



Ministry of Industry
and Commerce

Ministry of Industry and Commerce 2025 Fourth Quarter Client Satisfaction Survey

DRAFT

DECEMBER 14, 2025
UNIVERSITY OF ZIMBABWE

Executive Summary

The Ministry of Industry and Commerce (MoIC) 2025 Fourth Quarter Client Satisfaction Survey was conducted to assess stakeholder perceptions, experiences, and satisfaction with the Ministry's services, policies, regulatory functions, and engagement mechanisms. The survey supports the Ministry's mandate under Vision 2030 to deliver responsive, efficient, and accountable public services that contribute to Zimbabwe's industrialisation and commercial development agenda. The findings provide evidence-based insights to inform service delivery improvements, policy refinement, and institutional performance management.

The survey adopted a national quantitative cross-sectional design, utilising a structured questionnaire administered across all ten provinces. A total of 330 clients participated, representing individuals, small and medium enterprises, large enterprises, business membership organisations, and public institutions. This diversity ensured broad geographical and sectoral coverage, providing a reliable basis for national and provincial analysis.

Overall results indicate a generally positive perception of the Ministry's performance, with an overall client satisfaction index of 76 percent. Satisfaction was highest for communication (81 percent), reflecting strong performance in website usability, digital responsiveness, and publications. Satisfaction with Ministry services recorded 79 percent, while speed of processing requests and responses scored 78 percent. Staff performance scored 77 percent, highlighting professionalism, courtesy, and availability as key strengths.

Despite these positive outcomes, the survey identified important areas requiring improvement. Stakeholder engagement (70 percent) and the policy and regulatory environment (68 percent) recorded comparatively lower satisfaction levels. Concerns were raised regarding policy clarity and predictability, complaints handling, adherence to delivery timelines, and inclusiveness of engagement processes. Notably, 94.7 percent of respondents agreed that improvements in service performance and stakeholder engagement are necessary.

Provincial analysis shows that Harare and Bulawayo consistently performed above the national average, while provinces such as Matabeleland North, Mashonaland West, Mashonaland Central, and Midlands recorded lower satisfaction levels in selected dimensions. Sectoral analysis revealed higher satisfaction among business membership

organisations and public institutions, with relatively lower satisfaction among manufacturers and freight agents, indicating sector-specific challenges.

In conclusion, the survey confirms that clients are largely satisfied with the Ministry of Industry and Commerce’s services, while clearly highlighting areas that require targeted improvement. Strengthening policy clarity, stakeholder engagement, complaints handling, and service reliability while sustaining existing strengths will enhance client confidence and improve institutional responsiveness.

Contents

- Executive Summary ii
- 1. Introduction 1
 - 1.1. Background and Context 1
 - 1.2. Objectives of the Survey 1
 - 1.3. How the Results Will Be Used 2
 - 1.4. Key Questions the Survey Aimed to Answer 2
- 2. Methodology 3
 - 2.1. Survey Purpose and Objectives 3
 - 2.2. Survey Design 3
 - 2.3. Target Population and Respondents 3
 - 2.4. Sample Size and Sampling Strategy 3
 - 2.5. Qualitative Sampling 4
 - 2.6. Data Collection Tools and Instruments 4
 - 2.7. Data Collection Procedures 4
 - 2.8. Data Quality Assurance 4
 - 2.9. Data Management and Security 4
 - 2.10. Data Analysis Plan 5
 - 2.11. Ethical Considerations 5
 - 2.12. Outputs and Deliverables 5
 - 2.13. Team Composition and Responsibilities 5
 - 2.14. Timeline Overview 5

3.	Respondents Profile	5
4.	Key Findings	7
4.1.	Interaction and Communication Channels	7
4.2.	Components of client satisfaction	9
4.2.1.	Client Satisfaction with Ministry Staff	9
4.2.2.	Client Satisfaction with Ministry Services, Procedures and Regulations	10
4.2.3.	Client Satisfaction with Ministry’s Speed for Processing Requests, Documents, Licenses, or Responding to Queries	11
4.2.4.	Client Satisfaction with Ministry Communication Issues	12
4.2.5.	Client Satisfaction with Ministry Engagements	13
4.2.6.	Client Satisfaction with Ministry Policy and Regulatory Framework	14
4.2.7.	Client Satisfaction with Ministry Efforts	15
4.2.8.	Satisfaction with Ministry Services	17
4.3.	Overall Satisfaction	17
4.3.1.	Client Satisfaction by Sector	19
4.3.2.	Client Satisfaction by Size	20
4.4.	The Gaps in Client Satisfaction	20
4.5.	Key Areas Requiring Improvement in Service Performance and Engagement	21
5.	Conclusion and Recommendations	22

List of Figures

Figure 1. Percentage of Respondents by Province and Gender.....	6
Figure 2: Distribution of Respondents by Age Category	7
Figure 3: Distribution of Respondents by Sector and Business Size	7
Figure 4: Experience and Frequency of Interaction with the Ministry	8
Figure 5: Communication Channels Utilised by Clients	9
Figure 6: Clients' Satisfaction with Staff Index	9
Figure 7: Components of the Satisfaction Index by Province.....	10
Figure 8: Client Satisfaction with Ministry services, Procedures and Regulations Index	11
Figure 9: Client Satisfaction with Ministry's Speed for Processing Requests, Documents, Licences, or Responding to Queries Index.	12
Figure 10: Client Satisfaction with Ministry Communication Index.....	13
Figure 11: Client Satisfaction with Ministry Stakeholder Engagement Index	14
Figure 12: Provincial client satisfaction overall index	14
Figure 13: Policy Relevance, Predictability, Effectiveness and Clarity Indices by Province .	15
Figure 14: Client Satisfaction Index with Ministry Effort by Province	16
Figure 15: Provincial Index- Ministry Efforts.....	16
Figure 16: Satisfaction with Ministry Services.....	17
Figure 17: Overall Client Satisfaction Index and its Components	18
Figure 18: Sector Client Satisfaction Scores	19
Figure 19: Client Satisfaction Scores by Size Category	20
Figure 20: Need for Service Performance Improvement	21
Figure 21: Areas of Service Performance and Engagement Requiring Improvement	22

1. Introduction

1.1. Background and Context

The Ministry of Industry and Commerce (MoIC) plays a central role in Zimbabwe's socio-economic transformation agenda through the formulation, implementation, and enforcement of industrial and commercial policies. In line with the National Vision of achieving a Prosperous and Empowered Upper Middle-Income Society by 2030, the Ministry is mandated to ensure that its services, regulatory frameworks, and stakeholder engagement mechanisms are responsive, efficient, and aligned with national development priorities.

As the economy continues to undergo industrialisation and commercialisation under the Second Republic, the operating environment has become increasingly complex. The Ministry is confronted with challenges such as smuggling, the proliferation of counterfeit and sub-standard goods, informal trading activities, weak compliance with regulations, and the impact of illegal sanctions that constrain productivity and growth. These challenges necessitate robust regulatory enforcement, effective policy responses, and continuous engagement with a diverse range of stakeholders across the public and private sectors.

In this context, the Ministry conducts quarterly Client Satisfaction Surveys as a strategic tool for assessing stakeholder perceptions, experiences, and levels of satisfaction with Ministry services. To enhance objectivity and credibility, an independent consultant is engaged to conduct the survey in the fourth quarter of each year. The Client Satisfaction Survey provides an evidence-based platform for capturing client feedback, identifying service delivery gaps, and generating actionable insights to inform policy refinement and institutional performance improvement.

1.2. Objectives of the Survey

The primary purpose of the Client Satisfaction Survey is to systematically evaluate the quality, effectiveness, and accessibility of services provided by the Ministry of Industry and Commerce. Specifically, the survey sought to:

- Assess the level of satisfaction among clients and stakeholders with the Ministry's services, policies, regulatory functions, and initiatives.
- Identify strengths, weaknesses, gaps, and challenges in service delivery, communication, and stakeholder engagement mechanisms.
- Generate practical, evidence-based recommendations aimed at improving service quality, client experience, and institutional responsiveness.

- Establish baseline data for benchmarking and tracking changes in client satisfaction trends in future surveys.

1.3. How the Results Will Be Used

The results of the Client Satisfaction Survey will be used as a strategic management tool to support continuous improvement within the Ministry of Industry and Commerce. The findings will inform the review and refinement of policies, regulatory frameworks, and operational procedures to ensure they remain responsive to stakeholder needs and evolving market conditions.

Survey outcomes will guide the development of targeted short-term and long-term interventions aimed at addressing identified service delivery gaps and strengthening stakeholder engagement. In addition, the results will contribute to institutional planning, monitoring, and evaluation processes by providing measurable indicators of client satisfaction and service performance.

Furthermore, the survey findings will enhance transparency and accountability by ensuring that stakeholder feedback is systematically incorporated into decision-making processes. Where appropriate, the results may be shared with relevant stakeholders and used to support public communication on the Ministry's performance, reform initiatives, and service improvement efforts.

1.4. Key Questions the Survey Aimed to Answer

The survey was designed to answer the following key questions:

- To what extent are clients satisfied with the services provided by the Ministry?
- Which aspects of service delivery are effective and which require improvement?
- How accessible and responsive are the Ministry's communication channels and digital platforms?
- What challenges do stakeholders face when engaging with the Ministry?
- What interventions can be implemented to improve client satisfaction and service quality?

2. Methodology

2.1. Survey Purpose and Objectives

The primary purpose of this national Customer Satisfaction Survey was to assess clients' experiences and perceptions of the Ministry of Industry and Commerce's service delivery, policies, initiatives, and stakeholder engagement processes. The Survey measured overall satisfaction levels and examined satisfaction across key service dimensions, including efficiency, responsiveness, professionalism, accessibility, and transparency. It also assessed levels of awareness and perceived effectiveness of Ministry policies and programmes. In addition, the survey documented clients lived experiences, identified service delivery gaps and opportunities for improvement, and gathered stakeholder recommendations to strengthen performance. The Survey generated a comprehensive technical report and a policy-oriented summary to inform decision-making and future surveys.

2.2. Survey Design

The survey adopted a quantitative research design, focusing exclusively on the collection and analysis of numerical data. The study employed a national cross-sectional survey, administered across all ten provinces using a structured online questionnaire. The questionnaire consisted of closed-ended questions designed to generate measurable data on key variables of interest, enabling statistical analysis and comparison across regions. Data were collected at a single point in time, allowing the study to capture a snapshot of prevailing conditions at the national level while ensuring consistency and standardisation in responses

2.3. Target Population and Respondents

The target population comprised clients who had interacted with the Ministry of Industry and Commerce within the preceding two years. This included individual clients, small and medium enterprises, large enterprises, business membership organisations, cooperatives, and other government institutions that engage with the Ministry. Respondents were individuals with direct knowledge of these interactions, such as business owners, managers, or designated liaison officers, ensuring that responses reflected informed and relevant perspectives.

2.4. Sample Size and Sampling Strategy

The quantitative online survey targeted a minimum of 500 respondents, with a minimum of 50 per province. After accounting for non-response and data quality checks, the final analytical sample comprised approximately 330 complete interviews. A multi-stage stratified sampling approach was applied. Provinces were treated as primary strata, after

which respondents were selected from districts using Ministry client databases, business registries, and association membership lists. Quotas were applied to ensure representation across urban and rural areas and across different client categories. A predefined replacement protocol was used to substitute unreachable respondents while preserving the sampling structure.

2.5. Data Collection Tools and Instruments

Data was collected using online questionnaire with a link emailed to respondents. The primary quantitative tool was a structured questionnaire administered via online platform, Google Forms. The questionnaire covered client characteristics, service delivery experiences, policy awareness, satisfaction ratings, and suggested improvements. Qualitative data were collected using KII guides designed to explore experiences with Ministry services, perceptions of policies and regulations, and recommendations for improvement. All instruments were pre-tested and refined prior to full deployment.

2.6. Data Collection Procedures

Data collection was conducted primarily through emailed online questionnaire. Telephone interviews were also used to reach respondents. Four senior researchers supervised online data collection across the ten provinces, supported by trained research assistants to undertake follow-ups. A pilot test was conducted in one province to validate data collection tools and procedures, after which adjustments were made. Online data collection was conducted over a two-week period.

2.7. Data Quality Assurance

Quality assurance measures were implemented throughout the survey. Approximately 10 percent of interviews completed were subjected to back-checks through follow-up calls or visits. Real-time dashboards were used for electronic data to monitor completeness and consistency. Quantitative data cleaning involved validation checks, logic tests, and treatment of missing data. Qualitative data were transcribed verbatim, translated where necessary, and reviewed for accuracy.

2.8. Data Management and Security

All collected data were securely stored on encrypted digital platforms with restricted access. Daily uploads were conducted to prevent data loss. Quantitative datasets were anonymised and stored alongside accompanying codebooks, while qualitative transcripts were securely archived. Data protection and confidentiality protocols were strictly observed in line with ethical standards.

2.9. Data Analysis Plan

Quantitative data were analysed using descriptive statistics, including frequencies, means, and cross-tabulations disaggregated by province, client type, sector, and gender. Composite satisfaction indices were constructed. A simple measure of client satisfaction index was applied. First, a client satisfaction score for each of the eight components of satisfaction was estimated as the number of those satisfied as a percentage of the total respondents. The mean of the eight score was then considered the client satisfaction index. It is simply the percentage of satisfied clients. Qualitative data were analysed using thematic analysis, supported by coding frameworks aligned with the survey objectives. Integration of qualitative and quantitative findings was achieved through triangulation.

2.10. Ethical Considerations

Ethical standards were strictly adhered to throughout the survey. Informed consent was obtained from all participants prior to data collection. Respondents were informed of the voluntary nature of participation and assured of confidentiality and anonymity. Personal identifiers were excluded from analytical datasets. Where applicable, ethical clearance was obtained from the relevant institutional authority.

2.11. Team Composition and Responsibilities

The survey team comprised four senior researchers responsible for overall planning, supervision, quality assurance, and analysis. They were supported by four research assistants who did the follow-ups and supported KIs. The Principal Investigator oversaw implementation and led report writing, supported by a dedicated data analyst and a qualitative research lead.

2.12. Timeline Overview

The survey was conducted over a three-week period. Week one focused on inception and tool finalisation, weeks two and three on data collection, and four on data cleaning, analysis, and report writing, and dissemination activities.

3. Respondents Profile

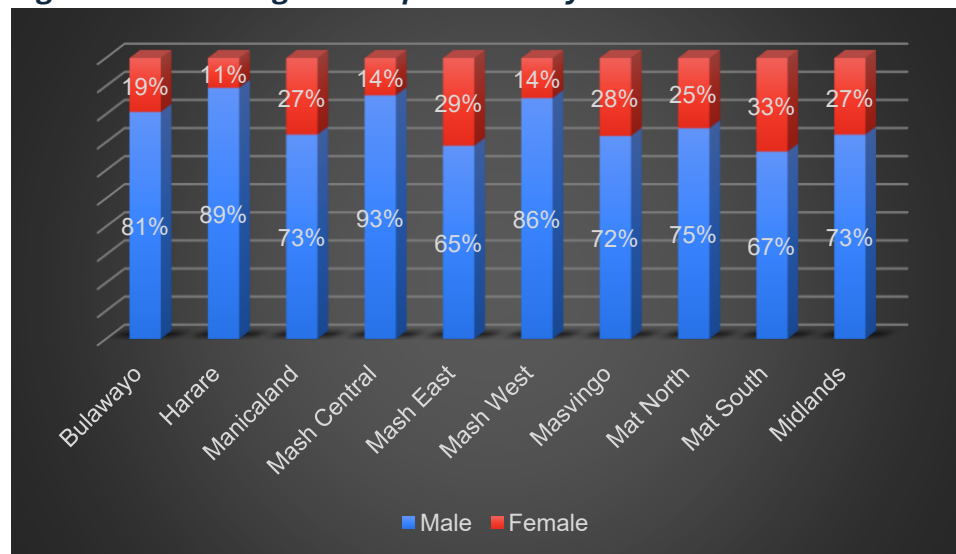
This section presents an overview of the respondents who participated in the Ministry of Industry and Commerce 2025 fourth quarter client survey. A total of 330 clients completed the questionnaire, providing a diverse and representative sample of the organization's client base. The respondents varied across key demographic and engagement characteristics, including age range, gender, geographical region, sector and business size category. This diversity ensures that the feedback reflects a broad range of client experiences and perspectives. Table 1 presents the number of respondents, and province (geographical

region) and Figure 1 illustrates the percentage of respondents by province and gender. Most respondents were from Harare (28 percent) and Bulawayo (16 percent), with male accounting for about 73 percent of the respondents.

Table 1. Distribution of the Respondents by Province.

Province	Number of respondents	No. of males	No. of females
Bulawayo	52	42	10
Harare	94	84	10
Manicaland	22	16	6
Mash Central	28	26	4
Mash East	34	22	10
Mash West	14	12	2
Masvingo	36	26	10
Mat North	16	12	4
Mat South	12	8	4
Midlands	22	16	6
Total	330	264	66

Figure 1. Percentage of Respondents by Province and Gender



Most respondents (50 percent) fall within the 46–55 age group (Figure 2). Regarding sectoral representation, 30 percent of respondents are from the manufacturing sector, 21 percent from wholesaling and retailing, and 40 percent are general citizens, while the remaining respondents are distributed across other sectors. In terms of business size, approximately 44 percent of respondents are small and medium-sized enterprises (SMEs), 11 percent are large-scale enterprises, and the remaining 45 percent comprise business member organizations, freight agents, ministries, and other government departments. Figure 3

illustrates the distribution of respondents by sector and business size. The respondent profile indicates that the survey results are well-balanced and provide a reliable basis for understanding client satisfaction, expectations, and areas for improvement.

Figure 2: Distribution of Respondents by Age Category

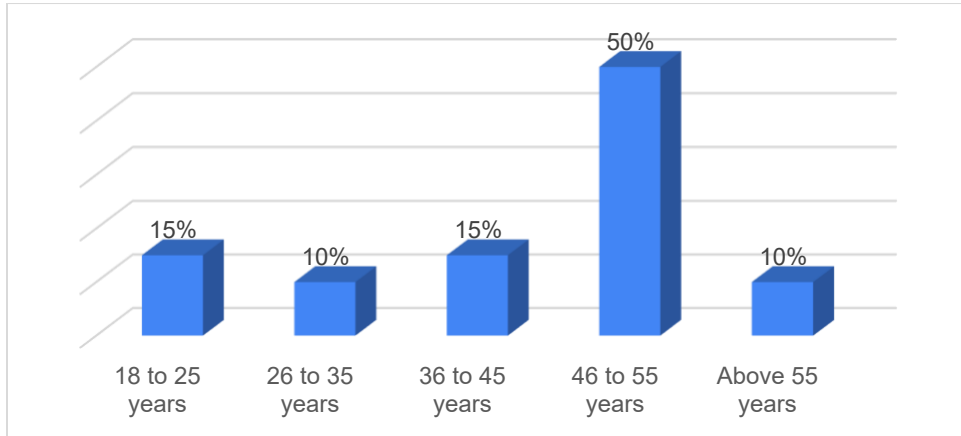
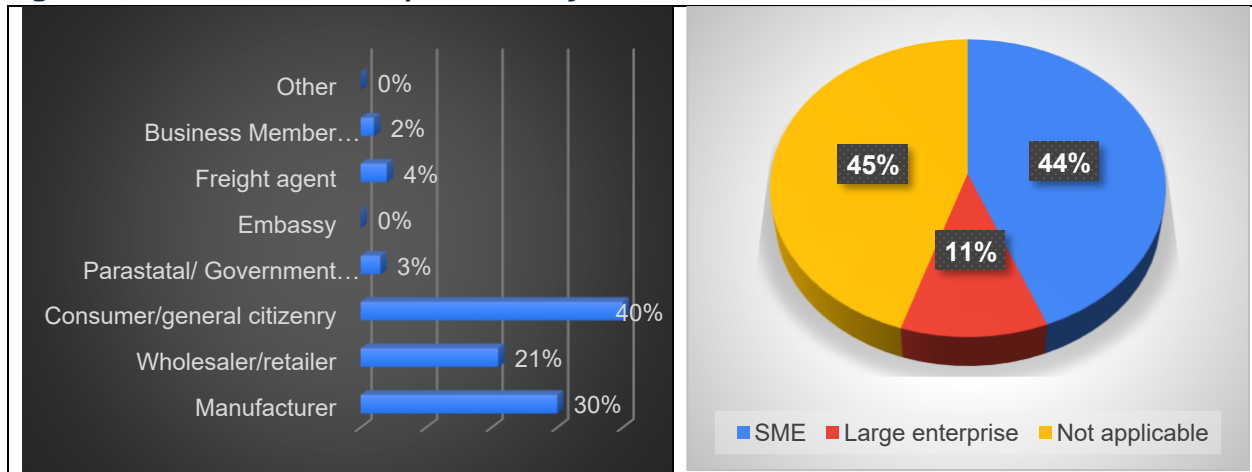


Figure 3: Distribution of Respondents by Sector and Business Size



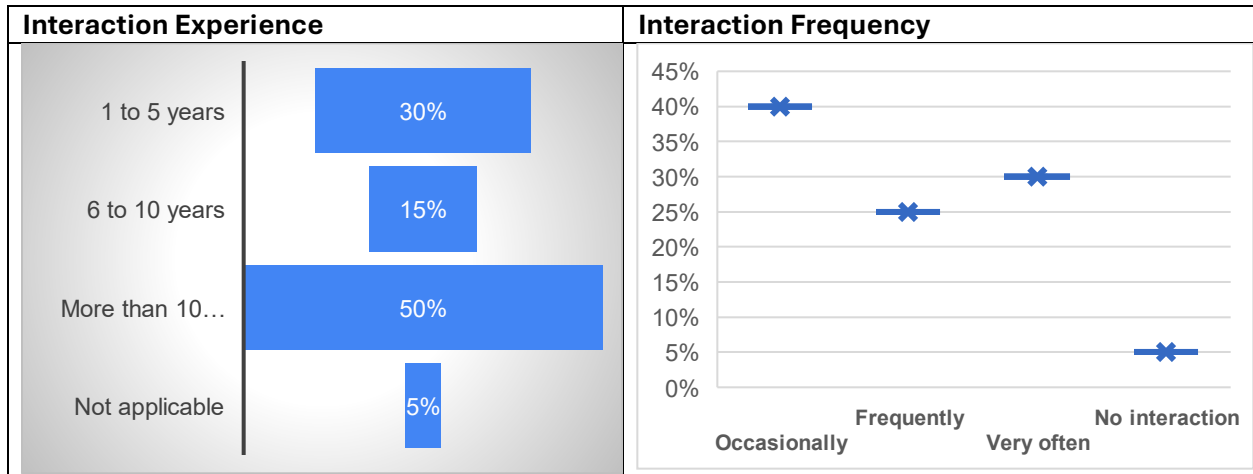
4. Key Findings

4.1. Interaction and Communication Channels

Most respondents have been engaged with the Ministry for varying lengths of time, including 1–3 years and more than three years, indicating that the survey captured insights from both newer and long-standing clients. In addition, most respondents interact with the Ministry frequently or very often (55 percent), while 40 percent reported interacting occasionally (Figure 4). Respondents who have never interacted with the Ministry could introduce bias into the findings if their number were significant. However, the survey results indicate that

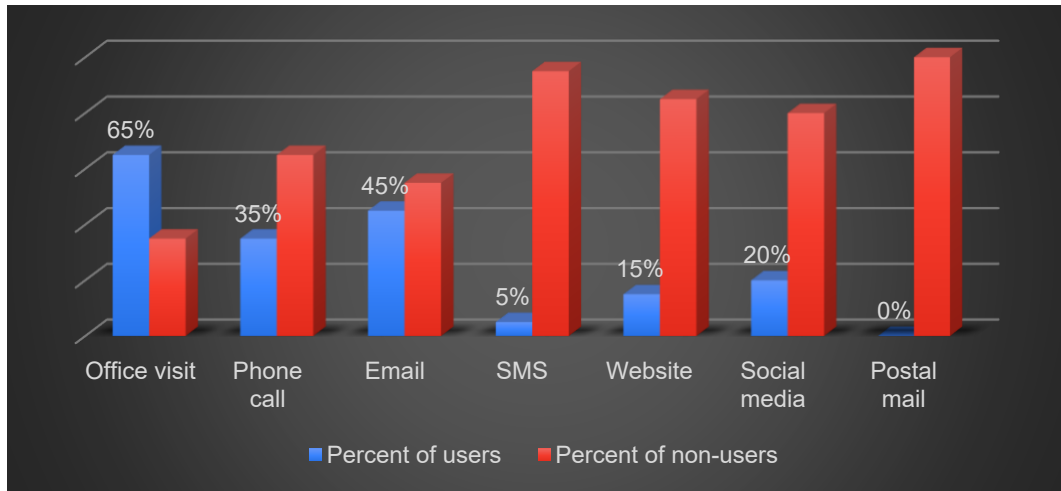
only 5 percent of respondents have never interacted with the Ministry. As a result, the risk of such bias is minimal.

Figure 4: Experience and Frequency of Interaction with the Ministry



Respondents also reported engaging with the Ministry through a variety of communication and interaction channels, highlighting multiple points of contact (Figure 5). Survey results show that these channels include in-person office visits, telephone calls, email, online platforms, social media, and SMS. The use of multiple channels reflects the Ministry’s broad reach and its capacity to accommodate diverse communication preferences. A significant proportion of respondents identified in-person office visits as their main point of contact, suggesting that this channel remains the most accessible and trusted means of communication. Other channels, such as emails, phone calls and social media, were commonly used for follow-up inquiries, information requests, and service updates. The distribution of communication and interaction channels indicates that respondents have several avenues through which to access services and information. These findings provide valuable insights for strengthening existing communication channels, improving responsiveness, and enhancing overall client engagement.

Figure 5: Communication Channels Utilised by Clients

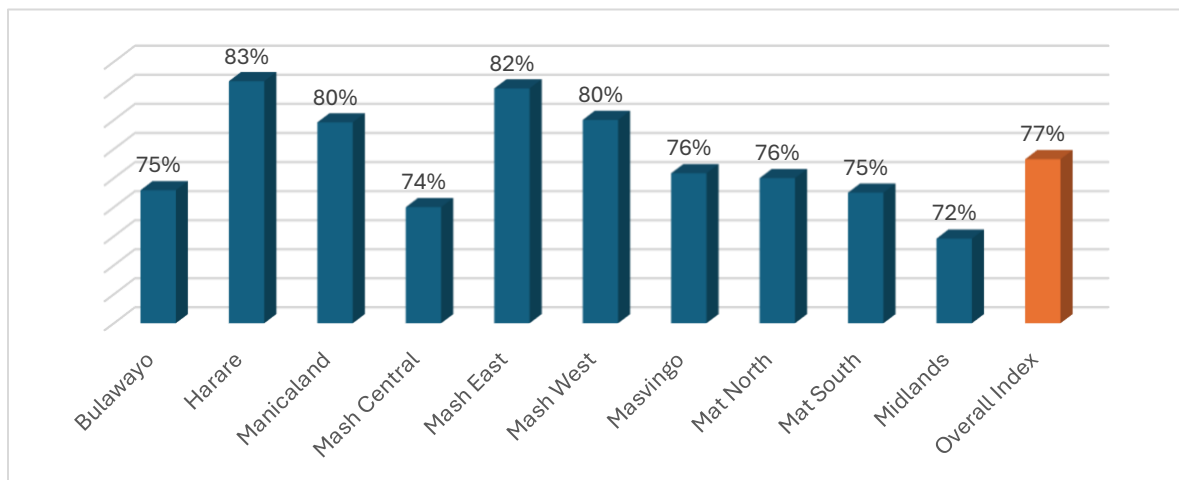


4.2. Components of client satisfaction

4.2.1. Client Satisfaction with Ministry Staff

The client satisfaction survey across Zimbabwe's provinces reveals an overall index of 77%, with strengths in professionalism (84%), courtesy (84%), and availability (80%), but room for improvement in complaints handling (67%) and timeliness of response (68%) (Figure 6). Harare led with the highest overall score of 83%, excelling in professionalism (91%) and courtesy (90%), while Mash East followed closely at 82%, topping professionalism at 92%. In contrast, Mat South scored lowest at 75%, though it shone in courtesy (90%).

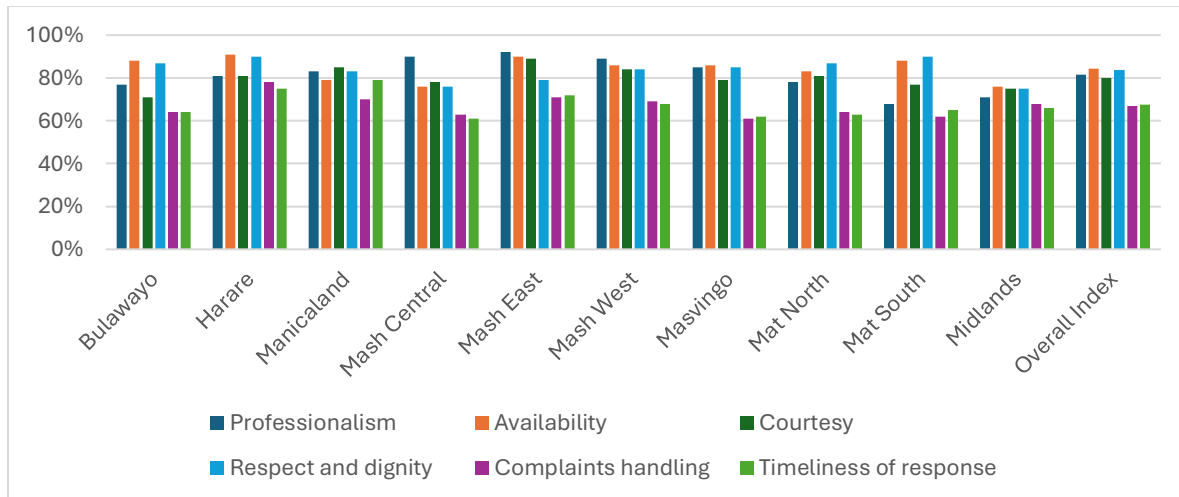
Figure 6: Clients' Satisfaction with Staff Index



Provincial variations highlight Mash Central's top respect and dignity rating (90%) but weaker timeliness (61%), and Masvingo's low complaints handling (61%). Bulawayo and Mat

North both hit 76% overall, with consistent mid-range performance, while Midlands lagged at 72% (Figure 7). These results underscore the need to prioritize complaints resolution and response speed nationwide to boost satisfaction.

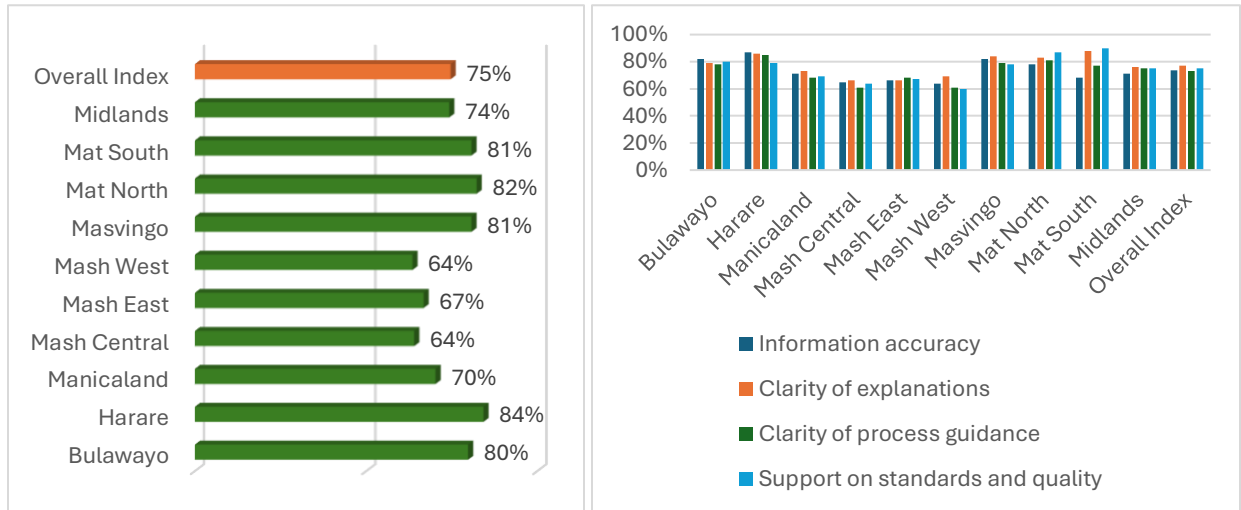
Figure 7: Components of the Satisfaction Index by Province



4.2.2. Client Satisfaction with Ministry Services, Procedures and Regulations

The client satisfaction survey on ministry services, procedures, and regulations across Zimbabwe's provinces shows an overall index of 75%, with clarity of explanations (77%) and support on standards and quality (75%) as relative strengths, while information accuracy (73%) and clarity of process guidance (73%) present opportunities for enhancement. Harare topped the list at 84%, leading in information accuracy (87%) and explanations (86%), closely followed by Mat North and Mat South at 82% and 81%, where Mat South excelled in support (90%). Masvingo also performed strongly at 81%, with solid clarity scores (See Figure 8).

Figure 8: Client Satisfaction with Ministry services, Procedures and Regulations Index

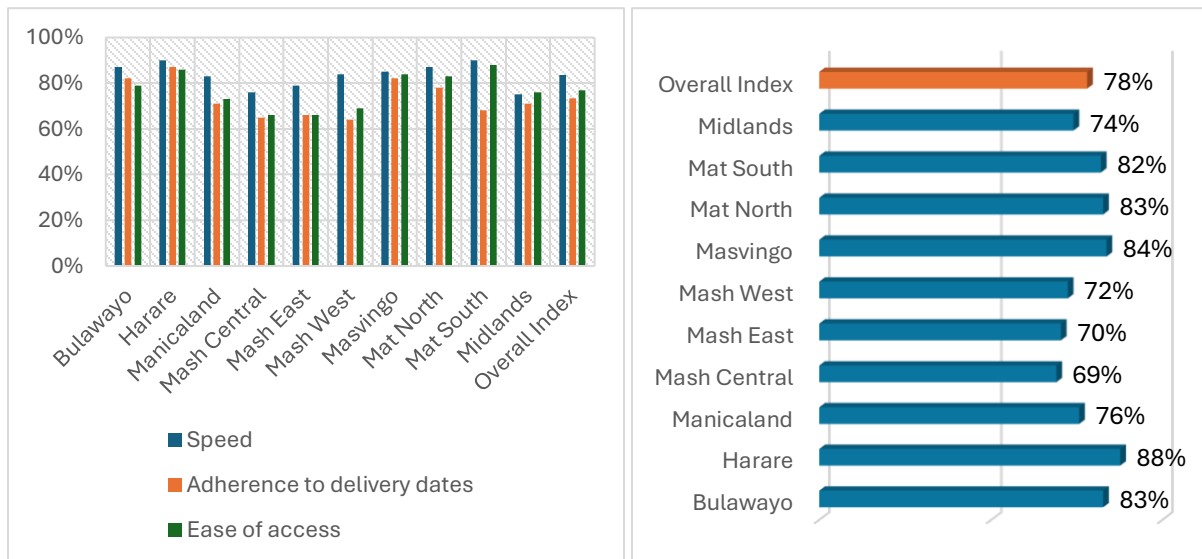


In contrast, Mash Central and Mash West scored lowest at 64%, struggling particularly in process guidance (61%) and support (60-64%), while Manicaland (70%), Mash East (67%), and Midlands (74%) fell below the national average. Bulawayo achieved a balanced 80% overall. These findings highlight the importance of improving informational accuracy and process clarity, especially in underperforming regions, to elevate nationwide satisfaction.

4.2.3. Client Satisfaction with Ministry’s Speed for Processing Requests, Documents, Licenses, or Responding to Queries

Client satisfaction with the Ministry’s speed for processing requests, documents, licenses, and responses is relatively strong, with an overall index of 78%, driven by high ratings for speed (84%) and ease of access (77%), though adherence to delivery dates lags at 73% (see Figure 9).

Figure 9: Client Satisfaction with Ministry’s Speed for Processing Requests, Documents, Licences, or Responding to Queries Index.

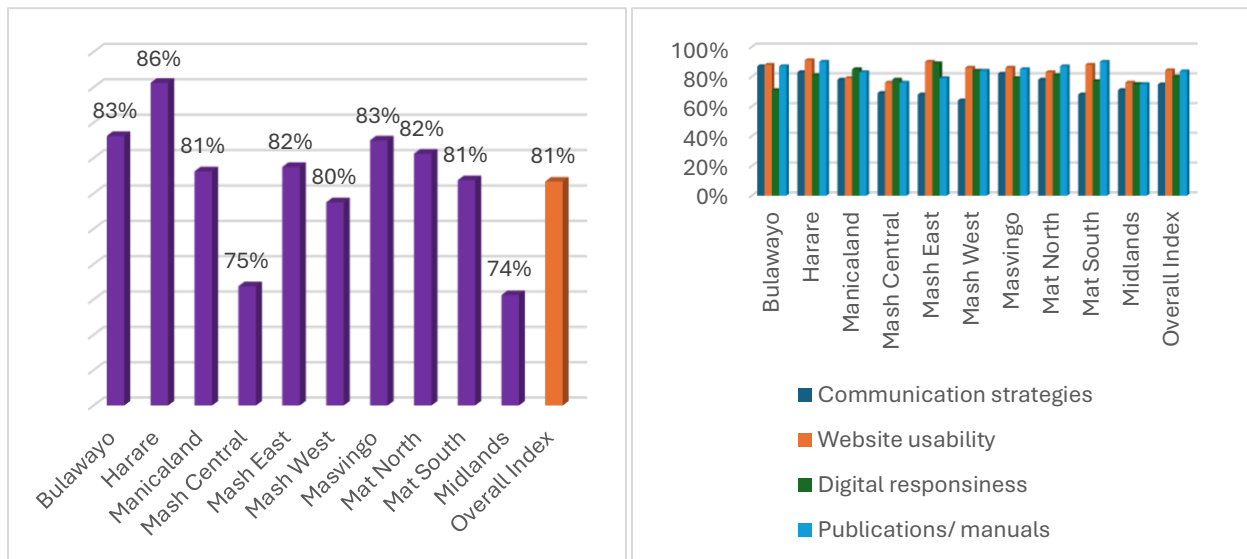


Harare recorded the highest speed scores at 90%, with Harare also leading on adherence (87%) and overall satisfaction (88%), while Mat South combined top-tier ease of access (88%) with an overall index of 82%. Most other provinces clustered between the mid-70s and mid-80s on the satisfaction index, with Masvingo (84%), Mat North (83%), and Bulawayo (83%) all performing above the overall average, supported by solid scores across speed and ease of access. Mash Central (69%), Mash East (70%), and Mash West (72%) were the weakest performers, reflecting lower ratings on adherence to delivery dates (mid-60s) and indicating that reliability of promised timelines remains the key area for improvement despite generally good processing speed.

4.2.4. Client Satisfaction with Ministry Communication Issues

Client satisfaction with the Ministry’s communication is generally positive, with an overall communication index of 81%, supported by strong website usability (84%), digital responsiveness (80%), and publications/manuals (84%), while communication strategies score slightly lower at 75%. Harare leads with an index of 86%, driven by excellent website usability (91%) and strong publications (90%), followed closely by Bulawayo, Masvingo, Mash East, Mat North, and Mat South, all clustered between 81% and 83%, reflecting broadly effective multi-channel communication in these provinces (see Figure 10).

Figure 10: Client Satisfaction with Ministry Communication Index

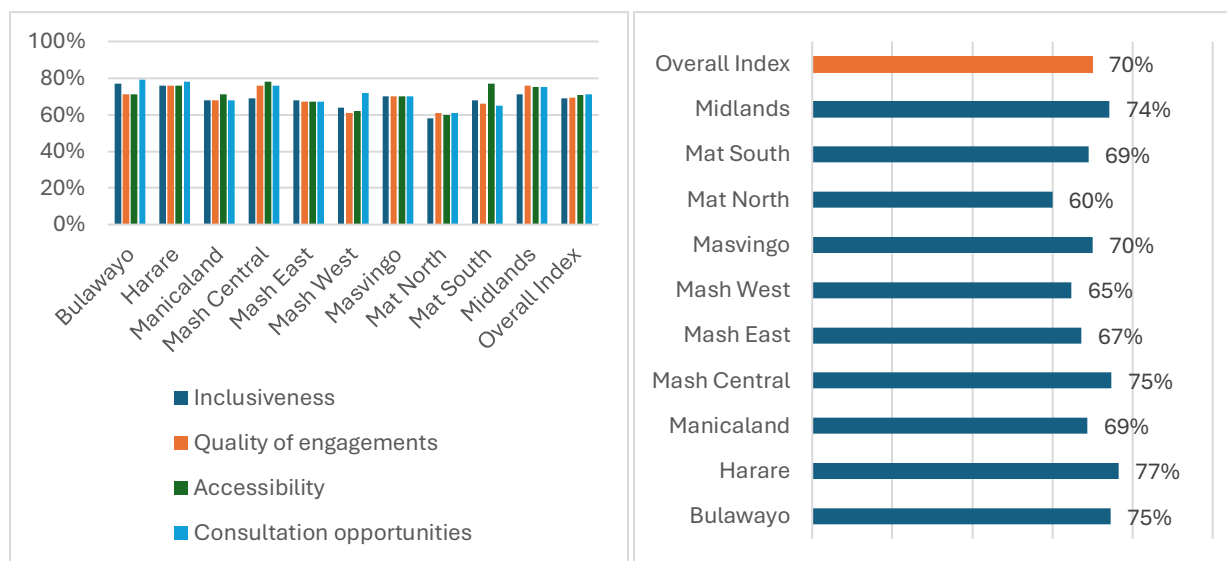


Mash Central, Mash West, and Midlands trail the pack with indices between 74% and 80%, largely due to weaker scores on communication strategies (64–71%), indicating that while digital and print platforms are reasonably functional, the overall planning and consistency of messaging need strengthening in these areas. The pattern suggests that enhancing the quality and targeting of communication strategies, particularly in lower-scoring provinces, would further boost already solid satisfaction levels with the Ministry’s websites, digital responsiveness, and publications.

4.2.5. Client Satisfaction with Ministry Engagements

The survey shows that client satisfaction with the Ministry’s stakeholder engagements is moderate, with an overall index of 70% (See Figure 11). Harare records the highest index at 77%, reflecting consistently strong scores across all four dimensions, while Bulawayo, Mash Central, Masvingo, and Midlands cluster close to the overall average at 74–75%. In contrast, Mat North is the weakest performer with an index of 60%, and Mash West also scores relatively low at 65%, indicating concerns around inclusiveness, perceived quality of engagements, and accessibility in these provinces.

Figure 11: Client Satisfaction with Ministry Stakeholder Engagement Index

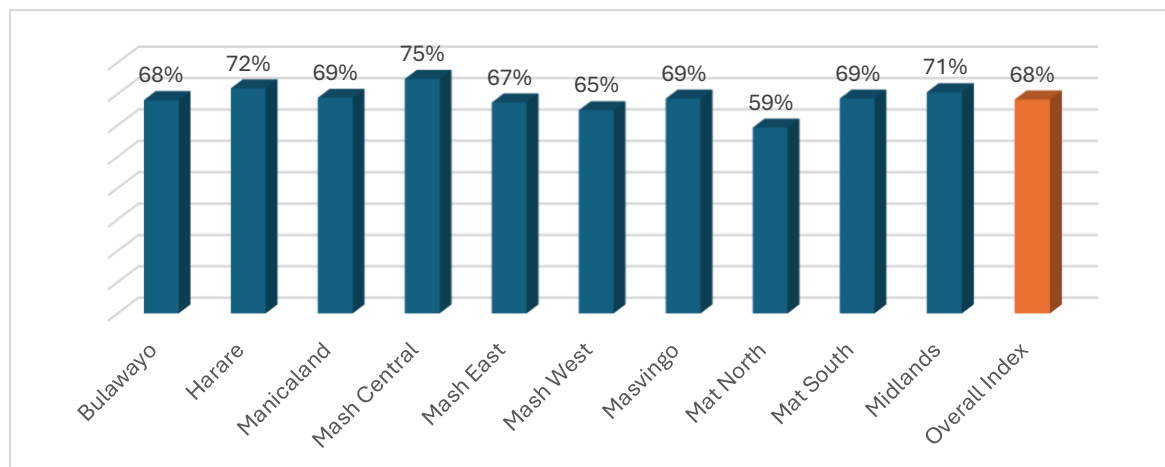


Inclusiveness and quality of engagements both average 69%, while accessibility and consultation opportunities score slightly higher at 71%, suggesting that people generally find it somewhat easier to access and participate in engagements than to feel fully included and well engaged.

4.2.6. Client Satisfaction with Ministry Policy and Regulatory Framework

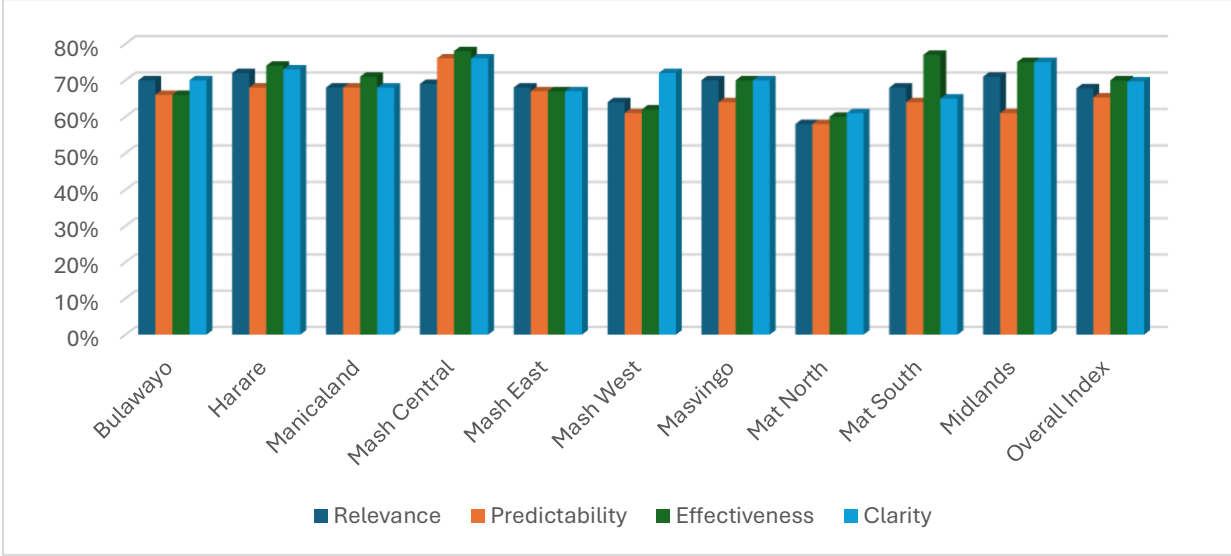
Client satisfaction with the Ministry’s policy and regulatory environment is moderate, with an overall index of 68%. Figure 12 shows the provincial client satisfaction index and Figure 13 shows the index by policy relevance, predictability, effectiveness and clarity.

Figure 12: Provincial client satisfaction overall index



Harare recorded the highest satisfaction at 72%, supported by relatively strong effectiveness (74%) and clarity (73%), while Mash Central and Midlands follow closely at 75% and 71% respectively, driven by higher scores on effectiveness and clarity. At the lower end, Mat North scores 59% and Mash West 65%, reflecting weaker perceptions across relevance, predictability, and effectiveness, suggesting that policy communication and implementation consistency need attention in these provinces.

Figure 13: Policy Relevance, Predictability, Effectiveness and Clarity Indices by Province



Relevance averages 68%, while clarity and effectiveness both stand at 70%, and predictability is slightly lower at 65%, indicating that clients find policies fairly clear and effective but less consistent and predictable in their application.

4.2.7. Client Satisfaction with Ministry Efforts

The client satisfaction survey reveals a varied response across different provinces regarding the Ministry’s efforts in competitiveness promotion, investment promotion, export promotion, consumer protection, trade measures, and overall client satisfaction (Figure 14). Bulawayo and Harare emerged as the top performers, with Bulawayo achieving 88% in competitiveness promotion and 85% in client satisfaction, while Harare scored 90% in both investment and export promotion, with an impressive 87% in client satisfaction. In contrast, provinces like Manicaland and Mash Central scored lower, with Manicaland achieving a 76% client satisfaction index and Mash Central scoring just 71%, reflecting weaker perceptions of the Ministry's impact in those areas.

Figure 14: Client Satisfaction Index with Ministry Effort by Province

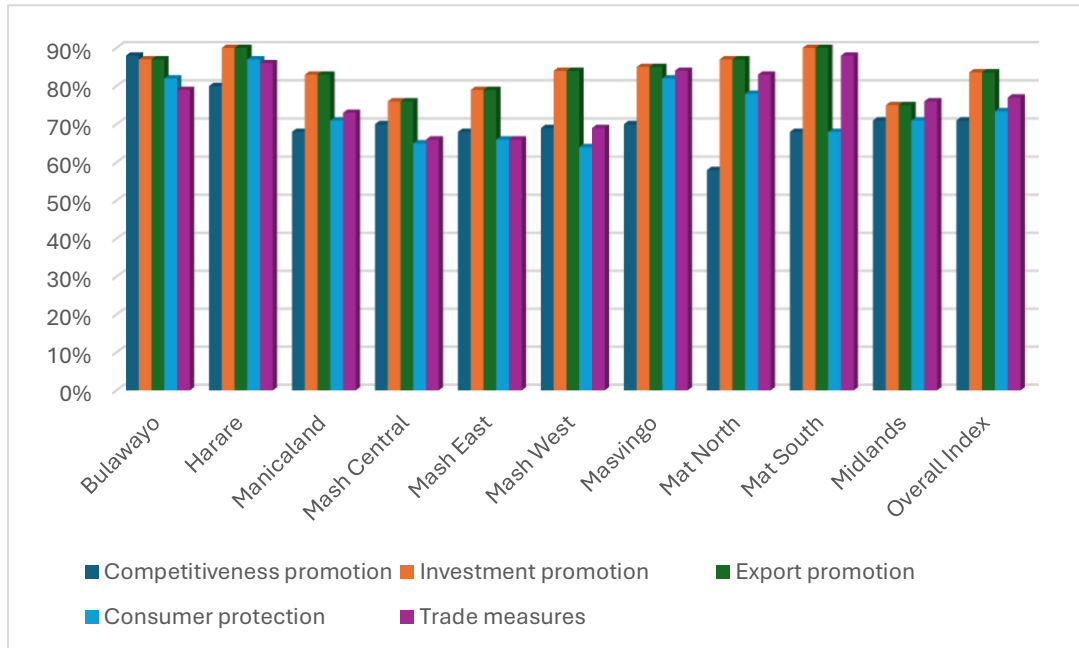
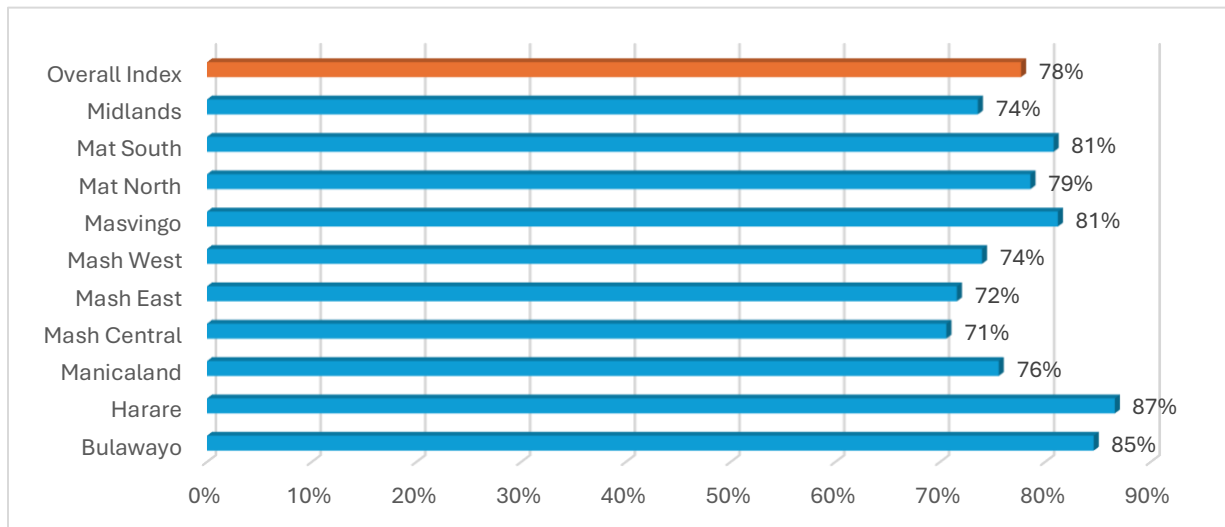


Figure 15: Provincial Index- Ministry Efforts



Other provinces showed more balanced results, with Masvingo and Mat South scoring 81% and 81% in client satisfaction, respectively (Figure 15). Consumer protection and trade measures had more mixed results, with some provinces like Masvingo excelling in trade measures (84%), while others like Mash West and Mash East scored lower in consumer protection (64% and 66%). The overall index for the survey stands at 78%, indicating a

generally positive but varied perception of the Ministry's efforts, with some provinces expressing higher satisfaction than others in different areas of service.

4.2.8. Satisfaction with Ministry Services

Client satisfaction with the Ministry's services is generally positive, with an overall index of 79% (Figure 16). Satisfaction is strongest for reserved sector certificates, consumer protection, standards development funds, and CRB and related commercial e-services, all at 84%, while relatively lower ratings are recorded for import and export licensing (71%), CBCA (73%), NIEF (77%), public finance and management systems (80%), and commercial e-services (70%) (Table 2 in Appendix).

Figure 16: Satisfaction with Ministry Services

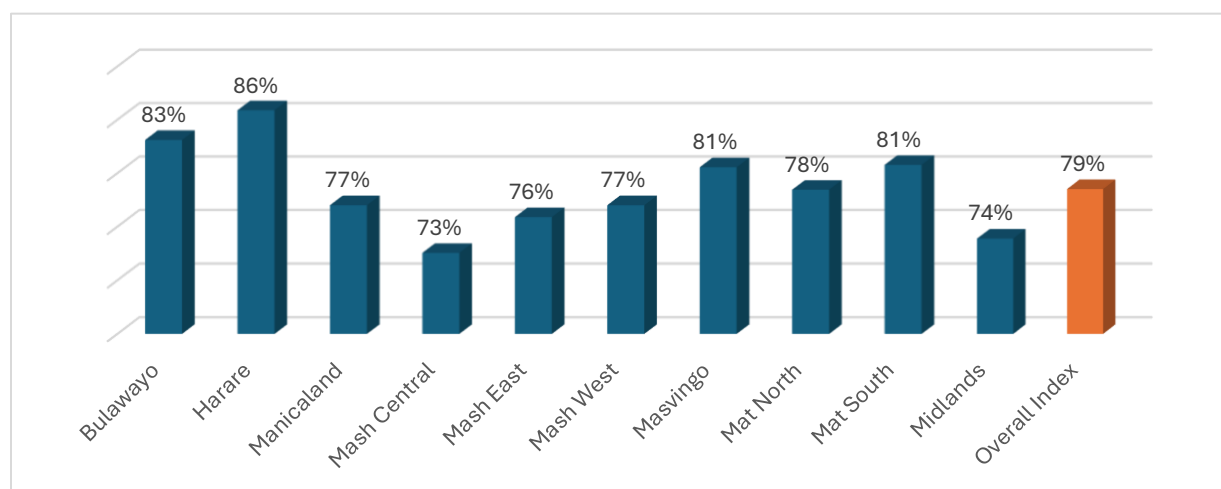
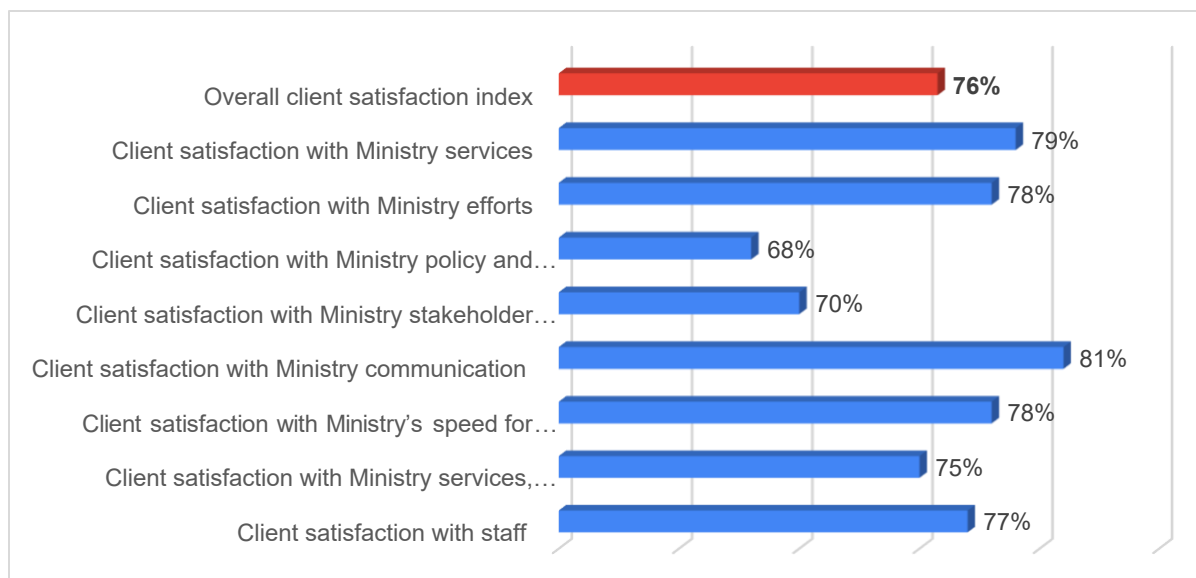


Figure 16 shows that Harare leads with an index of 86%, driven by very high scores across most services, including reserved sector certificates, consumer protection, standards development funds, CRB, and CBCA. Bulawayo follows at 83%, with consistently strong ratings on most services, while several other provinces, such as Manicaland, Mash West, Masvingo, Mat North, and Mat South, cluster in the upper-70s to low-80s range. Midlands and Mash Central record the lowest overall indices at 74% and 73% respectively, reflecting more modest satisfaction across multiple service areas.

4.3. Overall Satisfaction

The client satisfaction survey results indicate a generally positive perception of the Ministry's performance across key service delivery dimensions. The overall client satisfaction index stands at 76 percent, reflecting a solid level of satisfaction among respondents. Figure 17 illustrates the scores of the components of the client satisfaction index.

Figure 17: Overall Client Satisfaction Index and its Components



Clients reported relatively high satisfaction with the Ministry's communication, which recorded the highest score at 81 percent, suggesting that information sharing, clarity of messaging, and responsiveness are key strengths. Satisfaction with Ministry services overall was also strong at 79 percent, while speed in processing requests, documents, and responding to queries recorded a satisfaction level of 78 percent, indicating effective service turnaround times.

Satisfaction with staff performance stood at 77 percent, reflecting positive perceptions of staff professionalism, courtesy, and competence. Similarly, satisfaction with Ministry efforts was rated at 78 percent, demonstrating client appreciation of the Ministry's initiatives and commitment to service delivery. Satisfaction with services, procedures, and regulations was recorded at 75 percent, indicating general approval, though with room for refinement.

Comparatively lower satisfaction levels were observed in stakeholder engagement (70 percent) and the policy and regulatory environment (68 percent). While these scores still reflect a majority level of satisfaction, they suggest areas where increased consultation, clearer policy frameworks, or improved regulatory processes could further enhance client confidence.

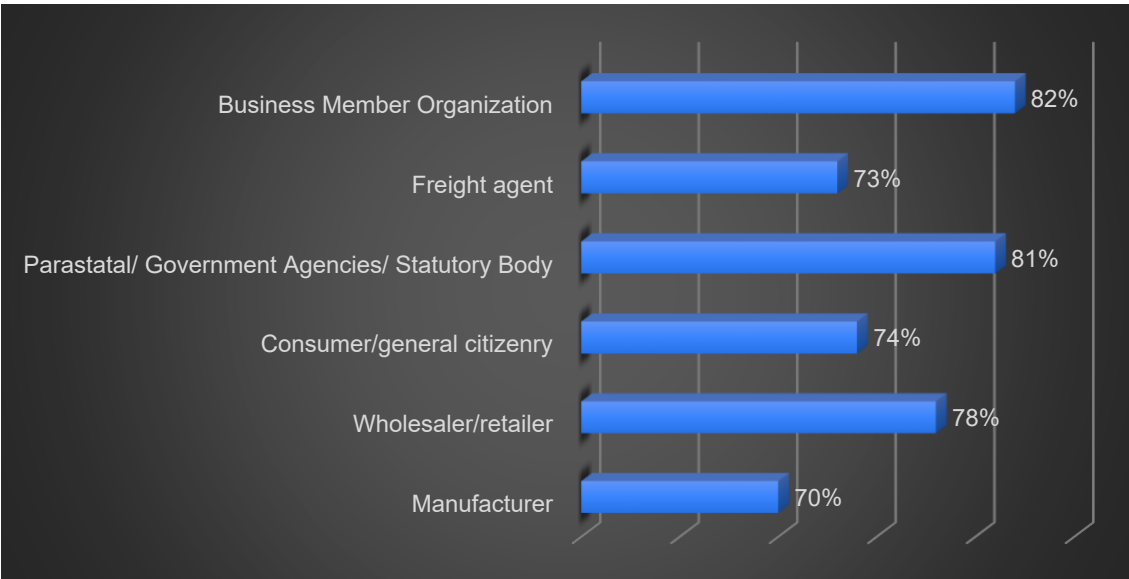
The findings suggest that clients are largely satisfied with the Ministry's services and interactions. At the same time, the results highlight specific areas, particularly stakeholder

engagement and the policy and regulatory environment, where targeted improvements could strengthen overall client satisfaction and service effectiveness.

4.3.1. Client Satisfaction by Sector

An analysis of client satisfaction by sector reveals variations in perceptions of the Ministry’s performance across different client groups. Overall, satisfaction levels are impressive across all sectors, with scores ranging from 70 percent to 82 percent, indicating broad-based approval of the Ministry’s services. Figure 18 illustrates sector scores.

Figure 18: Sector Client Satisfaction Scores



The highest levels of satisfaction were reported by Business Member Organizations, with a client satisfaction index of 82 percent, followed closely by Parastatal, Government Agencies, and Statutory Bodies at 81 percent. These results suggest strong engagement and effective delivery service for institutional stakeholders. Wholesalers and retailers also expressed a relatively high level of satisfaction, recording a score of 78 percent, while consumers and the general citizenry reported a satisfaction level of 74 percent, indicating generally positive experiences with Ministry services among the wider public.

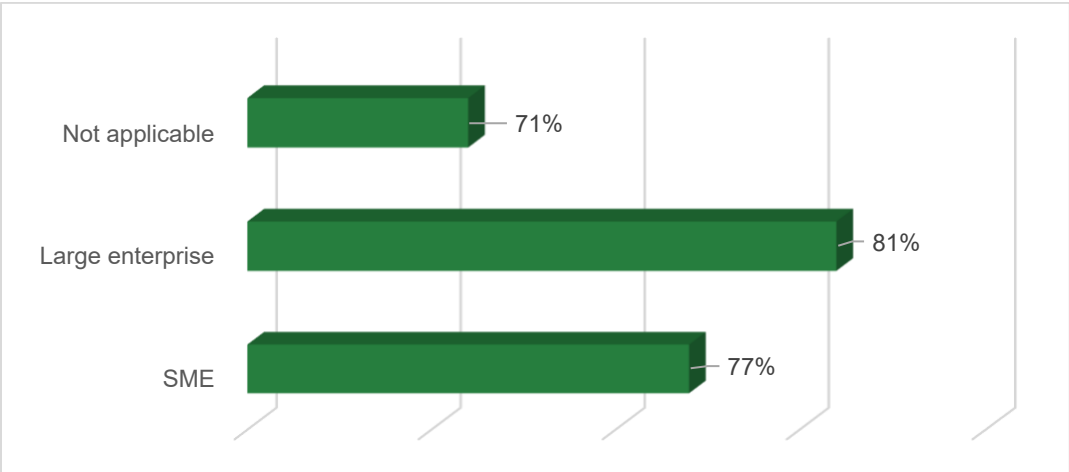
Comparatively lower satisfaction levels were observed among freight agents (73 percent) and manufacturers (70 percent). While these scores still reflect a majority level of satisfaction, they point to potential sector-specific challenges related to regulatory processes, service responsiveness, or engagement mechanisms that may require targeted attention. The sector-based findings highlight that while the Ministry is performing well

across most client groups, tailored interventions aimed at addressing the specific needs of manufacturers and freight agents could help improve satisfaction levels and ensure more consistent service experiences across all sectors.

4.3.2. Client Satisfaction by Size

The survey results indicate a positive trend in client satisfaction across different business categories. Large enterprises reported the highest level of satisfaction, with a client satisfaction index of 81%, suggesting that the services provided are well-aligned with the needs of more complex organizations. Small and medium-sized enterprises (SMEs) also demonstrated strong satisfaction levels, scoring 77%, reflecting a generally favorable experience among smaller businesses. The three size category scores are presented in Figure 19.

Figure 19: Client Satisfaction Scores by Size Category

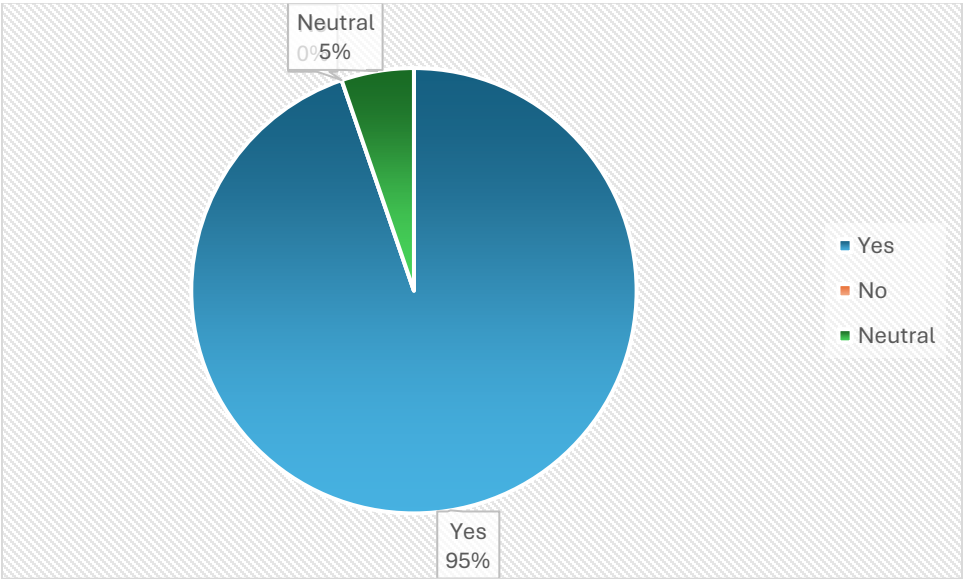


Respondents categorized as "Not applicable" reported a slightly lower satisfaction index of 71%, which may indicate differences in service relevance or engagement for clients not directly associated with a specific business size category. These findings suggest that client satisfaction is consistently high across all business categories, with large enterprises expressing the highest levels of satisfaction, followed closely by SMEs.

4.4. The Gaps in Client Satisfaction

The figure below illustrates respondents' perceptions regarding the need to improve the Ministry's overall service performance and stakeholder engagement.

Figure 20: Need for Service Performance Improvement

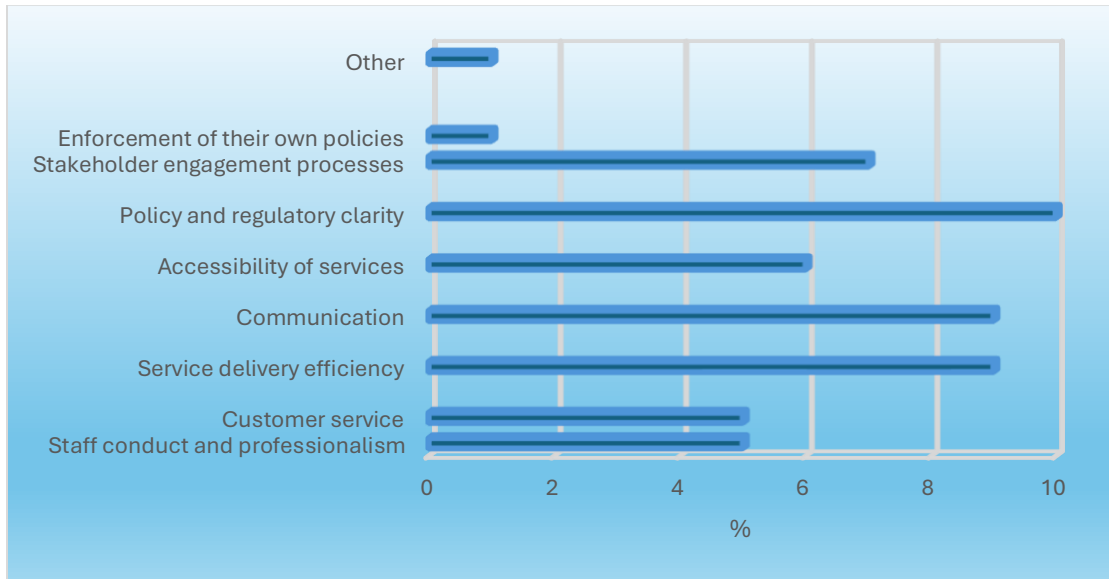


The findings indicate a very strong consensus among respondents regarding the need to improve the Ministry’s overall service performance and stakeholder engagement. An overwhelming 94.7 percent of respondents agreed that improvements are necessary, demonstrating widespread concern about the effectiveness and responsiveness of current service delivery and engagement mechanisms. No respondents (0 percent) felt that improvements were unnecessary, highlighting a unanimous recognition of the need for reform. Only 5.3 percent of respondents expressed a neutral position, possibly reflecting limited interaction or mixed experiences with the Ministry.

4.5. Key Areas Requiring Improvement in Service Performance and Engagement

The survey sought to identify specific areas within the Ministry’s overall service performance and stakeholder engagement that respondents believe require improvement, following their acknowledgement of the need for enhanced service delivery. The responses therefore reflect stakeholder priorities and highlight the key aspects of the Ministry’s operations that require targeted attention to improve effectiveness, efficiency, and engagement.

Figure 21: Areas of Service Performance and Engagement Requiring Improvement



The findings indicate that policy and regulatory clarity emerged as the most prominent area requiring improvement, accounting for approximately 18.9% of all selections, underscoring significant stakeholder concern regarding the interpretation, understanding, and application of policies and regulations. Service delivery efficiency and communication followed closely, each representing about 17.0%, reflecting challenges related to procedural delays, operational effectiveness, and the adequacy of information dissemination. Stakeholder engagement processes, which accounted for roughly 13.2%, point to the need for more structured, inclusive, and responsive engagement mechanisms, while accessibility of services (approximately 11.3%) highlights barriers faced by stakeholders in accessing Ministry services. Moderate levels of concern were recorded for staff conduct and professionalism and customer service, each accounting for about 9.4%, suggesting the need to strengthen frontline service interactions. In contrast, enforcement of the Ministry’s own policies and other issues were least cited, each at approximately 1.9%, indicating that these concerns, while present, are less widespread compared to other service performance challenges.

5. Conclusion and Recommendations

The client satisfaction survey reveals an overall positive perception of the Ministry’s services, with most indices in the high 70s and low 80s across services, speed, communication, engagement, and the policy and regulatory environment. Clients value the quality, responsiveness, and reliability of services, with especially strong satisfaction around professionalism, communication channels (web, digital, and publications), and key

regulatory services such as reserved sector certificates and consumer protection. Despite these encouraging results, about 95 percent of respondents still see room for improvement, particularly in complaints handling, adherence to delivery dates, policy clarity and predictability, service accessibility, and stakeholder engagement. Addressing these gaps while sustaining existing strengths will help the Ministry strengthen client relationships, foster loyalty, and drive continued service growth.

Based on the survey findings, the following recommendations are proposed to sustain and further enhance client satisfaction:

- Maintain high service standards and the practices that have produced strong scores, ensuring consistent quality across all service points.
- Recognise and reward staff performance to reinforce professionalism, accountability, and a client-centred culture.
- Leverage positive client feedback in internal briefings and public communication to build trust and confidence.
- Strengthen enforcement of the Client Service Charter through routine compliance audits focused on customer service, staff conduct, and turnaround times, with results reported to senior management.
- Improve service efficiency and adherence to delivery dates via tighter workflow management, monthly performance reporting, and corrective action plans where delays persist.
- Enhance complaints handling and communication responsiveness by monitoring response times, maintaining visible feedback loops, and using dashboards to track performance.
- Improve accessibility of services by inspecting provincial and district offices and ensuring digital platforms are reliable, user-friendly, and well-integrated with face-to-face channels.
- Enhance policy and regulatory clarity and predictability through user-friendly guidelines, FAQs, and regular updates when rules change, informed by analysis of complaints and enquiries.
- Strengthen stakeholder engagement by documenting consultations, tracking follow-up actions, and improving inclusiveness and quality of engagements, especially in lower-scoring provinces.
- Target support to weaker provinces (such as Mat North, Mash West, Mash Central, and Midlands) with capacity building, supervision, and tailored improvement plans, while spreading good practices from stronger performers through peer learning, staff exchanges, and common service standards.

Table 2: Client Satisfaction with Ministry Services

Province	Import and export licensing	Reserved sector certificate	Consumer protection	CBCA	NIEF	Standards Development Funds	Public Finance & Management System	CRB	Commercial E-services	Client satisfaction with ministry services index
Bulawayo	88%	87%	87%	82%	79%	88%	71%	87%	79%	83%
Harare	80%	90%	90%	87%	86%	91%	81%	90%	78%	86%
Manicaland	68%	83%	83%	71%	73%	79%	85%	83%	68%	77%
Mash Central	70%	76%	76%	65%	66%	76%	78%	76%	70%	73%
Mash East	68%	79%	79%	66%	66%	90%	89%	79%	67%	76%
Mash West	69%	84%	84%	64%	69%	86%	84%	84%	69%	77%
Masvingo	70%	85%	85%	82%	84%	86%	79%	85%	69%	81%
Mat North	58%	87%	87%	78%	83%	83%	81%	87%	62%	78%
Mat South	68%	90%	90%	68%	88%	88%	77%	90%	68%	81%
Midlands	71%	75%	75%	71%	76%	76%	75%	75%	71%	74%
Overall Index	71%	84%	84%	73%	77%	84%	80%	84%	70%	79%