

Medicines Control Authority of Zimbabwe

2025 Customer Satisfaction Survey

Final Report

08 December 2025



1.0: Research background

- ❑ Medicines Control Authority of Zimbabwe (MCAZ) is a statutory body established by an act of Parliament, with the mandate to regulate the manufacturing distribution, storage and sale of medicines and medical devices in the country. The Authority ensures that good quality medicine reaches the end user through enforcement of adherence to standards throughout the value chain. The MCAZ serves a diversified customer base consisting of individuals and entities that interact with the Authority, including pharmacies, dispensing medical practitioners, industrial clinics, veterinary medicines general dealers, clinical trial researchers, wholesalers, manufacturers, importers, exporters, applicants and the general public.
- ❑ Medicines Control Authority of Zimbabwe as an organization is comprised of various units carrying out different tasks in order to achieve the above-mentioned mandate. Although some units do not directly interface with the end customer , their performance has a bearing on the overall service delivery of the regulator. The regulatory body has a client services charter which outlines the service commitments and standards that stakeholders must expect. MCAZ as a customer centric organization values the feedback from its stakeholders so as to continually improve their service delivery promise to become a comparative regulator globally. MCAZ has a has a tradition of conducting periodic stakeholder feedback surveys.
- ❑ It is upon this background that Topline Research Solutions (TRS) was commissioned to conduct a customer satisfaction survey for 2025 having done the same work in the past 2 years. Metrics computed in 2025 were compared against those in 2023 & 2024 to reveal any improvement or decline in performance on any of the parameters.



2.0: Objectives of the study

Overall, Medicines Control Authority of Zimbabwe (MCAZ) sought to understand market sentiments around the regulator and how the authority is evaluated by key stakeholders on the current service delivery promise and thereof facilitate the identification of service gaps for improvements.

The specific objectives of the study are as follows;

- ✓ Determine how MCAZ own customers define excellent customer service
- ✓ Gauge on how MCAZ is performing on the identified service delivery descriptors by different customers
- ✓ Deduce the overall satisfaction of customers on MCAZ's services through a Customer Satisfaction Index (CSI) per customer segment
- ✓ Measure Complaints Resolution Ratio (CRR)
- ✓ Establish the Customer Effort Score (CES)
- ✓ Measure Net Promoter Score (NPS)
- ✓ To identify service performance gaps &
- ✓ To identify critical factors that lead to customer satisfaction and customer dissatisfaction with MCAZ's service delivery.



3.0: Methodology of the survey

The scope of the study was national and influenced largely by where MCAZ's customers are located. The research design was a multi-pronged approach encompassing qualitative and quantitative research techniques. The research was executed as follows;

- ❑ **Internal stakeholder consultation:** Head of business units were consulted during tools designing and their input was incorporated before signing off of the final questionnaires.
- ❑ **Qualitative research:** n=20 in-depth discussions with focal persons who deal with MCAZ within different organizations to understand their views on MCAZ service delivery.
- ❑ **Quantitative research:** n=750 telephonic interviews were conducted using Computer Aided Telephonic Interviewing (CATI) technique. The sample was split among stakeholder segments (11) based on the size of the databases.



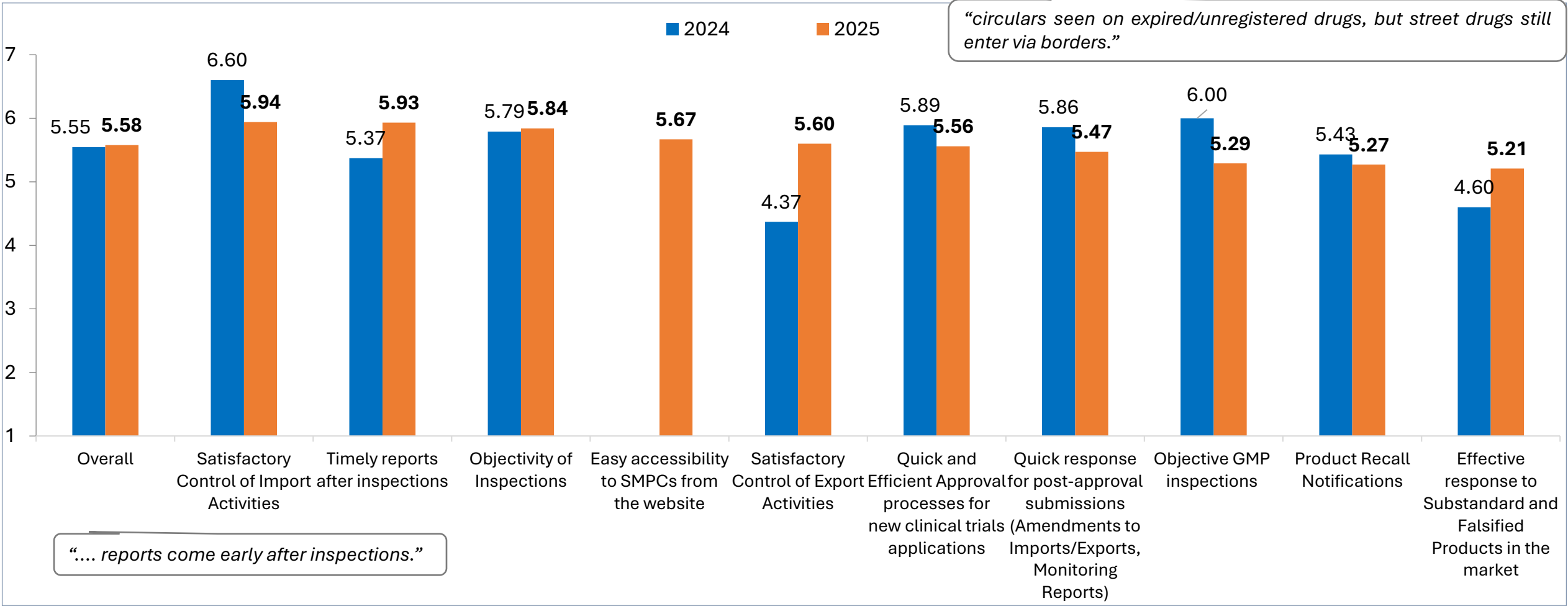


4.0: Main Findings



4.1.1a: MCAZ performance on Regulatory (KPIs) - GBT

Qn: Using a 7-point scale where 1 means extremely dissatisfied and 7 means extremely satisfied, how would you rate MCAZ on the following regulatory elements?



- ❑ Overall performance on regulatory elements evaluated across different categories improved slightly from 5.55 in 2024 to 5.58 in 2025, indicating stable stakeholder satisfaction.
- ❑ The regulatory body has maintained a high score on satisfactory control of import activities.
- ❑ There has been a significant improvement on timely reports after inspections in 2025.

4.1.1b: Impact of Global recognition

“Our pharmacies and warehouses are up to standard and so we can trade with other countries”

Qn: In your understanding what does this global recognition mean for the health sector?
Qn: In your understanding what does this global recognition mean for your organization?

Health sector

- ✓ Improves quality of services and safety within the health sector
- ✓ Boost public trust and confidence in the health sector
- ✓ Improves accessibility and availability of medicines and medicinal devices
- ✓ Counterfeit products reduction
- ✓ Supply chain improvement

“We hear about it every day and it speaks to progression we have had as an industry.”

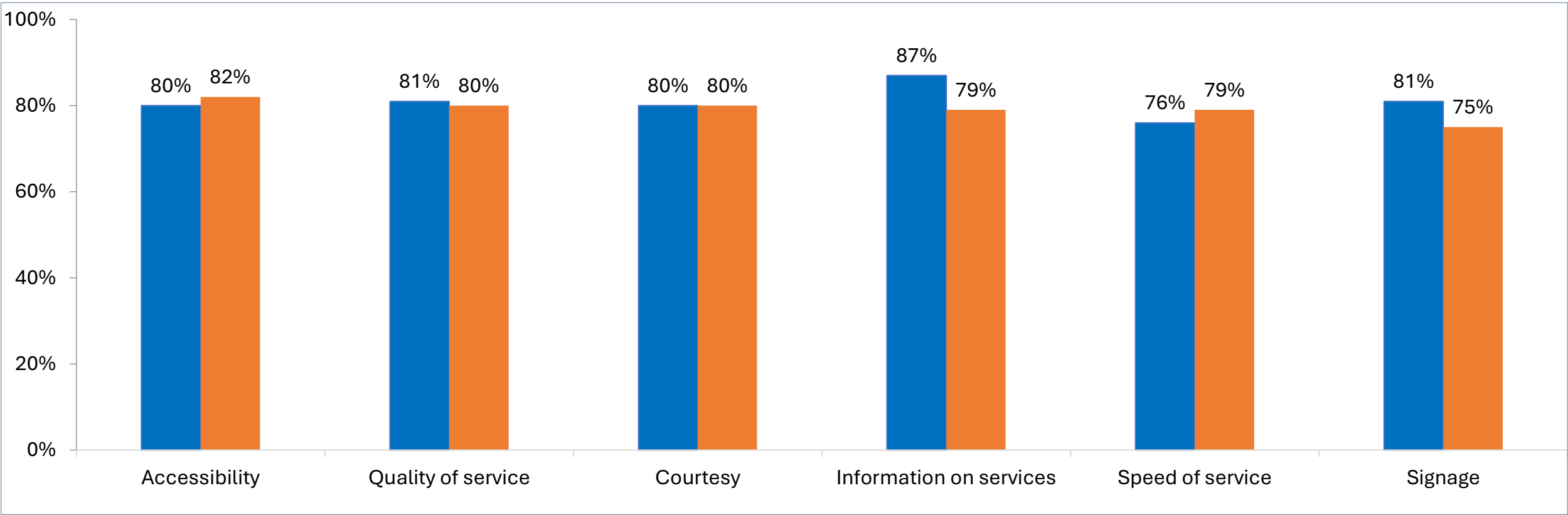
Organization level

- ✓ It's a quality assurance mechanism
- ✓ New export opportunities
- ✓ Increased competition from international players (access to the Zimbabwean market)
- ✓ Improved access and availability of drugs
- ✓ Increased compliance costs
- ✓ Boosts customer confidence in the regulator
- ✓ Balanced operating environment (reduced counterfeits, illegal businesses, etc.)

- ❑ Overall, most stakeholders are positively disposed towards global recognition
- ❑ As shown in most of the responses above, global recognition is associated with more opportunities and efficiencies at industry and organizational levels.

4.1.2: MCAZ continue to enhance customer experience

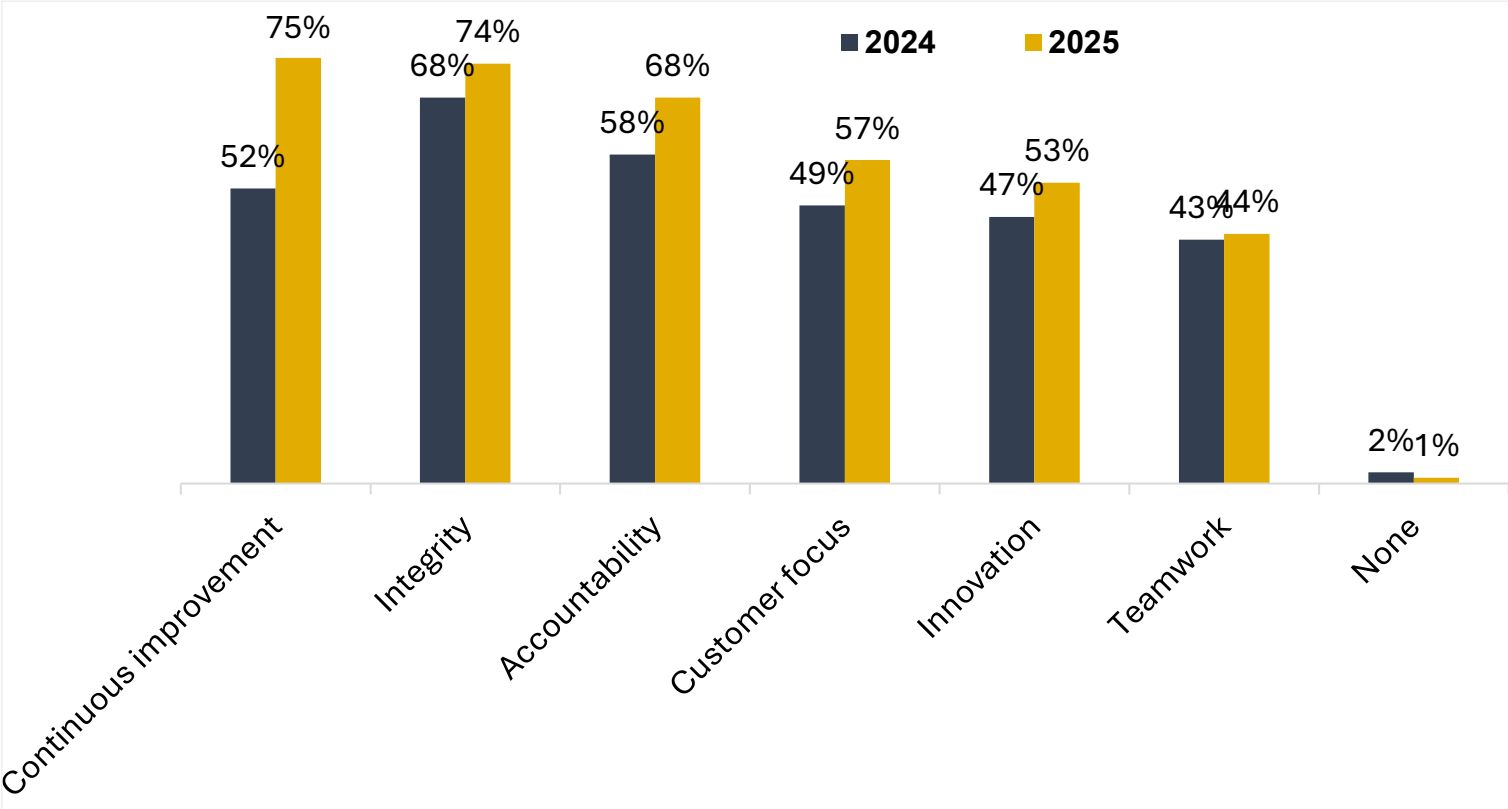
Qn: Overall, to what extent are you satisfied with MCAZ on the following customer experience elements?



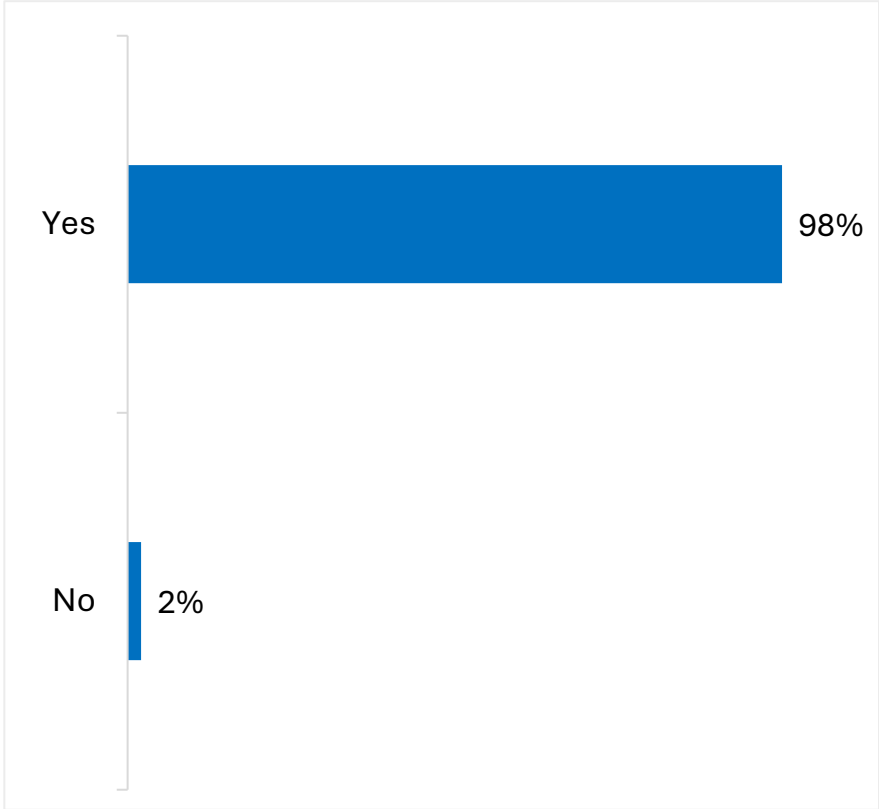
- ❑ Overall customer experience remains positive, with most elements above 75%, indicating consistent satisfaction.
- ❑ Accessibility improved slightly from 80% to 82%, showing better ease of interaction for stakeholders.
- ❑ Speed of service increased from 76% to 79%, reflecting progress in operational efficiency. The rating for information on services declined significantly although it remained positive. Information regarding exports is perceived to be limited by those considering exporting medicines.

4.1.3: Integrity & Continuity drive MCAZ values

Qn: Which of the following values do you associate with MCAZ?



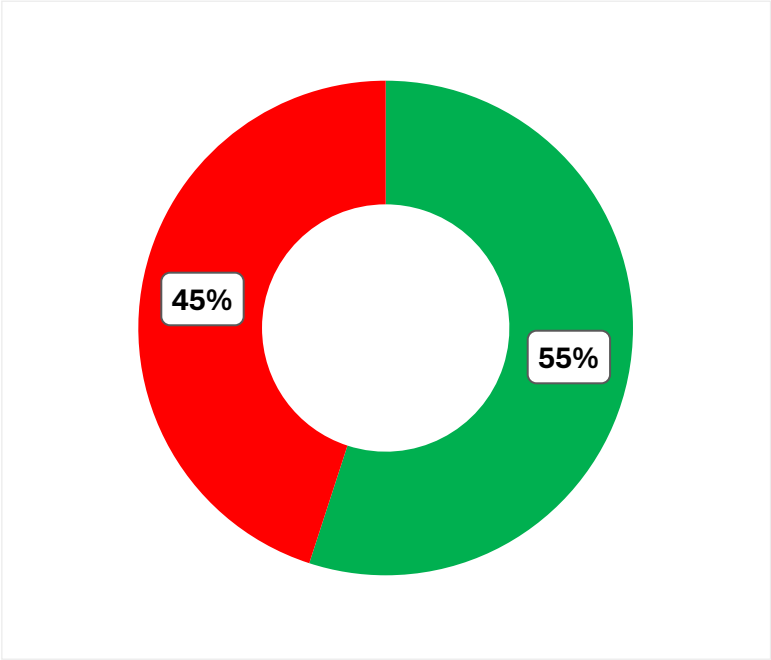
Qn: Does MCAZ staff reflect these values in their behavior and interactions with you?



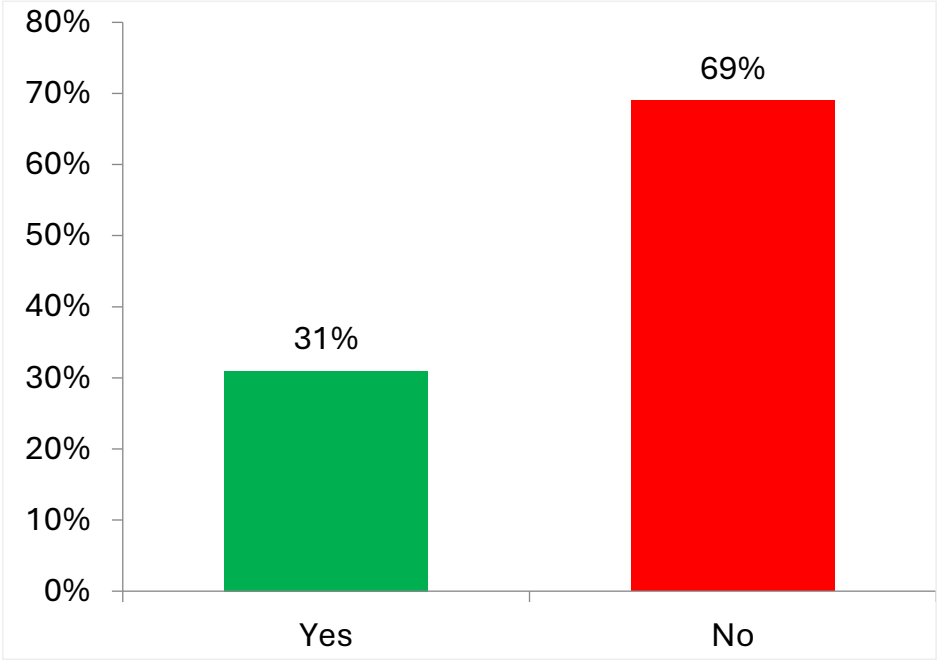
- ❑ The regulatory board is generally associated with positive values.
- ❑ Integrity remains a core value, with 74% in 2025, higher from 68% in 2024. Continuous Improvement shows the largest gain, rising from 52% to 75%, a sign of strong commitment to operational excellence.
- ❑ Accountability and Customer Focus remain significant at 68% and 57%, reinforcing transparency and stakeholder engagement which remains a challenge for most public sector entities.
- ❑ Staff alignment with values is exceptional, with 98% of stakeholders confirming MCAZ staff reflect these values, an improvement from 97% in 2024.

4.1.4: Awareness of MCAZ Client Service Charter

Qn: Are you aware of the MCAZ Client Service Charter?



Qn: Would you say you understand the commitments outlined in the service charter?



- ❑ Overall awareness is moderate, with 55% indicating awareness of the Client Service Charter.
- ❑ Detailed awareness is low, with only 31% confirming knowing the commitments in the service charter.
- ❑ Customers appear partially clear on MCAZ’s commitments, rather they strongly recognize the regulatory mandate.
- ❑ Time delivery standards for different services offered by the Medicines Control Authority of Zimbabwe was the most recognized element of the service charter.

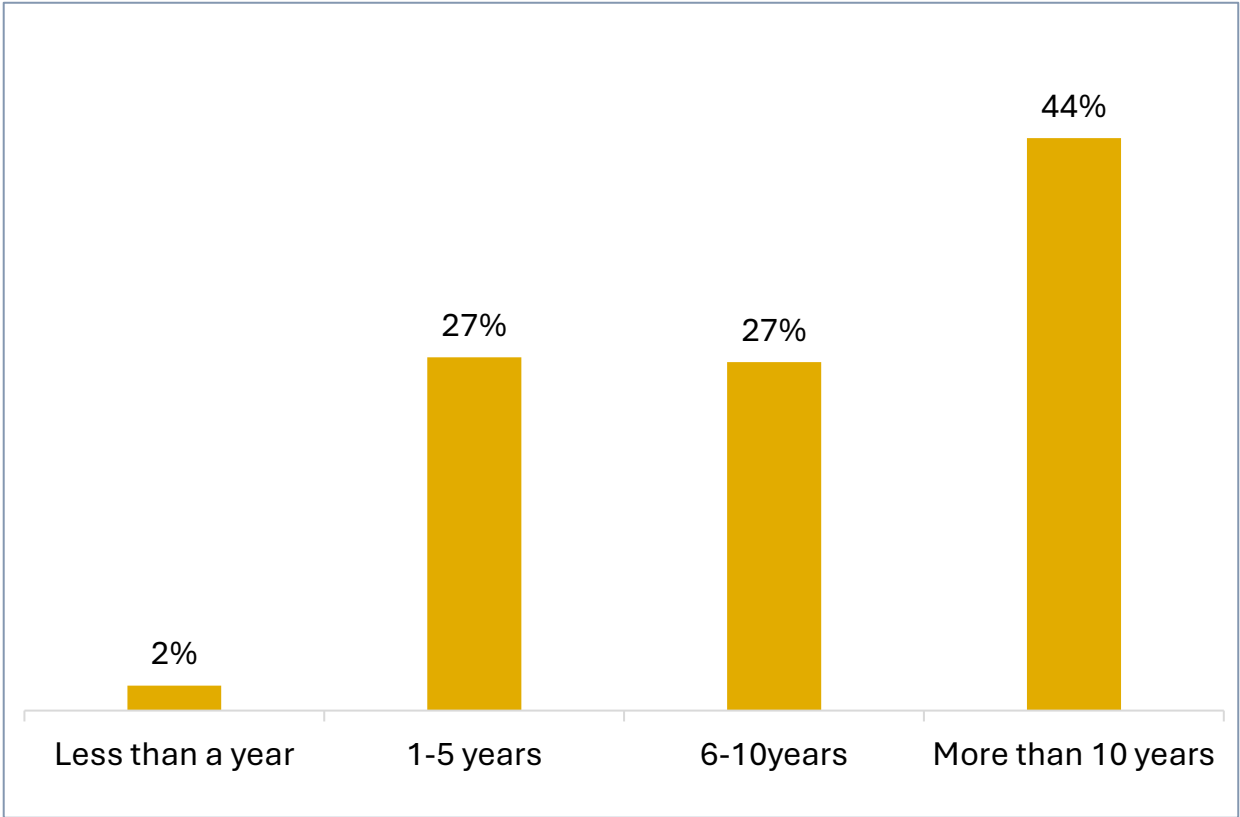
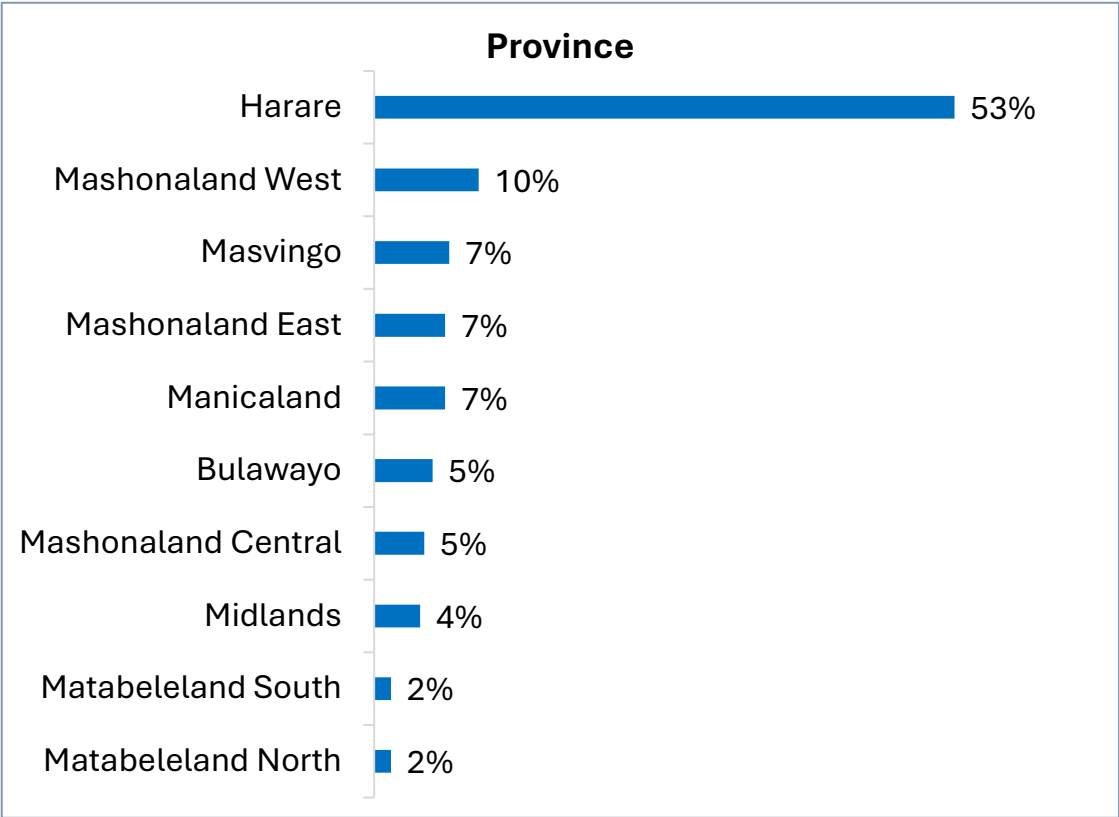
4.2.0: Pharmacies

(retail/community/hospital)



4.2.1: Region | Period engagement with MCAZ

Qn. How long have you been using MCAZ services?

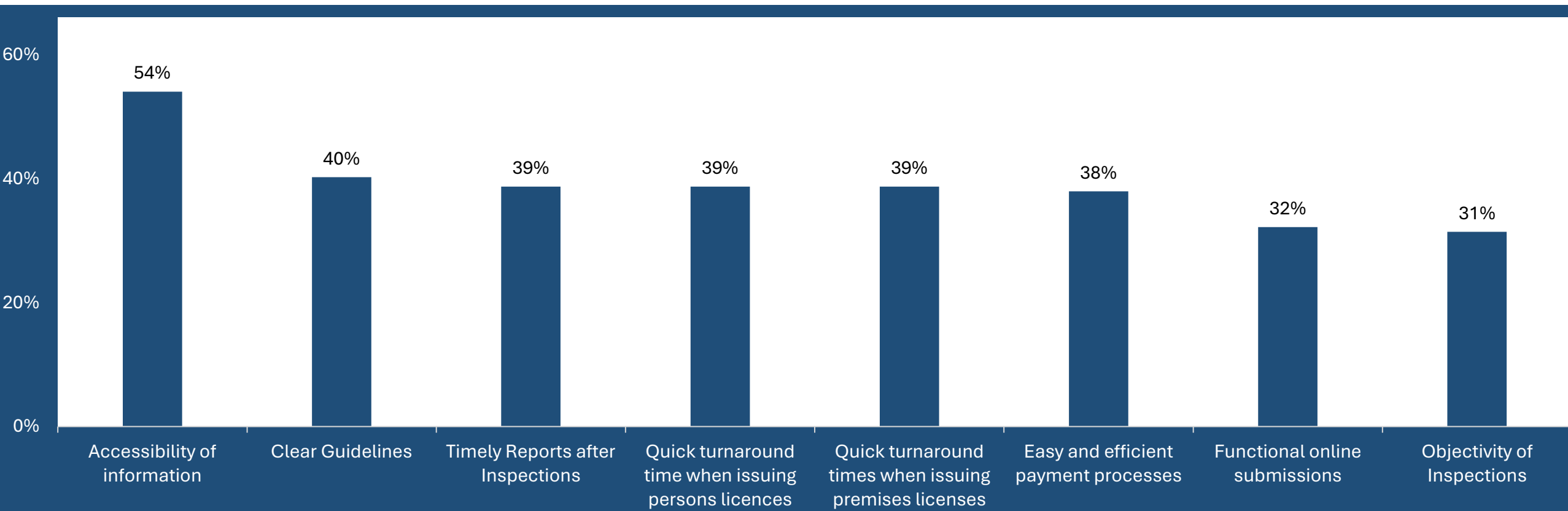


- ❑ The sample for pharmacies (retail, community or hospital) was largely drawn from Harare. Matabeleland provinces were the least represented because of little business in the area.
- ❑ Over half of pharmacies engaged for the survey have been dealing with MCAZ for a period of more than 6 years, confirming market maturity.



4.2.2: Customer service expectations

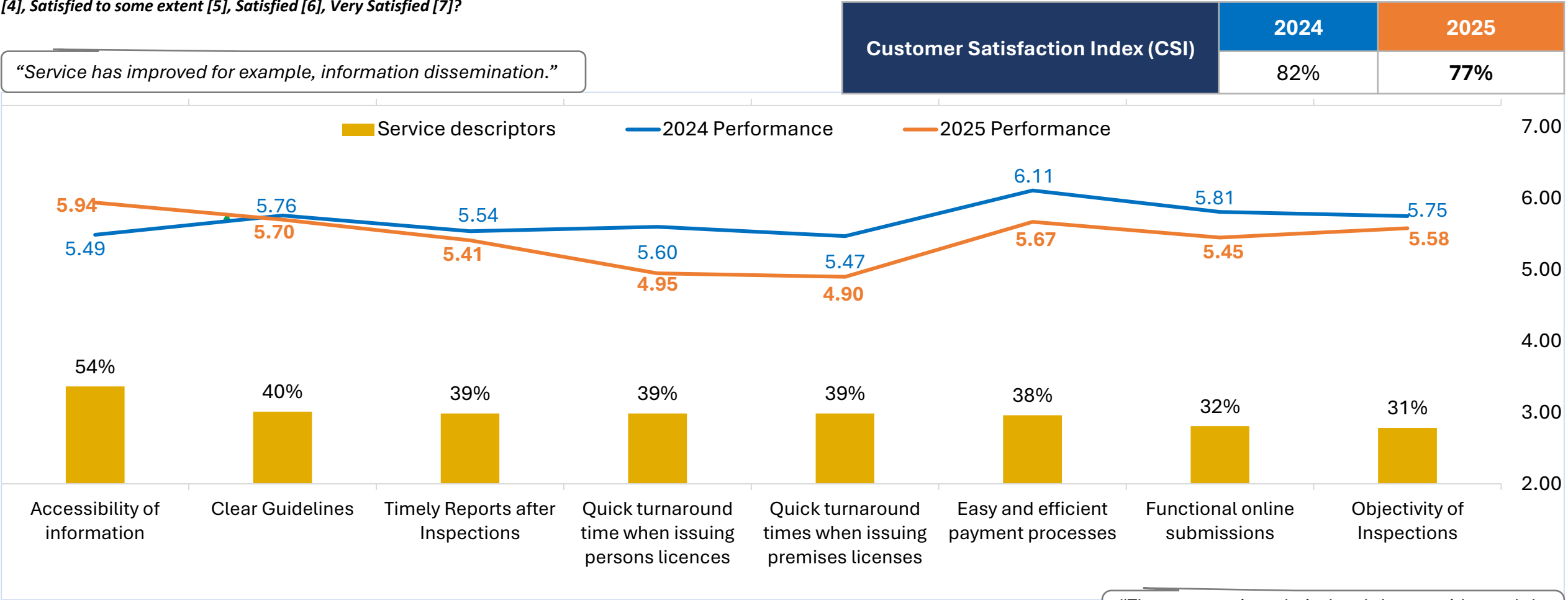
Qn. Qn: When it comes to excellent customer service what do you expect from MCAZ?



- ❑ Accessibility of information leads service expectations for the pharmacies, with 54% demanding clear and easy access to information.
- ❑ Clear guidelines rank second at 40%, while timely reports and quick turnaround times for licenses (persons and premises) each stand at 39%.
- ❑ Timely reports after inspections promotes operational efficiency through addressing non-compliance issues and minimizing penalties. The licensing process remains an integral part of quality service within the sector with an expected turn around time of 10 working days.

4.2.3: Satisfaction for pharmacies drops in 2025

Qn. To what extent are you satisfied with each of the following attributes pertaining to MCAZ services on a scale ranging from – Extremely Dissatisfied [1], Dissatisfied [2], Dissatisfied to some extent [3], Indifferent [4], Satisfied to some extent [5], Satisfied [6], Very Satisfied [7]?



- “They are trying their level best evidenced by periodic checks and the engagements.”
- ❑ Overall Customer Satisfaction Index (CSI) decreased from 82% in 2024 to 77% in 2025.
 - ❑ MCAZ is doing well on accessibility of information and provision of clear guidelines which are the top ranked service attributes in this category showing alignment to customer priorities.
 - ❑ The turn around time for issuing operational licensees/permits for both persons and premises licenses remain unstable following a decline in 2025.

4.2.4: Customer pain points | Complaints Resolution

Qn: What are the causes of dissatisfaction?

The following areas were identified as key customer pain points;

- ✓ Licensing and registration delays
- ✓ Inefficient online systems
- ✓ Unfair inspection practices
- ✓ Regulatory enforcement gaps

"Borders are porous, tuck-shops operating as pharmacies"

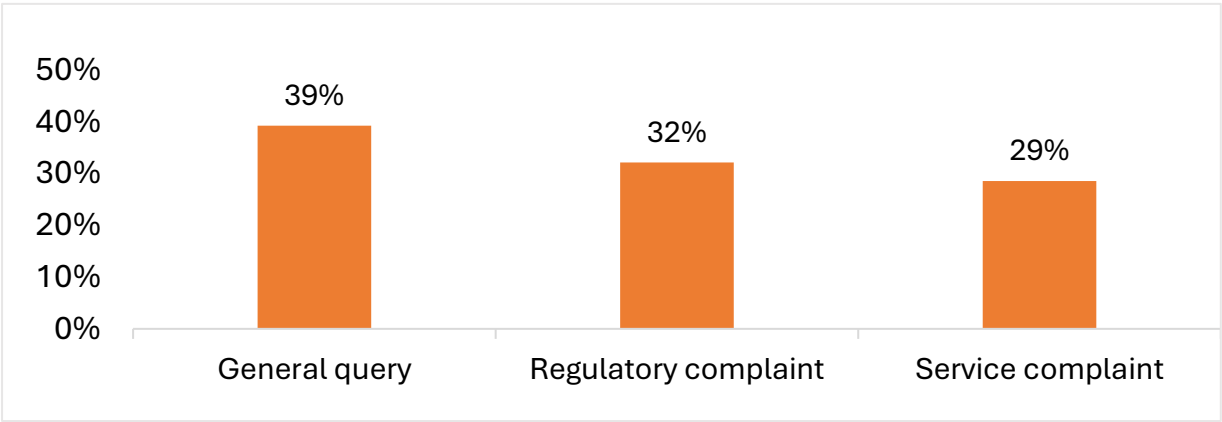
*"They take time to issue licenses especially with their **new system** and they do not give status feedback."*

"Their platform is not reliable, it can say one thing and the office will say the other..."

"They don't tell us in time for us to prepare but they inform bigger companies."

Qn: Did you lodge any query/complaint with MCAZ in the last 6 months?
Qn: Was the query/complaint resolved to your satisfaction?

PHARMACIES	2023	2024	2025
QUERY LODGED	17%	8%	11%
QUERY RESOLUTION	59%	83%	61%



- ❑ Complaint lodging increased slightly to 11% in 2025, up from 8% in 2024. The complaint resolution rate fell to 61%, down from 83% in 2024 due to time taken resolve.
- ❑ General queries dominate followed by regulatory complaints and service complaints showing a diverse of pain points.
- ❑ Top queries registered were as follows; Licensing and renewal issues, communication and enforcement concerns.

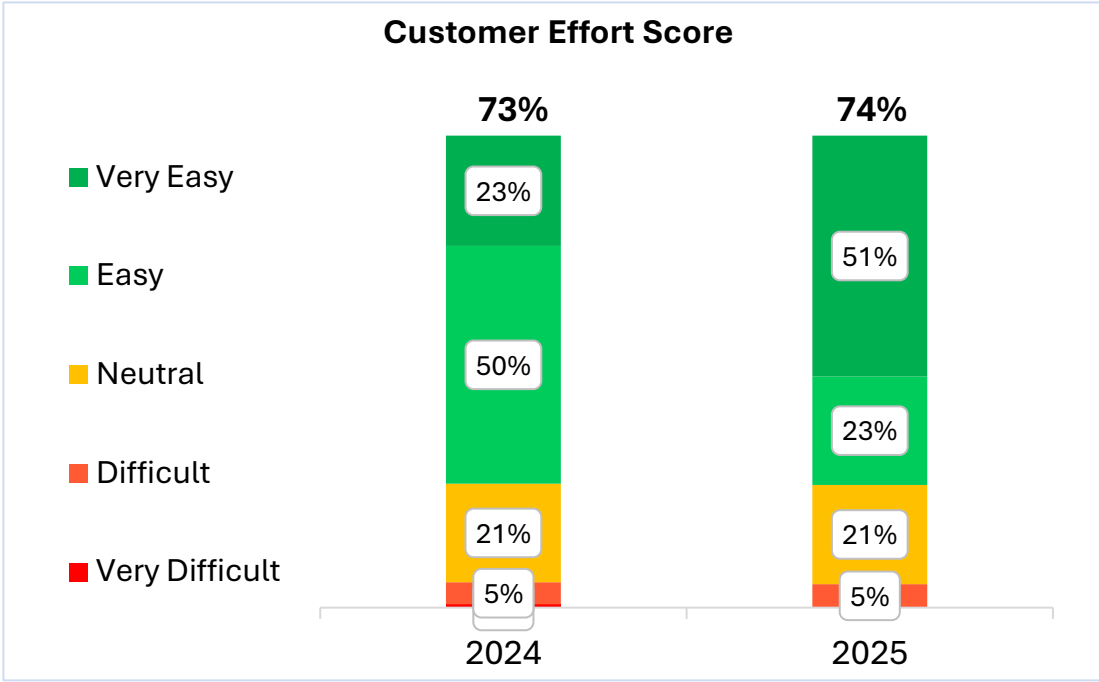
"There are unexpected fees for interbranch transfer of medicines."

4.2.5: Net Promoter Score (NPS) | Ease of doing business (CES)

Qn: Using a 10-point scale where 0 means very unlikely and 10 means very likely, how likely are you to recommend MCAZ to your business peers?
Qn: On a 5-point scale where 1 means very difficult and 5 means very easy, how easy is it doing business with MCAZ?

"It's easy to access portals and applications can easily be reviewed"

NET PROMOTER SCORE = PROMOTERS – DETRACTORS		
	2024	2025
Detractors (0 – 6)	9%	12%
Passives (7 – 8)	29%	30%
Promoters (9 -10)	62%	58%
Net Promoter Score	53	46

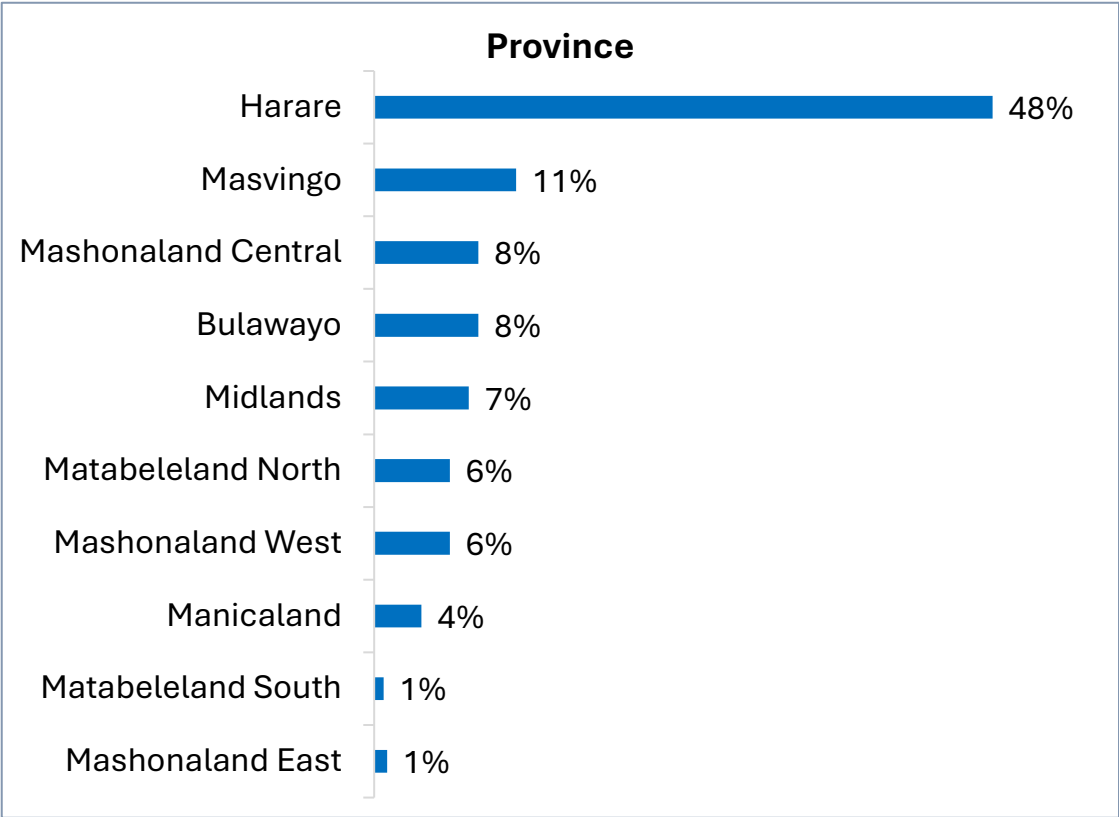


- ❑ MCAZ maintains a positive Net Promoter Score (46), though this is a decline from 53 in 2024.
- ❑ The number of promoters decreased from 62% in 2024 to 58% in 2025, while detractors slightly increased from 9% to 12% following drop in performance on turnaround time for issuing persons and premises licensees/permits.
- ❑ The concern about centralization of services due to lack of sub offices in regions remains unaddressed.
- ❑ Customer Effort Score (CES) improved marginally from 73% in 2024 to 74% in 2025.

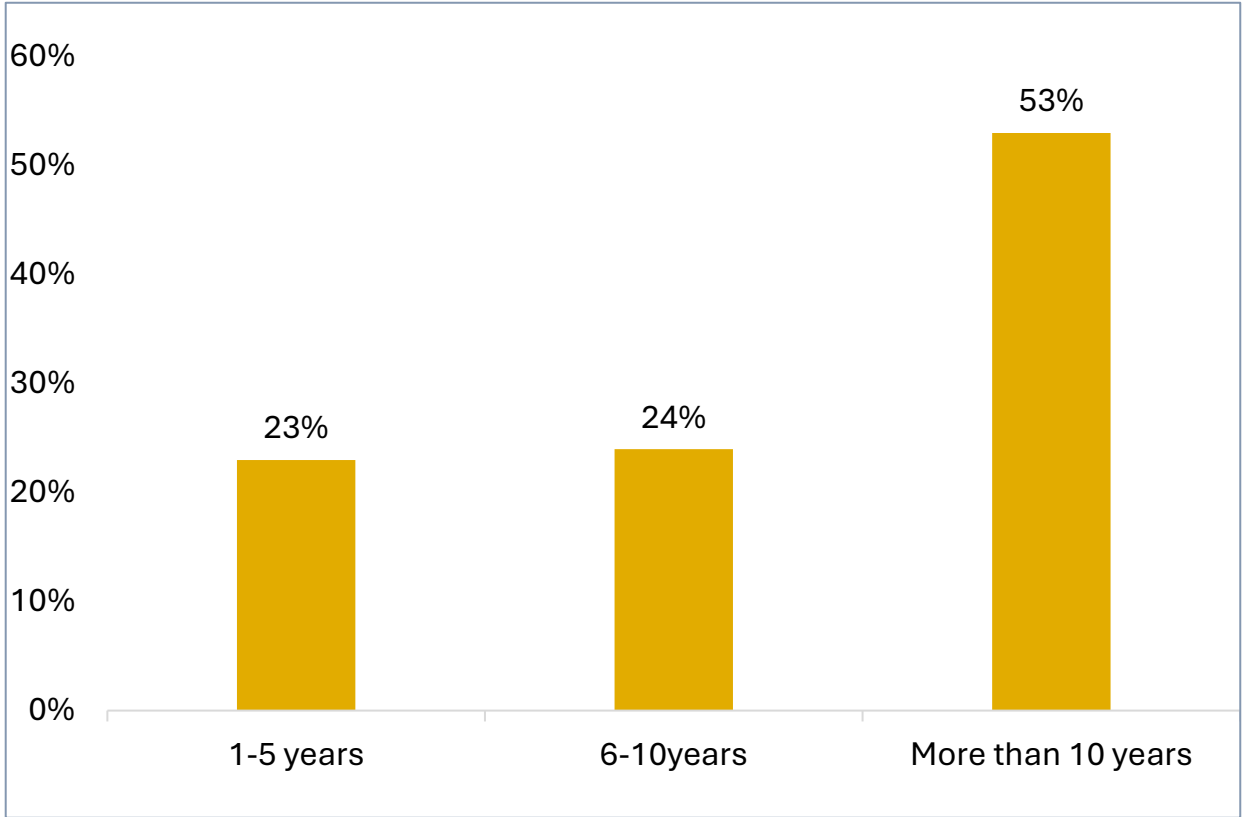
4.3.0: Dispensing Medical Practitioners (DMP)



4.3.1: Region | Period engagement with MCAZ



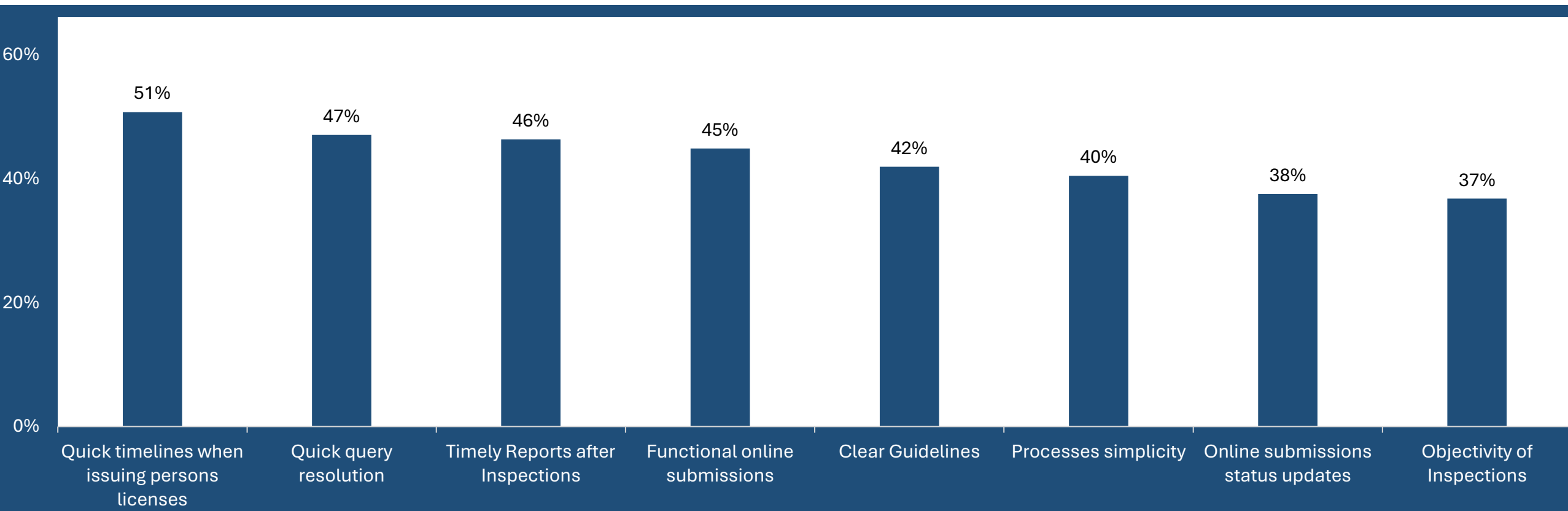
Qn. How long have you been using MCAZ services?



- ❑ The sample for Dispensing Medical Practitioners was concentrated in the five major cities, dominated by Harare.
- ❑ Over half of dispensing medical practitioners engaged for the survey have been using MCAZ services for more than 10 years.

4.3.2: Customer service expectations

Qn. Qn: When it comes to excellent customer service what do you expect from MCAZ?



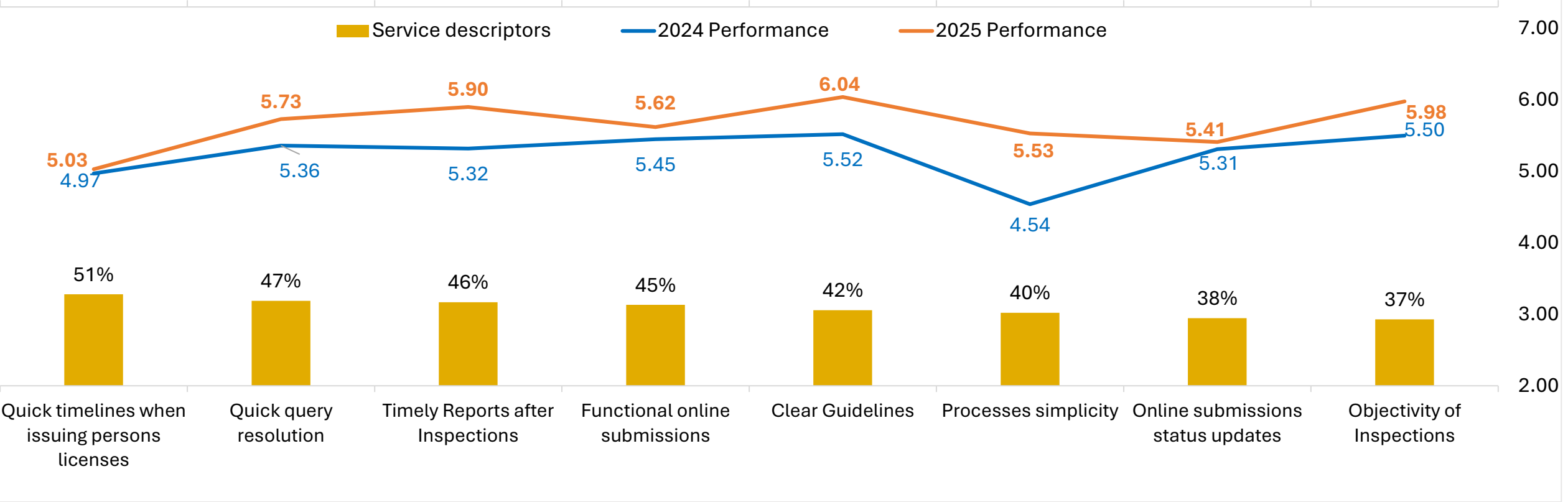
- ❑ The top expectation from customers is quick timelines when issuing persons licenses (51%), followed by quick query resolution (47%) and timely reports after inspections (46%).
- ❑ Functional online submissions and clear guidelines are also highly prioritized, due to growing importance of digital solutions and transparent processes.
- ❑ Objectivity of inspections features among key service expectations highlighting the impact of Global Benchmarking Tool (ML3).

4.3.3: DMPs' happiness level increases



Qn. To what extent are you satisfied with each of the following attributes pertaining to MCAZ services on a scale ranging from – Extremely Dissatisfied [1], Dissatisfied [2], Dissatisfied to some extent [3], Indifferent [4], Satisfied to some extent [5], Satisfied [6], Very Satisfied [7]?

Customer Satisfaction Index (CSI)	2024	2025
	77%	80%



- ❑ MCAZ’s Customer Satisfaction Index (CSI) improved from 77% in 2024 to 80% in 2025.
- ❑ Satisfaction scores for individual service descriptors show slight improvements across most areas.
- ❑ The regulatory board excelled on providing clear guidelines to the stakeholders, timeous delivery of inspection reports and objectivity of inspections.
- ❑ There are perceived bottle necks on the processes which tend to delay the licensing process.

4.3.4: Customer pain points | Complaints Resolution

Qn: What are the causes of dissatisfaction?

The following areas were identified as key customer pain points;

- ✓ Licensing and permit delays
- ✓ Poor communication
- ✓ System and data issues
- ✓ System glitches (errors in the Pharmacovigilance app when logging in.

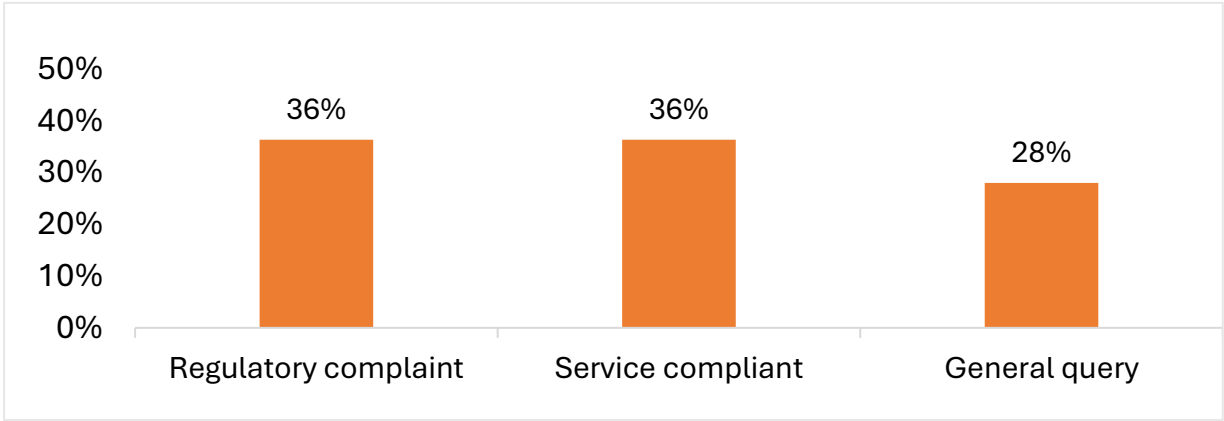
“They are inconsistent in terms of reminding clients about submissions, payments, and reports..”

“My personal details were wiped out in the system and had to start again as if someone starting registration”

Qn: Did you lodge any query/complaint with MCAZ in the last 6 months?

Qn: Was the query/complaint resolved to your satisfaction?

DMP	2023	2024	2025
QUERY LODGED	15%	7%	8%
QUERY RESOLUTION	56%	72%	66%

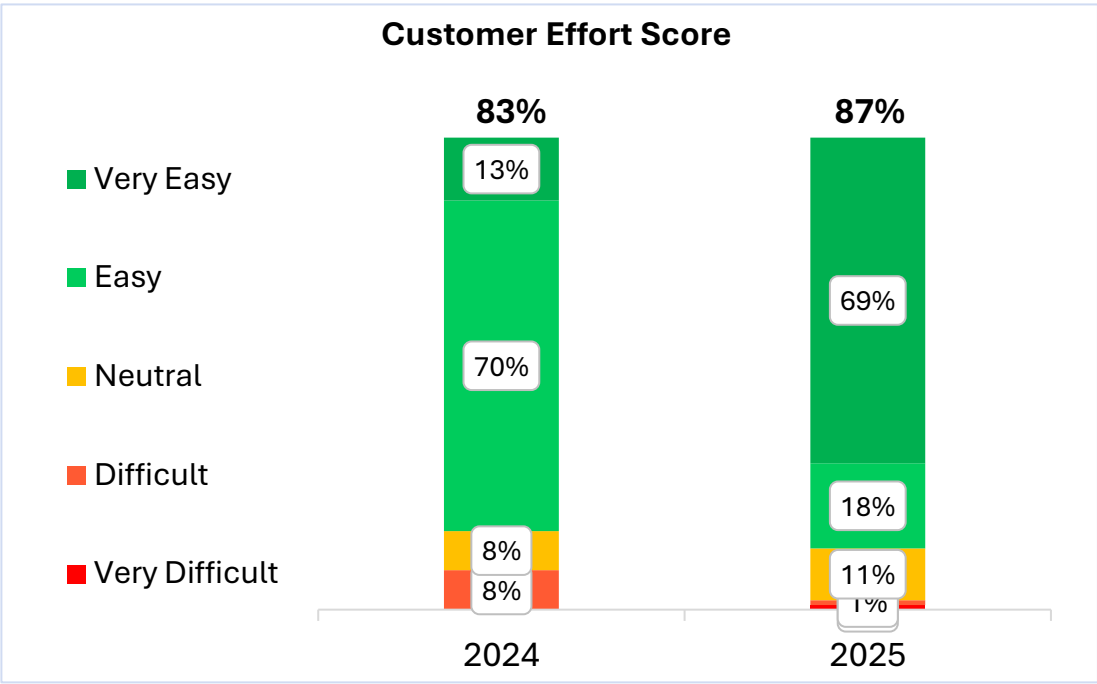


- ❑ The incidence of lodging queries by Dispensing Medical Practitioners dropped significantly in 2024 and remained low in 2025, with only 8% of respondents lodging queries.
- ❑ Query resolution rate improved from 56% in 2023 to 72% in 2024, but slightly declined to 66% in 2025, confirming challenges in maintaining high resolution efficiency.
- ❑ Top queries registered were about licensing delays, certificate and documentation errors, etc.

4.3.5: Net Promoter Score (NPS) | Ease of doing business (CES)

Qn: Using a 10-point scale where 0 means very unlikely and 10 means very likely, how likely are you to recommend MCAZ to your business peers?
Qn: On a 5-point scale where 1 means very difficult and 5 means very easy, how easy is it doing business with MCAZ?

NET PROMOTER SCORE = PROMOTERS – DETRACTORS		
	2024	2025
Detractors (0 – 6)	9%	6%
Passives (7 – 8)	28%	32%
Promoters (9 -10)	63%	62%
Net Promoter Score	54	56

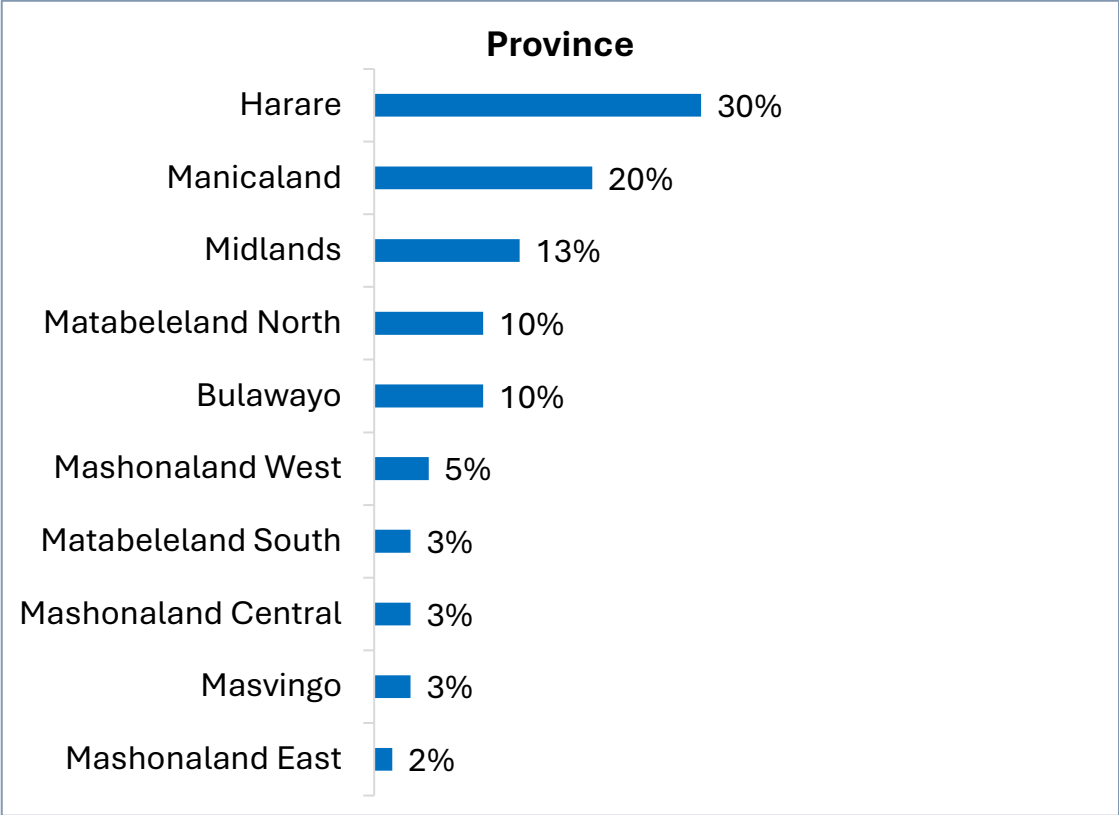


- ❑ MCAZ’s Net Promoter Score (NPS) improved slightly from 54 in 2024 to 56 in 2025.
- ❑ Promoters remained stable (63% in 2024 vs. 62% in 2025) and they are most excited with provision of clear guidelines that enhances transparency among stakeholders.
- ❑ The unhappy DMPs (brand detractors) are concerned about inconsistencies on time taken to issue premises licenses (4.95/7) and persons’ licensees (5.03/7). complicated process particularly on subscriptions.
- ❑ Customer Effort Score (CES) rose from 83% in 2024 to 87% in 2025, driven by availability and functionality of online/ platforms.

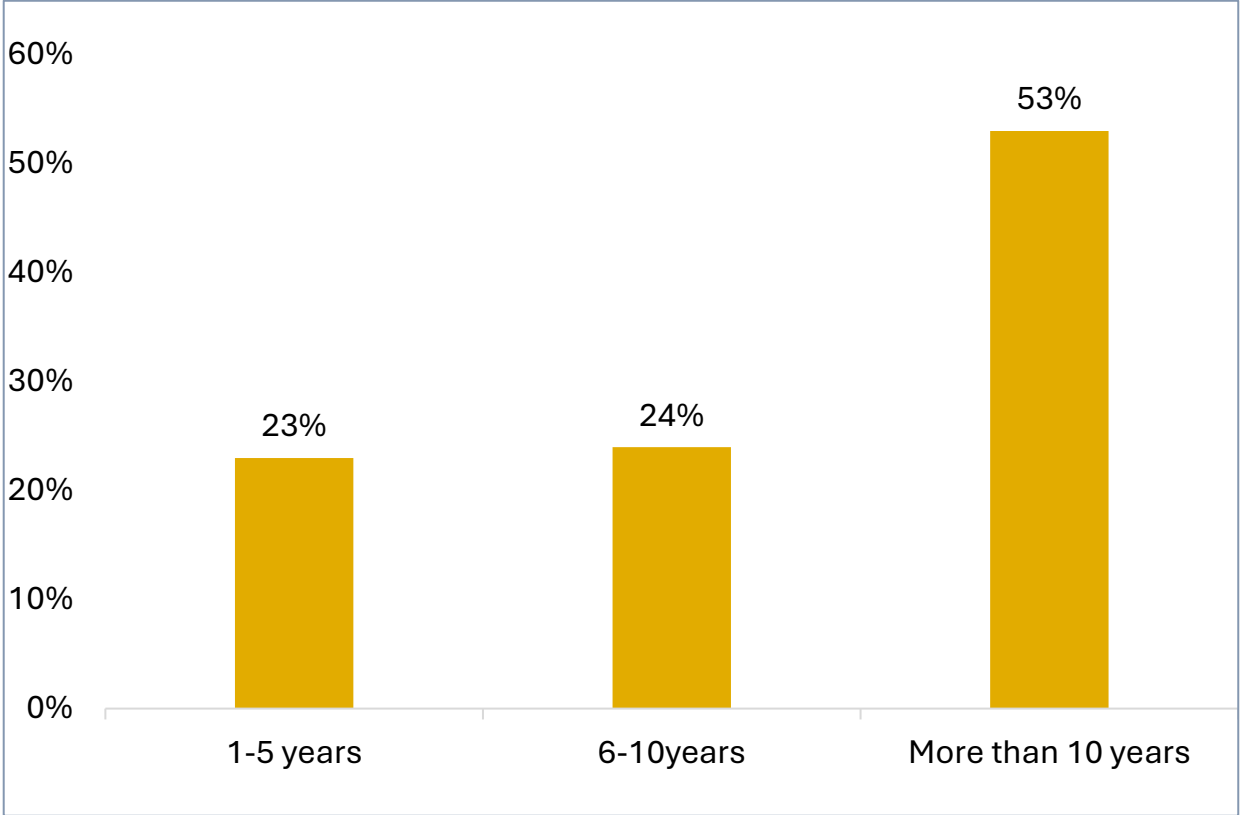
4.4.0: Industrial Clinics



4.4.1: Region | Period engagement with MCAZ



Qn. How long have you been using MCAZ services?



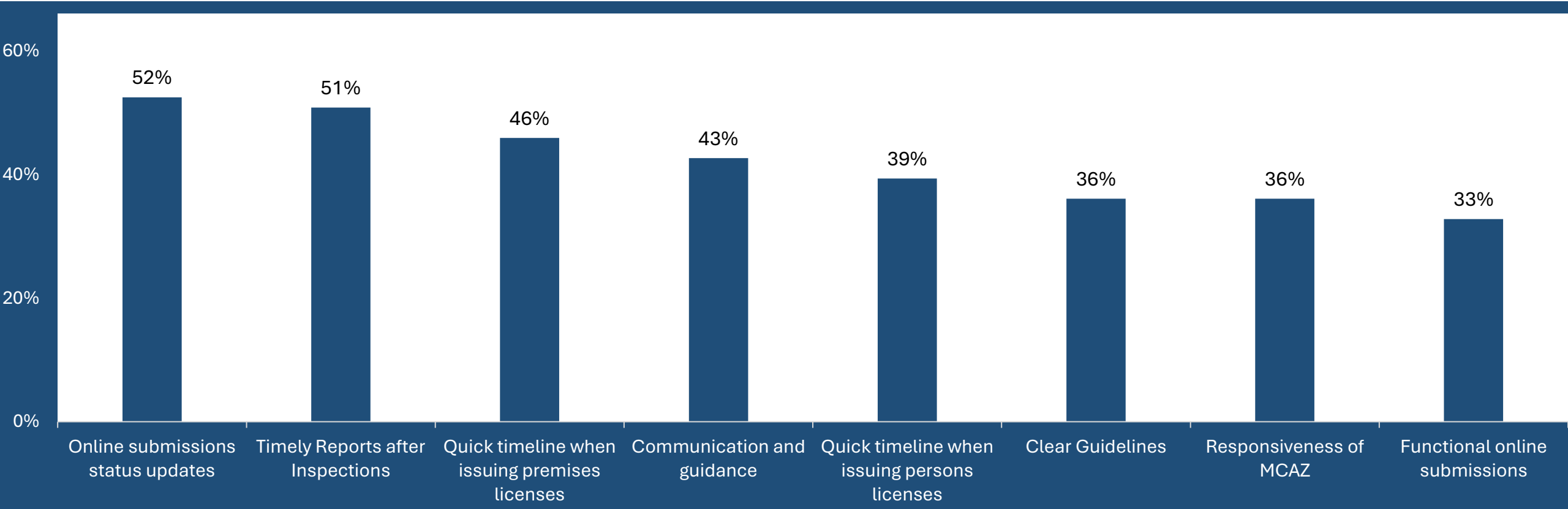
- ❑ The sample for industrial clinics was dominated by Harare province.
- ❑ MCAZ has long-term relationships with Industrial clinics, with over half of respondents engaged for more than a decade.



4.4.2: Customer service expectations



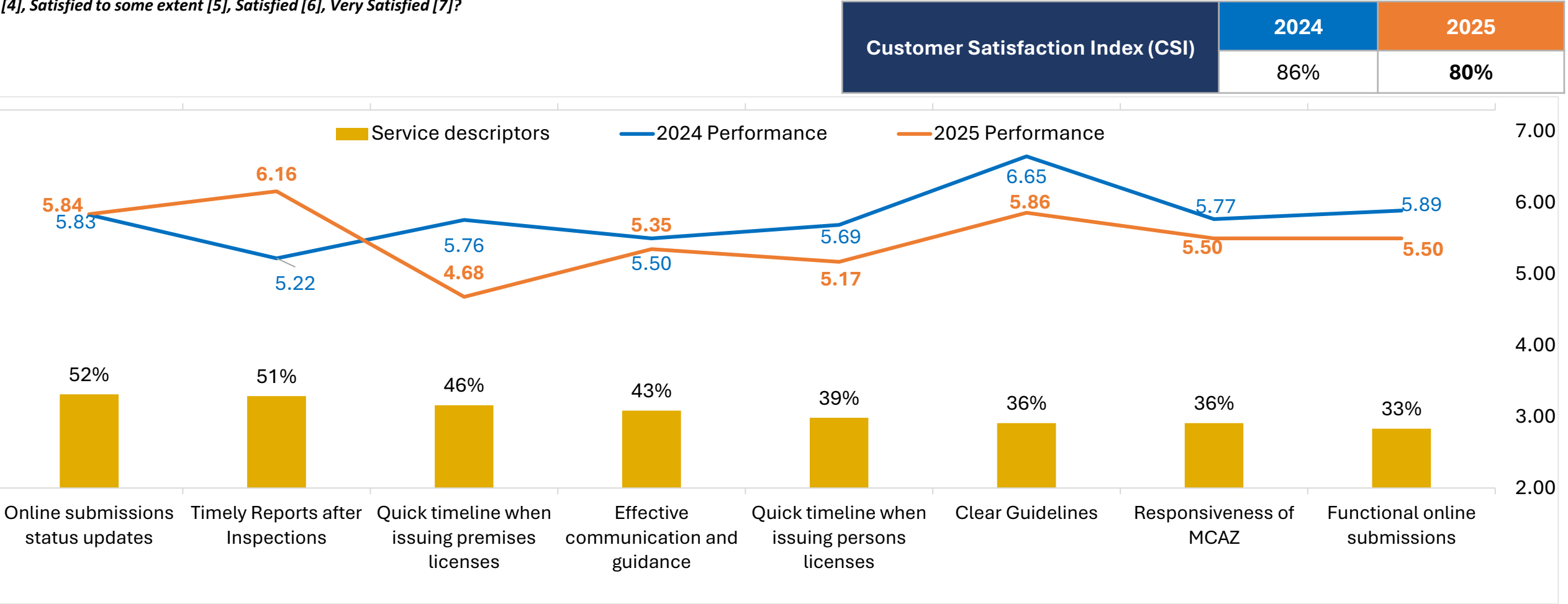
Qn. Qn: When it comes to excellent customer service what do you expect from MCAZ?



- ❑ The top expectation among Industrial clinics is online submission status updates, followed closely by timely reports after inspections and quick timelines for issuing premises licenses.
- ❑ Communication and guidance and quick timelines for issuing persons licenses remain important but rank slightly lower.

4.4.3: Industrial clinics were less enthusiastic in 2025

Qn. To what extent are you satisfied with each of the following attributes pertaining to MCAZ services on a scale ranging from – Extremely Dissatisfied [1], Dissatisfied [2], Dissatisfied to some extent [3], Indifferent [4], Satisfied to some extent [5], Satisfied [6], Very Satisfied [7]?



- ❑ The performance of Medicines Control Authority of Zimbabwe on service expectations is on a downward trajectory. This has subsequently led to a decline on overall customer satisfaction index from 86% in 2024 to 80% in 2025.
- ❑ MCAZ is delivering the best service on timely report after expectations and online submission status updates.
- ❑ The regulator was rated lower on turnaround time for issuing premises licenses extending beyond 2 weeks in some instances.

4.4.4: Customer pain points | Complaints Resolution

Qn: What are the causes of dissatisfaction?

The following areas were identified as key customer pain points;

- ✓ Licensing issuance/renewal delays
- ✓ Online platform challenges
- ✓ Certificates not received

“Our application for new issuance of person’s license took forever.”

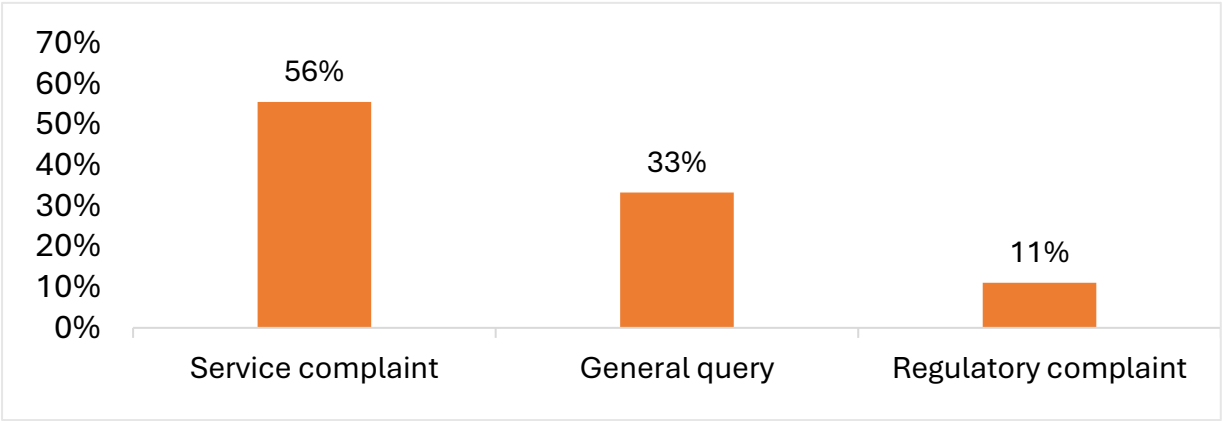
“Our post-renewal certificate hasn’t been issued to us since it expired 30 September. They said the doctor should write a letter and it was done.”

“For some reason, the platform didn’t recognize me when I tried to login.”

Qn: Did you lodge any query/complaint with MCAZ in the last 6 months?

Qn: Was the query/complaint resolved to your satisfaction?

INDUSTRIAL CLINIC	2023	2024	2025
QUERY LODGED	15%	7%	15%
QUERY RESOLUTION	63%	67%	67%

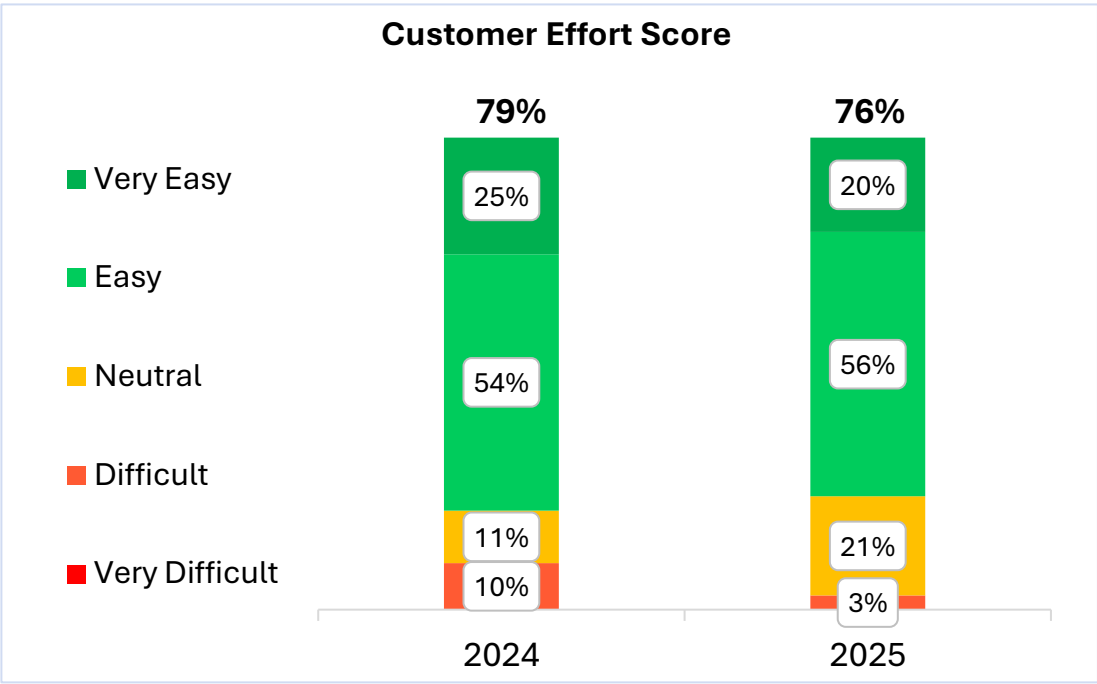


- ❑ The number of queries lodged by industrial clinics increased significantly in 2025 (15%) showing renewed concerns.
- ❑ Query resolution rate has remained steady at 67% in 2025, showing consistent responsiveness. Most complaints were service-related.
- ❑ Common queries included delays in processing licenses.

4.4.5: Net Promoter Score (NPS) | Ease of doing business (CES)

Qn: Using a 10-point scale where 0 means very unlikely and 10 means very likely, how likely are you to recommend MCAZ to your business peers?
Qn: On a 5-point scale where 1 means very difficult and 5 means very easy, how easy is it doing business with MCAZ?

NET PROMOTER SCORE = PROMOTERS – DETRACTORS		
	2024	2025
Detractors (0 – 6)	9%	10%
Passives (7 – 8)	30%	15%
Promoters (9 -10)	62%	75%
Net Promoter Score	53	65



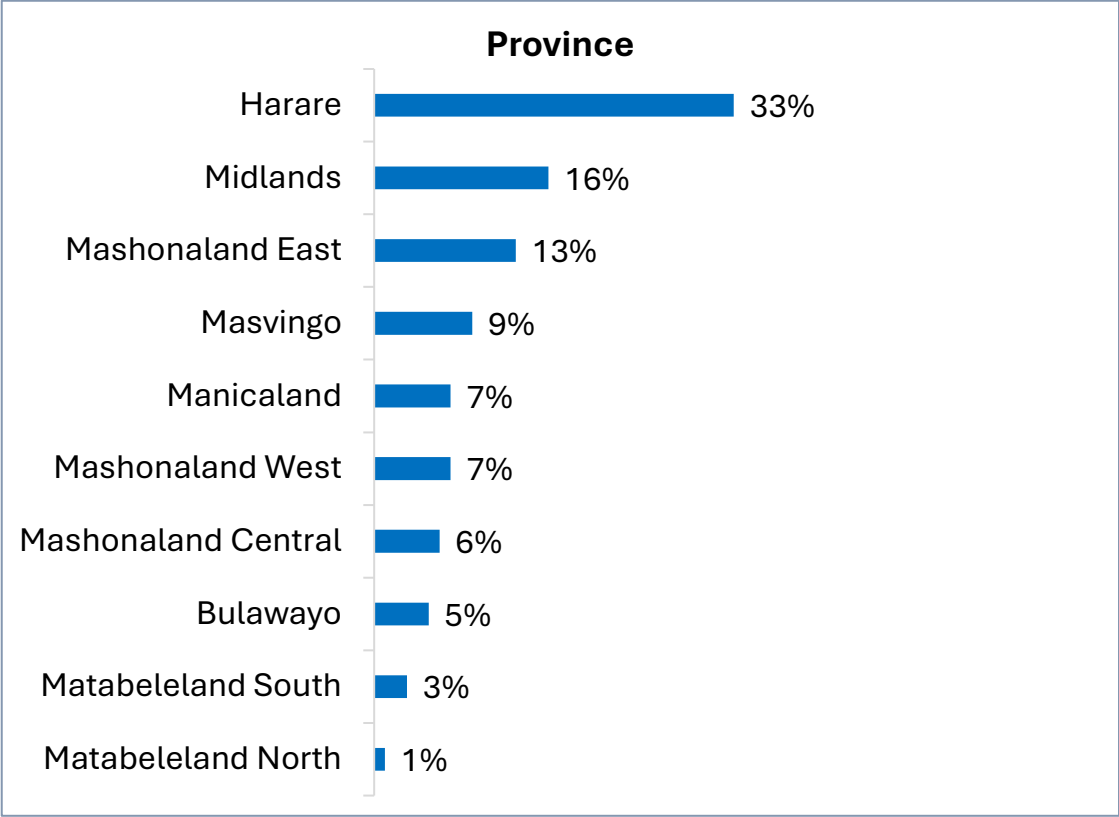
- ❑ MCAZ’s Net Promoter Score (NPS) for industrial clinics improved significantly from 53 in 2024 to 65 in 2025.
- ❑ Positive experiences span from timeous delivery of inspections reports and clear operational guidelines.
- ❑ The regulator was slightly lower on ease of doing business compared to the previous year.

“...you call other regulators they don’t answer... but I have never had such issues with MCAZ.”

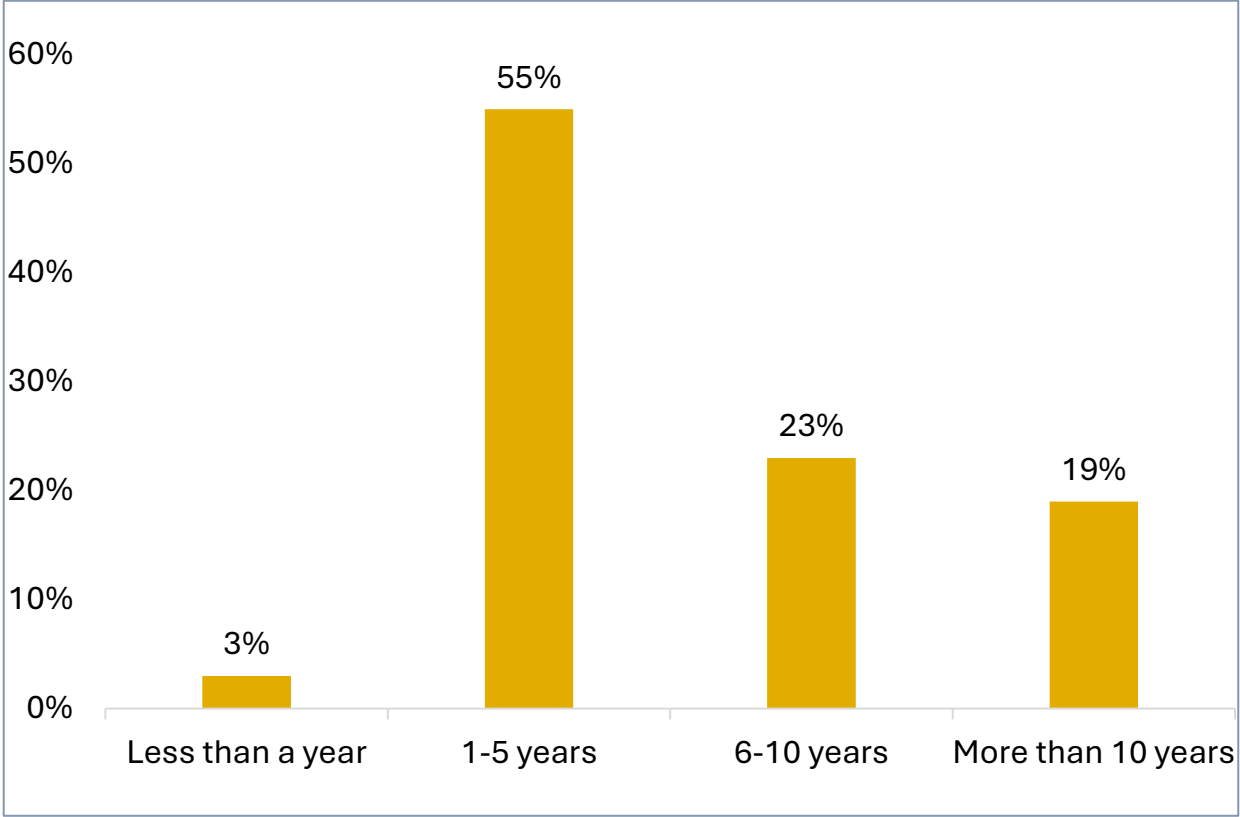
4.5.0: Veterinary Medicines General Dealers



4.5.1: Region | Period engagement with MCAZ



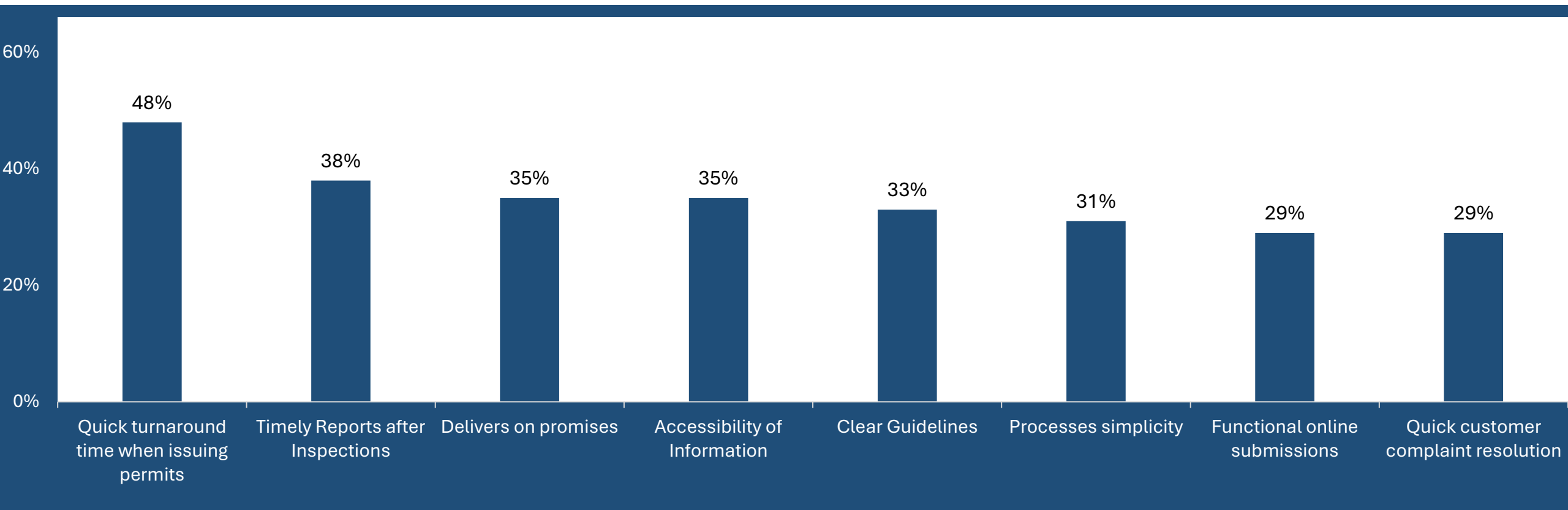
Qn. How long have you been using MCAZ services?



- ❑ The sample for Veterinary Medicines General Dealers was largely drawn from Harare.
- ❑ The majority of VMGDs engaged for the survey have been dealing with MCAZ for a period between 1 and 5 years.

4.5.2: Customer service expectations

Qn. Qn: When it comes to excellent customer service what do you expect from MCAZ?



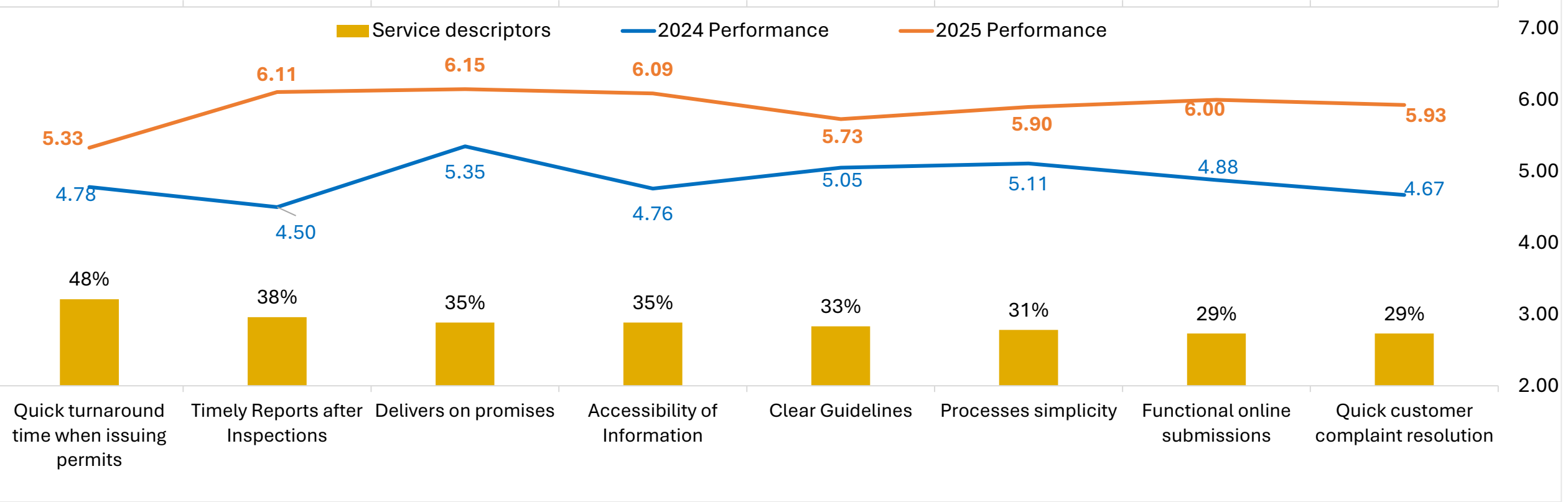
- ❑ The top expectation among Veterinary Medicines General Dealers is quick turnaround time when issuing permits, followed by timely reports after inspections.
- ❑ Other notable expectations include delivering on promises, accessibility of information and provision of clear guidelines.

4.5.3: VMGDs express huge satisfaction with MCAZ

Qn. To what extent are you satisfied with each of the following attributes pertaining to MCAZ services on a scale ranging from – Extremely Dissatisfied [1], Dissatisfied [2], Dissatisfied to some extent [3], Indifferent [4], Satisfied to some extent [5], Satisfied [6], Very Satisfied [7]?

“We have sector consultation meetings once every quarter and we iron out all issues there.”

Customer Satisfaction Index (CSI)	2024	2025
	65%	84%



- ❑ Medicines Control Authority of Zimbabwe (MCAZ) performed very well on customer service attributes; all rated above 2023 performance.
- ❑ The Customer Satisfaction Index (CSI) for Veterinary Medicines General Dealers significantly improved from 65% in 2024 to 84% in 2025, which is a huge rebound in overall satisfaction. This is however a sector that is most vulnerable to infiltration by fake products.
- ❑ The regulator performance on quick query resolution has improved due to reduced time taken to issue permits.

4.5.4: Customer pain points | Complaints Resolution

Qn: What are the causes of dissatisfaction?

The following areas were identified as key customer pain points;

- ✓ Licensing/permit delays
- ✓ Unresolved queries/poor follow up
- ✓ E-portal challenges
- ✓ Enforcement without prior education

“They do not resolve or come back to clients after you lodge a query. Got a query that has taken forever to be resolved. I paid for a permit twice because I did not get clear guidance from the staff ”

“We have about 76 branches and they don’t do batch processing so we have to do it 1 by 1 on the portal.”

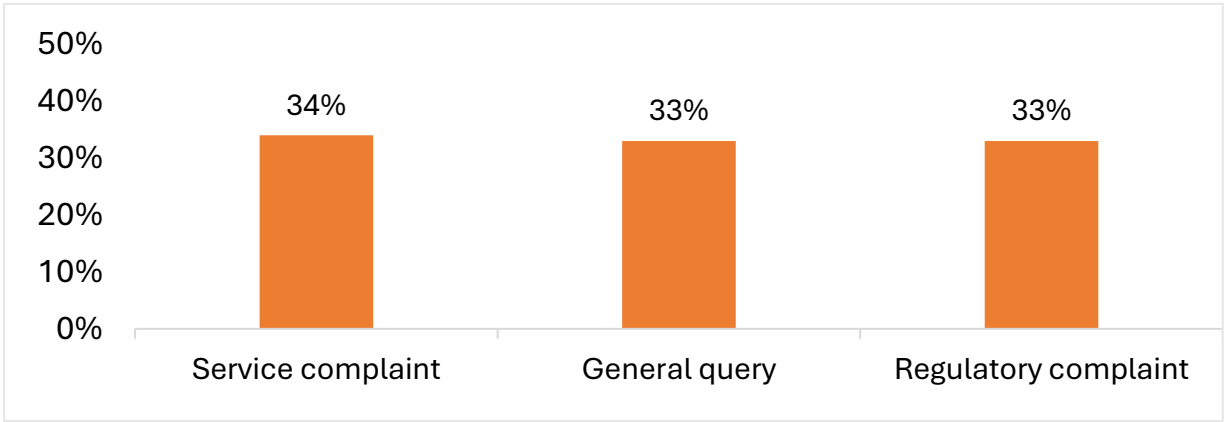
“We get to know a wrong when it’s already too late from the inspectors and being fined for that.”

- ❑ The number of queries lodged by Veterinary Medicines General Dealers (VMGDs) further drop to 6% in 2025.
- ❑ Query resolution rate improved significantly to 67% in 2025 from just 50% in 2024, showing better responsiveness in the latest period. Most complaints were service-related.
- ❑ Top queries registered were as follows; inspection of falsified products, online platform challenges and application process delays.

Qn: Did you lodge any query/complaint with MCAZ in the last 6 months?

Qn: Was the query/complaint resolved to your satisfaction?

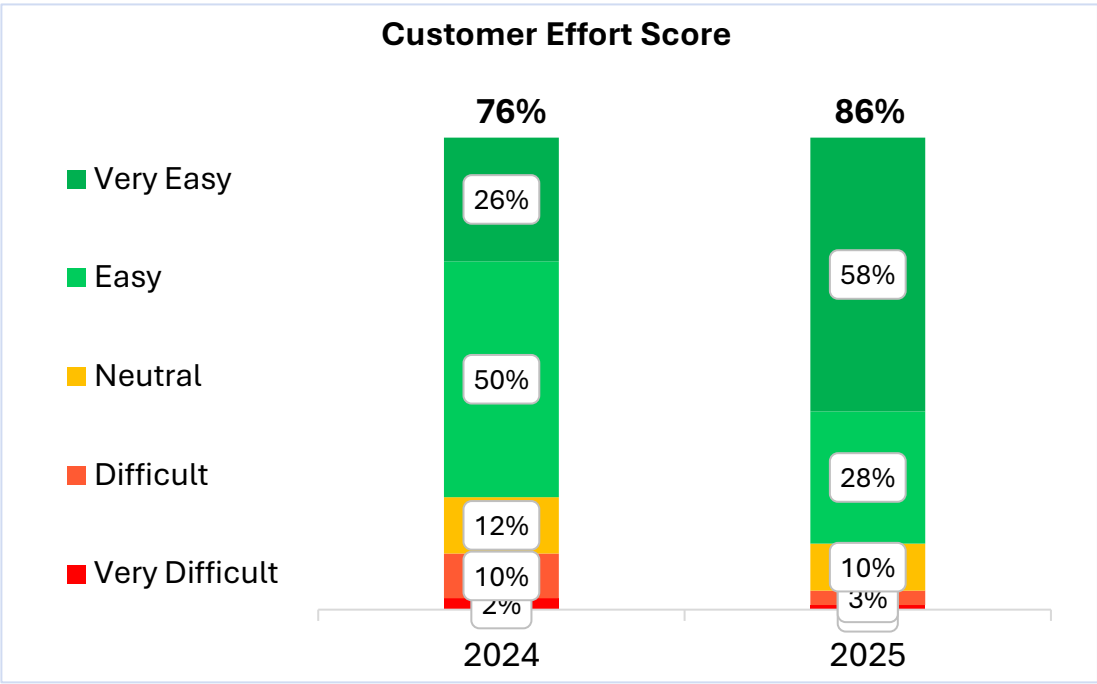
VMGD	2023	2024	2025
QUERY LODGED	21%	7%	6%
QUERY RESOLUTION	57%	50%	67%



4.5.5: Net Promoter Score (NPS) | Ease of doing business (CES)

Qn: Using a 10-point scale where 0 means very unlikely and 10 means very likely, how likely are you to recommend MCAZ to your business peers?
Qn: On a 5-point scale where 1 means very difficult and 5 means very easy, how easy is it doing business with MCAZ?

NET PROMOTER SCORE = PROMOTERS – DETRACTORS		
	2024	2025
Detractors (0 – 6)	10%	8%
Passives (7 – 8)	17%	35%
Promoters (9 -10)	73%	57%
Net Promoter Score	63	49



- ❑ MCAZ has a positive Net Promoter Score (63) which is a huge improvement from 2023.
- ❑ Majority of passives were converted to brand promoters through excellent delivery on the promises and simplified processes.
- ❑ Few disengaged customers were not happy with how their complaints/queries were handled.
- ❑ The customer effort score has remained more or less the same.

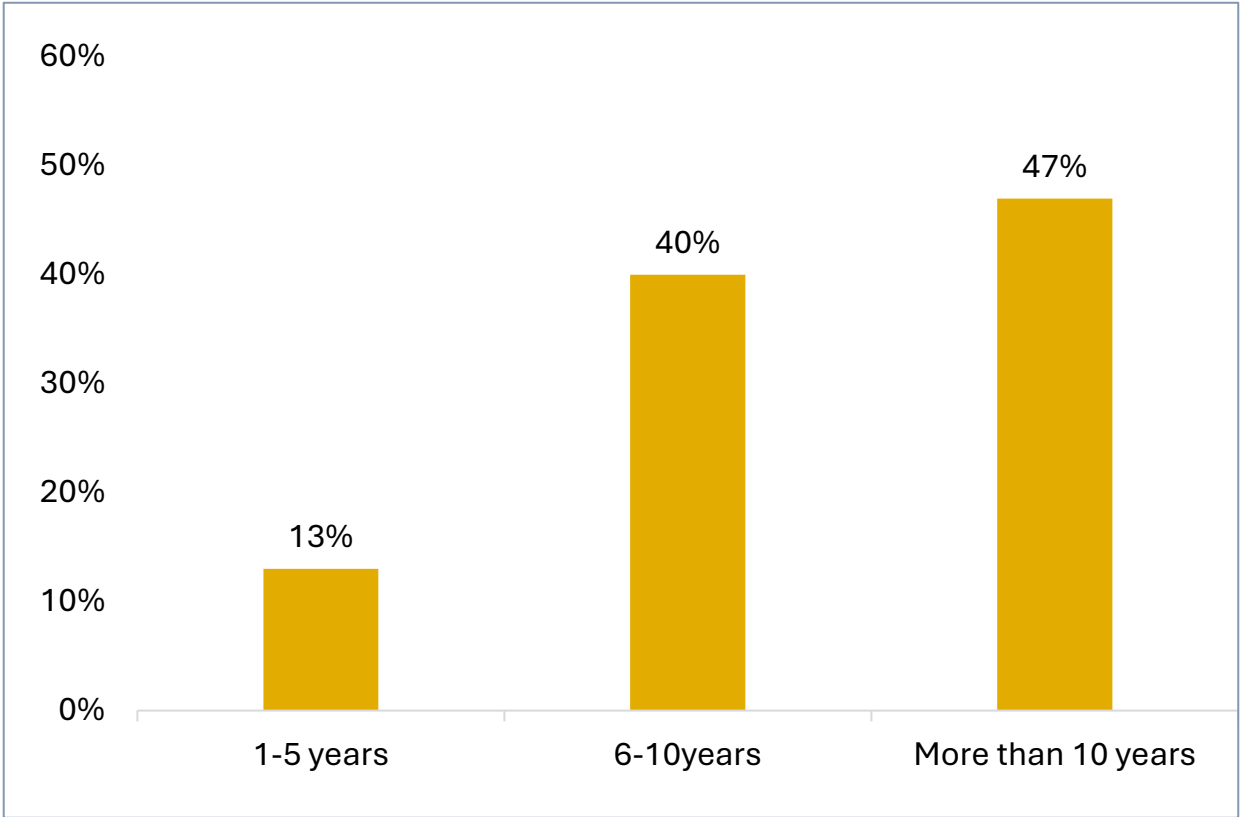
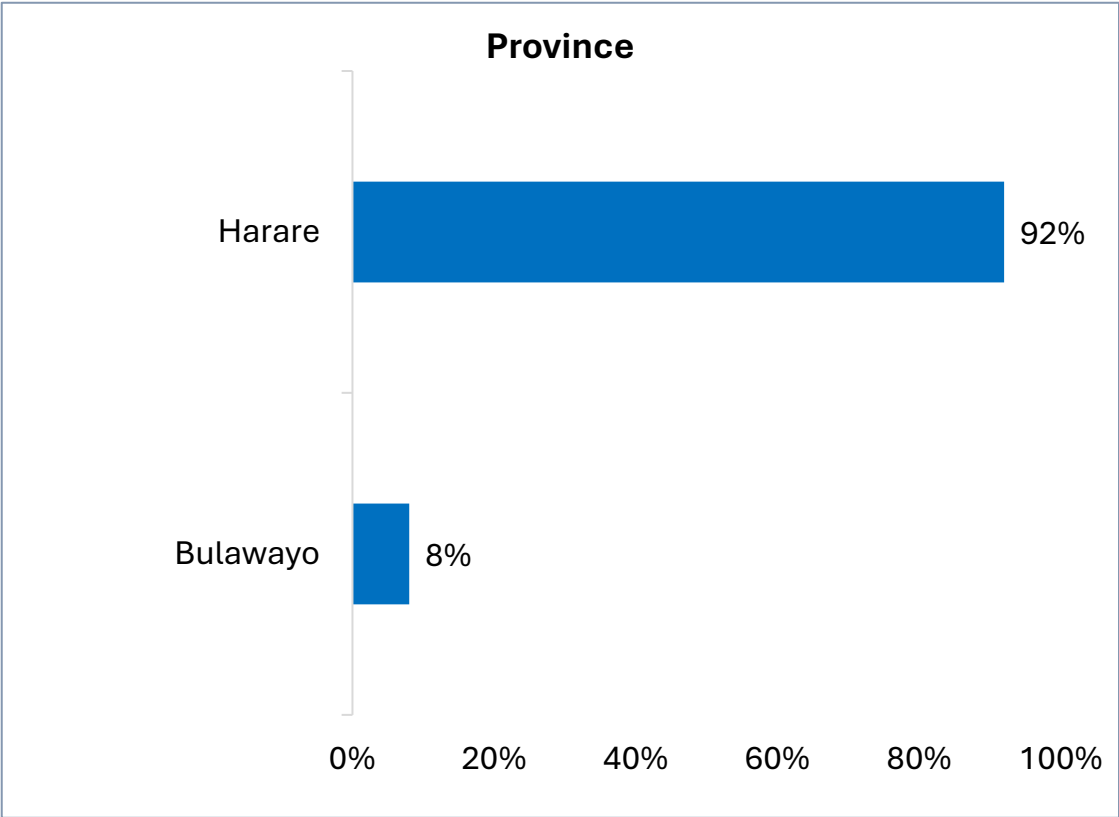
“Yes... now that they have an online portal it’s easy and if you don’t understand you call them and they assist you.”

4.6.0: Clinical Trial Researchers



4.6.1: Region | Period engagement with MCAZ

Qn. How long have you been using MCAZ services?

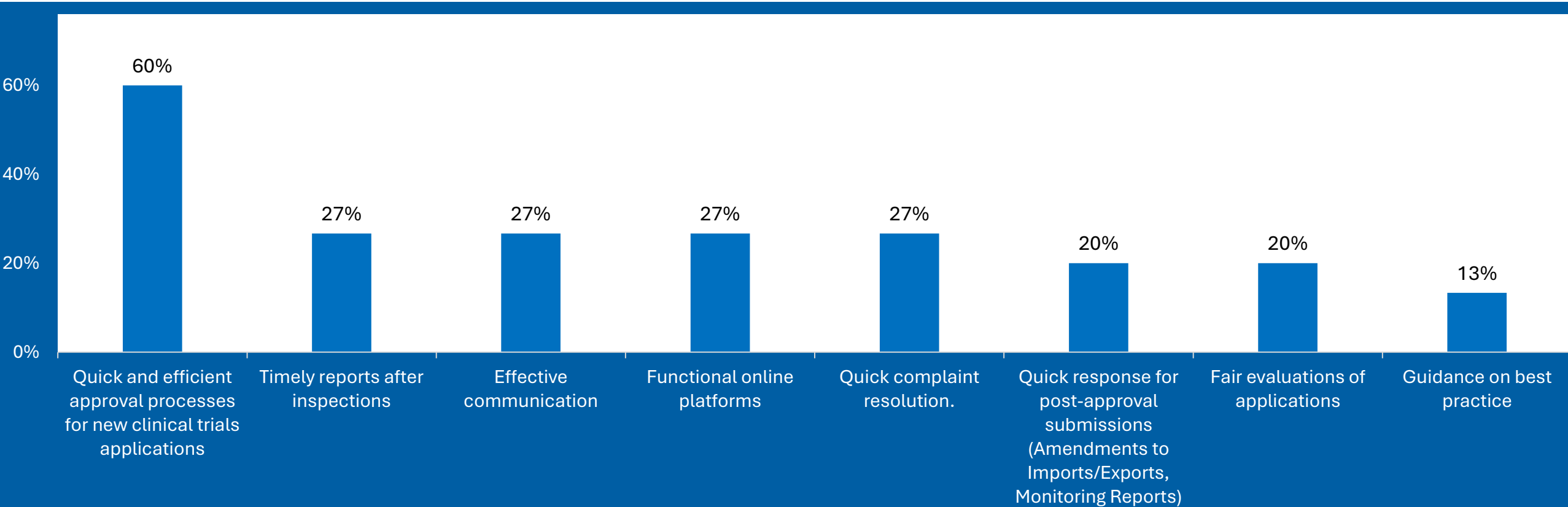


- ❑ Most clinical trial researchers who took part in the survey are domiciled in Harare.
- ❑ Over 80% of Clinical Trial Researchers engaged for the survey have been using MCAZ services for more than 6 years.



4.6.2: Customer service expectations

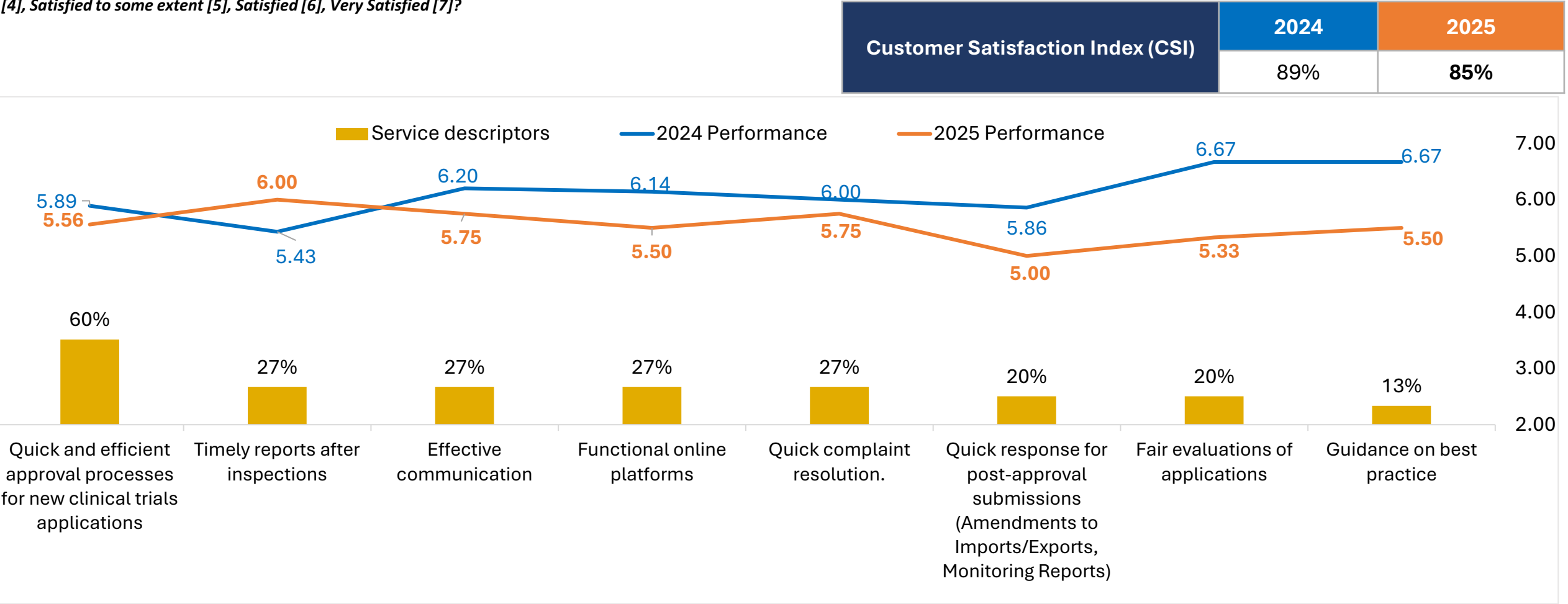
Qn. Qn: When it comes to excellent customer service what do you expect from MCAZ?



- ❑ The most important expectation for Clinical Trial Researchers is quick and efficient approval processes for new clinical trial applications (60%), far ahead of other priorities.
- ❑ Timely reports after inspections, effective communication, functional online platforms, and quick complaint resolution are also among the top service expectations.

4.6.3: MCAZ maintained high satisfaction levels among CTRs

Qn. To what extent are you satisfied with each of the following attributes pertaining to MCAZ services on a scale ranging from – Extremely Dissatisfied [1], Dissatisfied [2], Dissatisfied to some extent [3], Indifferent [4], Satisfied to some extent [5], Satisfied [6], Very Satisfied [7]?



- ❑ Clinical Trial Researchers rated MCAZ better in 2024 on all customer service attributes compared to 2023.
- ❑ The customer happiness levels improved significantly with CSI going up to 89% from 60% which was the lowest across all categories in 2023.
- ❑ The regulator did exceptionally well on putting easy application guidelines and providing guidance on best practice.
- ❑ In 2023 there were issues about delayed approvals for new clinical trials applications but there are notable improvements in that area.

4.6.4: Complaints Resolution

Qn: Did you lodge any query/complaint with MCAZ in the last 6 months?
Qn: Was the query/complaint resolved to your satisfaction?

CLINICAL TRIAL RESEARCHERS	2023	2024	2025
QUERY LODGED	18%	5%	13%
QUERY RESOLUTION	33%	100%	100%

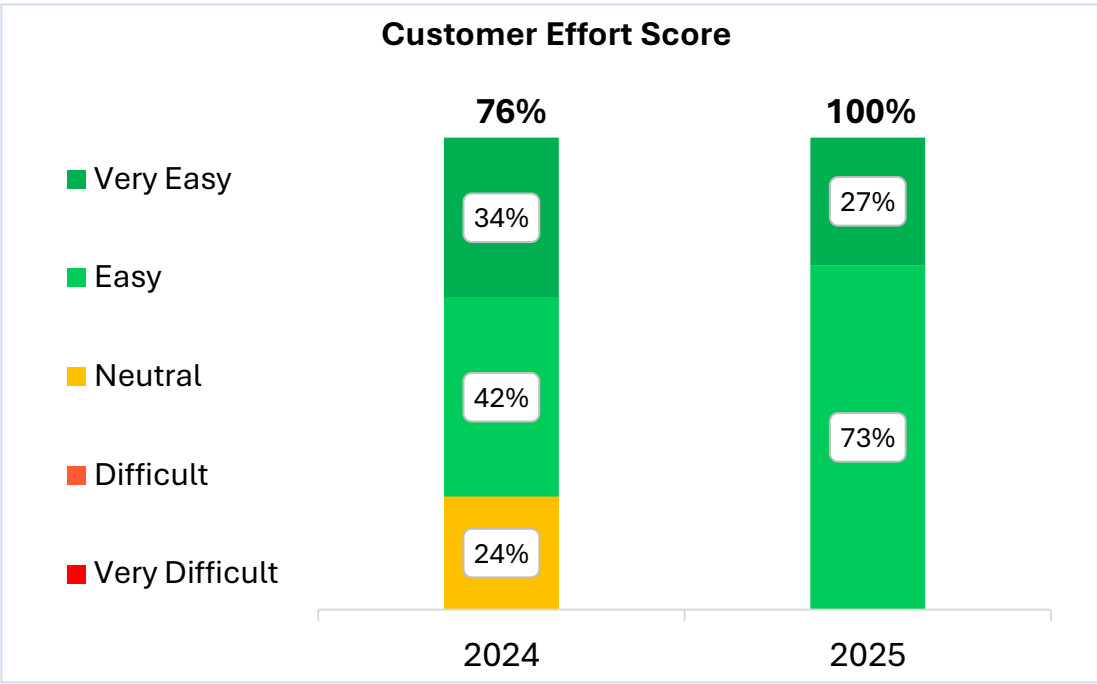
- ❑ The incidence of lodging queries by Clinical Trial Researchers went up from just 5% in 2024 to 13% in 2025.
- ❑ Despite a rise in queries lodged, MCAZ maintained a high-resolution rate 100%.
- ❑ All queries lodged were regulatory complaints.



4.6.5: Net Promoter Score (NPS) | Ease of doing business (CES)

Qn: Using a 10-point scale where 0 means very unlikely and 10 means very likely, how likely are you to recommend MCAZ to your business peers?
Qn: On a 5-point scale where 1 means very difficult and 5 means very easy, how easy is it doing business with MCAZ?

NET PROMOTER SCORE = PROMOTERS – DETRACTORS		
	2024	2025
Detractors (0 – 6)	-	-
Passives (7 – 8)	53%	33%
Promoters (9 -10)	47%	67%
Net Promoter Score	47	67



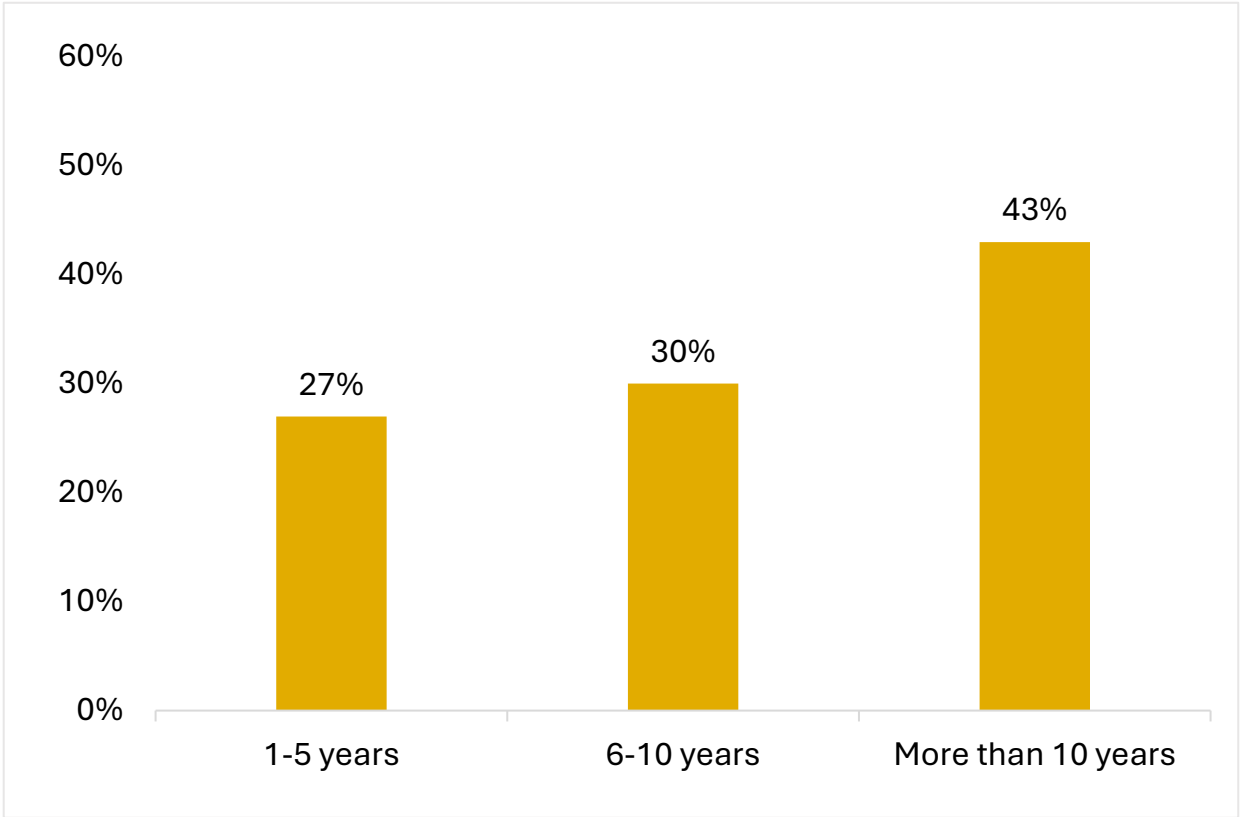
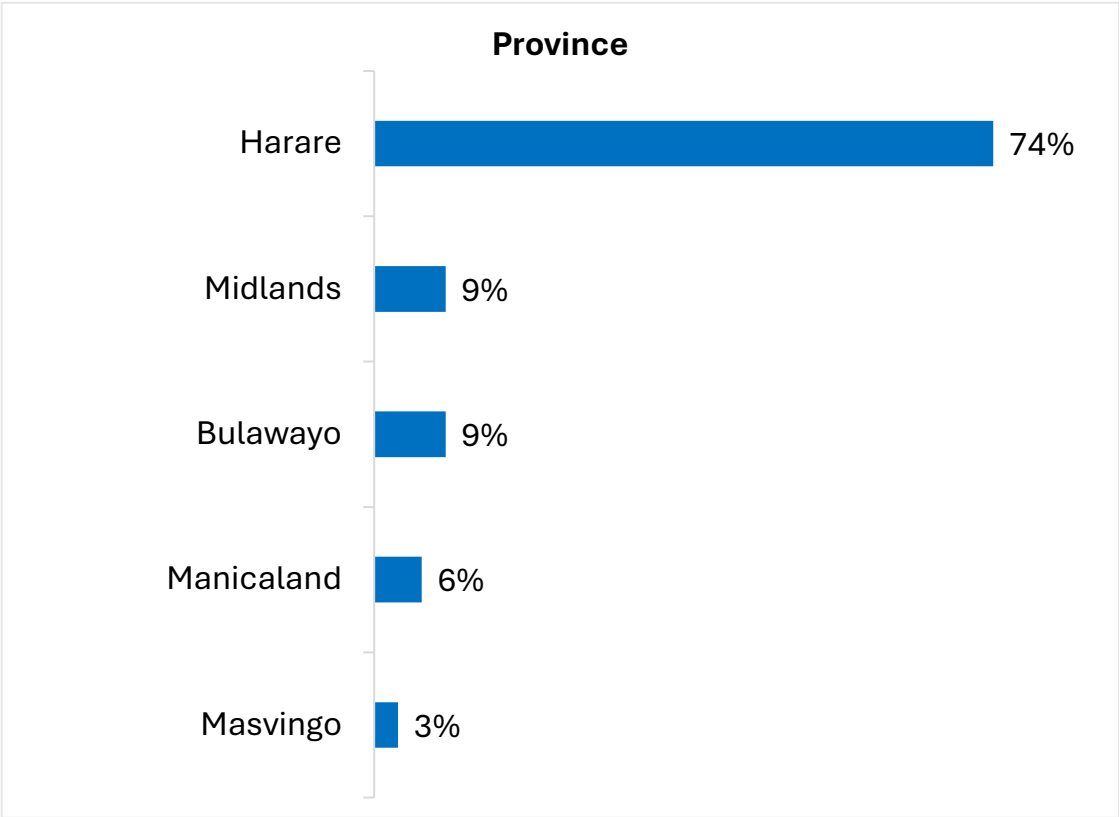
- ❑ MCAZ managed to gain more brand promoters and reduce the number of passive customers in the recent period improving an NPS of 47 attained in 2024 to 67 in 2025.
- ❑ Clinical Trial Researchers are generally happy with interventions made towards fair evaluations of applications. Despite improvements, a notable share of CTRs is still undecided about recommending MCAZ, likely due to historical issues
- ❑ The customer effort score went up from 76% to 100% due to improved online functionality.

4.7.0: Wholesalers



4.7.1: Region | Period engagement with MCAZ

Qn. How long have you been using MCAZ services?

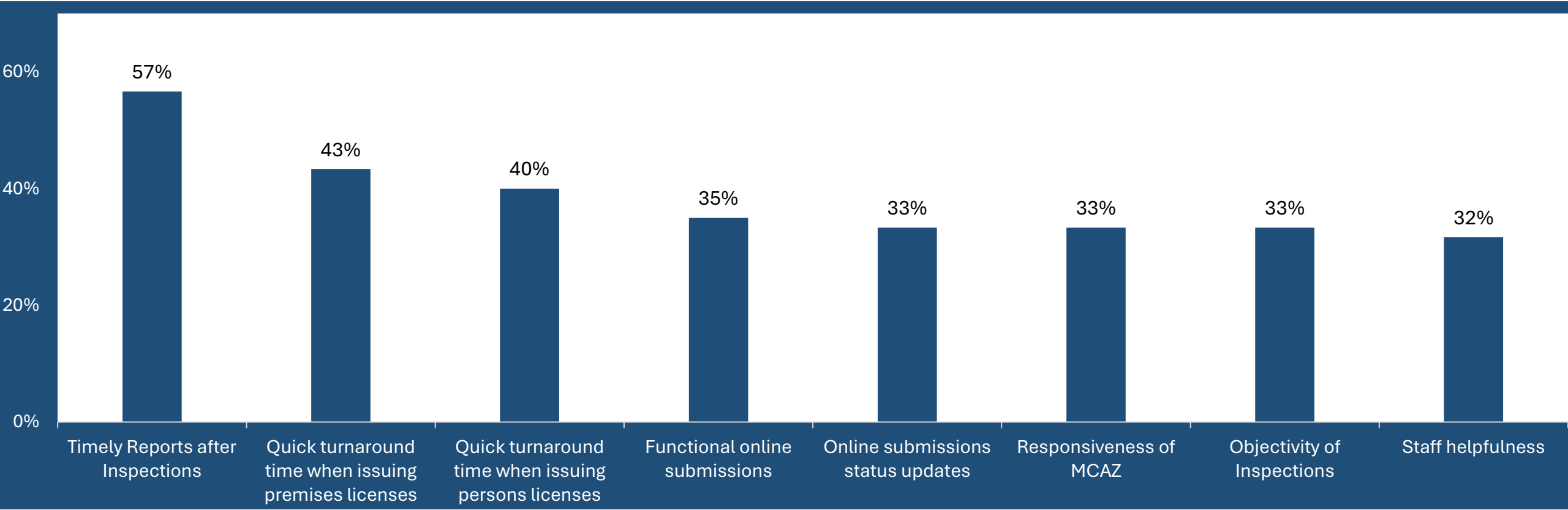


- ❑ The sample for Veterinary Medical General Dealers was largely drawn from Harare, Mashonaland West and Mashonaland East.
- ❑ Over 70% stakeholders engaged for the survey in this segment have been dealing with MCAZ for more than 6 years.

4.7.2: Customer service expectations



Qn. Qn: When it comes to excellent customer service what do you expect from MCAZ?

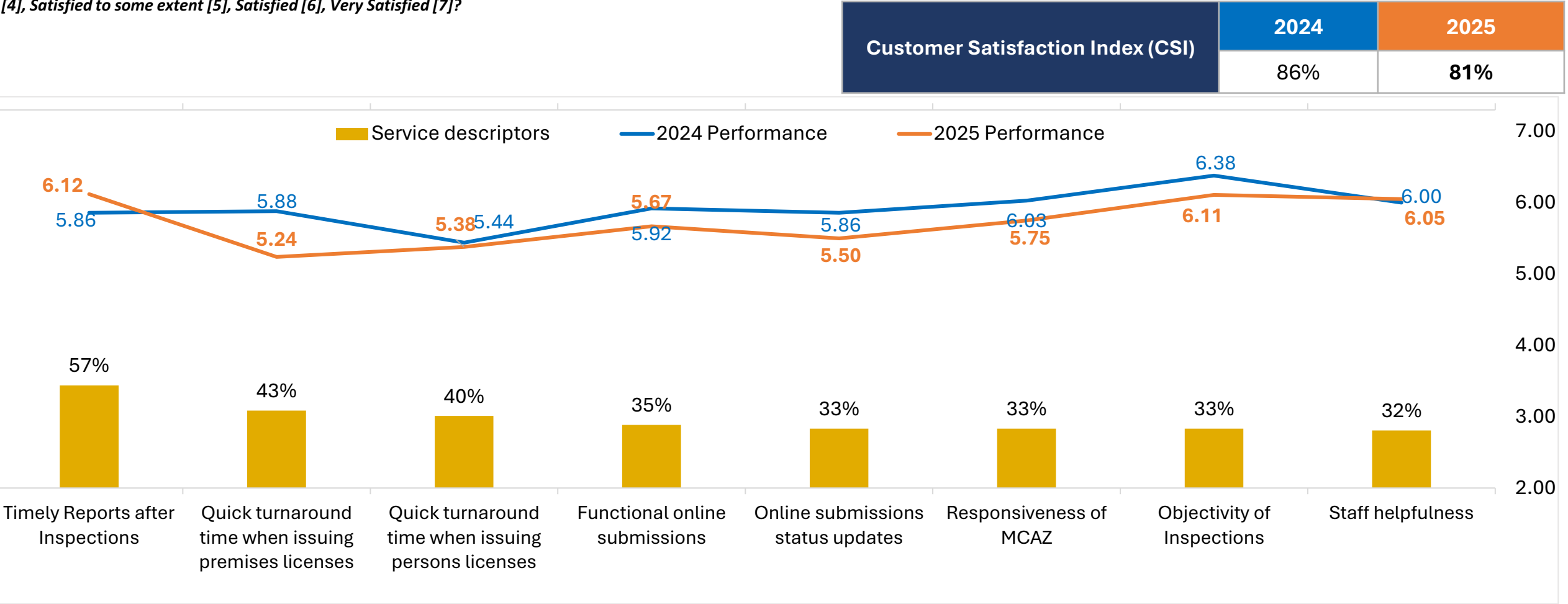


- ❑ Timely reports after inspections (57%) is considered the most crucial service factor by Wholesalers with emphasis on the importance of post-inspection communication.
- ❑ Quick turnaround time when issuing premises and persons licenses as well as functionality of digital platforms are also part of the top service expectations in this category.



4.7.3: MCAZ maintained high satisfaction levels among wholesalers

Qn. To what extent are you satisfied with each of the following attributes pertaining to MCAZ services on a scale ranging from – Extremely Dissatisfied [1], Dissatisfied [2], Dissatisfied to some extent [3], Indifferent [4], Satisfied to some extent [5], Satisfied [6], Very Satisfied [7]?



- ❑ Wholesalers' performance ratings of MCAZ in 2025 are lower than 2024 on most attributes. MCAZ recorded a Customer Satisfaction Index (CSI) of 81% in 2025, which is a slight declined from 86% attained in 2024.
- ❑ The regulator was best rated on provision clear guidelines, timely report after inspections.
- ❑ Time taken to issuing licenses/permits is inconsistent hence fluctuations in performance ratings.

4.7.4: Customer pain points | Complaints Resolution

Qn: What are the causes of dissatisfaction?

The following areas were identified as key customer pain points;

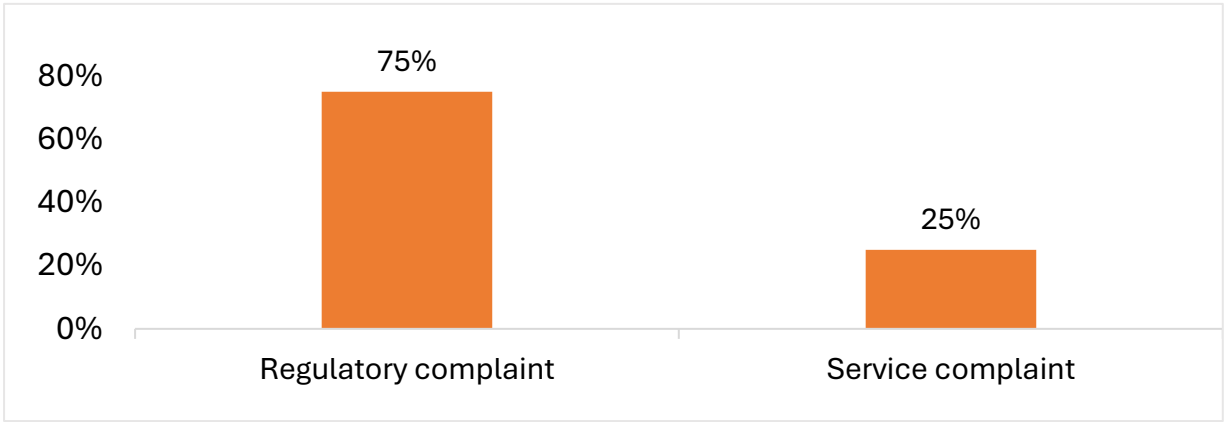
- ✓ Counterfeit & street drug proliferation
- ✓ Unregistered products in circulation (gloves, gripe water, colic drops, and cosmetics allegedly sold without proper registration)

“Individuals are selling counterfeit medicines on their watch.”

Qn: Did you lodge any query/complaint with MCAZ in the last 6 months?

Qn: Was the query/complaint resolved to your satisfaction?

WHOLESALEERS	2023	2024	2025
QUERY LODGED	21%	2%	7%
QUERY RESOLUTION	57%	0%	75%

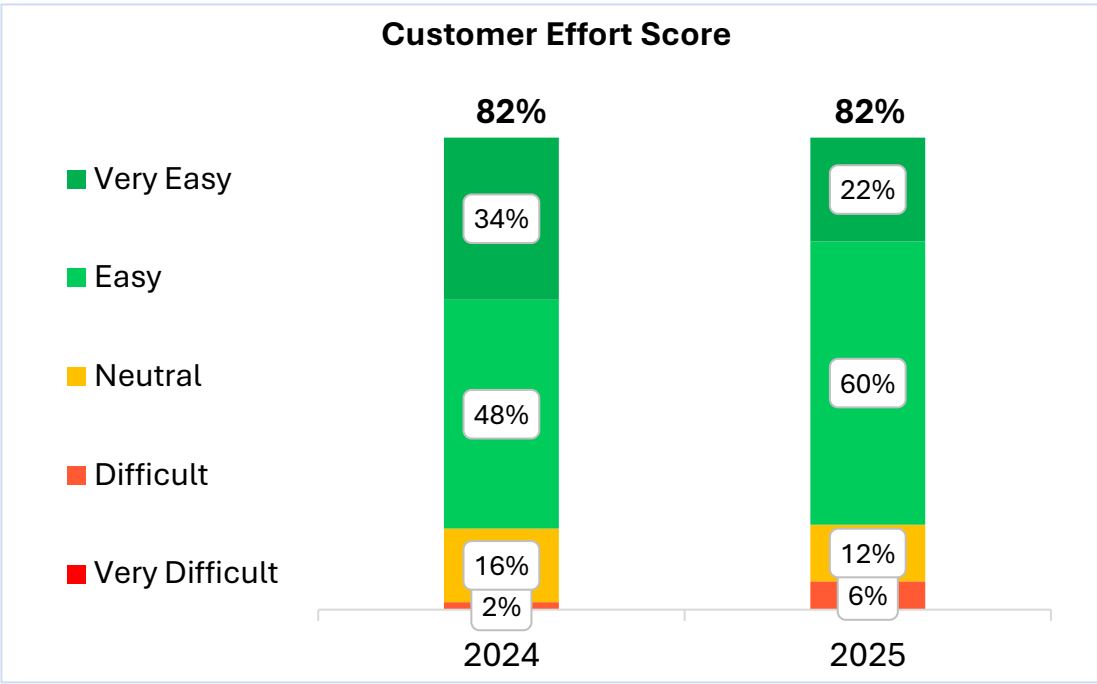


- ❑ Queries lodged increased from 2% in 2024 to 7% in 2025.
- ❑ Despite an increase in number of queries received by MCAZ, efforts towards improving the complaints resolution ratio significantly improved.
- ❑ Popular customer complaints were regulatory in nature.
- ❑ Regular complaints lodged were about delays in issuance of operating licenses for both persons and premises, penalty window, etc.. Stakeholders often submit incomplete documentation which lead to prolonged licensing process.

4.7.5: Net Promoter Score (NPS) | Ease of doing business (CES)

Qn: Using a 10-point scale where 0 means very unlikely and 10 means very likely, how likely are you to recommend MCAZ to your business peers?
Qn: On a 5-point scale where 1 means very difficult and 5 means very easy, how easy is it doing business with MCAZ?

NET PROMOTER SCORE = PROMOTERS – DETRACTORS		
	2024	2025
Detractors (0 – 6)	14%	14%
Passives (7 – 8)	52%	38%
Promoters (9 -10)	34%	48%
Net Promoter Score	20	34

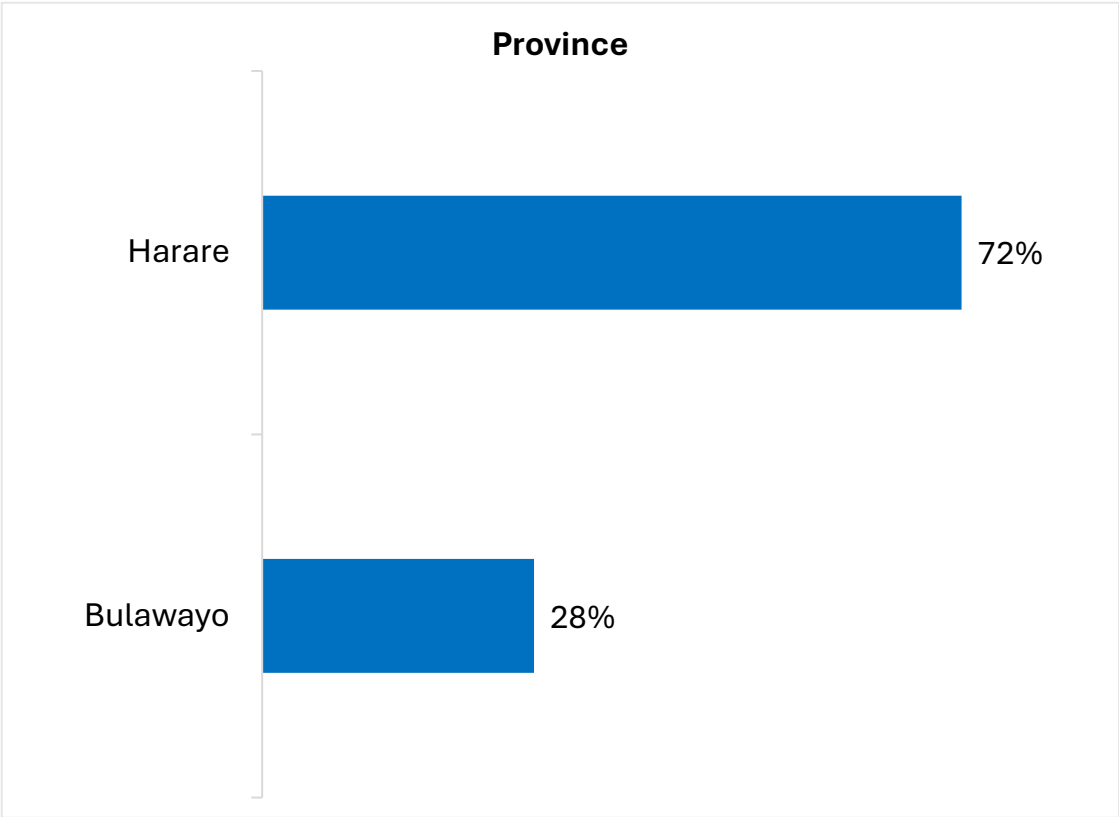


- ❑ The Net Promoter Score (NPS) improved from 20 in 2024 to 34 in 2025, driven by an increase in brand promoters.
- ❑ The happiest wholesalers are pleased with provision of clear guidelines and timeous delivery of inspection reports while detractors complain about delayed licensing process.
- ❑ The Customer Effort Score (CES) remained constant at 82%.

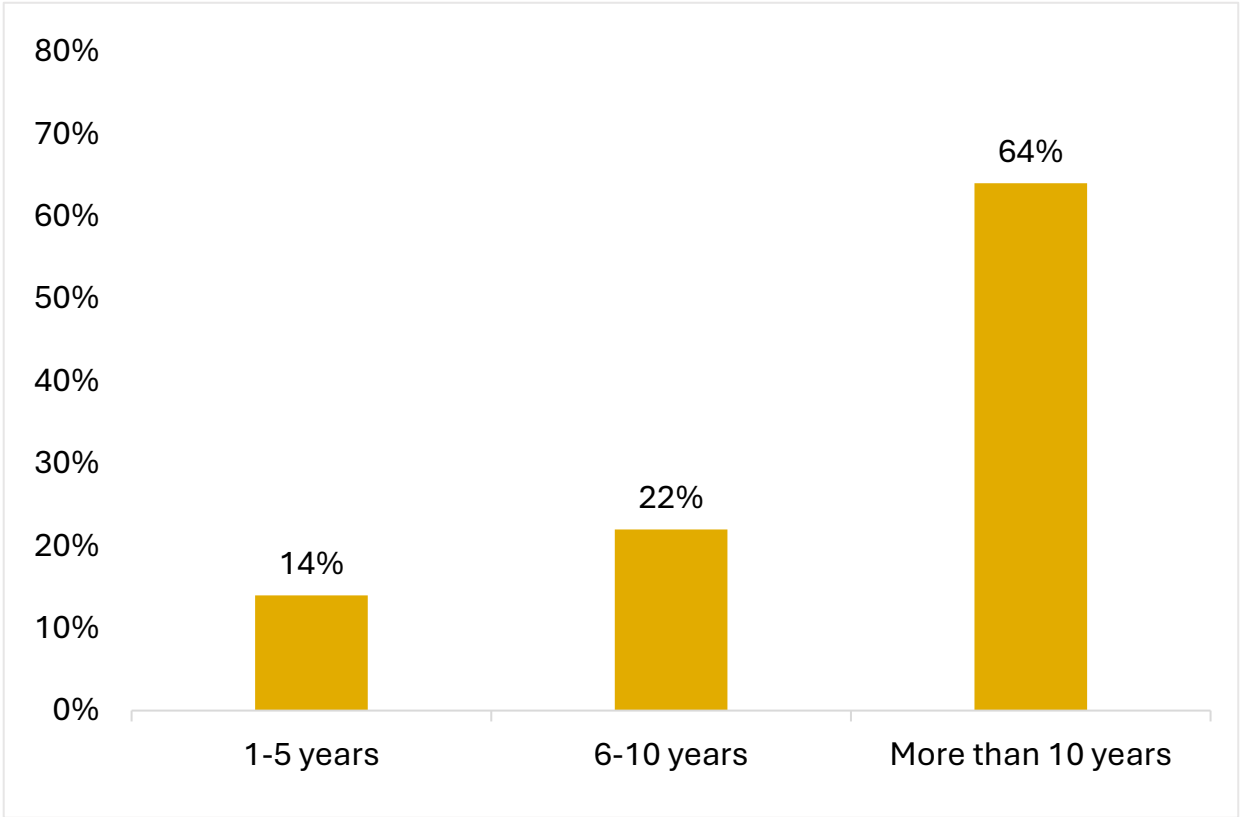
4.8.0: Manufacturers



4.8.1: Region | Period engagement with MCAZ



Qn. How long have you been using MCAZ services?

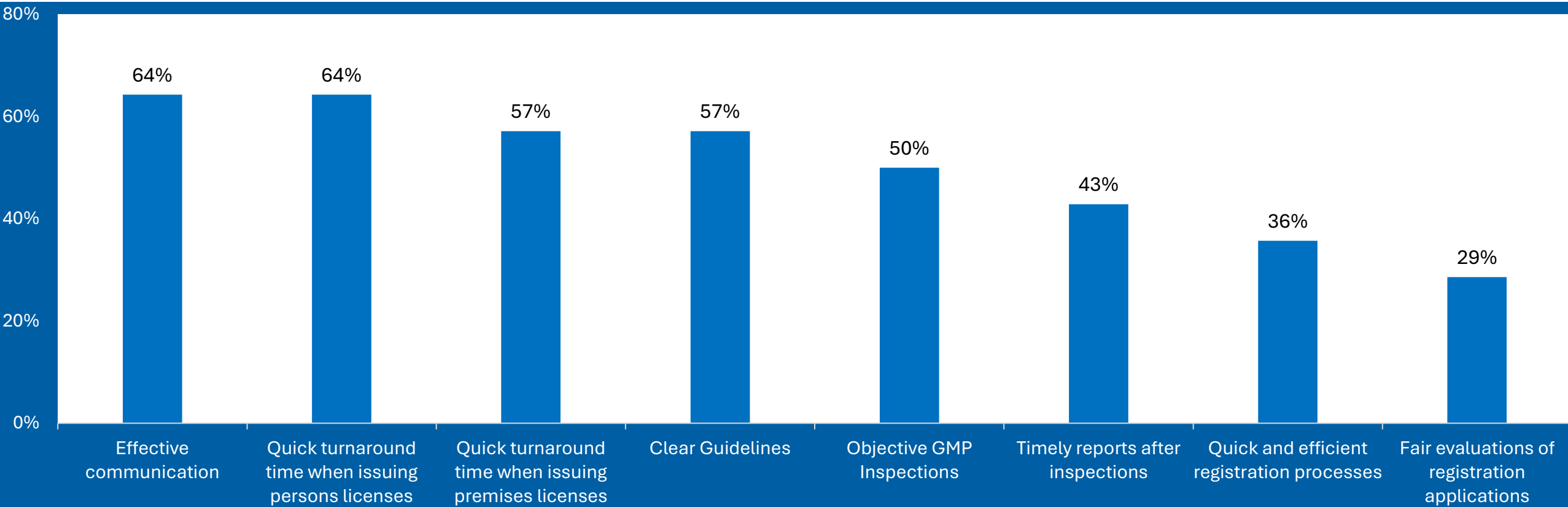


- ❑ The sample for manufacturers was drawn from Harare and Bulawayo metropolitan provinces.
- ❑ Over two thirds of manufacturers engaged for the survey have been using MCAZ services for more than 10 years.



4.8.2: Customer service expectations

Qn. Qn: When it comes to excellent customer service what do you expect from MCAZ?

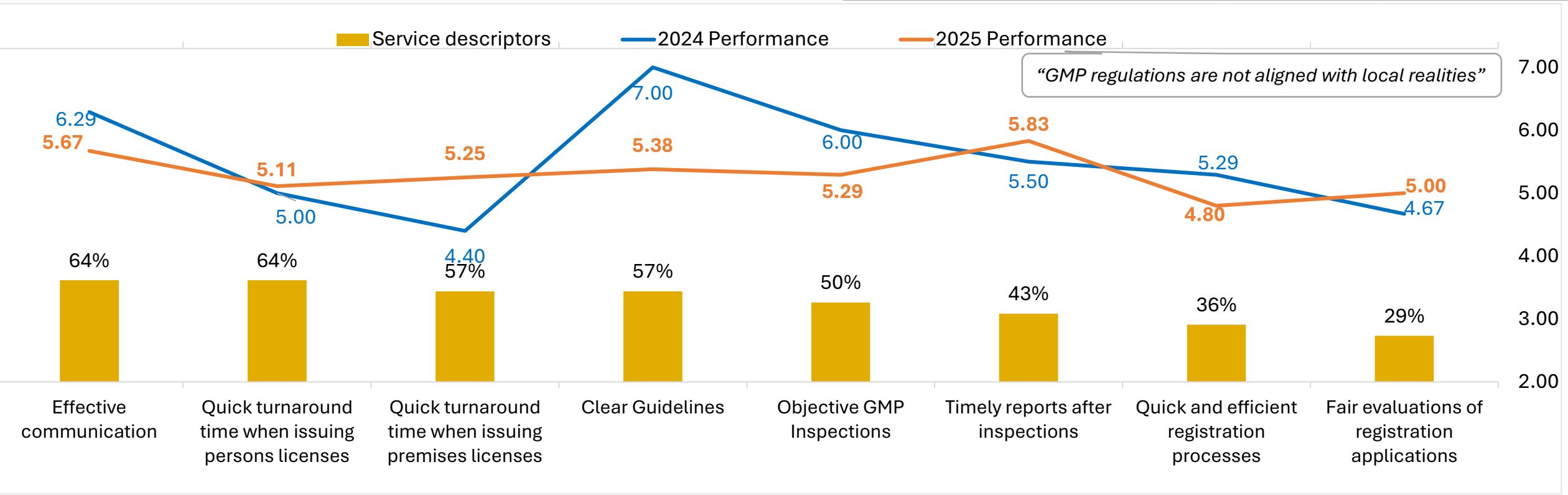


- ❑ Effective communication and quick turnaround time when issuing persons licenses are tied as the most critical expectations, each at 64%.
- ❑ Quick turnaround time for premises licenses follows closely at 57%.
- ❑ Clear guidelines also rank high at 57%, emphasizing the need for transparency and structured processes alongside efficiency.

4.8.3: Manufacturers were less enthusiastic in 2025

Qn. To what extent are you satisfied with each of the following attributes pertaining to MCAZ services on a scale ranging from – Extremely Dissatisfied [1], Dissatisfied [2], Dissatisfied to some extent [3], Indifferent [4], Satisfied to some extent [5], Satisfied [6], Very Satisfied [7]?

Customer Satisfaction Index (CSI)	2024	2025
	83%	73%



- ❑ Overall Customer Satisfaction Index (CSI) fell from 83% in 2024 to 73% in 2025.
- ❑ Manufacturers were more excited with provision of clear guidelines with as well as timely delivery of inspection reports.
- ❑ Despite improving, persons and premises license turnaround time ratings are still average. Registration process of medicines still ranks among the lowest rated elements.

4.8.4: Customer pain points | Complaints Resolution

Qn: What are the causes of dissatisfaction?

The following areas were identified as key customer pain points;

- ✓ Licensing turnaround delays
- ✓ Disconnection between online platform and traditional processes.

“Turnaround time on licenses is poor, be it persons or premises licenses.”

“There is misalignment between automation system and the physical part which is causing back and forth on many elements”

Qn: Did you lodge any query/complaint with MCAZ in the last 6 months?

Qn: Was the query/complaint resolved to your satisfaction?

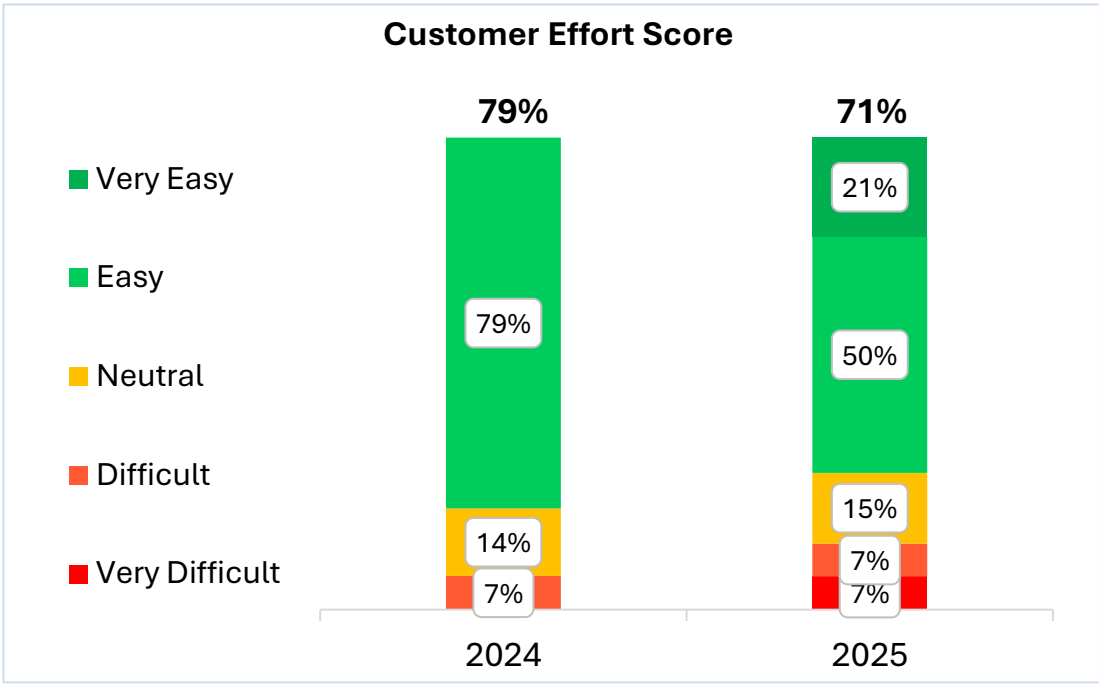
MANUFACTURERS	2023	2024	2025
QUERY LODGED	27%	7%	7%
QUERY RESOLUTION	80%	100%	100%

- ❑ Only 7% lodged queries, maintaining same number of queries received in 2024.
- ❑ MCAZ has maintained 100% complaints resolution rate, a sign of consistence and efficiency on query handling procedures.
- ❑ All registered customer complaints were of service nature.

4.8.5: Net Promoter Score (NPS) | Ease of doing business (CES)

Qn: Using a 10-point scale where 0 means very unlikely and 10 means very likely, how likely are you to recommend MCAZ to your business peers?
Qn: On a 5-point scale where 1 means very difficult and 5 means very easy, how easy is it doing business with MCAZ?

NET PROMOTER SCORE = PROMOTERS – DETRACTORS		
	2024	2025
Detractors (0 – 6)	-	14%
Passives (7 – 8)	64%	40%
Promoters (9 -10)	36%	46%
Net Promoter Score	36	32



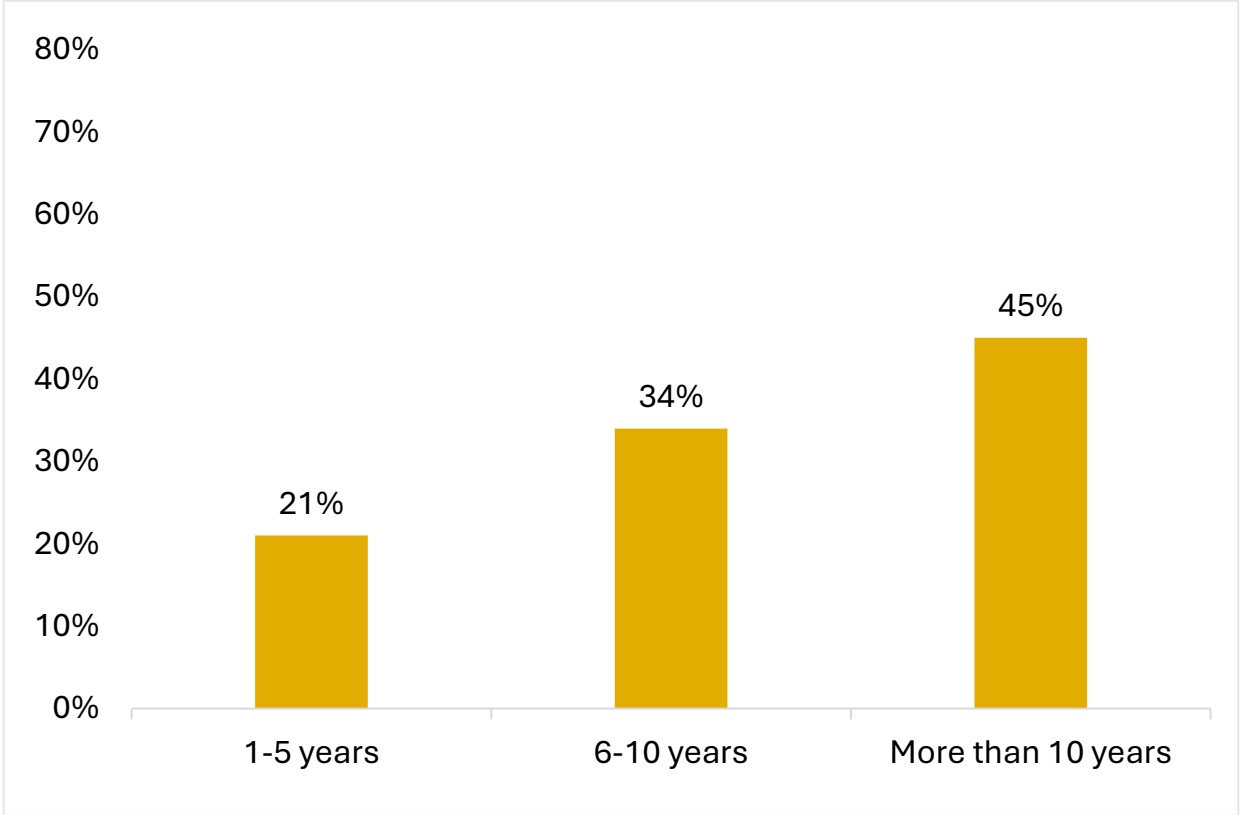
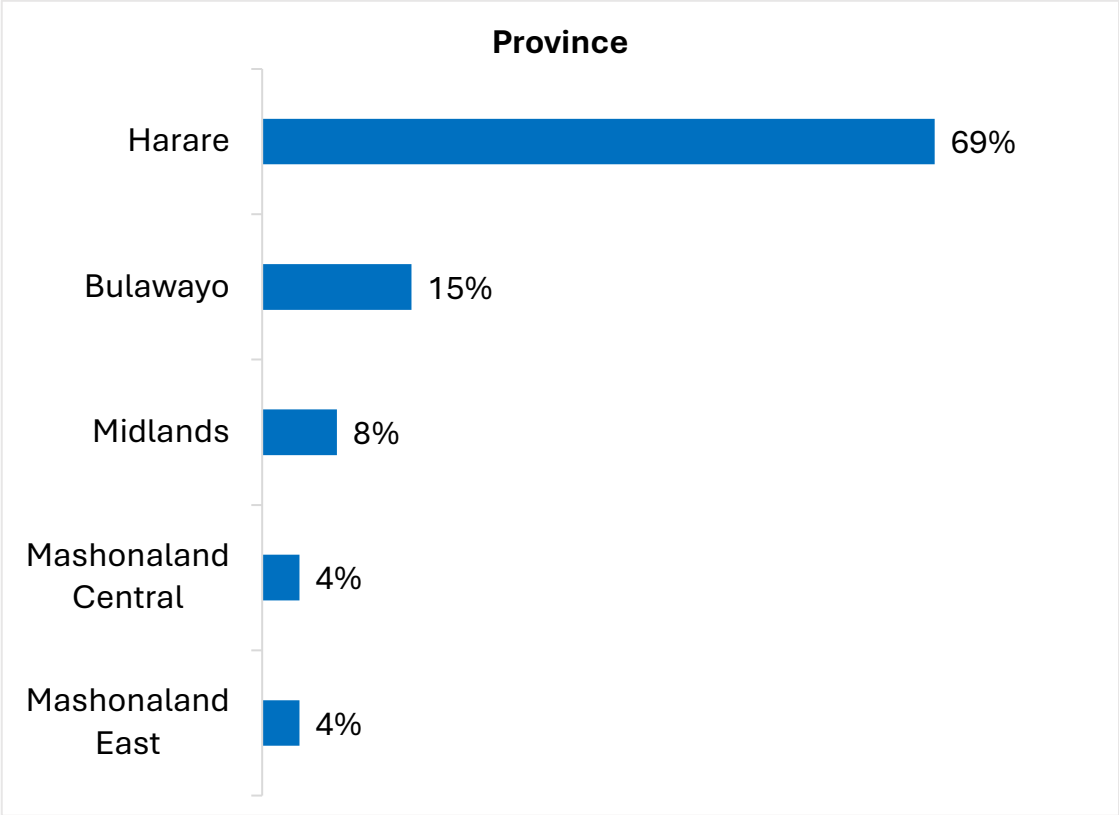
- ❑ The Net Promoter Score declined slightly from 36 in 2024 to 32 in 2025 following emerging of detractors (14%). In 2023, MCAZ has a NPS of 59.
- ❑ Manufacturers would be happy to recommend MCAZ to its business peers because of positive staff attitude and quick turnaround time on inspection reports.
- ❑ Easy accessibility of services further drops from 79% to 71%.

4.9.0: Importers



4.9.1: Region | Period engagement with MCAZ

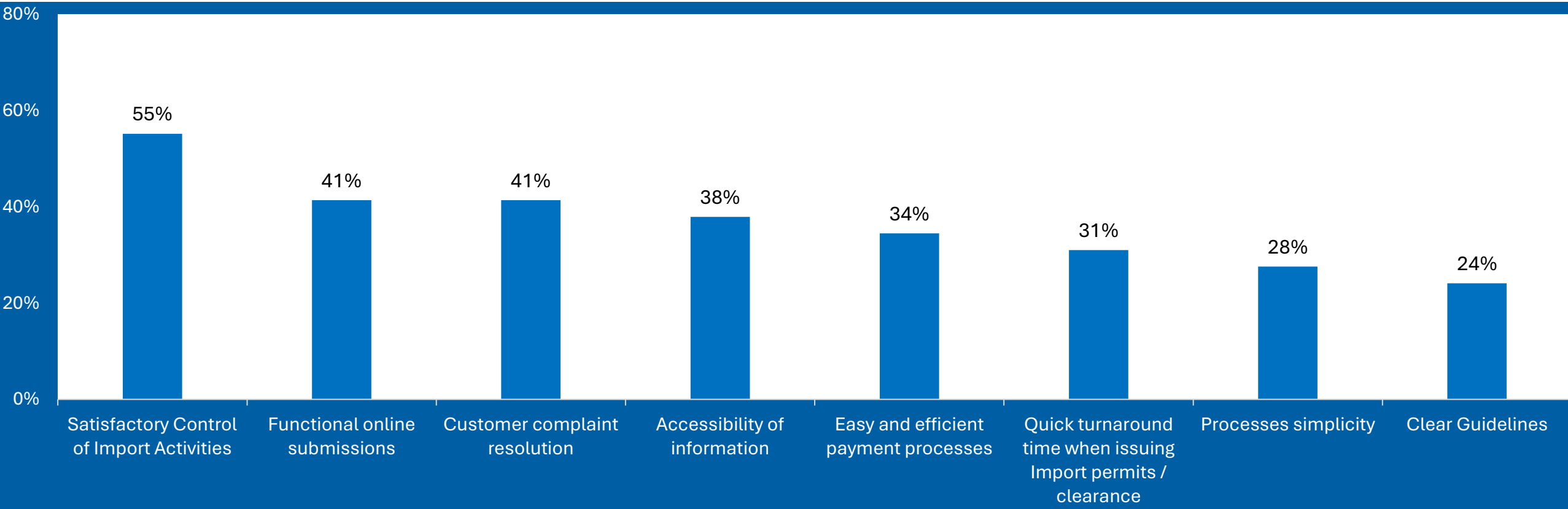
Qn. How long have you been using MCAZ services?



- ❑ Harare dominated the sample for the importers.
- ❑ Over 70% of the importers engaged for the survey have been using MCAZ services for more than 6 years.

4.9.2: Customer service expectations

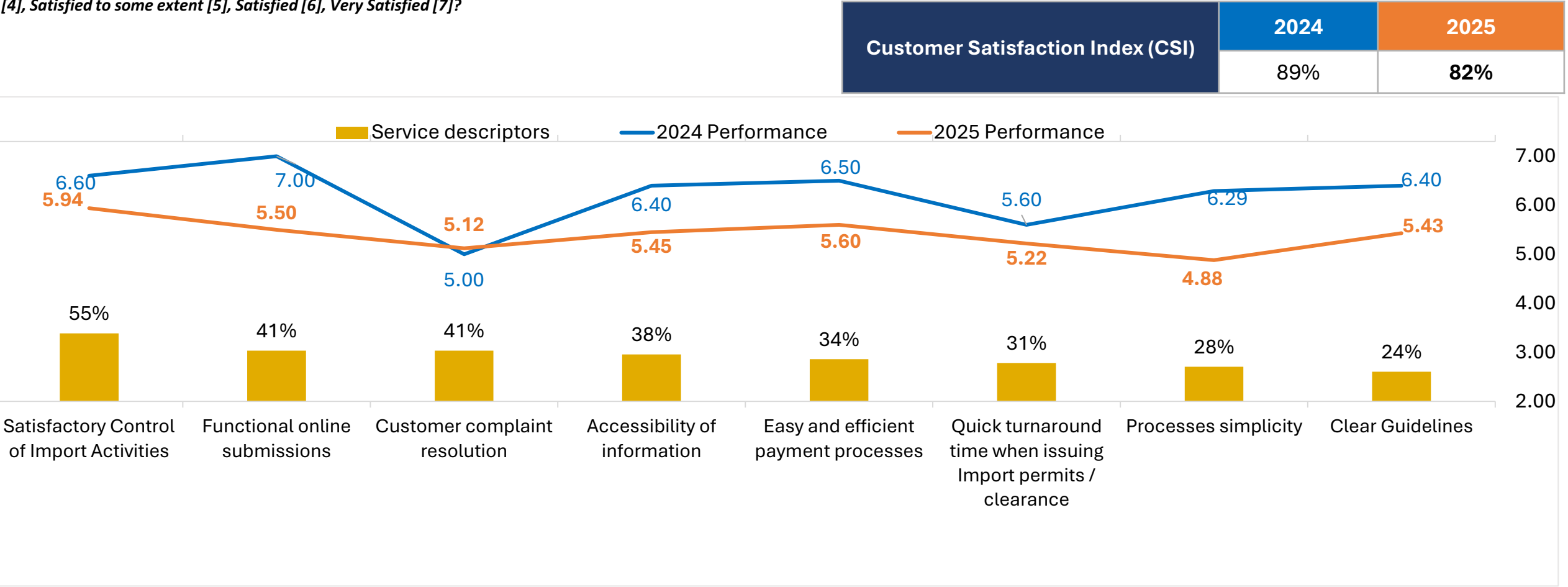
Qn. Qn: When it comes to excellent customer service what do you expect from MCAZ?



- ❑ At least 50% of importers emphasize proper control and documentation for import activities as the most critical expectation.
- ❑ Functional Online Submissions and Complaint Resolution both at 41%, shows a big demand for reliable digital systems and effective handling of complaints.

4.9.3: MCAZ maintained high satisfaction levels among importers

Qn. To what extent are you satisfied with each of the following attributes pertaining to MCAZ services on a scale ranging from – Extremely Dissatisfied [1], Dissatisfied [2], Dissatisfied to some extent [3], Indifferent [4], Satisfied to some extent [5], Satisfied [6], Very Satisfied [7]?



- ❑ The performance of Medicines Control Authority of Zimbabwe on customer service expectations in 2025 is below the 2024 performance. Subsequently overall Satisfaction dropped from 89% in 2024 to 82% in 2025.
- ❑ Satisfactory Control of Import Activities remains the highest-rated attribute despite a drop.
- ❑ There was huge drop in performance on functional online submissions and processes simplicity.

4.9.4: Customer pain points | Complaints Resolution

Qn: Did you lodge any query/complaint with MCAZ in the last 6 months?
Qn: Was the query/complaint resolved to your satisfaction?

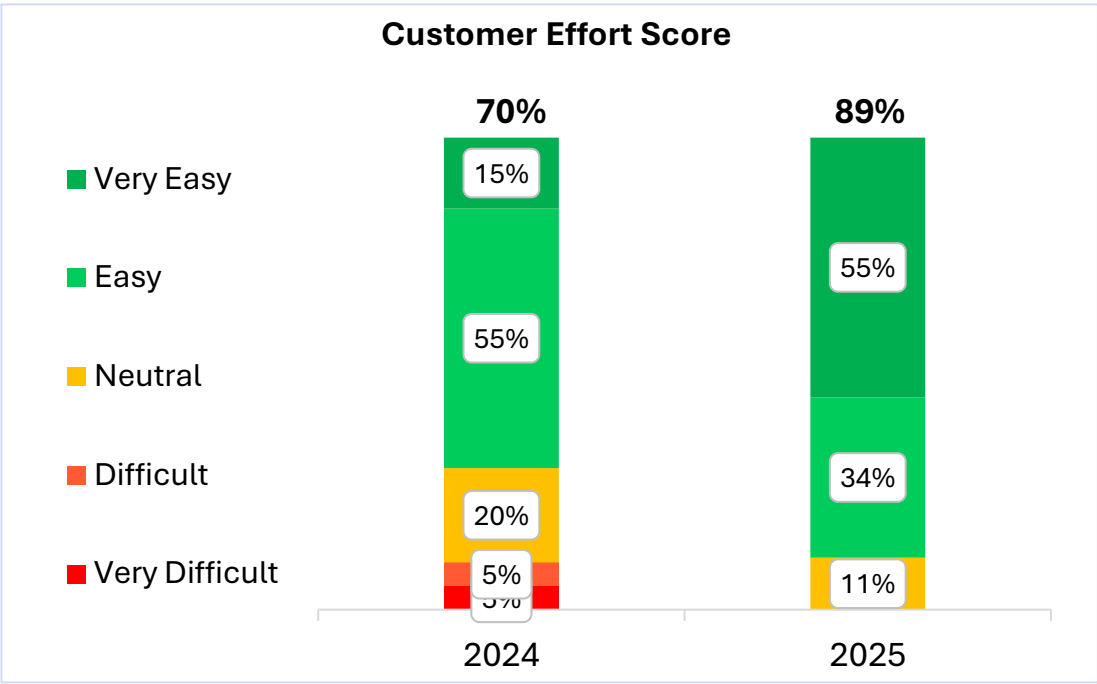
IMPORTERS	2023	2024	2025
QUERY LODGED	38%	10%	14%
QUERY RESOLUTION	73%	100%	50%

- ❑ Importers lodged more queries in 2025 compared to the same period in 2024.
- ❑ Following an increase in number of queries lodged, the complaints resolution ratio massively declined.
- ❑ There was a fair split on nature of queries lodged between regulatory and service.
- ❑ All complaints lodged were regulatory with more focus on guidelines on import processes as well as follow ups on product registration.

4.9.5: Net Promoter Score (NPS) | Ease of doing business (CES)

Qn: Using a 10-point scale where 0 means very unlikely and 10 means very likely, how likely are you to recommend MCAZ to your business peers?
Qn: On a 5-point scale where 1 means very difficult and 5 means very easy, how easy is it doing business with MCAZ?

NET PROMOTER SCORE = PROMOTERS – DETRACTORS		
	2024	2025
Detractors (0 – 6)	10%	7%
Passives (7 – 8)	45%	38%
Promoters (9 -10)	45%	55%
Net Promoter Score	35	48



- ❑ Most importers had a positive experience when dealing business with MCAZ in 2025, attracting additional 10% brand promoters.
- ❑ NPS improved significantly from 35 in 2024 to 48 in 2025
- ❑ Importers are most excited with MCAZ on control of import activities procedures.
- ❑ The Customer Effort Score significantly improved in 2025, driven by positive staff attitude.



4.10.0: Exporters



4.10.1: Exporters' views on MCAZ, its roles & experiences

- ❑ **Regulator Image:** MCAZ is widely recognized as the national regulator. Most exporters describe it as stringent, strict, and sometimes anti-progress. There's a perception that MCAZ approach can feel overly rigid for a developing and largely informal economy where a soft touch is seen as desirable from the regulator.
- ❑ **Performance on Mandate:** MCAZ is viewed as over-delivering, given the operating environment. The introduction of global standards (GBT ML3) is prestigious but has its own shortfalls to the local industry such as resource constraints.
- ❑ **Global Benchmarking Concerns:** MCAZ's achievement of GBT Maturity Level 3 is acknowledged, but exporters question its relevance for Zimbabwe, a net importer of medicines. Benchmarking against countries like Australia, Canada, South Africa feels unrealistic and economically burdensome. There is fear that compliance costs will raise medicine prices and strain local manufacturers who lack funding for upgrades.
- ❑ **Positive Experiences:** MCAZ earns praise for objectivity and fairness in inspections, response to substandard and falsified products, quick approvals for clinical trials and easy accessibility.
- ❑ **Pain Points:** GBT requirements seen as overly stringent, creating financial strain and defensive interactions. MCAZ perceived as having more skills than the industry, setting standards beyond what the economy can sustain.

"Create a Zimbabwe-specific regulatory framework that balances global best practices with local affordability."

"MCAZ should engage beyond regulation, understand the economic realities of exporters..."

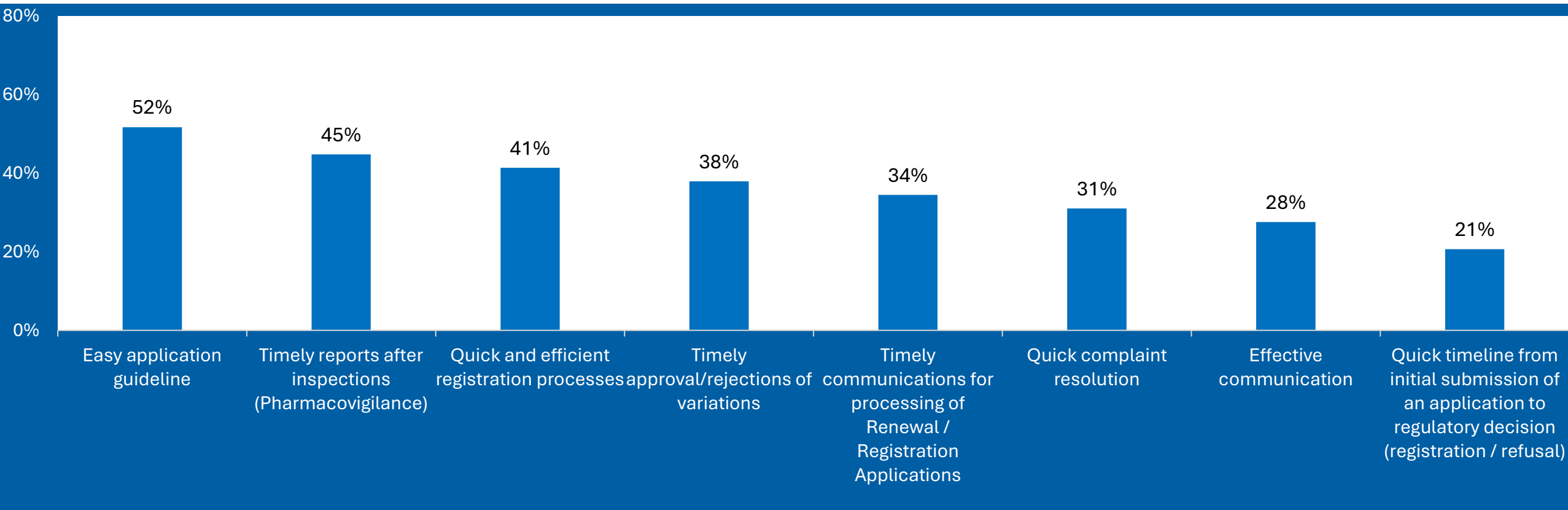
"MCAZ is among the best regulators in the country, quite responsive and objective"

4.11.0: Applicants



4.11.1: Customer service expectations

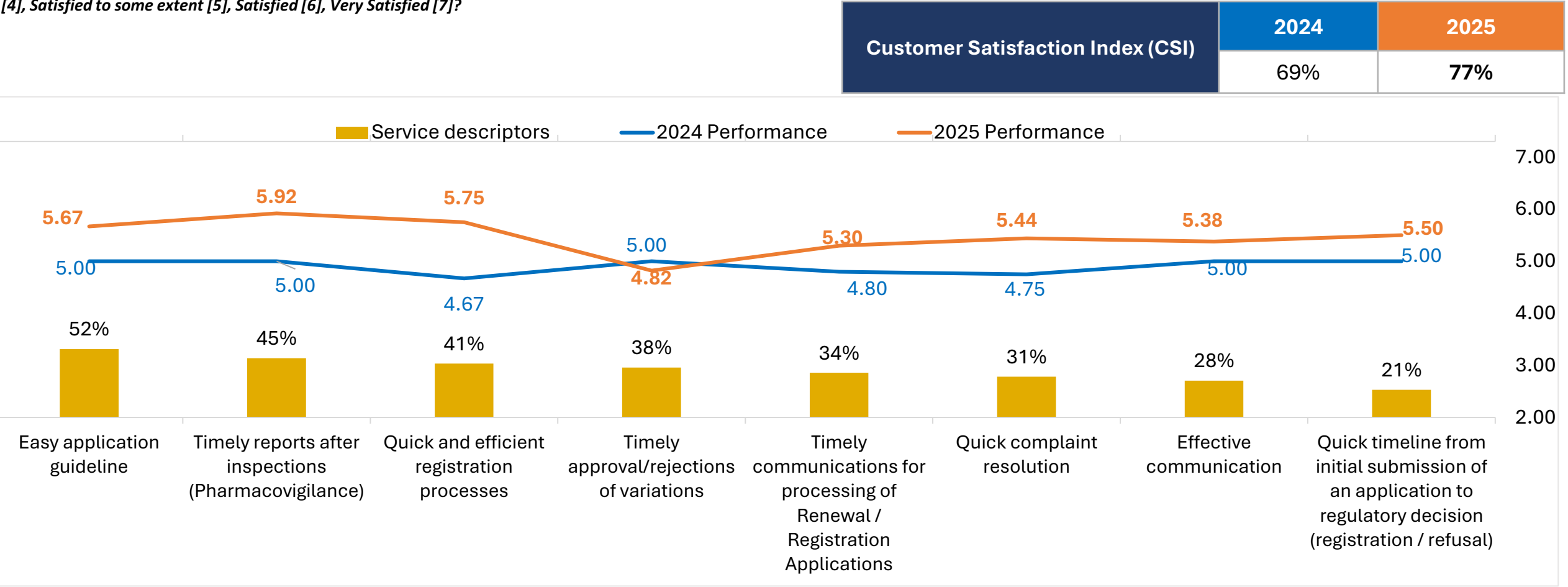
Qn. Qn: When it comes to excellent customer service what do you expect from MCAZ?



- ❑ Easy application guidelines and the provision of timely reports after inspection are the top service expectations for new applicants..
- ❑ The applicants also prioritize quick and efficient registration processes and timely approval/rejections of variant when it comes to excellent customer service.

4.11.2: Applicants are more enthusiastic in 2025

Qn. To what extent are you satisfied with each of the following attributes pertaining to MCAZ services on a scale ranging from – Extremely Dissatisfied [1], Dissatisfied [2], Dissatisfied to some extent [3], Indifferent [4], Satisfied to some extent [5], Satisfied [6], Very Satisfied [7]?



- ❑ Customer Satisfaction Index (CSI) improved from 69% in 2024 to 77% in 2025.
- ❑ Service descriptor scores for 2025 are slightly higher than 2024 for most areas, except timely approval/rejections of variations, which declined from 5.00 to 4.82.

4.11.3: Customer pain points | Complaints Resolution

Qn: What are the causes of dissatisfaction?

The following areas were identified as key customer pain points;

- ✓ Application processing delays
- ✓ Certificate Errors
- ✓ Registration platform challenges

"I enquired about my license certificate, it had missing information, they told me it was a printing error"

"It was about an application that we made which we have not yet been responded to."

Qn: Did you lodge any query/complaint with MCAZ in the last 6 months?
Qn: Was the query/complaint resolved to your satisfaction?

APPLICANTS	2024	2025
QUERY LODGED	5%	14%
QUERY RESOLUTION	100%	50%

"We registered, emailed them, they said I should apply on their platform, they charged me for late registration but it was their fault."

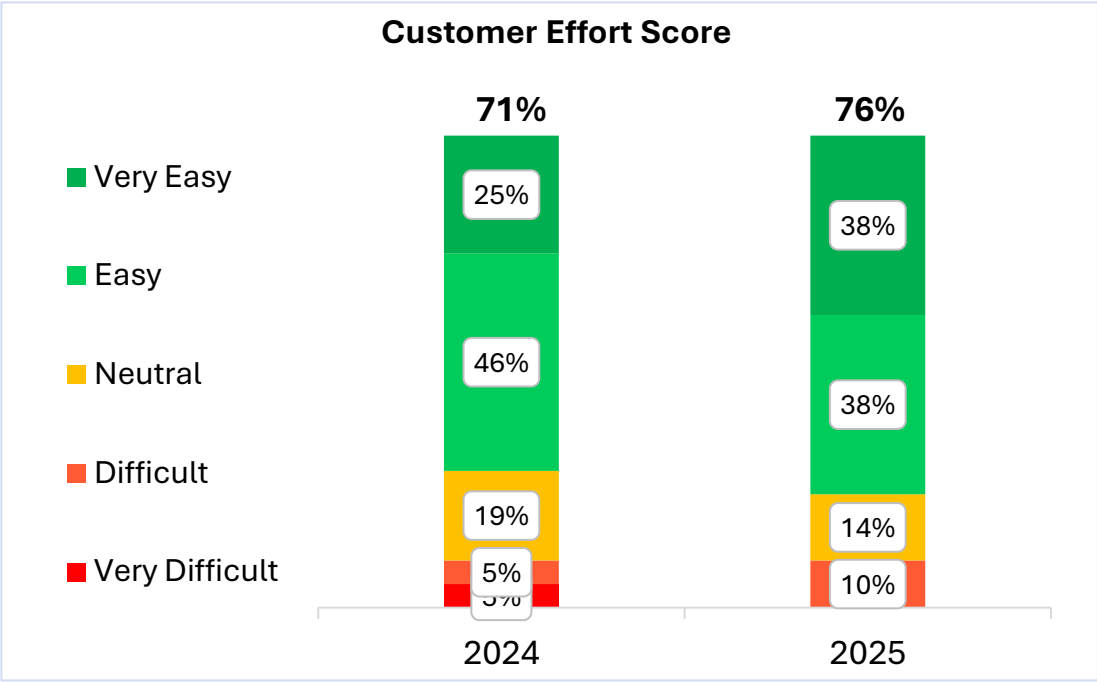
- ❑ MCAZ received more queries in 2025 (14%) than in 2024 in the same period.
- ❑ Complaints resolution effectiveness dropped sharply from 100% to just 50%.
- ❑ All queries put through by the applicants were service related.



4.11.4: Net Promoter Score (NPS) | Ease of doing business (CES)

Qn: Using a 10-point scale where 0 means very unlikely and 10 means very likely, how likely are you to recommend MCAZ to your business peers?
Qn: On a 5-point scale where 1 means very difficult and 5 means very easy, how easy is it doing business with MCAZ?

NET PROMOTER SCORE = PROMOTERS – DETRACTORS		
	2024	2025
Detractors (0 – 6)	5%	7%
Passives (7 – 8)	4%	28%
Promoters (9 -10)	91%	66%
Net Promoter Score	86	59



- ❑ The Net Promoter Score for MCAZ has dropped from 86 to 59 in 2025 although it remained positive.
- ❑ Ineffective complaints resolution in 2025, primarily led to the decline of overall NPS.
- ❑ Like in other customer segments, MCAZ continue to deliver exceptionally on timely delivery of inspection reports.
- ❑ Overall, ease of doing business with MCAZ improved in 2025, due to simplified processes.

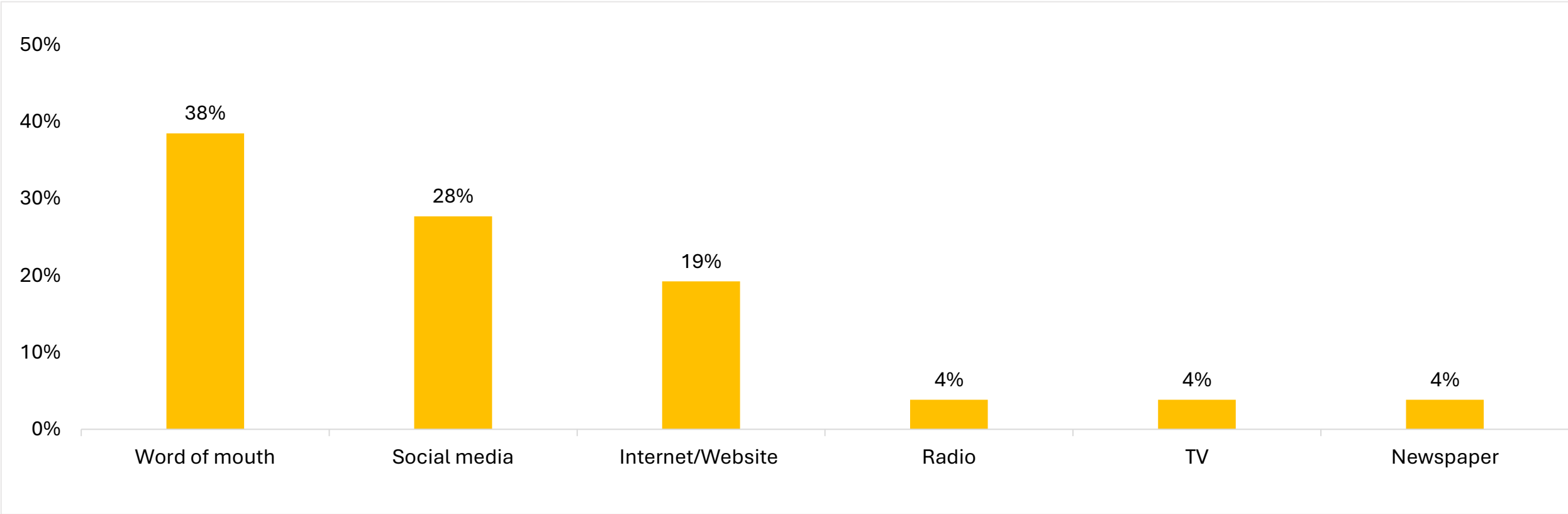
4.12.0: General Public



NB: The sample was drawn from a database of Zimbabweans who have interacted with MCAZ on their own accord.

4.12.1: How did you come to know MCAZ?

Qn: How did you get to know about MCAZ?

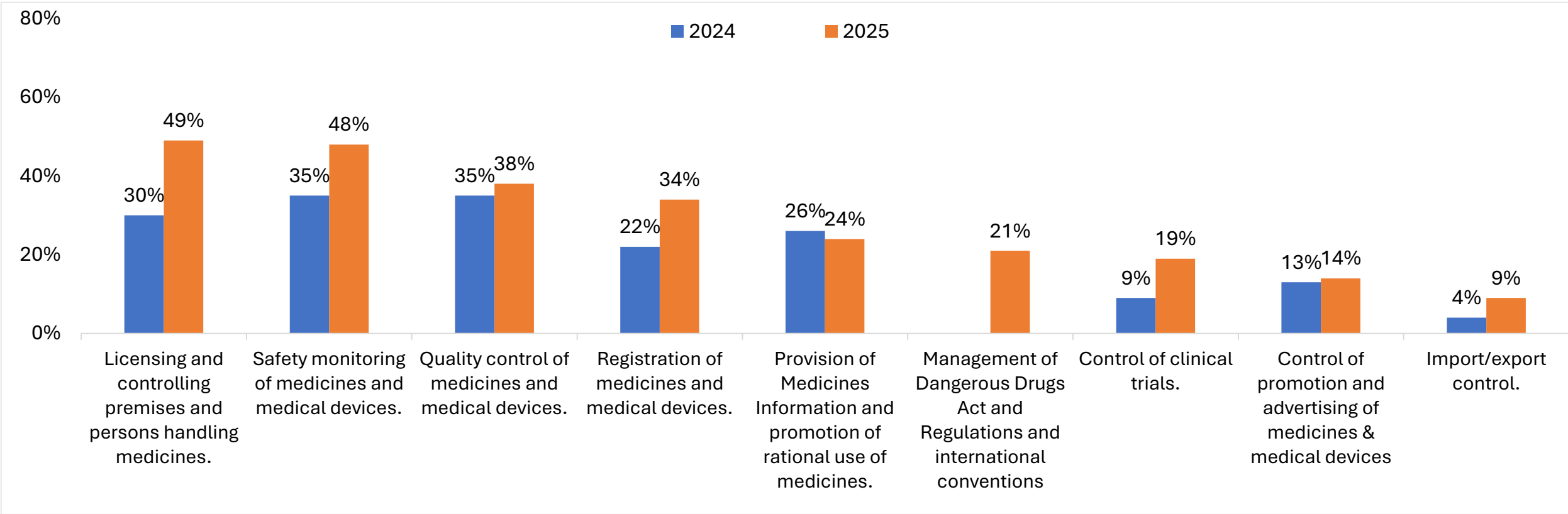


☒ The majority of the general public got to know about the Medicines Control Authority of Zimbabwe (MCAZ) through the word of mouth (38%) followed by social media, and television.



4.12.2: Understanding of MCAZ mandate is fair and growing

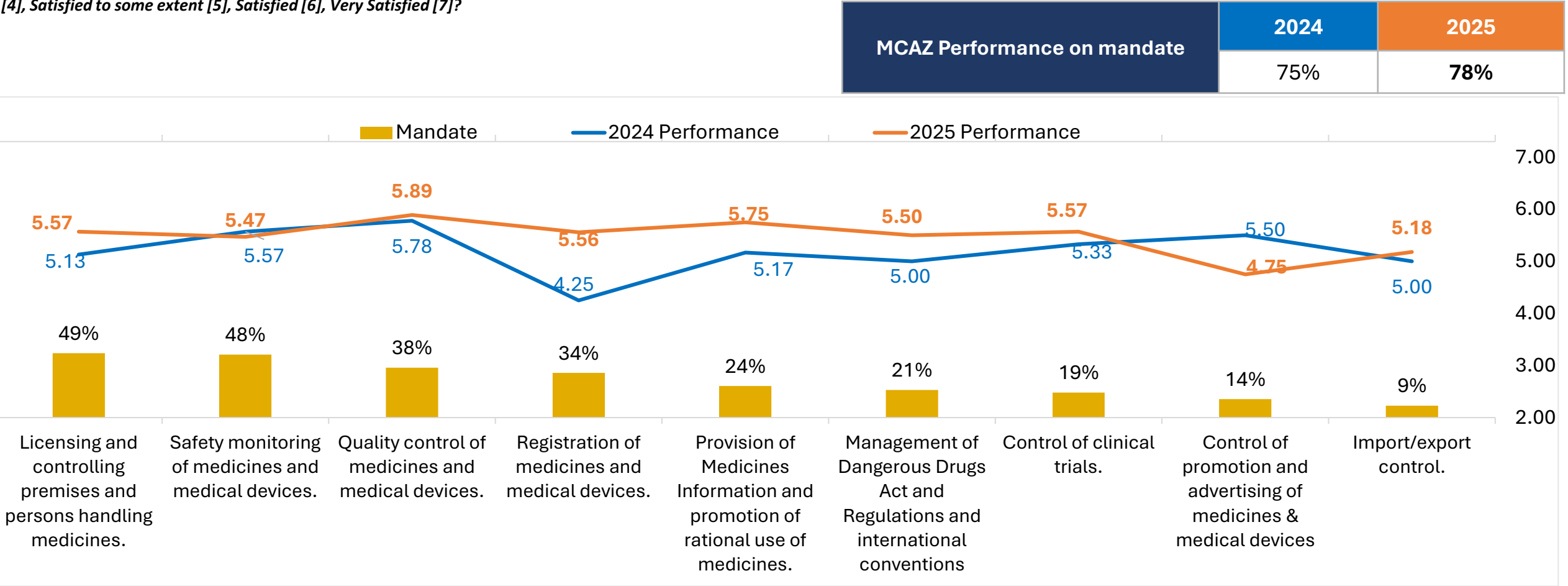
Qn: Which roles of MCAZ are you aware of?



- ❑ There is overall improvement in public understanding of MCAZ’s mandate, especially in licensing and safety monitoring.
- ❑ However, specialized areas (clinical trials, import/export control, dangerous drugs regulations) remain poorly understood.

4.12.3: General public applauds MCAZ on mandate delivery

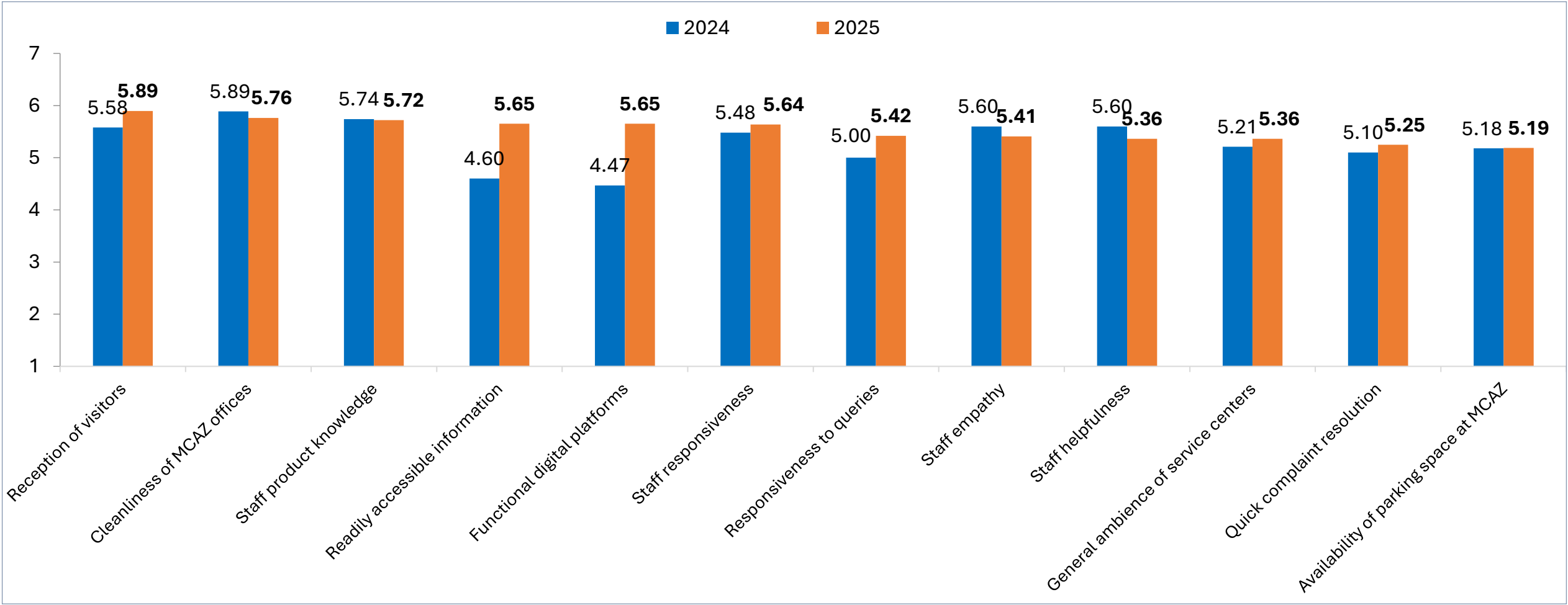
Qn. To what extent are you satisfied with each of the following attributes pertaining to MCAZ services on a scale ranging from – Extremely Dissatisfied [1], Dissatisfied [2], Dissatisfied to some extent [3], Indifferent [4], Satisfied to some extent [5], Satisfied [6], Very Satisfied [7]?



- ❑ The public generally appreciates MCAZ’s efforts, especially in quality control and safety monitoring.
- ❑ Registration processes and advertising control remain weak points.
- ❑ The improvement on mandate performance from 73% in 2024 to 78% in 2025 shows significant progress is being made but gaps in specialized areas persist.

4.12.4: MCAZ impresses with staff attitude, ambience & expertise

Qn: Qn: Using a 7-point scale where 1 means extremely dissatisfied and 7 means extremely satisfied, how would you rate MCAZ on the following attributes?



- ❑ Most members of the public had positive experiences during interactions with Medicines Control Authority of Zimbabwe.
- ❑ MCAZ is doing so well on staff attitude and staff expertise which contributes to positive customer interactions.
- ❑ Cleanliness and ambience improvements reinforce MCAZ’s commitment to a professional environment.
- ❑ Quick complaints handling and availability of parking space remain as pain points.

4.12.5: Net Promoter Score (NPS) | Ease of doing business (CES)

Qn: Using a 10-point scale where 0 means very unlikely and 10 means very likely, how likely are you to recommend MCAZ to your business peers?

NET PROMOTER SCORE = PROMOTERS – DETRACTORS		
	2024	2025
Detractors (0 – 6)	21%	7%
Passives (7 – 8)	25%	25%
Promoters (9 -10)	54%	68%
Net Promoter Score	33	61

- ❑ MCAZ has a positive Net Promoter Score (61) which is an improvement from (33) achieved in 2024.
- ❑ It gained brand promoters due to improved efforts towards delivering on key mandates.
- ❑ Previous decline was linked to low performance on medicines registration processes which seems to have improved in 2025.



5.0: Conclusions & Recommendations



4.1.0: Dashboard summary



Stakeholder Category	Customer Satisfaction Index (CSI)			Complaints Resolution Ratio (CRR)			Customer Effort Score (CES)			Net Promoter Score (NPS)		
	2023	2024	2025	2023	2024	2025	2023	2024	2025	2023	2024	2025
Pharmacies (Retail, community or hospital)	72%	82%	77%	59%	83%	61%	74%	73%	74%	35	53	46
Dispensing medical practitioners	70%	77%	80%	56%	72%	66%	78%	83%	87%	35	54	56
Industrial clinics	74%	86%	80%	63%	67%	67%	83%	79%	76%	46	53	65
Veterinary Medical General Dealers	71%	65%	84%	56%	50%	67%	74%	76%	86%	36	63	49
Clinical trials researchers	60%	89%	85%	33%	100%	100%	63%	76%	100%	-35	47	67
Wholesalers	74%	86%	81%	57%	-	75%	79%	82%	82%	54	20	35
Manufacturers	75%	83%	73%	80%	100%	100%	90%	79%	71%	59	36	32
Importers	69%	89%	82%	73%	100%	50%	75%	70%	89%	41	35	48
Applicants	-	69%	77%	-	100%	50%	-	71%	76%	-	86	59
Overall	71%	81%	80%	56%	75%	71%	77%	77%	82%	34	50	51



5.1: Conclusions

- ❑ There is generally a *clear understanding of the mandate of MCAZ* across the different stakeholder categories.
- ❑ Overall, Medicines Control Authority of Zimbabwe (MCAZ) is associated with *positive values* more so continuity and integrity.
- ❑ Stakeholders demonstrate a *clear understanding of GBT* and its positive influence on MCAZ's regulatory performance. Overall satisfaction with regulatory KPIs improved slightly (from 5.55 in 2024 to 5.58 in 2025). GBT is perceived to improve *service quality and safety, boost public trust, and enhance accessibility* of medicines and devices in the health sector as well as at organization level.
- ❑ Popular service descriptors across different customer segments include speed of service, ease of interaction, effective communication, transparency quick complaint resolution and responsiveness. MCAZ performed much better on all customer service metrics in 2025 compared to 2023. However, compared to 2024 some metrics improved whilst some declined. Overall, *Customer Satisfaction Index (CSI)* however remained stable at 80%,
- ❑ 2025 Customer Satisfaction Indices (CSI) for all MCAZ stakeholders were above the national average of 70% according to the State of the Services Economy Survey (SOSSES) commissioned by ZB Financial Holdings in 2023 and 2024. The highest CSI was for Clinical Trials Researchers (85%), while the lowest was for Manufacturers (73%). Whilst majority of the stakeholders saw a decline in satisfaction, Dispensing Medical Practitioners (DMPs), Veterinary Medicines General Dealers (VMGDs), Applicants and members of the public saw significant improvement in the CSI between 2024 and 2025. Key drivers of satisfaction were timely reports after inspection, accessibility of information and quick query resolution.
- ❑ *Ease of doing business (CES)* with MCAZ has remained the same in 2025 at 82% compared to the same period in 2024. Clinical Trial Researchers find it very ease to access services from MCAZ than other customer groups with 100% CES, while manufacturers leg behind at 71%.
- ❑ Overall, *Complaints Resolution Rate (CRR)* stands at 71% which is a decline from 75% in 2024. Customers have picked inconsistencies on the query resolution timeframes. Manufacturers and Clinical trials researchers recorded the highest resolution rate (100%) while Applicants and Importers show weak CRR at 50%.
- ❑ Overall *likelihood to recommend (NPS)* for MCAZ has shown improvement from a Net Promoter Score of 50 in 2024 to 51 in 2025. CTRs and Industrial clinics lead the pack with an NPS of 67 and 65 respectively. Manufacturers indicate low likelihood to recommend, although the NPS is positive 32.

5.2: Recommendations

1. Engage in **promotional activities** to deliberately boost awareness of **MCAZ mandate** with special focus on the global recognition (GBTML3) and what it means to the industry and organizational level. The global recognition is an asset that MCAZ needs to lead and help the industry to sweat.
2. Aggressively promote the **MCAZ Service charter** by making awareness and understanding of the charter Key Performance Indicators (KPIs) for responsible personnel. Provide incentives to MCAZ general staff who consistently excel on excellent customer service delivery as a culture.
3. Leverage on MCAZ enthusiasts like Clinical Trials Researchers (CTR), Veterinary Medicines General Dealers and Dispensing Medical Practitioners to do **Joint Business Plans** (JBPs) for 2026-2030 with them and inherently utilize them as **Brand Ambassadors** for MCAZ initiatives.
4. Appoint a **digital and social media planner** before officially launching MCAZ App and Portal through which critical information can be shared with stakeholders. MCAZ needs to **entrench a digital culture** in all it does and the media planner should ensure that there is no difference between online and offline content. To ease transition, Artificial Intelligence (AI) needs to be seen as a new Team Member at MCAZ who is very wise and experienced.
5. Introduce an online **query tracking system** to keep stakeholders proactively informed about their enquiries status. Introduce ticket tracking where customers can monitor the progress of their complaints like a parcel tracking system that courier companies use.
6. Conduct annual **multi-stakeholder conferences** where global best practice, educational content and Frequently Asked Questions (FAQs), will be shared to help various stakeholders better understand regulatory processes, MCAZ modus operandi and stance on industry fundamentals.
7. Initiate **joint operations** (MCAZ + local councils + ZRP + ZIMRA) focused on hotspots for street drugs and non-compliant health products. This will also help address constraints in confronting the influx of substandard healthcare products and **counterfeit medicines** in Zimbabwe.
8. Create **advisory committees** with representatives from different sectors (e.g., pharmaceutical companies, healthcare providers, consumer groups etc) to provide input on prevailing practices and recommend regulatory policies.
9. Commission more frequent but **focused feedback surveys** to track progress on selected stakeholders, identified in the annual survey, as needing urgent corrective intervention. These include pharmacies, Industrial Clinics and Manufacturers. TRS can proactively assist with necessary designs.

Thank you!!!



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