to farm profitably. We pay levies but do not see any benefit coming through to the commercial farmer. The government must take its hand off the Meat Board.	1
a) Monopolistic demand side (abattoirs); b) Too much red tape and regulations; c) Insufficient policing of industry (only some stock apply to the rules, others not).	1
To stop the veterinary department from making totally unnecessary regulations, just for the sake of regulating! Namibia is a hopeless over-regulated Country!	1
Balancing stakeholder's interests. Commercial farmers want to export and abattoirs want to maintain their interest in terms of quota.	1
Provide more production and market information background to the producer to enable the producer to produce more efficient.	1
Bush encroachment and the slow rate at which new international markets becomes available to producers.	1
The Meat Board is more interested in pleasing the government than keeping the producers' interest at heart.	1
Clear sheep slaughtering scheme, electronic sheep ear tags for easier counting and 100% surety.	1
They must hold some road shows to listen to the farmers needs.	1
Conducting services in commercial areas, no office in regions.	1
To get all stakeholders under one umbrella in order to achieve mentioned goals.	1
Consequences of droughts and political issues with South Africa being an export market.	1
To provide conducive markets for our livestock.	1
Creating new markets nationally and internationally for farmers to sell their produce. Extreme regulation limiting free cross-border trade is currently prohibiting effective marketing of produce.	1
Politics, bankruptcy, tribalism, racism, not taking responsibility, etc.	1
Producing quality products to export to other countries due to unavailability of funds.	1
Drought, time consumption and effort it takes to do the paper works (forms, applications, emails, etc.)	1
Service to the farmers (It's not on standard)	1
The low standards of meat processing in Katutura and communal areas.	1
Enough productive farmers.	1
The quality of products must be of higher quality. We as farmers loose too much on this expensive low quality ear tags.	1
Equator finance scheme should be available to all.	1
They don't care for the producers - it has to be changed.	1
Export	2
To assist the farmers with more export markets to market their products	1
Find alternative markets for our products.	1
To finalize International Markets for Namibian Meat. The SA boarder. To help a crippled government to finalize management in a good financial perspective for economic growth in Namibia. Expensive ear tags.	1
Finding an overseas market for more sheep with bone-in carcass. 95% is going to South Africa with no extra income for our farmers. With all the extra costs it is not viable.	1
To get small stock marketing right according to the gazette.	1
Funding and general lack of knowledge in government.	1
To negotiate better prices in relation to the high quality product delivered and guaranteed worldwide. The Meat Board has successfully branded Namibia as top class beef worldwide, and has played open cards in negotiating prices that reflect the quality of the	1

product. Producers currently deliver the quality, but the prices paid to producers as well as sold to international consumers do not reflect the same. A niche market should reflect a niche price.	
Get markets for all the abattoirs not only Meatco.	1
To secure a safe meat export market without political interference.	1
Getting new markets for meat exports.	1
Please send out communications in Afrikaans. MBN does not meet any of their goals / mission statement. The farmer is not their main priority.	1
Getting resettlement farmers to utilize the land and become productive.	1
Poor infrastructure and unmotivated field workers.	1
"To promote a conducive environment for sustainable livestock production, market growth and diversification for livestock, meat and meat products" - providing equal access to export markets for all producers! The differences (subsistent, communal & commercial) in livestock production between NCA & SCV seem too great to achieve an economical, sustainably growing meat industry.	1
Price fixing.	1
Government interference, not implementing decisions/resolutions by the industry, i.e. small stock marketing scheme.	1
Provide more competitive markets to market livestock.	1
Grading of livestock and regulating competitive local abattoir prices vs. South Africa abattoirs	1
I am worried that the Meat Board is not getting the full support from Government.	1
Should promote the export of meat	1
I see no need for the Meat Board, producers can find their own markets. The Meat Board did not help with the new regulations regarding the export for cattle, sheep and goats. They make it more difficult with the new ear tags for small stock.	1
Stable market environment.	1
In my view one of the biggest challenges is the correct documentation of "ear tag number". The information on the system isn't always correct.	1
The Meat Board is not independent and is not meat industry oriented. Too much Government intervention! The MBN is an extended arm of government to implement their policies. The MBN is not equipped in any way to achieve any of its noble objectives.	1
Internal market is too small, must focus more on outside markets.	1
The part that the Ministry takes in decision making is strangling its productivity and the speed at which it can happen.	1
International know-how; communication between government and farmers; marketing of communal meat as well as marketing of genetic improved and marbled bio meat; slaughter/farmer education.	1
The small stock scheme, e.g. allow farmers to slaughter one sheep in Namibia and in South Africa.	1
Investment and assistance from government.	1
There is no real alignment between the farmer's needs and what current policies do. Historic achievement in agriculture is being eroded by lack in clear strategy rather focusing on inclusion vs. ensuring the survival of economically viable farming.	1
It is the duty of the MBN to promote/assist healthy competition in the industry. Bureaucracy, of which the MBN is part, is making this a mere pipe dream.	1
They don't market our meat and if they try they are doing it in a very half hearted bad way. They work against the farmer and only use the money to enrich themselves.	1
Market growth and sustainability of beef production in Namibia.	1
To act independent from government and their opinion.	1
Market growth and to obtain lucrative markets.	1
Marketing problems in the near future. Export markets.	1

Markets for our cattle and sheep, open borders!	1
To fulfill its functions independently and not being an instrument of government to manipulate the sector. Not to be swallowed by AMTA.	1
MBN cannot take a decision and carry it through. They do not place enough pressure on the government to ensure exports and markets. We are the country in Africa with the most EU standards in place but it costs the producer just one more ear tag, etc. and no progress is being made.	1
To get international markets, that the farmer gets the most out of his product.	1
MBN fails to achieve it's mission due to the red line.	1
To keep the Namlits updated.	1
Meat Board is politically appointed and serving political interests, not the interests of livestock producers. There is more concern for protecting the meat processors, totally at the expense of the livestock producers. An example is the export levy on cattle over 450kg, while no obligation on meat processors to match a RSA price less costs of transport. Effectively livestock producers are forced to accept 25% less, this is not promoting sustainable livestock production. What is the Meat board doing to correct this with any level of urgency?	1
To match the interests of the secondary sector to the changeable and inconstant potential of the extensive production of sheep in most arid areas without the destruction of the primary producer sector.	1
More markets for export of mutton. Not creating a value added product within the country borders.	1
To promote a conducive environment for sustainable production more must be done for inland value addition and better comparable prizes to those of the RSA.	1
More user friendly and less levies. The prices obtained on international markets must be filtered through to the producers.	1
To provide reliable data to all stakeholders.	1
Namibia controlled by one market, Meatco. We need other exporters.	1
To sell our products and stop making regulations that harms the farmer/producer.	1
Top heavy Meatco.	1
1. Getting the communal areas to comply with branding, ear tags, vaccinations, record keeping etc. 2. Preventing borders to close again on calves 3. Sustainability of an industry and what is happening to a key role player in sustainability e.g. Meatco, is unacceptable. This petty African politics will cost an existing, thriving cattle industry (which contribute to the National-Development-Plan) dearly. This battle is out of the single commercial farmer and member of Meatco. The industry will have to get involved on a higher level. 4. Cattle feed and local feed production. It is a shame to see how the Namibian producer is fleeced (ripped-off) by retailers, and expect the producer to produce quality and quantity, cost-effective and competitive. Grass that should be between N\$1200 to N\$ 1800 / ton sells for as high as N\$3800 per ton in Namibia. (Extreme poor quality grass in most cases with no fertilizers (Urea/Phosphate) applied during growing season.) Yellow maize went well below N\$1900 per ton in South-Africa recently and in Namibia it is difficult to find Yellow Maize below N\$4600 per ton (N\$230 per bag) - this is daylight robbery.	1
Very limited producer involvement due to government policy.	1
Meatco has to serve the farmer and not the farmer Meatco! Meatco has to find a market for MY product! We do not want to be penalized because we are farming (stud!) with perfect Nguni cattle, JUST because the carcass is too "small". These cattle are perfect for our land and nature. Farmers are not involved in Meatco anymore and that is why it looks like chaos! I would like to know, how the international relations (for the market) look like, when the Board created chaos IN NAMIBA (see the last meeting and the others before).	1
Political appointments and government interference, lack of focus.	1

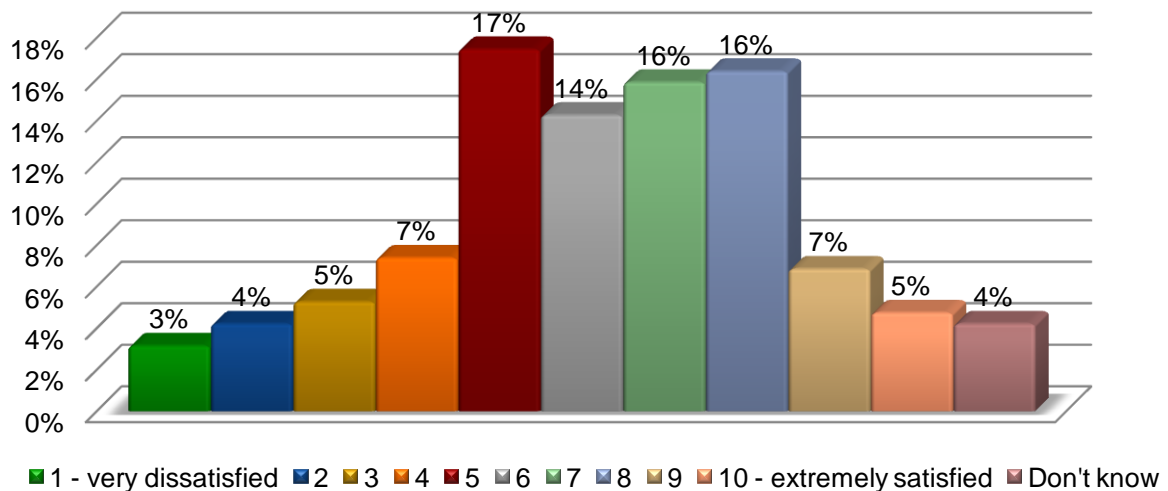
Communal Farmers	
Selling weaners to South Africa.	1
More people are needed to take part in farming businesses.	1
They fail to promote livestock equally in Namibia. Cattle farming in my view is getting most attention.	1
Assistance from the government in terms of funding for upgrades.	1
New markets	1
Communication on marketing.	1
Slow progress in terms of the plans they have initiated.	1
Distribution of ear tags.	1
Assistance from government.	1
Drought and disease.	1
Namlits system controls only cattle.	1
Elimination of unfair market practices during auctions especially for communal farmers marketing their livestock at Agra, Blauw Berg and Karoo Oche auctions. Discrimination includes: 1. Price discrimination 2. Evidence of collusion amongst buyers/speculators 3. Failure to unify and standardize the livestock sector under "The Common Industry Vision" 4. Free entry and free exit of livestock speculators 5. High concentration of livestock marketing activities at farm gate with minimal participation at the higher end of the value chain especially for communal farmers 5. Outdated, old policies of Meat Industry that should be aligned to Vision 2030/HPP & NDP4/5 6. Failure to investigate market practices through e.g. Competition Commission, and 7. Paucity of market information in communal areas	1
Prices	1
Fanmeat	1
Shortage of skilled farmers.	1
Farming is not considered as a business. If more people would get involved in farming activities - MBN would be a success.	1
The market in the northern Namibia is a monopoly.	1
Finding functional marketing for the Northern areas.	1
We don't understand the role of MBN.	1
Food and mouth disease. Education to farmers.	1
More information days in communal areas.	1
Most people do not want to invest in farming activities.	1
Government influence / interference	1
NCA does not export meat out of region.	1
Health of animals.	1
Political challenges - the Act is outdated. The Ministry of Agriculture involves politics and dictates which is not good.	1
Information needs to be shared in all regions; not well informed about the role of MBN.	1
Selling livestock outside Namibia.	1
Insensitivity in service provision.	1
Service delivery to the western part of Kunene-south.	1
Lack of decentralized offices, at regional or grass root level to maintain regular contact with producers and have constant engagement. Secondly Meat Board is not fully promoted or does much in respect of the domestic market and surely nothing on small stock	1

marketing, especially goat farming.	
Should meet all the farmers in the regions to hear their views and concerns.	1
Lack of marketing and selling points.	1
Source of funds	1
Lack of marketing facilities.	1
They do not meet our expectations. They do not send veterinarians on time.	1
Marketing and drought.	1
To address local strategies in marketing because currently MBN does not increase in grassroots domestic markets.	1
Marketing problem.	1
MBN neglected our area - no development / marketing for the past 4 years.	1
Meatco is not coming to Mukwe, the abattoir in Rundu is not yet finished and we are facing drought.	1
Government / Ministries	
Limited market growth and diversification for livestock and meat products.	1
Stakeholder relations/division; Government intervention.	1
MBN should expand to all areas.	1
Division in the industry.	1
Catering for the demand in tick-season from extension officers.	1
Ear tags should be distributed on time.	1
Stakeholders	
(i) How to effectively cater for communal farmers with limited market opportunities and (ii) The fact that EU standards are applied to all commercial farmers (SVCF) while some might not be interested to supply the EU market but rather alternative markets where strict EU rules might not apply. It does not mean that the quality of their livestock is sub-standard but their efforts could be directed in other strategic focus areas	1
Political agendas.	1
Operations taken over by AMTA.	1
To promote and ensure that livestock production is increased and that animals are slaughtered in Namibia and not exported on the hoof.	1
Conflict of interest of people in decision making positions.	1
Meat Board is supposed to act in the interest of all stakeholders, but due to the fact that it is a regulatory body under government, it cannot adjust easily to changing circumstances and give support to a part of the sector.	1
Creating market opportunities.	1
Policy environment in the agriculture (livestock and beef) sector is highly volatile and unstable thus affecting the mandate of the MBN. Lately there is a drive to take statutory functions away to other institutions.	1
Drought and time consumption/effort it takes to do the paper work (forms, applications, emails, etc.).	1
Putting policies and legislation in place e.g. where is the animal welfare policy? Prices for Namli's ear tags are way too expensive to producers. What happened to courses and training that were catered for farmers?	1
Expensive feed	1
Expertise	1
Government agencies (MAWF) have different, non-factual ideas for the NCA versus the rest of Namibia.	1

Satisfaction with overall service delivery

How satisfied are the respondents with the overall service that they receive from the Meat Board?

Rating of the overall service received from the Meat Board

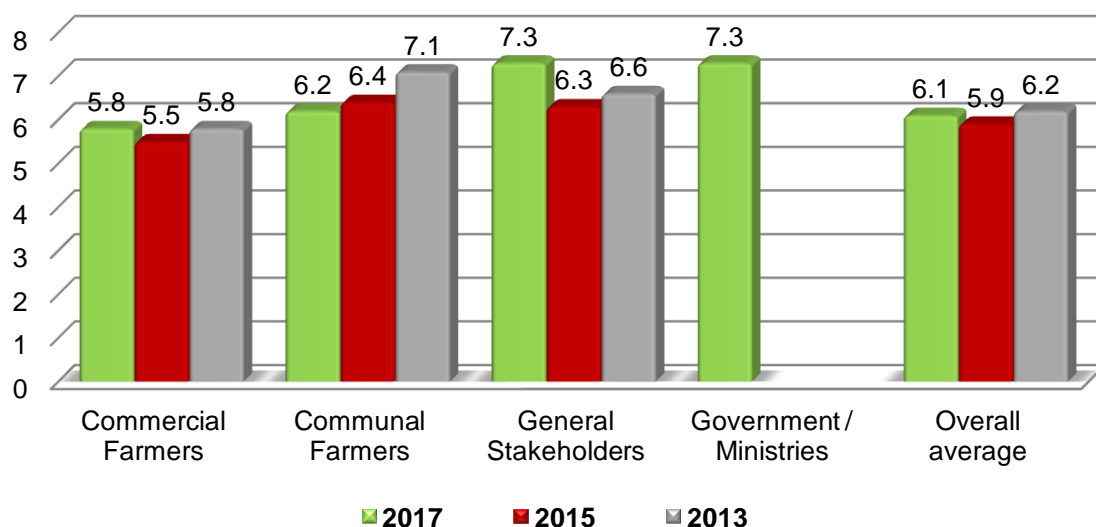


28% (rating 8, 9 and 10) of the respondents are very satisfied with the services they receive from the Meat Board, whereas 45% (rating from 1 to 5) indicated some dissatisfaction with the service from MBN. These respondents could damage the brand through negative word-of-mouth.

27% of the respondents have given ratings of 6 and 7 meaning that they are either averagely satisfied with the service that they receive from the Meat Board or chose a midpoint rating because they do not have definite opinion.

In the graph below the rate of satisfaction has been converted into weighted mean scores for each of the stakeholder groups interviewed and is compared to the scores received in the 2013 and 2015 survey.

Rating of the overall service received from MBN



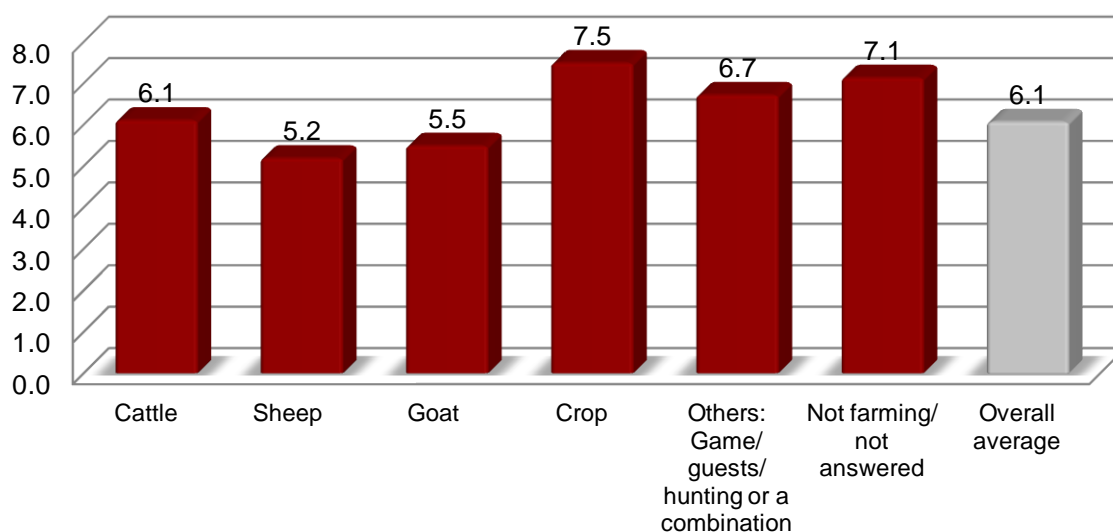
The graph shows that an overall mean score of 6.1 out of a maximum of 10.0 has been achieved compared to 5.9 in the 2015 survey and 6.2 in the 2013 survey.

General stakeholders appear to be most satisfied with the service from MBN whereas commercial farmers interviewed are most critical. This result is concerning as commercial farmers are the major producers in terms of numbers and contribution to agricultural income.

Stakeholders are non-farming respondents and are probably not as dependent on the Meat Board compared to farming respondents.

In the graph below the rating of the overall service has been converted into weighted mean scores for the stakeholders interviewed and split into their farming activity as follows:

Rating of the overall service received from MBN



Crop farming respondents have given the highest rating (however the sample is very small, n=2), apart from that non-farming respondents appear to be most satisfied compared to the sheep farmers being least positive about the service delivery of the Meat Board.

The rating of the sheep farmers most probably holds relation with the fact that they feel they are not sufficiently supported and negatively affected by the small stock marketing scheme.

The respondent who have given a negative rating, substantiate it with the following comments:

Commercial Farmers	
MBN is not able to convince the Minister of Agriculture to address the small stock marketing scheme and also not able to convince the GRN to take a smaller slice of the valuta gained from beef exports. The producer must get more out of it. RSA exports our own beef to the EU via Cape Town and earns much more money than we do. Several beef producers are already giving up or they change to another income like trophy hunting, charcoal etc. Meatco Okahandja is closed already.	1
Classification system of meat.	1
Dissatisfied because the Meat Board does not deliver any service to me as a Beef producer! If the MBN was non-existent, I would not notice it, except for its services to Gov. on a cost recovery basis, e.g. ear tags.	1
Do not see the need for the board, because we do not see results.	1
Farmers pay lots of money to put in European ear tags, to fill in departure arrivals and to drop off information on time at veterinary services, but Fan Meat does not show correct updated numbers - even with a lot of extra input from ourselves. With this system, farmers are meant to send their meat in export to overseas to receive better money, but because of Meatco/government troubles this system is of no use and ear tags are much too expensive for our "controlled" system, and cattle ending up at a normal slaughter house/feedlot.	1
Finding an overseas market for more sheep with bone-in carcass. 95% is going to South Africa with no extra income for our farmers. With all the extra costs it is not viable.	1
I cannot see and do not know what Meat Board does except create rules and regulations.	1
In an environment where traceability is a critical component, the Meat Board keeps on getting my registration details and brands wrong (for many years now). They actually change from time to time, although no changes were entered by the producer.	1

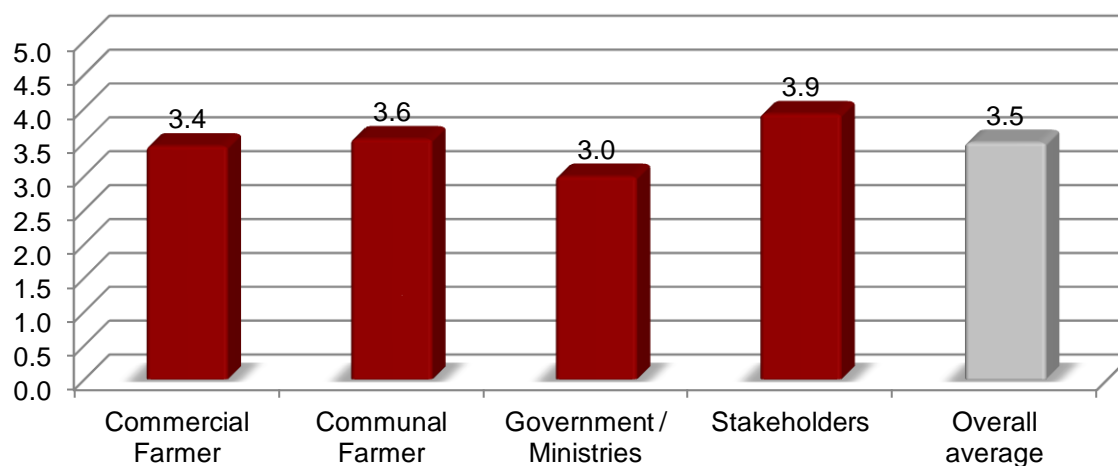
Also, the Namlits system still contains a few flaws: most importantly during processing of tag records between producers, DVS and Namlits.	
MBN not reachable in our region so the service is not sufficient and affective.	1
More development in the Southern Part of the land - main development happens in the Northern and Central Areas.	1
Namlits office people are not helpful at all. I have reasons to believe that the annual form to register as a producer is only a formality and serves no purpose. I am extremely unhappy about the fact that the LPO/ NAU will not be funded via Meat Board levy anymore whilst they make very valuable contributions to the whole agricultural sector in the country .	1
New things are being implemented when the old things are still working. E.g. ear tags that are being captured wrong and then not appearing on the statement.	1
No markets outside Namibia except for South Africa (sheep).	1
No service at all - they don't care for us.	1
Please send communication in Afrikaans.	1
Producer's needs are not satisfactorily met. Extremely slow decision making. Again...government interference	1
Registration as a producer seems to be difficult and has to be repeated annually without automatic confirmation that you are registered.	1
Service is not on standard.	1
Small stock scheme is a disaster.	1
The ability for the Meat Board to act I see severely curtailed with no clear strategy regarding the next years in place. While local slaughter and possible export seems to suggest the biggest value to the country, a high percentage of raw material being exported live subjecting Namibian farmers to market speculation risk and killing local value add. Again lack a comprehensive plan for the Namibia meat industry for the next 5 year is the key to this. Known risks, such as the export vs. local value creation are simply not addressed, in essence decreasing local capabilities and putting the whole industry at risk in the long run.	1
The Board was established to serve primary producers and is still funded by the same. It was captured by the government and is now a SOE, serving the Minister and the secondary sector at the expense of the primary producers.	1
The MBN was originally founded by the meat producers of this country. Now the NLU, organized agriculture, the founder of the MBN, are refused to fund themselves in the form of levies. 13 years of my productive life has been wasted by the MBN as the small stock scheme in Namibia is deprived of market related prices. The GRN of the day instructed that the MBN should warrant that the Namibian producers should not be worse off than their SA counterparts. Just have a look at the current price differences. 4 professional audit surveys indicated without a doubt that the Namibian producer was definitely penalized. Nobody leaves a productive or a lucrative sector. Just have a good look at the decreasing small stock as well as cattle numbers in Namibia. Agriculture in Namibia provides a direct or indirect living for an estimated 70% of the population. Agriculture is the most neglected economic sector in Namibia and the MBN has to carry his proportion of the blame for this development.	1
The Meat Board serves the meat processors, they provide NO service to livestock producers.	1
The price difference between classes in Namibia and South Africa.	1
Unresponsive to producer's needs and re-active to market changes.	1
When doing payments, speed points are sometimes not in working condition.	1
You cannot complain about their service as there is none!!!	1
Communal Farmers	
Auctioneers are not empowered.	1
Finding alternative markets globally, other than the South African market, and creation of an all inclusive value chain for communal and commercial farmers. Failure to review meat classification to include fat tailed sheep and late maturing cattle breeds such the "Nguni".	1
It's not regular.	1

Little or no service from Meat Board for communal farmers.	1
Livestock marketing training so that farmers can know how to castrate, the age/when to take products to the market.	1
MBN not negotiating new markets.	1
No access to conducive marketing.	1
No marketing in our area.	1
Service is not acceptable for communal farmers, we do not feel recognized.	1
The input from MBN to balance the market and to put a standard price across the board so that the speculator does not rob us.	1
Their implementation strategy excludes communal farmers because they only focus on traditional export markets.	1
Their service does not meet the expectations of the farmers. The prices are too low.	1
Stakeholders	
Slow service	1

Ease of Engaging

How easy is it to do business or engage with the MBN? Respondents were asked to rate on a scale of 1 to 5, where 1 means extremely difficult and 5 means extremely easy.

Ease of engaging



In terms of the ease to engage or do business with the Meat Board, it appears that respondents are averagely satisfied which results in a score of 3.5 out of 5.0.

Stakeholders find it the easiest to engage with the MBN followed by communal farmers, compared to Government and ministries who seem to find it rather difficult to engage, followed by commercial farmers.

5.2 Rating of Services

Rating of Functions of the Meat Board in Namibia

In this section respondents were given a list of **functions that fall within the mandate of the Meat Board** and were asked to rate how well the Meat Board fulfills it. The results are shown as scores out of a possible of 5.0 points and are provided split of the various stakeholder groups:

	% don't know	Commercial Farmers	Communal Farmers	Government/ Ministries	Stakeholders	Total
To address developments in livestock and meat market access in NCA.	28%	3.1	3.2	2.0	3.4	3.1
To assist Government in trade negotiations.	19%	3.3	3.6	3.5	4.0	3.4
To disseminate strategic market information both nationally and internationally.	10%	3.2	3.5	3.2	3.5	3.3
To assist in the creation and promotion of a strong quality brand in the export markets.	8%	3.1	3.5	3.7	4.1	3.3
To facilitate the development of the new markets.	12%	2.8	3.4	3.8	3.8	3.1
To identify opportunities for value addition/ business opportunities in the meat industry.	12%	2.7	3.2	3.0	3.4	2.9
To regulate cattle, sheep, goat, pork and poultry sectors to achieve economic growth.	9%	3.0	3.4	3.3	3.8	3.2
To continue with import and export control to protect the meat industry.	8%	3.5	3.7	3.5	4.0	3.6
To perform classification services - classification of cattle & sheep at export abattoirs	10%	3.5	3.6	4.5	4.5	3.7
To administer projects on behalf of the industry on a cost recovery basis.	24%	3.2	3.5	4.2	4.1	3.4
To assist the Directorate Veterinary Services in maintaining Namibia animal disease status.	6%	3.6	3.8	3.8	4.1	3.7
To contribute to an increase in sheep and cattle production.	10%	2.5	3.5	3.5	3.1	2.8
To improve the quality of meat through the promotion of standards (FAN Meat &	6%	3.5	3.6	4.0	4.0	3.6

Classification) to consumers.						
To promote locally produced meat e.g. Seal of Quality in Namibia	8%	3.1	3.4	3.8	3.6	3.2

The table is intended to guide the management and board of MBN towards better service delivery, through knowing at a glance which stakeholder group requires more attention and in which aspects. The highest and lowest scoring functions are highlighted for each stakeholder group.

Commercial farmers have given the most unfavorable rating on most of the questions resulting in lower scores than their communal counterparts, and industry stakeholders.

The services which were rated the lowest overall are “to contribute to an increase in sheep and cattle production” and “to identify opportunities for value addition/business opportunities in the meat industry”. The services which were rated the best indicated that respondents are most satisfied with these services are “To perform classification services - classification of cattle & sheep at export abattoirs” and “to assist the Directorate Veterinary Services in maintaining Namibia animal disease status”.

As shown in the first column of the table, between 6% and 28% of the respondents did not have sufficient knowledge about MBN to be able to rate them. Apart from this, a fairly high percentage of respondents gave MBN an average rating – this might be because they find the services neither good nor bad, but might also indicate that respondents do not have a distinct opinion.

Services from staff of MBN

How do survey respondents rate the services **from the staff** of the Meat Board?

	% of don't know	Commercial Farmers	Communal Farmers	Government / Ministries	Stakeholders	Total
The staff of the MBN is easy to get hold of	7%	3.5	3.9	3.7	4.0	3.7
The staff of the MBN is willing to assist	7%	3.7	3.9	3.8	4.0	3.8
The staff of the MBN is professional & competent	7%	3.5	4.0	3.7	4.0	3.7
The staff of the MBN treats me friendly and respectfully	4%	3.8	4.1	4.2	4.0	3.9
The staff of the MBN resolves my queries satisfactorily	7%	3.6	3.9	3.8	3.8	3.7
The staff of the MBN is giving professional information & advice	9%	3.4	4.0	3.8	4.0	3.7

Results are presented as mean scores out of a maximum of 5.0. Most scores are fairly similar.

Staff treating its stakeholders friendly and respectfully has received the highest score (3.9).

It should also be mentioned that only less than 10% (in 2015 as many as 36%) of the respondents were not able to answer the questions due to lack of knowledge about MBN. This shows that MBN seems to have more contact or touch points with their stakeholders (farmers and/or industry stakeholders).

Additional services offered by the Meat Board

	Commercial Farmers	Communal Farmers	Government / Ministries	Stakeholders	Total
The Meat Board deploys transparent marketing schemes	2.9	3.3	3.4	3.9	3.1
Service associated with issuing of import/export permits	3.5	3.6	4.3	3.4	3.5
Service associated with registering at Meat Board	3.8	3.7	4.2	4.0	3.8
Service associated with selling of ear tags and stock brands on a cost-recovery basis.	4.0	3.8	4.2	4.1	3.9
Mentoring of communal & upcoming commercial farmers	2.8	3.2	3.8	3.7	3.0
Providing information and statistics (prices) to farmers	3.7	3.3	3.8	4.2	3.6
Facilitating access to export markets	2.9	3.4	3.2	3.7	3.1
The Meat Board is transparently managing its financial resources	3.2	3.4	3.4	4.0	3.3

Respondents seem to be most satisfied with the service associated with the selling of ear tags and stock brands which resulted in a score of 3.9.

The lowest score was achieved for mentoring of communal and upcoming commercial farmers and interestingly, the commercial farmers gave the lowest rating of 2.8 compared to 3.2 from the communal farmers.

Additional Expected Services

Which additional services and/or interventions do respondents **expect** from the Meat Board, however some of the services may result in an increase levies?

Respondents were asked to base their opinions on a scale from 1 to 5 where 5 means very important and 1 means not important at all for each of the following statements.

	Commercial Farmers	Communal Farmers	Government / Ministries	Stake-holders	Overall average
The Meat Board should control construction of private and informal abattoirs	3.2	4.2	4.3	3.5	3.6
The Meat Board should continue providing classification services at all export abattoirs	4.2	4.4	4.5	4.8	4.3
The Meat Board should control imports and exports at the borders, i.e. rendering a border control service	4.2	4.5	4.3	4.5	4.3
The Meat Board should insist on a “seal of quality” on locally slaughtered meat and sales in local markets	4.0	4.3	4.3	4.4	4.1
The Meat Board should engaged in the management of import or export restrictive schemes, eg sheep, pork, hides/skins and poultry	3.7	4.3	4.0	4.3	3.9
The Meat Board should maintain Namliits helpdesk	4.4	4.4	4.2	4.5	4.4
The Meat Board should continue ultrasonic scanning of cattle	4.0	4.5	3.4	4.3	4.1
The MBN should assist Directorate of Veterinary Services (DVS) in improving animal disease status	4.3	4.7	4.7	4.4	4.5
The Meat Board should own abattoirs/auctions to create additional markets.	2.1	3.9	3.8	2.4	2.7

Results are presented as mean scores out of a maximum of 5.0. Most named functions are seen as relatively important with scores of above 4.0, however there are also some services which are seen as relatively unimportant such as “The Meat Board should own abattoirs/auctions to create additional markets”.

“The MBN should assist in improving animal disease status” has received the highest scores. This could have been influenced by the outbreak of foot and mouth disease in the north of the country at the time of conducting the survey.

Generally, the commercial producers have given a slightly lower score on most of the given functions.

FAN Meat (Farm Assured Namibian Meat)

Does FAN Meat (Farm Assured Namibian meat) sufficiently and efficiently demonstrate the advantages of buying Namibian?

	Yes	No	Don't know
Commercial Farmer	55%	43%	2%
Communal Farmer	50%	22%	28%
Government / Ministries	17%	50%	33%
Stakeholders	85%	15%	0%
Total	55%	35%	10%

55% (59% in the 2015 survey) of the respondents feel that FAN Meat (Farm Assured Namibian meat) sufficiently and efficiently demonstrates the advantages of buying Namibian.

The table also shows that there is still a fair deal of uncertainty regarding FAN Meat promotion from communal farmers and Government and ministries, as 28% and 33% respectively were not able to express their opinion on this issue.

5.3 Communication from and with the Meat Board

Do respondents feel **sufficiently informed** by the MBN about the meat industry and future trends etc.?

	Always	Sometimes	Never	Don't know
Commercial Farmer	30%	59%	8%	3%
Communal Farmer	16%	67%	16%	0%
Government / Ministries	17%	50%	33%	0%
Stakeholders	54%	38%	8%	0%
Total	27%	60%	11%	2%

Are respondents satisfied with the **level of interaction and commitment** of the management team of MBN?

	Always	Sometimes	Never	Don't know
Commercial Farmer	20%	50%	12%	18%
Communal Farmer	18%	59%	14%	8%
Government / Ministries	17%	33%	17%	33%
Stakeholders	46%	38%	0%	15%
Total	21%	51%	12%	15%

The two tables above reveal that respondents generally appear to feel well informed and are fairly satisfied with the level of interaction with the Meat Board.

Are respondents of the opinion that when required, they have **direct access to the senior management** of the Meat Board?

	Yes	No	Don't know
Commercial Farmer	45%	13%	42%
Communal Farmer	53%	29%	18%
Government / Ministries	50%	17%	33%
Stakeholders	69%	15%	15%
Total	49%	18%	33%

Almost half of all respondents are convinced that they would have direct access to the senior management of MBN if required – proof of an “open door policy”.

33% replied with 'don't know' which might imply that they have never required to speak to the senior management personally.

How would respondents **prefer any relevant information** from MBN to be communicated to them?

The table below represents the percentage of respondents and their preferred medium when receiving information.

	% of respondents		% of respondents
Radio	27%	Per email	59%
Newspaper	19%	Via their website	12%
Presence on Farmers days	25%	Annual Report	7%
Meat Board Newsletter	25%	Social Media (Facebook, Twitter etc.)	7%

(The total adds up to more than 100% as most respondents have chosen more than one medium)

The majority of respondents prefer to have information from MBN communicated to them via email followed by the radio.

Presence on Farmers days and the Meat Board Newsletter also appear as popular communication mediums, while social media does not seem to be very popular amongst most stakeholders interviewed.

In terms of radio usage, the use of different channels and languages should be explored.

Respondents were asked whether there is any other information that you would need from the Meat Board:

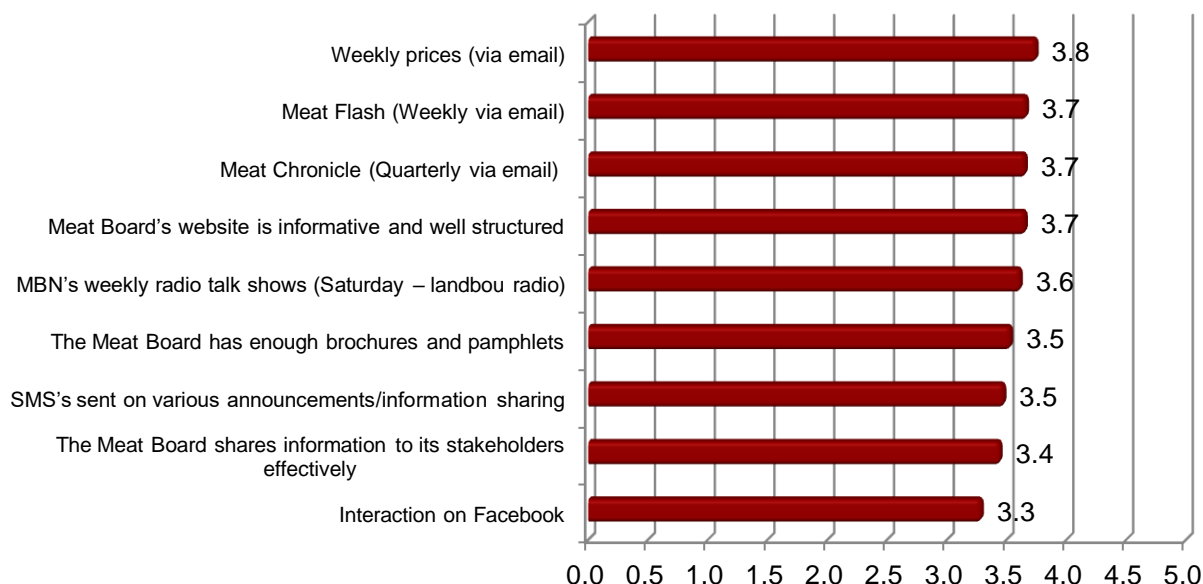
Commercial Farmers	
Better coverage of Telecom/MTC of the whole country so that it is easier for farmers to obtain information. MBN (tog with banks) should work towards that	1
Don't penalize the small lambs. Best quality in whole world is punished in Southern Africa.	1
Export control must be upgraded.	1
Give us an aim of what kind of meat, or what to produce for the future so that we can create long term plans on what to produce and from what to survive.	1
I am worried about veterinary services and more specifically the service from the government regarding financial assistance for it's officials. Also the danger of our health status for the future.	1
International prices and price trends.	1
Just be honest - why are our meat prices so low and engage to rectify it so that farmers can be compensated reasonably for their work.	1
Just get the Meat Board Directors to start working - then maybe one day they could start marketing our meat - in my opinion they are just a bunch of fat cats.	1
Possibility of offices in our region.	1
Price of cattle on the hoof and when slaughtered in other countries.	1
Regular updates on livestock figures in Namibia.	1
We don't get information on time.	1
What do they provide; I do not know of them.	1
Why do you allow the continuation of levies on livestock producers, but no requirement on meat processors to at least match RSA prices adjusted for transport? MBN is taking money	1

out of the hands of the many livestock producers and giving it to the few meat processors.	
Why does MBN not you fight against stock theft?	1
Why is there such a big difference in prices between South African and Namibian abattoirs and for years nothing has changed about it.	1
Communal Farmers	
Form committees on constituency levels.	1
Free access to market intelligence information.	1
Increase information sharing on international activities.	1
Information on how to sell outside Namibia.	1
Information on prices.	1
Information shared should be available in all languages.	1
Marketing strategies	1
MBN must have a disaster fund in case of drought, disease and so forth.	1
Meat prices	1
Price regulation and progress in border controls.	1
Receiving updated information	1
Regular information sharing and updates.	1
The prices and immunization of animals, the feeding of livestock.	1
We want to know our benefits of working with them.	1
What is the progress on Act 12 of 1981 Meat industry	1
When cattle prices (life stock) will be reduced.	1
Government / Ministries	
Marketing, communication and decentralization.	1
Training and exposure in breeding and selection criteria for that product.	1
Stakeholders	
Accurate data reflecting the number of cattle slaughtered at the local informal abattoirs.	1

Communication and Marketing Activities

This section focuses on the marketing activities of the Meat Board and results are given on a scale of 1 to 5 where 5 means very good and 1 means very poor. The results are shown as mean scores.

Communication and marketing activities of MBN



The table below provides a split of the results between the various surveyed sample groups:

	% of don't know	Commer- cial Farmers	Commu- nal Farmers	Govern- ment / Ministries	Stake- holders	Overall average
The Meat Board shares information to its stakeholders effectively	6%	3.4	3.4	3.5	3.9	3.4
The Meat Board has enough brochures and pamphlets	14%	3.6	3.3	3.6	3.9	3.5
Meat Board's website is informative and well structured	21%	3.7	3.4	3.8	4.1	3.7
MBN's weekly radio talk shows (Saturday – landbou radio)	25%	3.9	3.2	3.7	4.0	3.6
Meat Chronicle (Quarterly via email)	13%	3.9	3.1	3.5	4.0	3.7
Meat Flash (Weekly via email)	13%	3.8	3.2	3.3	4.2	3.7
Weekly prices (via email)	9%	3.9	3.2	4.0	4.1	3.8
Interaction on Facebook	42%	3.4	3.0	4.0	4.1	3.3
SMS's sent on various announcements/ information sharing	23%	3.6	3.2	4.0	4.3	3.5

The chart and table reveal that generally most marketing activities have received fairly positive scores with the overall average scores ranging between 3.3 and 3.8.

The weekly prices (via email) seem to be appreciated mostly whereas stakeholders interviewed value the interaction on Facebook the least. As can be seen however, 42% of the respondents appear to be unaware of MBN's presence on Facebook.

On most activities, communal farmers are more critical with lower ratings. General stakeholders appear to be most satisfied with the highest scores on most activities.

The results also reveal that still a relatively high percentage of respondents replied on the various activities with "don't know" indicating that they are not aware or familiar with the various marketing services of the Meat Board and can thus not rate the efficiency thereof.

However, comparing the "don't know" replies with the 2015 survey, reveal that respondents seem to be more informed as can be seen in the table below:

	% don't know in the 2015 survey	% don't know in the 2017 survey
The Meat Board's brochures and pamphlets	31%	14%
Meat Board's website (informative & well structured)	49%	21%
MBN's weekly radio talk shows (Saturday – landbou radio)	46%	25%
Meat Chronicle (Quarterly via email)	51%	13%
Meat Flash (Weekly via email)	51%	13%
Weekly prices (via email)	34%	9%
Interaction on Facebook	73%	42%

Overall, it can be surmised from this section that even though MBN seems to be doing a lot regarding promoting themselves and information sharing, often stakeholders are not aware of it and the information often does not reach the stakeholders (many have mentioned that they have never received information such as the Meat Chronicle and Meat Flash etc.) This has also been supported in some of their comments throughout the report.

It is believed that MBN should inform stakeholders of the various channels that they use in order to provide information such as their website, Facebook etc.

Further suggestions on sharing information were named as follows:

	No. of respondents
Meetings/ Updates on meetings.	7
Information sharing should be in all languages.	2
I'd like to see Afrikaans being used more. It would ensure that more of the producers give attention.	2
Most farmers do not have access to SMSes and Facebook.	1

Do market research as to why processor prices in Namibia are much lower than in RSA and determine the annual cost to the livestock producers and disseminate this amongst all the livestock producers so that they are empowered to lobby other parties to act to correct the situation.	1
Decentralize services, then the communication will be better.	1
Radio talk shows should be in all languages.	1
WhatsApp forum please.	1
Don't think every farmer has cellphone reception.	1
Keep regional communal farmers up to date, especially the western part of the country.	1
MBN staff should go out to the regions.	1

Low ratings in terms of communication and information sharing were substantiated with the following comments:

- ♦ *Don't receive SMSes/ we no longer receive SMSes.*
- ♦ *Communication is poor*
- ♦ *The Meat board is serving the GRN and meat processors at the cost of the livestock producers.*
- ♦ *Communication is poor, we don't receive any correspondence.*
- ♦ *MBN should come to all regions.*
- ♦ *No communication from MBN.*
- ♦ *Perhaps I am not connected on MBN data base and thus I do not receive the information? Meat Board should expand it's data base to reach many.*
- ♦ *Social media is not good to protect and provide crucial and confidential information therefore keep it on email it will be good as it is.*
- ♦ *Email was not updated.*
- ♦ *They don't have a platform.*
- ♦ *Facebook interpretation is sometimes wrong.*
- ♦ *I have seldom seen pamphlets or brochures. The information the MBN sends out is not enough, it mainly shows their own achievements and not what is going on in the market.*
- ♦ *I am not on an email list, I do not listen to NBC and I'm not on Facebook.*
- ♦ *Meat board is not transparent or informative in the market.*
- ♦ *I do not receive radio reception in my area so do not get Landbou Radio news.*
- ♦ *No interaction on FB at all.*
- ♦ *I do not receive weekly prices from the Meat Board by e-mail, and I am not a Facebook freak! I also do not receive SMSes from the Meat Board!*
- ♦ *Seen nothing of the envisaged information.*
- ♦ *Increase intensity of activities around PR.*
- ♦ *The management calendars are not enough and not distributed to the producers. The Fan*

Meat scheme booklet is also not well distributed.

- ♦ *Information sharing is poor or non-existent. Appearance of information is very poor / unprofessional (email).*
- ♦ *Insufficient communication from Meat Board regarding its work and efforts for promoting the industry and helping the farmer.*
- ♦ *Too many emails make some people crazy. Only important information must be spread but on the other hand, every farmer should know about troubles at Meat Board which must be helped to solve. SMS when important changes take place.*
- ♦ *Khoekhoe language not used to share information.*
- ♦ *Landbou radio - frequency is not available.*
- ♦ *MBN is lacking marketing NCA meat.*

Problems and Suggestions

The questionnaire made provision for an open ended question as follows:

Do respondents have any suggestions for the Meat Board and /or comments about the Meat Board?

Replies are provided as verbatim in order to ensure that the meaning and context of the answers are fully captured.

It is important to mention that the comments and suggestions included here are as provided by the respondents on the questionnaire. Further, the comments and suggestions reported herein are the view points of respondents and some may need to be clarified through facts.

Furthermore, it is also important to note that many comments do not fall within the mandate of the Meat Board and it appears that mainly producers see this section as an opportunity to vent any frustrations that they have even if it does not directly relate to the functions and interactions with the Meat Board.

Suggestions for the Meat Board and /or comments about the Meat Board are summarised as follows:

Commercial Farmer	
Agricultural Education	1
Apart for Argentina/Brazil, the Namibian meat is the cheapest in the world! Why?	1
Assist in the effectiveness and functionality of Meatco.	1
Finance scheme	1
Get more involved in the small stock sector.	1
Get sheep market overseas. Get better quality control on local abattoirs (sheep). See that meat that is selling in shops and butcheries are A grade, B or C grade (sheep). Inform the local markets (housewives and cooks) what grade and classification is the better quality (sheep).	1
Government via the Meat Board should keep its fingers out of active business but should help create a conducive environment for the private sector to flourish.	1

How can the MBN provide the required "safe" environment for export status if the DVS can't provide the necessary service? I refer to keeping the Veterinary Fences in order and processing of tag records.	1
I don't market very often but I am aware that the prices obtained in overseas markets do not reach the producer.	1
I don't think the Meat Board fulfils in its objectives.	1
I see no need for the Meat Board, producers can find their own markets. The Meat Board did not help with the new regulations regarding the export for cattle, sheep and goats. They make it more difficult with the new ear tags for small stock, the sheep "quota" 6 on 1 and 1 on 1 cost the sheep farmers a lot of money. Only a few is making money with the new regulations to export cattle, the Meat Board regulations cost the producers a lot of money. Show us your financial statements - you collect levies from the poorest producers, to finance what?	1
Issuing of ear tags and brand marks.	1
Looking at interventions to improve the share that livestock producers are getting of the final meat price, versus what is being consumed by meat processors and levies.	1
MBN does everything, but what it is supposed to do! Maybe some of the objectives of the Meat Board are obsolete?	1
MBN first priority must be increased production and market access thus producers needs must be high priority. Production is hampered when the producer is exploited by the rest of the industry. Meat Board is financed by producers' levies and must see to it that production is not hampered by regulations and decisions not serving Namibia in the long run.	1
MBN is doing well in terms of communicating and interacting with stakeholders. Unfortunately there is too much political interference as farmers are forced to sell products locally at lower prices. Farming should be seen as a business and when farmers are being kept from their own decisions it negatively affects our businesses. Government should respect the mandate of MBN. I wish them good luck in keeping the diverse group of stakeholders happy	1
MBN should become involved at farmers associations and tell us more on what they can help the producer with.	1
More information sharing is needed around the activities of MBN.	1
Namlits should continue improving.	1
Please start doing something which could advance our meat industry - stop sleeping and collecting big salaries!	1
Price fixing of local abattoirs should be investigated.	1
Promoting export of calf meat with the DVS.	1
Provide us with more information on farming.	1
Thank you for the service that you provide. Keep on being a gate for the government to provide stability because what is being decided today is not necessarily the same tomorrow.	1
The interaction between the permit offices and the Namlits is not working and quite a few problems with no listing or wrong listing still occur.	1
The MBN should make sure when distributing the quotas for the most lucrative markets such as the Norwegian market, that the returns on such markets is floating back to producers and not get lost along the value chain!	1
Very grateful for commercial representatives on the Board! Management should keep up the good work they are doing!	1
We lose - if we do not all combat stock theft together.	1
Communal Farmer	
Communicate in all languages.	1
Do animal disease inspections on a weekly basis.	1
Domestic markets - Meat Board must help local producers to get the competitive national market price for their livestock. Small stock marketing - let MBN secure a reliable market for goats. Value addition - MBN must help local grass roots producers to fully engage in value addition	1

processes and thus assist in growth local production chain. Middle man speculators vs. Export market - MBN should assist grass roots producers to have direct access to export markets.	
Education initiatives should be increased to all farmers.	1
Engage with government to invest in SME businesses.	1
Footprint and visibility not in Hardap region. Value addition training not given to any of our farmers.	1
Include marketing of goats. Ear tags for small stock should be introduced at a minimal price.	1
Increase staff members in the Northern Area.	1
Increase the price of cattle.	1
Information should be provided to all registered and non-registered farmers to educate them on advancements that the Meat Board has been doing up to date.	1
Introduce specific programs for communal farmers.	1
MBN must be involved in marketing strategy and to train more mentors in Kavango West.	1
MBN needs to organize farmer's days to engage farmers on different levels and to share information.	1
MBN should approach the customers so that we can understand their service better and know the benefits.	1
MBN should be visible in all regions.	1
MBN should communicate with the farmers.	1
MBN should involve the MTI and NCCI to inform farmers on what they are doing.	1
MBN should strengthen individual communication with its stakeholders. Improve information and disseminate in local languages.	1
Meat Board should establish a market intelligence unit that deals with market development and actively participate in training of communal farmers through short courses and information session in:	
1. Animal Health	
2. Livestock Marketing	
3. Financial Management	
4. Rangeland Management	
5. Value addition	
6. Business Administration for farmers and farmers organisation	
7. Breeding	1
More brochures in indigenous languages so that all farmers can understand the message.	1
More meetings so that farmers can understand the aim and mission of MBN for it's members.	1
Pressurize government for domestic market livestock produce in NCA.	1
Provide medical treatment for animals in Okongo.	1
Service from staff to be improved and veterinary office queues are too long.	1
The selling price of livestock is too low.	1
They should first weigh the cattle and tell the farmers the value before slaughtering.	1
They should have people to visit our farms to see what we are doing and to tell us of ways to improve.	1
They should please assist in working with our traditional leader and make them understand the importance of selling local livestock.	1
They should visit our farmers in the North to see what we are doing and to help us.	1
To educate farmers about livestock feeding, immunization and to have veterinarian services in the north.	1
We are suffering in Mukwe constituency.	1
We in the Northern Areas, like Okongo, would like to have meetings with them every 2 months.	1
We want to see that Meat Board service is engaging all parts of the communal areas. We	1

need border access, meat pricing and evaluation.	
Government / Ministries	
Improve on price incentive for all producers.	1
MBN should reach out to farmers through farmer's cooperatives.	1
Stakeholders	
Do not outsource your core statutory functions to others as it will diminish your statutory mandate	1
The legal/regulatory framework must be discussed and sorted with the Ministry (MAWF) to spearhead the common vision.	1
The Meat Board should act in the interest of all stakeholders within the legal framework set. They should not be allowed to make decisions contradicting laws to the advantage of a single stakeholder.	1
What happened to the blue files? Please - they were so important to the producers. And the stock cards worked better than all these papers you give to producers!	1

6. RECOMMENDATIONS AND REMARKS

The consultants are not entirely familiar with the functions and services of the Meat Board and the actual business processes and strategies. We may therefore make recommendations which are not suitable for MBN, have already been implemented to a certain degree or which the board is already planning to implement.

Challenges

- ♦ In the last two surveys, the most pressing issue throughout the survey is that most stakeholders are not entirely informed about what the Meat Board is doing and which functions fall within the mandate of the Meat Board. In this survey, it showed that respondents seem to be more informed which resulted in a slight increase in positive ratings in many aspects however as mentioned below farmers/producers appear to feel under pressure.
- ♦ Furthermore, it is very important to mention that **stagnating meat prices, more cumbersome documentation and an increase in animal poaching and theft leave farmers often frustrated and might have an effect on the ratings**. To control all these, is not seen as the mandate of the Meat Board but throughout the report it is clear that producers/farmers seem to be expecting some form of support and assistance from MBN as well as a closer engagement with MBN. The challenge to consider is therefore, what needs to be done to instil trust into the Meat Board and what does MBN do to raise the profile of farming for future generations?

Communication of survey results

- ♦ We recommend that the results of the survey are properly communicated to Meat Board's management. It is also crucial that the most important results are communicated to the employees to ensure that they know how stakeholders feel about the board and which areas need improvement.
- ♦ Comments should also be given to the employees – especially where they are directly involved. The positive comments might motivate them and show they have done something right.
- ♦ Individual sessions with the department heads and employees of the different departments should be held whereby employees are informed of the survey results that directly affect

their work flow. If employees are aware of; and understand the opinion of the stakeholders (and how important these opinions are) they might be more willing to improve on certain work flows and processes.

Communication with stakeholders

- ♦ Communication programs are valuable for creating awareness of good operational practices and in enhancing the organisation's relationships with stakeholders.
- ♦ Communication and information sharing is seen as an important and continuous action or intervention to enhance corporate reputation. For MBN it should receive high priority following the survey.
- ♦ It is however very important how the information is shared. MBN needs to find the right channels which will reach various stakeholders and even the public at large.
- ♦ The Meat Board has a communication strategy in place, and it is seen throughout most sections of the survey that more respondents are aware of the activities of MBN compared to the 2015 survey. However, we recommend that the communication strategy for internal and external stakeholders is to be reviewed on a regular basis.
- ♦ As part of the communication plan, it is suggested to develop the communication plan according to a stakeholder mapping as follows:

Stakeholder analysis (stakeholder mapping) – the purpose of a stakeholder mapping is to determine how you should work and communicate with stakeholders with different levels of interest and influence.



- ♦ It was found that there is still a confusion and/or ignorance about the exact functions of MBN. This underlines the importance for intensive information sharing.

Overall performance

- ♦ The overall performance of MBN was rated fairly positive, and has shown a slight increase since the 2015 survey. When assessing the level of satisfaction with the overall service delivery of MBN, Government / Ministries and general stakeholders were most satisfied and commercial farmers were most critical.
- ♦ It is seen throughout the survey, that the commercial producers is the stakeholder group that is most critical which is quite concerning because they are the highest in numbers and contribute the most towards the GDP.
- ♦ Various comments were made especially from the commercial producers that the MBN should rather be operating on sound business principles and that the interference of the Government is hindering the MBN in achieving its mission together with the development of AMTA.
- ♦ It is commonly known that the farmers operate under extremely difficult situations which is reflected in the dwindling figures of meat producers each year. What does the MBN do to raise the profile of farming for future generations? Where are future meat producers going to come from and how are they going to compete in the very competitive world economy?

Marketing

- ♦ Despite the fact that the MBN does not need to promote itself in the classic term, it is still important to create awareness about its services, strategies and future amongst its stakeholders.
- ♦ Most stakeholders indicated that they prefer to receive information from MBN via email. This method of communication is easy, quick and cost effective. MBN could, as a quick win following the survey, send an email to their stakeholders thanking them for participating.
- ♦ Generally, most marketing efforts from MBN have been rated positively by the different stakeholder groups.
- ♦ Even though MBN's website was rated as informative and appealing, 21% of the respondents did not know of or have never seen the website. MBN's website has been updated and redesigned and portrays a modern and clear image. The website is an

important medium whereby a wide scope of information can be made available and it is thus recommended that the Meat Board tries to promote the website more profoundly.

Promotion of meat

- ♦ The survey results have revealed that respondents are of the opinion that the general demand for meat and meat products needs to be increased in Namibia which will result in better prices for their livestock. Especially the sheep farmers have expressed dissatisfaction and want additional markets to be developed.
- ♦ MBN can be involved more actively in promoting meat and meat products in terms of running awareness campaigns encouraging people to eat more meat and meat products.
- ♦ Most people in Namibia are not aware about the health benefits of buying Namibian meat – MBN can get involved in educating the public (seal of quality). MBN should do more educate the public of the various grades of meat – this concerns was mainly expressed again from the sheep farmers.
- ♦ It is believed that MBN is doing quite a bit in terms of promoting meat, but it might be that the campaigns are not always consistent, thus not becoming engrained in people's minds and eventual behaviour. It is therefore very important, that all marketing and advertising material (brochures, pamphlets but also electronic newsletters) and corporate identity elements need to be reviewed to ensure that they enforce the marketing strategy developed with a very clear message and consistency to stakeholders.

People

- ♦ We recommend involving staff of the different departments and regions of various levels to give their input and suggestions for possible improvements of service levels, better work flows and service innovation. Regular staff meetings, encouragement of participation, suggestion boxes and feedback thereon, innovation programmes and so forth, often provide good platforms for employees to participate and provide their input. There also needs to be clarity about which areas of work the board encourages employee participation in decision making and which areas must be the prerogative of management in order to ensure proper business management and good governance.
- ♦ Generally, stakeholders interviewed experience the staff of MBN to be friendly and willing to assist, a few comments related to the staff needing more training, staff being unproductive and a lack of decision making amongst them.

- ♦ We recommend that an action plan is developed for all areas of concern, assigning persons accountable as well as specific measurable deadlines. The progress made on the corrective actions should be monitored regularly (weekly, bi-monthly or monthly) as part of the management controls.

Future surveys

- ♦ We recommend that a similar survey is conducted every two to three years. Surveys need to be uniform as far as possible to be able to compare results with each other effectively. Improvement can only be seen if the proverbial “apples are compared with apples”. It is thus recommended that the focus areas in the questionnaires remain the same. This will enable MBN to draw some comparative conclusions such as:
 - Has MBN’s overall performance improved or deteriorated?
 - How do stakeholders perceive MBN’s ability to meet its goals and fulfil its mandate?
 - How is the image of the organisation changing amongst stakeholders?
 - How are market conditions changing?

7. CONCLUSION

“Perceptions are what people believe to be true. Actively managing stakeholders’ perceptions is fundamental to a strong and creative organisation.”

By embarking on this stakeholder survey, MBN has taken an important step into the right direction to take informed decisions and to strengthen their knowledge about the feelings and opinions of their stakeholders.

Please be aware that the areas of concern raised by the respondents should by no means discredit any party, but should at this stage merely provide the opportunity to understand the perceptions of the stakeholders and create action plans and implement them and thereby reap the business benefits.

Acknowledgement

We would like to thank the Meat Board of Namibia for awarding us the opportunity to be part of their endeavours to strive for continuous improvement. It is critical that all parties who have access to the information utilise it in a positive spirit. The message throughout the organisation should remain a positive one and the purpose of this exercise should never be lost from sight, namely, to use information received for development towards improvement and increased levels of stakeholder satisfaction.

Any actions agreed should be part of the larger business plan to ensure alignment, focus, monitoring and execution.

APPENDIX: Questionnaire

INTRODUCTION Business Intelligence Africa has been commissioned to do a stakeholder perception evaluation on behalf of the Meat Board of Namibia. We would greatly value your opinion; the information gathered from this survey will be treated confidentially and will only be reported in group format. The interview should not take longer than 15 to 20 minutes.	Questionnaire no.		
	Year 2017	Month	Day
	Back checked by:		Interviewer:
INTERVIEWER DECLARATION: I certify that this interview has been personally carried out by me with the correct respondent. I further declare that all the information is truthful and as told to me by the respondent. I understand that any discrepancies discovered during back-checking of this questionnaire will result in the cancellation of this interview. Signed by Interviewer)			

RESPONDENT DEMOGRAPHICS		
1	Respondent name: (copy from list)	
2	Town/region:	
3	Email address:	
4	Telephone number:	
5	Cell phone number:	

SCREENER		
Do you know or have you dealt with the Meat Board of Namibia in the past?	Yes	CONTINUE
	No	CLOSE

Category: in which category does your business fall?	Stakeholders	1	Communal farmer	3
	Government/Ministries	2	Commercial farmer	4

QUESTIONNAIRE

Q1. Only if respondent is a producer/farmer (option 3 or 4 in above question), please ask: Which type of farming is the main source of income? Single Mention

Cattle farming	1	Goat farming	3
Sheep farming	2	Pig farming	4
Other, please specify:			

Q2a. The mission statement of the Meat Board is to promote a conducive environment for sustainable livestock production, market growth and diversification for livestock, meat and meat products; and to maintain standards and quality assurance by way of appropriate regulatory intervention. To date, if 10 is "completely" and 1 is "not at all"; to what extent do you believe the Meat Board is achieving its mission? Single Mention

Not at all									Completely	Don't know
1	2	3	4	5	6	7	8	9	10	x

Q2b. In your opinion, what are the biggest challenges the Meat Board is facing in achieving its mission?

STAKEHOLDER RELATION

Q3a. How satisfied are you with the overall service that you receive from the Meat Board? On a scale of 1 to 10, where 1 means you are “extremely dissatisfied” and 10 means you are “extremely satisfied”.

Extremely dissatisfied									Extremely satisfied	Don't know
1	2	3	4	5	6	7	8	9	10	X

Q3b. IF RESP. IS DISSATISFIED (1 to 4): Can you please tell me why you are dissatisfied with the service?

Q4. Listed below are the functions that fall within the mandate of the Meat Board - according to your knowledge how well does the Meat Board fulfill each of these functions? Please give a rating where 5 means “very good” and 1 means “not good at all”.

		Very Good	Good	Average	Not good	Not good at all	Don't know
1	To address developments in livestock and meat market access in the Northern Communal Areas	5	4	3	2	1	x
2	To assist Government in trade negotiations	5	4	3	2	1	x
3	To disseminate strategic market information both nationally & internationally	5	4	3	2	1	x
4	To assist in the creation and promotion of a strong quality brand in the export markets	5	4	3	2	1	x
5	To facilitate the development of the new markets	5	4	3	2	1	x
6	To identify opportunities for value addition/business opportunities in the meat industry	5	4	3	2	1	x
7	To regulate cattle, sheep, goat, pork and poultry sectors to achieve economic growth	5	4	3	2	1	x
8	To continue with import and export control to protect the meat industry	5	4	3	2	1	x
9	To perform classification services - classification of cattle & sheep at export abattoir	5	4	3	2	1	x
10	To administer projects on behalf of the industry on a cost recovery basis	5	4	3	2	1	x
11	To assist the Directorate Veterinary Services in maintaining Namibia animal disease status	5	4	3	2	1	x
12	To contribute to an increase in sheep and cattle production	5	4	3	2	1	x
13	To improve the quality of meat through the promotion of standards (FAN Meat & Classification) to consumers	5	4	3	2	1	x
14	To promote locally produced meat e.g. Seal of Quality in Namibia	5	4	3	2	1	x

SERVICES

Q5. How would you rate the Meat Board on the following services or statements? Please use a scale from 1 to 5 where 5 means very good and 1 means not good at all for each of the following statements. Single Mention per row

		Very Good	Good	Average	Not good	Not good at all	Don't know
1	The Meat Board deploys transparent marketing schemes	5	4	3	2	1	x
2	Service associated with the issuing of import/export permits	5	4	3	2	1	x
3	Service associated with registering at the Meat Board	5	4	3	2	1	x
4	Service associated with selling of eartags and stock brands on a cost-recovery basis	5	4	3	2	1	x
5	Mentoring of communal and upcoming commercial farmers	5	4	3	2	1	x
6	Providing information and statistics (prices) to farmers	5	4	3	2	1	x
7	Facilitating access to export markets	5	4	3	2	1	x
8	The Meat Board is transparently managing its financial resources	5	4	3	2	1	x

Q6. How would you rate the service from the staff of the Meat Board on the following statements? Please use a scale from 1 to 5 where 5 means very good and 1 means very poor for each of the following statements. Single Mention per row

		Very Good	Good	Average	Not good	Not good at all	Don't know
1	The staff of the MBN is easy to get hold of	5	4	3	2	1	x
2	The staff of the MBN is willing to assist	5	4	3	2	1	x
3	The staff of the MBN is professional and competent	5	4	3	2	1	x
4	The staff of the MBN treats me friendly and respectfully	5	4	3	2	1	x
5	The staff of the MBN resolves my queries satisfactorily	5	4	3	2	1	x
6	The staff of the MBN gives professional information and advice	5	4	3	2	1	x

Q7. Which services and/or interventions do you expect from the Meat Board (some of the services may result in an increase in levies)? Please use a scale from 1 to 5 where 5 means very important and 1 means not at all important for each of the following attributes.

		Very important	Important	Neither important nor unimportant	Not important	Not at all important
1	The Meat Board should control construction of private and informal abattoirs	5	4	3	2	1
2	The Meat Board should continue providing classification services at all export abattoirs	5	4	3	2	1
3	The Meat Board should control imports and exports at the borders, i.e. rendering a border control service	5	4	3	2	1
4	The Meat Board should insist on a "seal of quality" on locally slaughtered meat and sales in local markets	5	4	3	2	1
5	The Meat Board should engaged in the management	5	4	3	2	1

	of import or export restrictive schemes, eg sheep, pork, hides/skins and poultry					
6	The Meat Board should maintain Namlit's helpdesk	5	4	3	2	1
7	The Meat Board should continue ultrasonic scanning of cattle	5	4	3	2	1
8	The MBN should assist Directorate of Veterinary Services (DVS) in improving animal disease status	5	4	3	2	1
9	The Meat Board should own abattoirs/auctions to create additional markets.	5	4	3	2	1
10	Are there any other services that you expect from the Meat Board (and how important are they?):					
	1.	5	4	3	2	1
	2.	5	4	3	2	1
	3.	5	4	3	2	1

Q8. According to your opinion, does FAN Meat (Farm Assured Namibian meat) sufficiently and efficiently demonstrate the advantages of buying Namibian?

Yes	1	No	2	Don't know	x
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COMMUNICATION

Q9. Do you feel that you are sufficiently informed by the Meat Board about the meat industry and future trends etc.?

Always	1	Sometimes	2	Never	3	Don't know	x
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Q10. Are you satisfied with the level of interaction and engagement with the management team of the Meat Board?

Always	1	Sometimes	2	Never	3	Don't know	x
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Q11 Is there any other information that you would need from the Meat Board? If so, please specify:

Q12. How would you like any relevant information from the Meat Board to be communicated to you?

Radio	1	Email	6
Newspaper	2	Via website	7
Presence on Farmers days	3	Annual Report	8
Meat Board Newsletter	4	Social Media (Facebook)	9
SMS	5	Other: Please specify	

Q13a. How would you rate the quality and content of the following communications efforts of the Meat Board? Please use a scale from 1 to 5 where 5 means very good and 1 means very poor.

		Very Good	Good	Average	Poor	Very Poor	Don't know
1	The Meat Board shares information to its stakeholders effectively	5	4	3	2	1	x
2	The Meat Board has enough brochures and pamphlets	5	4	3	2	1	x
3	Meat Board's website is informative and well structured	5	4	3	2	1	x
4	MBN's weekly radio talk shows (Saturday – landbou radio on NBC)	5	4	3	2	1	x
5	Meat Chronicle (Quarterly via Email)	5	4	3	2	1	x
6	Meat Flash (Weekly via Email and Facebook)	5	4	3	2	1	x
7	Weekly prices (via Email and Facebook)	5	4	3	2	1	x
8	Interaction on Facebook	5	4	3	2	1	x
9	SMSes sent of various announcements/ information sharing	5	4	3	2	1	x
10	Any other suggestions: Please specify						

Q13b. If you have rated any of the above poorly (rating of 1 or 2), please provide a reason for your rating.

Q14. Are you of the opinion that when required, you have direct access to the senior management of the MBN?

Yes	1	No	2	Don't know	x
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Q15. **EASE OF ENGAGING:** How easy is it to do business or engage with the MBN? Please use a scale of 1 to 5, where 1 means "extremely difficult" and 5 means "extremely easy".

Extremely easy	Easy	Average	Difficult	Extremely difficult	Don't know
5	4	3	2	1	x

Q16. In closing do you have any further requests / suggestions in which areas the Meat Board of Namibia should get involved and /or any comments you have about the Meat Board?

ON BEHALF OF THE MEAT BOARD AND BUSINESS INTELLIGENCE AFRICA, THANK YOU FOR PARTICIPATING IN OUR SURVEY. IN THE NEXT FEW DAYS MY SUPERVISOR MAY CONTACT YOU TO EVALUATE THE QUALITY OF MY WORK AND ANSWER ANY QUESTIONS YOU MAY HAVE ABOUT THE INTERVIEW.