



**Zimbabwe Energy Regulatory Authority**

**2023**

**Client Satisfaction Survey Report**

## Executive summary

The responses and statistics provided indicate a variety of concerns and suggestions regarding the services, communication, and accessibility of the Zimbabwe Energy Regulatory Authority (ZERA). Some of the main issues highlighted include slow response times to emails; concerns about the understanding and performance of ZERA as a regulator; the need for improved real-time updates on the website and social media, recommendations for better engagement with stakeholders in the fuel industry and better management of unlicensed LPG outlets, and clear enforcement of laws.

There are also calls for ZERA to have a better understanding of the fuel market, with specific recommendations for regulating the number of importers' licenses; and enhancing swift responsiveness on digital platforms.

Improving communication from ZERA is seen as vital, with suggestions including real-time communication on both forms of media, official communication of pricing to OMCs via email prior to social media publication, and utilizing WhatsApp platforms for improved communication channels.

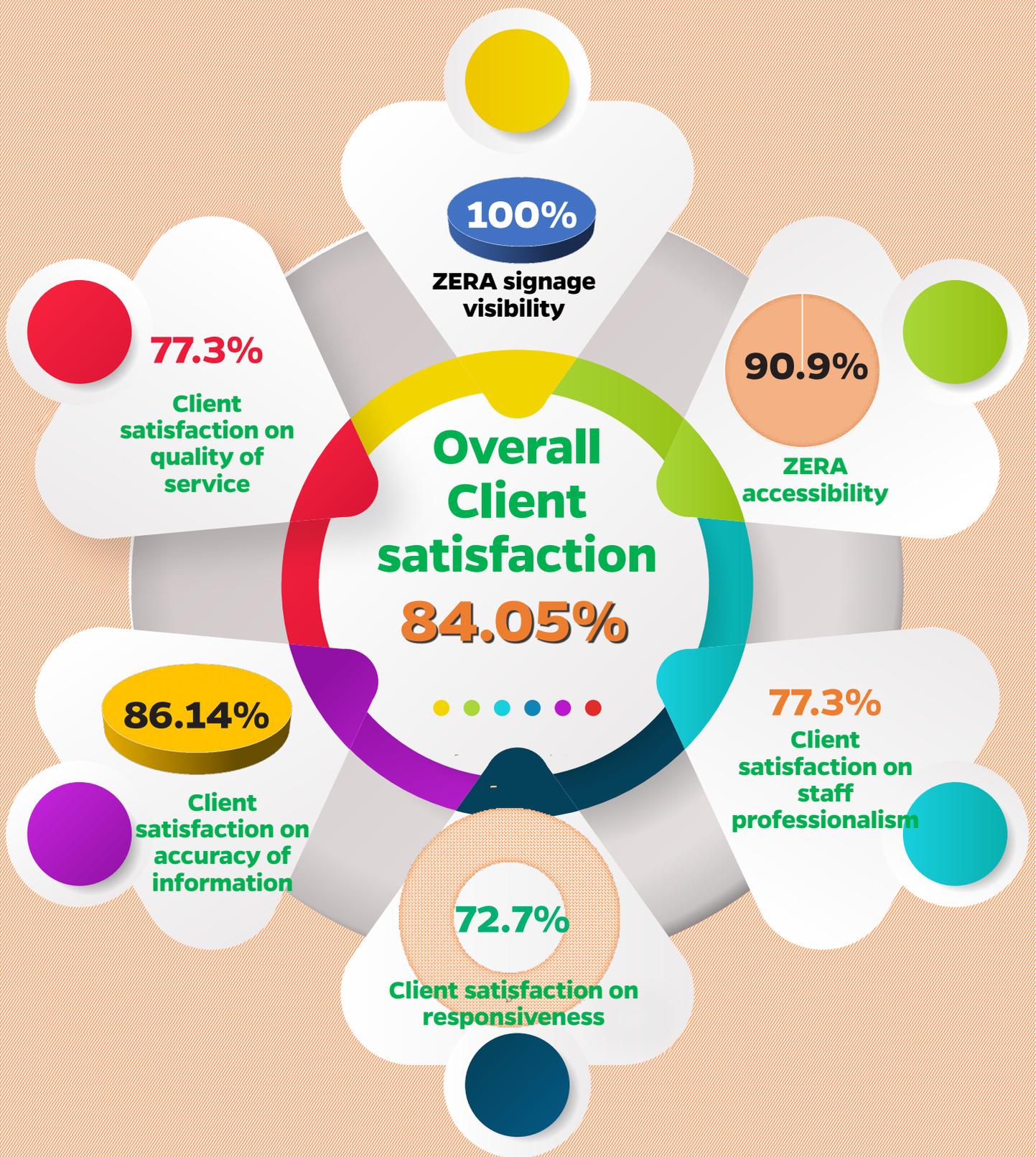
In terms of accessibility, there are calls for the establishment of a customer service centre, the use of WhatsApp bots and toll-free numbers, and the need to increase staff to attend to stakeholders' needs. Additionally, some respondents recommended having offices in all the 10 provinces of the country and sharing industry data on websites.

Overall, these responses reflect a strong desire for improved communication, real-time updates, and enhanced engagement from ZERA, with a focus on addressing the specific challenges and needs of stakeholders in the fuel industry.

The lack of input or requests on the electricity sector is an indication of the lack of respondents with concerns for the electricity sector.



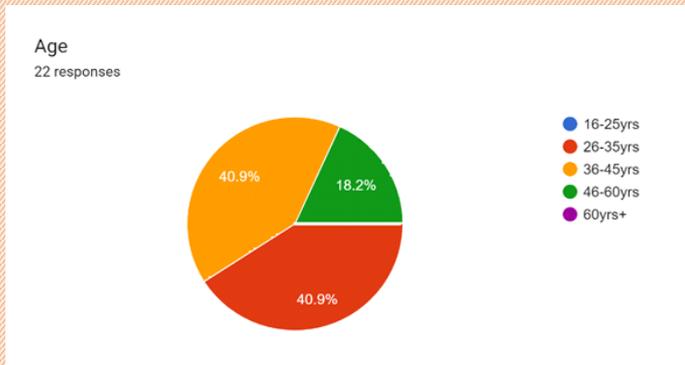
# The survey in figures:



The relevance of what ZERA should communicate was in this order, Fuel Prices, Licensing Requirements, safe use of energy, investment opportunities and electricity tariff.

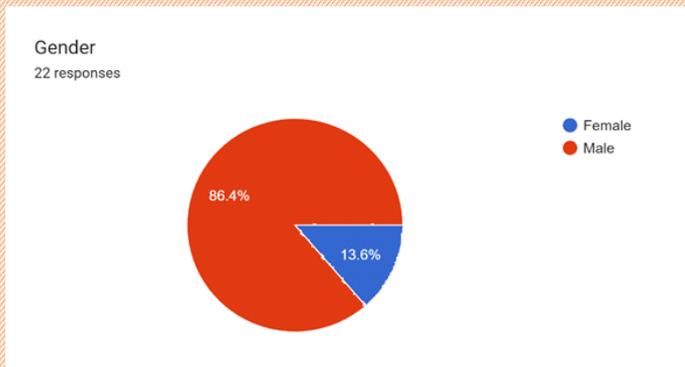
### AGE DEMOGRAPHIC

The majority of the respondents that participated were from the 26-35 year olds band. This suggests the middle-aged, professional people with interests in the Authority's work.



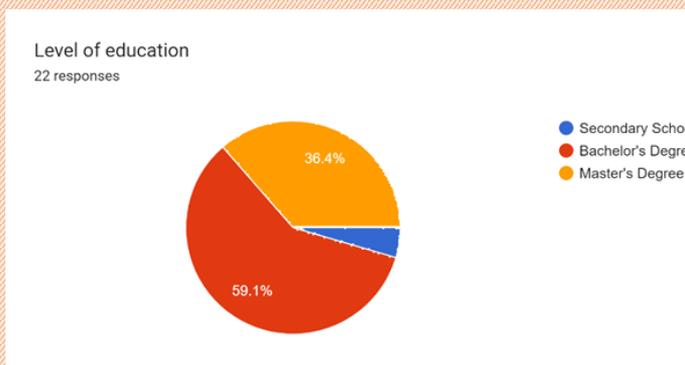
### GENDER DEMOGRAPHIC

Majority of the respondents were male, giving the indication that issues on the energy sector are predominantly engaged in by men.



### LEVEL OF EDUCATION

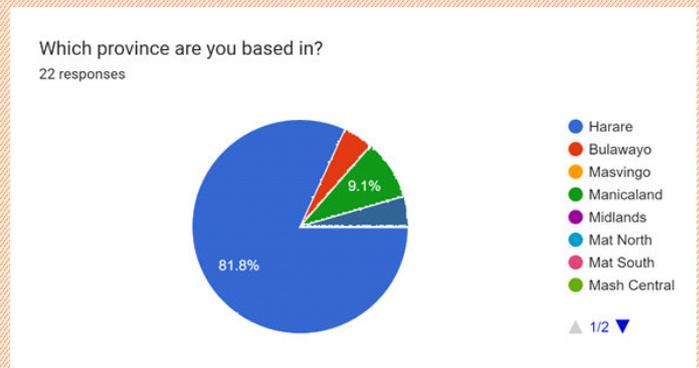
Respondents were mainly educated up to tertiary education. This could mean the survey was accessed by educated professionals and may not have been easily accessible to less educated stakeholders. A need to ensure that a survey is rolled out as far as possible and becomes accessible to all stakeholders.



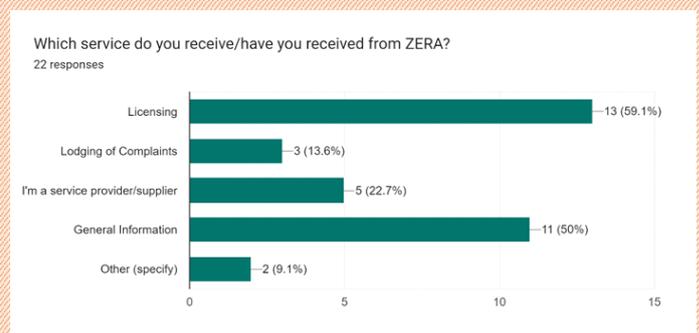
### RESPONDENT'S LOCATION

Respondents were predominantly from Harare, with a few from Manicaland, and Bulawayo, a reflection of ZERA's physical presence in those regions.

This indicated that the platform used for this survey is mainly accessible to urban dwellers, as it requires internet and a computer or a smartphone to be able to participate in it. This indicates that the online survey will be responded to by those with access to technology, hence no stakeholder feedback will be obtained from those without access to technology.

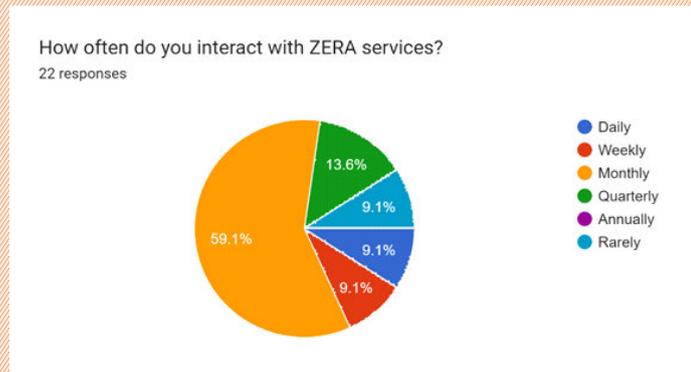


Licensing stood out as the sought-after service, with those seeking general information being the second sought after. General information may include but not limited to: inquiry on contact details, fuel prices, and information on registered energy service providers. Lodging of consumer complaints stood at 13.6% of the total respondents.



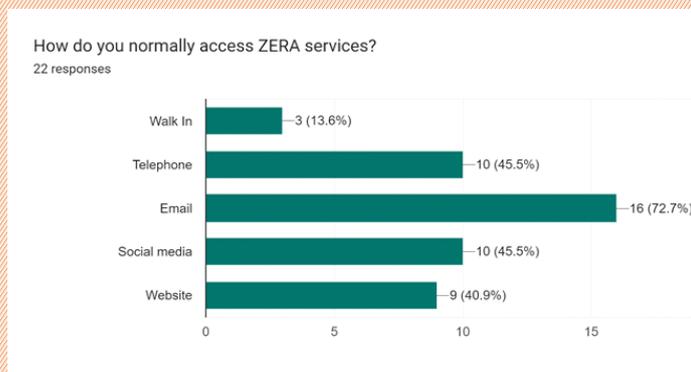
### LEVEL OF INTERACTION WITH ZERA SERVICES

The frequency of the use of ZERA services indicates that the monthly announcements of fuel and LPG prices lead to the majority engaging with ZERA monthly, whilst the daily, quarterly and other interactions are based on a 'as per need' basis for information, lodging complaint, application for license or providing a service to the Authority.



### HOW DO YOU NORMALLY ACCESS ZERA SERVICES

The graph below shows how the rate of 'walk-in' clients have fallen, since the Authority strengthened its service provision over the telephone, email, the website and social media platforms.



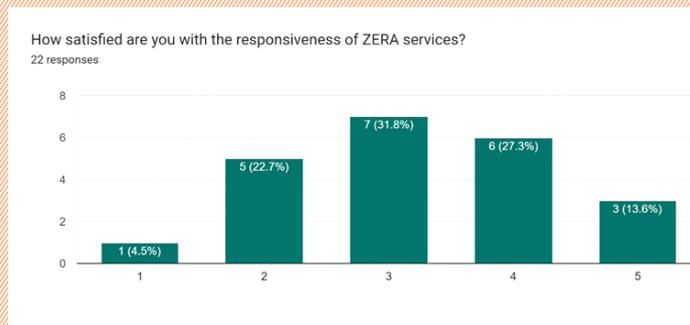
### HOW SATISFIED ARE YOU WITH THE OVERALL QUALITY OF ZERA SERVICES

The average of the respondents' satisfaction to the quality of service provision by the Authority was aggregated to 77.3%. This was based on using category 3,4 and 5 being measures for satisfaction.



### HOW SATISFIED ARE YOU WITH THE RESPONSIVENESS OF ZERA SERVICES

Stakeholders' satisfaction on the responsiveness of ZERA was averaged at 72.7% (using 3,4,5 as measures for satisfaction).



Respondents went on to further give reasons to the level of satisfaction regards responsiveness as shown below:

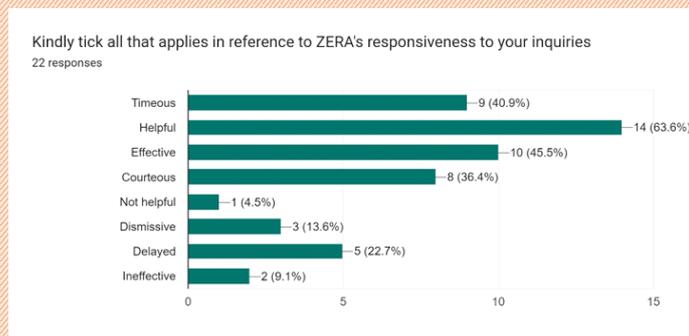
Kindly explain your answer to the previous question 14 responses

- Sometimes it takes ages to get a response
- Due to the current boom in petroleum stations in the country the regulator has failed to identify that there are too many service stations for the current demand of the country. Formal OMCs with actualised overheads are bearing the brunt of this due to informal service stations on the rise.
- ZERA communicate well and represent our industry effectively.
- I feel like ZERA has many times tried to correct its own mistakes and inefficiencies by taking advantage of complaint bodies and threatening licenses.
- Too strict
- ZERA seems to not understand the Fuel Industry and does not perform its function as a regulator. OMC's are the last to hear about FOB monthly price changes, as ZERA publishes these on social media first. Formal correspondence to Oil Companies need to be sent first before Social Media gets information.
- Response time on emails takes too long. The licencing department in responding to application sent they take too long to respond they are swift when you do resend the application.
- Zera must provide a customer service desk to ensure fast responses to queries
- Their staff is kind and informed
- The organization tries to strike a balance, though there is room for improvements.
- They are overwhelmed with issues
- Due to being far from the City. Response is rather slow. Can go for days without service. These days we have to make do with reduced electricity voltages of 170-195V
- Positive with ZERA
- The emails I have written to ZERA have not been responded to in time

Stakeholder satisfaction on staff professionalism was averaged at 77.3% (with 3,4,5 being measure for satisfaction).

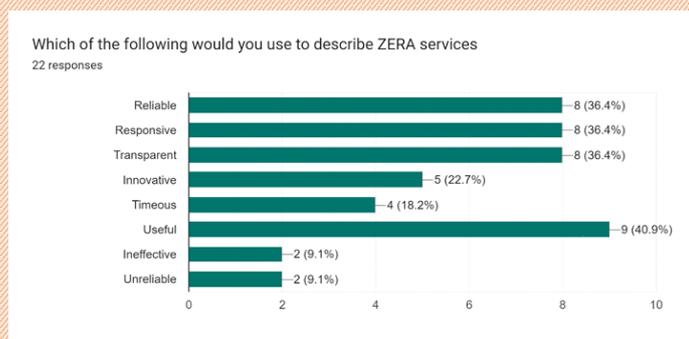
### HOW SATISFIED ARE YOU WITH ZERA'S RESPONSIVENESS

Stakeholder satisfaction on staff professionalism was averaged at 77.3% with 3,4,5 being measure for satisfaction.



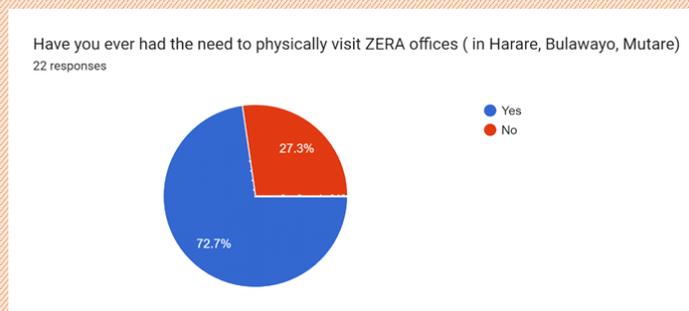
Based on the above, ZERA responsiveness was regarded relatively timeous, helpful, relatively effective, and courteous. A low percentage of respondents felt responsiveness was delayed, dismissive and ineffective.

### HOW WOULD YOU DESCRIBE ZERA SERVICES



Services offered by ZERA proved to be relevant to stakeholders' needs as they were generally rated well for being reliable, responsive, transparent, innovative and useful.

### HAVE YOU EVER HAD THE NEED TO PHYSICALLY VISIT ZERA

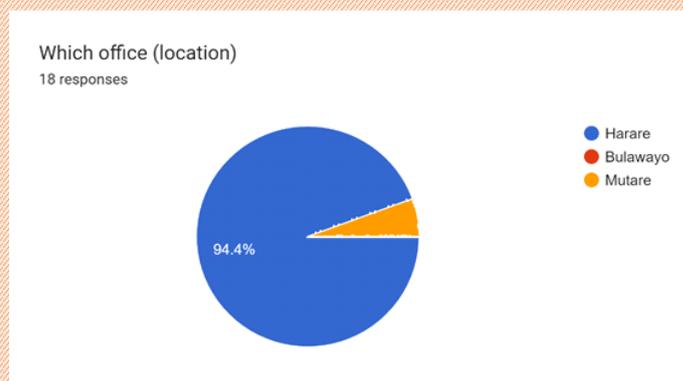


Although the percentage for walk-in clients was low, the respondents indicated that they have physically visited a ZERA office.

### WHICH OFFICE HAD THE HIGHEST NUMBER OF WALK INS

The Harare Head office was the office most physically visited with 5.6% of the

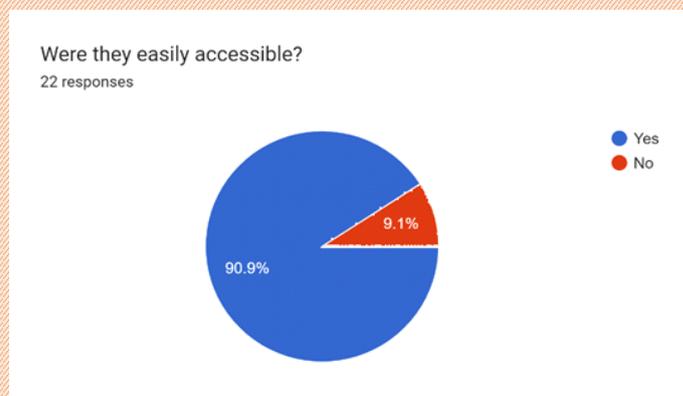
respondents having visited offices in Mutare.



For what service have you visited ZERA offices for? The following were cited as reasons for physically visiting a ZERA office.

1. Certificate collection
2. None
3. Registration for LPGas filling certificate
4. Petroleum Licences and pricing
5. None this year.
6. license application
7. Licencing
8. Follow up on License application
9. Licence enquiries
10. Licensing

### ACCESSIBILITY OF ZERA OFFICES



Accessibility of the ZERA offices was rated at 90.9%, with recommendations listed below:

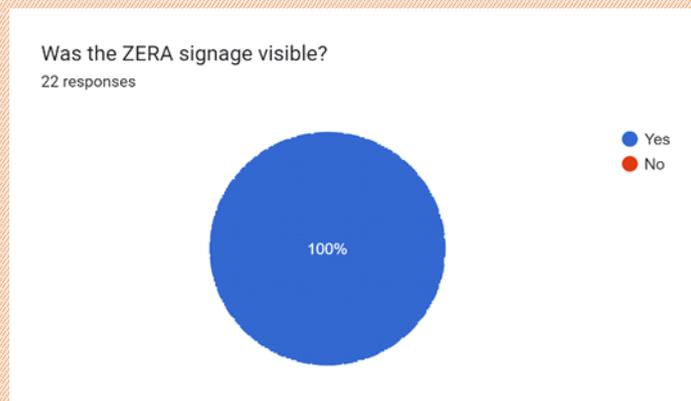
If not, what would you recommend?

#### Four responses

1. N/A
2. Delegation of authority needs to be VERY clear
3. Need for parking provision for visitors in advance
4. Not applicable

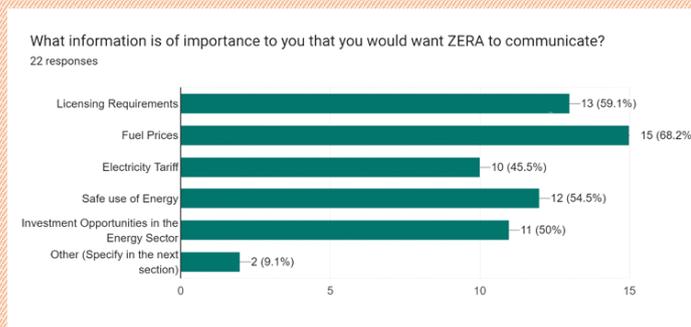
### ZERA SIGNAGE VISIBILITY

ZERA signage was rated at 100% visible.



### INFORMATION IMPORTANCE

Information needs of the stakeholders was portrayed in the graph above with the most important being: Fuel Prices, Licensing Requirements, safe use of energy, investment opportunities, electricity tariff. Stakeholders listed the following as other information needs:



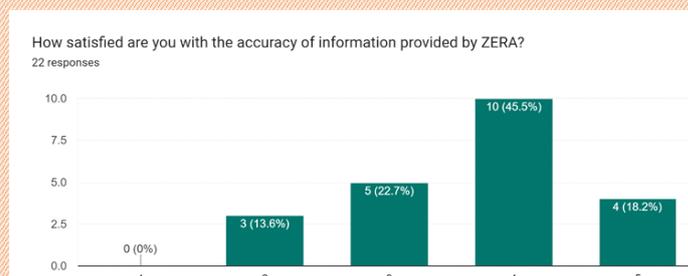
Other information of importance to you

Seven responses

1. LPgas Wholesale prices
2. Timeous disclosure of petroleum industry statistics, including both imports and sales.
3. Training workshops for retail supervisors and staff.
4. ZERA needs to FIRST publish Fuel prices by contacting the fuel companies first, BEFORE putting FOB pricing on Social Media. Fuel companies need to be informed BEFORE the public. Social Media is not informing. That is why it is called Social Media.
5. Fuel station selling Authentic Unleaded
6. Guidance on fuel station construction, illegal fuel selling points names and shamed
7. Fuel price build up each time when you publish fuel prices

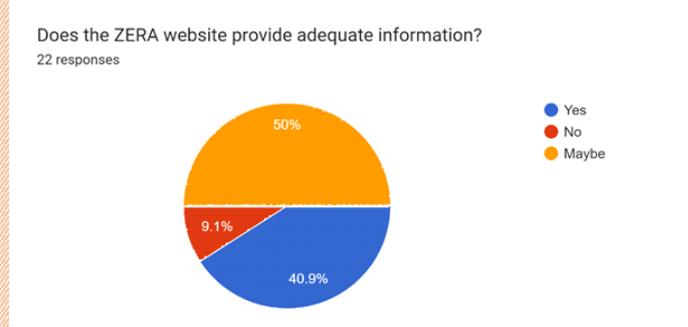
### ACCURACY OF INFORMATION

Client satisfaction on the accuracy of information provided by ZERA was 86.14% (using category 3,4,5 for satisfaction). This indicates how reliable ZERA information resources are deemed by its stakeholders.



### ADEQUACY OF INFORMATION OF ZERA WEBSITE

The uptake of ZERA on digital platforms is still making small, but impactful strides based on the above. It was felt that the following information was necessary to be posted on the website:



If not, what information would you like to see on the website?

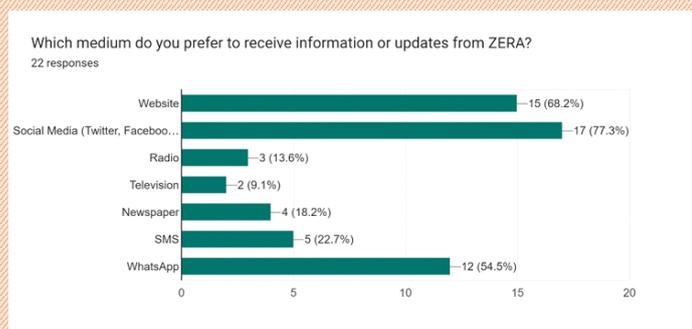
5 responses

1. LPgas Wholesale prices build up
2. LPgas Retail prices build up
3. For example, ZERA could differentiate between organizations with Importers Licences, Wholesale Licences, and Retail Licences.
4. Licence application progress status
5. There's need to update regulations on the website. Everything needs to be accessible from there.
6. We have a gap on information especially sales volumes not aligning to pipeline imported volumes. There may be need to add export volume analysis so as to see the gap between what is reported by OMCs and Pipeline Authorities.

### PREFERRED MEDIA TO RECIEVE ZERA COMMUNICATION

The top 5 preferred mediums to receive ZERA information were Social Media platforms, the ZERA website, sending information on WhatsApp, use of Short

Message Service (SMS) and print media. Broadcast media were the lowest desired.



What suggestions do you have for improving ZERA services?

**15 responses**

1. Realtime updates on website & social media
2. Engaging with key stakeholders to tackle industry issues.
3. improvement in managing unlicensed LPG outlets.
4. When enforcing laws, enforce with hierarchy in terms of offense. For example, ZERA will drive past and illegal vendor with no licensing to fine a compliant retailer or shop that has failed to display licenses or it compliance.
5. Be a listening entity.
6. ZERA needs to understand the Fuel Market better. ZERA is not being a regulator. It is most likely regulated by Treasury. ZERA needs to perform its function as an independent regulator. ZERA needs to look at the business of which organizations are getting licences to import. For example, how can a Transporter be allowed to have an importers licence for fuel? ZERA should regulate the number of importers licences and rather give all these new mushrooming stations a wholesaler's licence.
7. Swift Responsiveness should be key on digital platform. More personnel to be recruited for the Licencing department to enhance efficiency.
8. Fuel licensing jurisdiction must be made clear, we have service stations with retail licenses supplying Government departments, entities and Universities directly at their premises in bulk thereby sabotaging us with Wholesale licenses. Basically, fuel bulk supplies is open for all & this is unfair considering the license fee amounts we pay. Service Stations must stick to supplying at the site. This should be communicated to PRAZ & relevant authorities. Those in violation must

have their licenses revoked. Such ignored activities are causing SERIOUS corruption within the BULK FUEL supply industry as this loophole is being taken advantage of continuously by those with Retail Service Station licenses. PRAZ or Commercial clients must know that only those holding Procurement or Wholesale Licenses are the ones allowed to offer BULK supplies & deliveries at their premises/yard.

9. Respond to your social media messages
10. On the ground engaging
11. Improve on presence in the Industry to regulate, assist in protecting those playing fair from unregistered fuel vendors, manage Traders in doing downstream business, manage mushrooming of stations and provide guidelines and only depend on landbanks availability.
12. Increase workforce
13. Faster delivery of service for entities you regulate
14. More trainings to us in energy sector
15. Retail service stations must be done for 12 months rather than the current practice of Jan-Dec as service stations are being opened throughout the year.

**What suggestions do you have for improving communication from ZERA?**

**9 responses**

1. Realtime communication on both forms of media
2. Official communication of pricing etc to OMCs should always be done via email prior to ZERA publishing on Social media platforms. OMCs in the past have been updated about pricing by their customers rather than official channels.
3. The communications is excellent
4. Employ people who understand social media
5. On the ground engaging
6. Ensure data basis of recipients is updated regularly to keep with new development.
7. Have a WhatsApp platform
8. Real-time response channels
9. Email group communication should be utilised more to communicate.

## What suggestions do you have for improving the accessibility of ZERA services?

### 9 responses

1. WhatsApp bot, toll free numbers
2. Don't be dismissive
3. They should increase staff to attend stakeholders needs
4. ZERA must put up a customer service centre.
5. They are ok
6. Industry data can be shared on websites.
7. Have offices in all the 10 provinces of the country
8. More dynamic Website
9. None really

### Recommendations

Based on the feedback provided, I would recommend that ZERA focuses on the following areas to improve its services, communication, and accessibility:

#### 1. Real-time Updates:

ZERA should work on providing real-time updates on its website and social media platforms to ensure stakeholders have access to the latest information regarding fuel prices, industry statistics, and regulatory changes.

#### 2. Communication Channels:

The authority should enhance its communication channels by ensuring that official communications, such as pricing updates, are consistently delivered to stakeholders via email well in time before being published on social media. Additionally, the establishment of a WhatsApp platform could

facilitate more direct and real-time communication with stakeholders.

#### 3. Understanding of the Fuel Market:

ZERA should prioritize efforts to better understand the fuel market and the specific needs of industry players, with a focus on addressing concerns related to importers' licenses, retail licenses, and the overall regulation of the industry.

#### 4. Customer Service Center:

To improve accessibility, ZERA could consider establishing a dedicated customer service center to address stakeholders' queries and provide efficient support.

#### 5. Engagement with Stakeholders:

The authority should actively engage with key stakeholders in the fuel industry to address industry issues, manage unlicensed outlets, and provide guidance on industry best practices.

#### 6. Staffing and Presence:

ZERA may need to consider increasing its workforce to improve response times and efficiency, especially in critical departments such as licensing and communication.

By focusing on these recommendations, ZERA can work towards enhancing its services, improving communication, and ensuring greater accessibility for stakeholders in the energy sector.

