

INDUSTRY INSIGHT CC

Construction Business Intelligence

Consulting Engineers South Africa (CESA)

Quality Survey: December 2011

QUALITY OF SERVICE SURVEY: DECEMBER 2011

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Background and Methodology

As part of the Association's bi-annual state of the industry survey, member firms were asked to comment on the services offered by the association.

Questions included in the survey pertain to:

- Level of service from the Association as a whole
- Level of service from the Directorate and personnel
- Relevance and quality of services offered pertinent to the firms' sector(s)
- Suggestions for improvement

Information was aggregated from the *sample* of surveys and weighted according to the total number of full and part time staff employed by the firm. It is important to monitor the responses from a consistent base of firms to accurately identify existing and possible changes to perceptions regarding the services offered by the Association.

Results are based on a reflective sample totalling 8321 employees over the 6 months between July and December 2011. Majority of the firms employ between 20 and 100 people and earn between R1,5 million and R11,5 million per annum.

Profile of respondents

Table 1: Profile of respondents

Employment	% of total number of firms in December 2010 sample	% of total number of firms in June 2011 sample	% of total number of firms in December 2011 sample
>100	38.2%	28.3%	15.4%
Between 20 and 100	47.1%	39.1%	35.2%
Less than 20	14.7%	32.6%	49.5%
Total	100.0%	100.0%	100.0%

Overall service of the Association and its Directorate

Question 1

Do you consider the overall service you receive from CESA as a body to be:

- Unsatisfactory
- Satisfactory
- Good
- Exceptional

At face value all participating firms included in the survey were satisfied with CESA services including the directorate, which is the best rating since the inception of this survey (December 2006) – in other words hardly anybody rated services as unsatisfactory. Looking closer, majority of firms found services to be of a good standard, with an increasing number of firms finding services to be at satisfactory level only .

Table 2: Question 1 and 2

	Unsatisfactory	Satisfactory	Good	Exceptional
December 2006 Survey				
CESA	1.0%	21.3%	73.12	4.4%
Directorate	0.8%	21.1%	72.8%	5.2%
June 2007 Survey				
CESA	0.7%	22.8%	71.3%	5.1%
Directorate	0.7%	29.0%	65.2%	5.1%
December 2007 Survey				
CESA	0.3%	26.0%	73.4%	0.3%
Directorate	0.7%	33.9%	64.1%	1.3%
June 2008 Survey				
CESA	0.09%	31.6%	65.9%	2.4%
Directorate	0.8%	30.1%	55.5%	13.6%
December 2008 Survey				
CESA	0.00%	16.28%	83.53%	0.19%
Directorate	0.72%	14.68%	76.25%	8.35%
June 2009 Survey				
CESA	0.0%	45.2%	54.6%	0.2%
Directorate	0.0%	49.8%	50.0%	0.2%
December 2009 Survey				
CESA	0.4%	14.0%	85.6%	0.0%
Directorate	0.0%	7.4%	92.6%	0.0%
June 2010 survey				
CESA	2.7%	35.1%	59.5%	2.7%
Directorate	2.7%	35.1%	59.5%	2.7%
December 2010 survey				
CESA	0.0%	42.1%	57.9%	0.0%
Directorate	0.0%	39.5%	57.9%	2.6%
June 2011 surveys				
CESA	7.6%	33.0%	59.3%	0.0%
Directorate	7.3%	22.9%	69.7%	0.0%
December 2011 Surveys				

CESA	0.7%	16.7%	72.8%	9.8%
Directorate	0.4%	47.0%	52.1%	0.6%

Question 2

Do you consider the service you receive from the Directorate and personnel to be:

- *Unsatisfactory*
- *Satisfactory*
- *Good*
- *Exceptional*

There was a 99,2% positive nett response rate from firms satisfied with general and directorate services, compared with a slightly lower rate of 98,6% with regards to CESA as a body. Overall the ratings improved since the June 2011 survey.

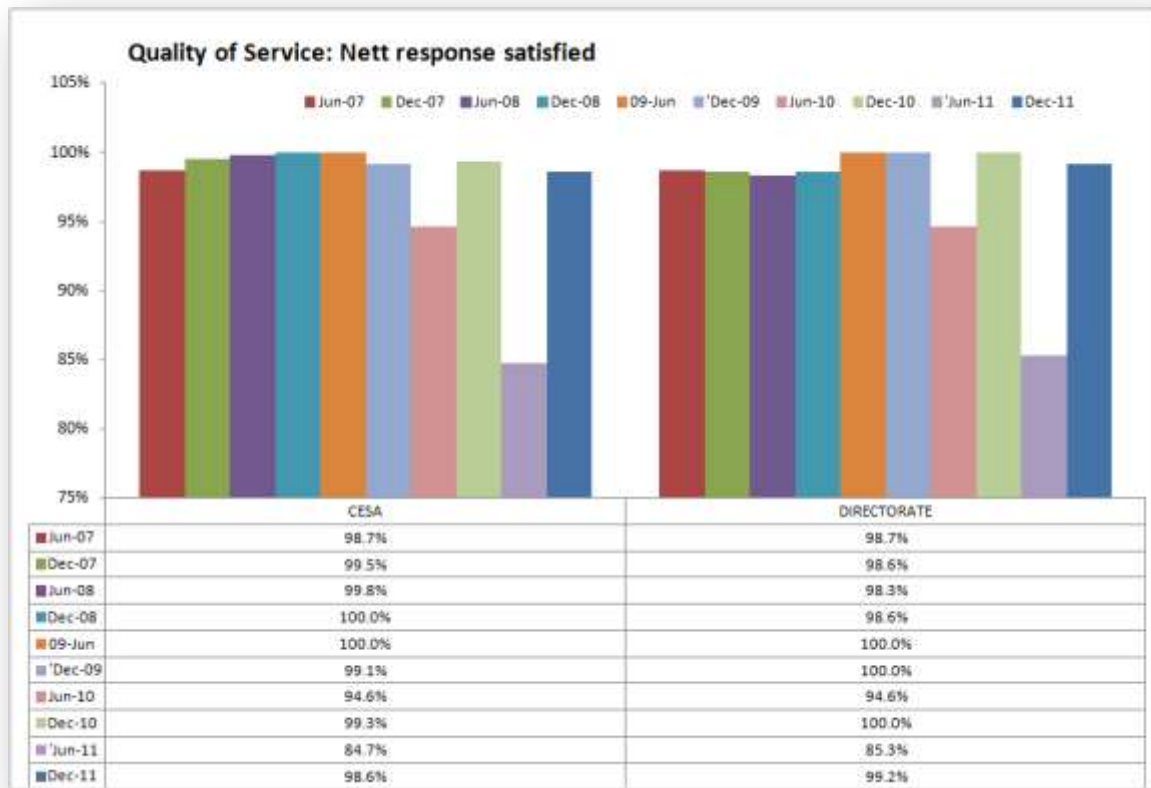


Figure 1: Nett response rate CESA and Directorate services

Relevance to industry needs

Question 3a

Does the Association focus on addressing the needs and issues pertinent to your **sector** of the industry:

- Yes
- No

Table 3: Question 3a

	Dec07	Jun08	Dec08	Jun09	Dec-09	Jun-10	Dec-10	Jun-11	Dec-11
Weighted	85.3%	87.1%	98.9%	94.8%	96.9%	89.2%	96.9%	95.9%	95.1%

Members are confident that CESA is addressing their industry needs, which averaged 95,1% compared to 95,9% in the previous survey. Interesting perhaps not note here, that medium and smaller size firms are not as satisfied that their needs are being met, as the opinions expressed by the larger firms. The satisfaction rate of medium and smaller size firms were 82% and 88% respectively.

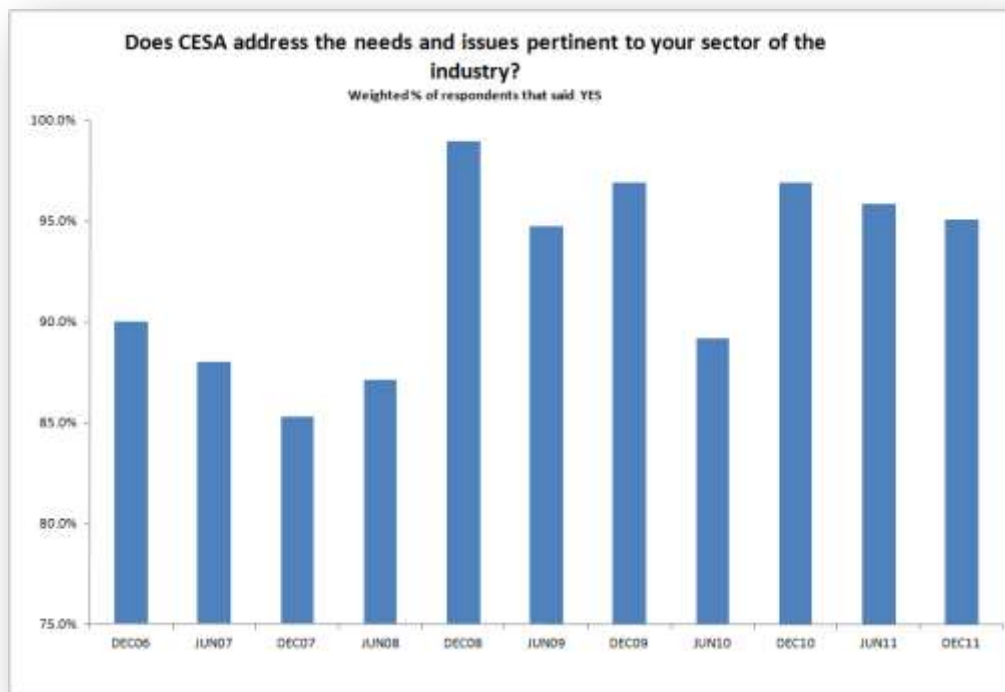


Figure 2

Question 3b

...and in a manner which is

- Unsatisfactory
- Satisfactory
- Good
- Exceptional

Table 4: Question 3b

Weighted responses	Unsatisfactory	Satisfactory	Good	Exceptional
December 2006	12.1%	22.5%	63.1%	2.3%
June 2007	10.2%	22.2%	66.8%	0.9%
December 2007	3.1%	57.6%	38.2%	1.1%
June 2008	2.7%	23.9%	72.2%	1.1%
December 2008	1.8%	28.4%	69.6%	0.2%
June 2009	4.9%	40.3%	54.8%	0.1%
December 2009	2.9%	74.5%	22.2%	0.4%
June 2010	2.9%	40.0%	57.1%	0.0%
December 2010	0.8%	81.1%	18.1%	0.0%
June 2011	8.6%	59.4%	22.4%	9.7%
December 2011	2.8%	46.0%	50.9%	0.3%

The nett satisfaction rate improved from 82,8% in the June 2011 survey to 94,5% in the current survey, as a higher percentage reported services as being good (50,8% up from 22,4% in the June 2011 survey).

There seems to be a growing disparity between those satisfied and those dissatisfied. The response rate of firms that reported services as exceptional, increased to 9,7% in the current survey.



Figure 3

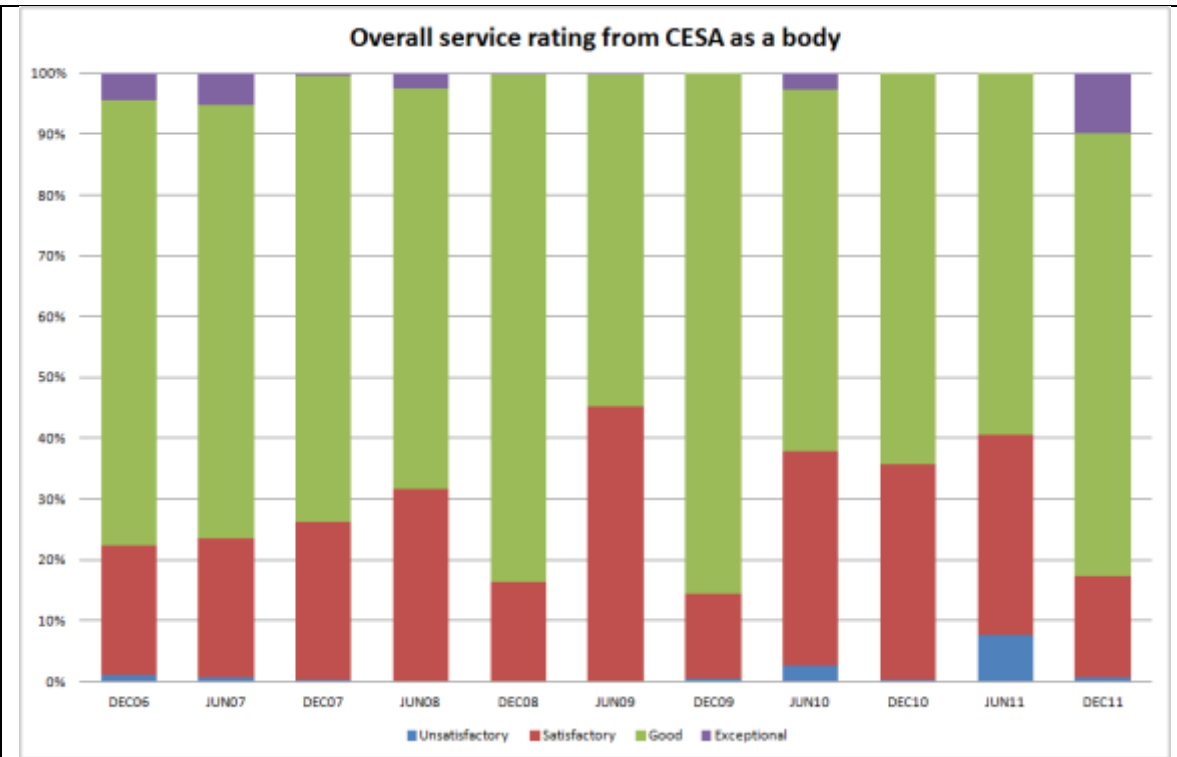


Figure 4

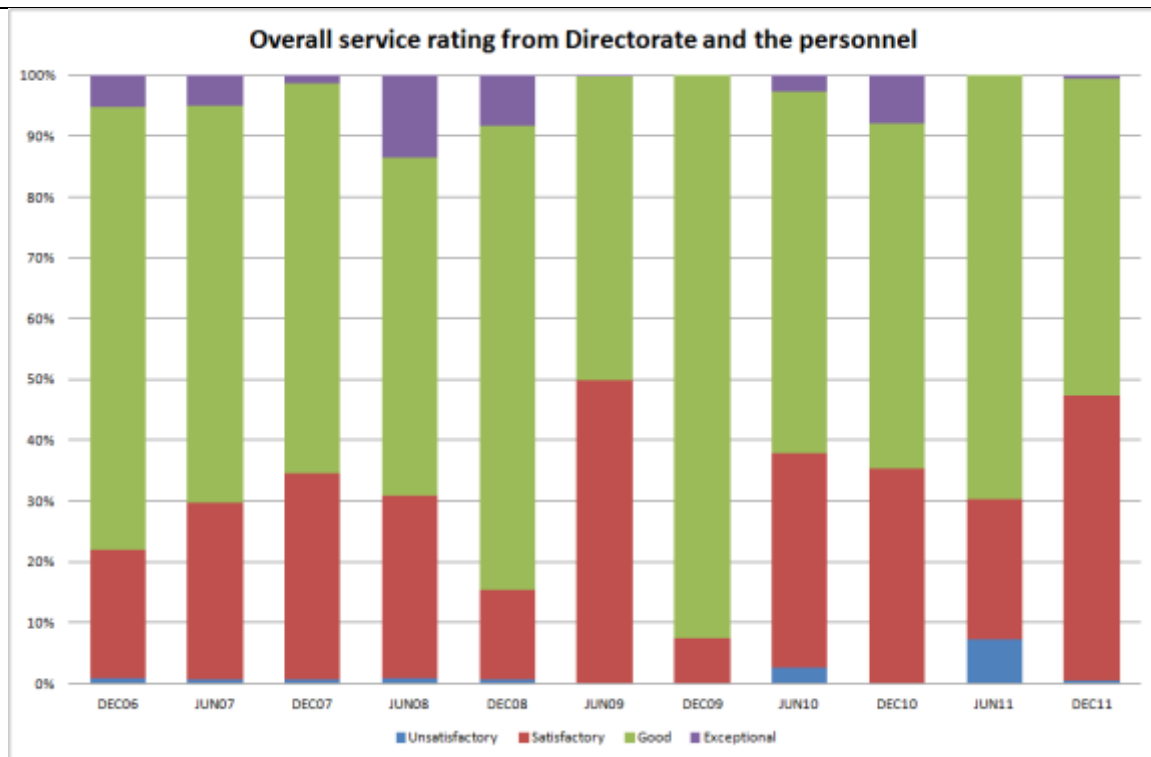


Figure 5

Benefits

Question F4

Are you aware of the benefits of being a CESA member?

- Yes
- No

Majority of responding firms (85,6%) were aware of the benefits of being a CESA member. The rate amongst medium size firms (employing between 20 and 100 people) was slightly lower at 77,2%.

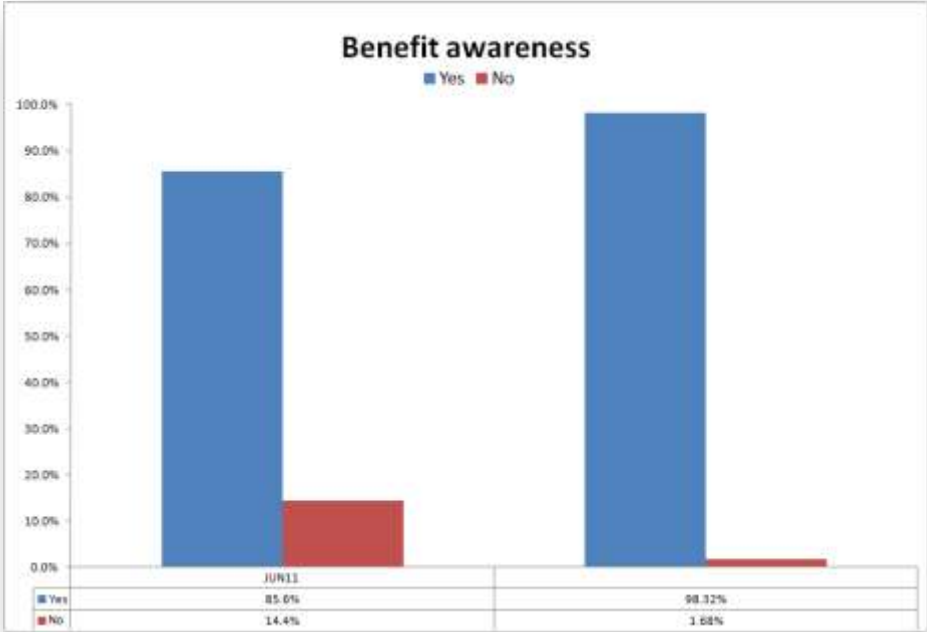


Figure 6

Suggestions

Question 4

Any comments or suggestions for improvement? General comments received from respondents are included here. Unfortunately some comments were truncated by the system.

- Free feedback regarding the survey results would be appreciated.
- Support Consultants in getting Clients to use standard bidding documents and compliance with latest (7th December 211) FPPFA (BBBEE regulations).
- CESA review municipalities procedures and compliance with the respective procurement policies
- Promote the use of consultants to fulfil the task local authorities are incapable of doing-ie improve service delivery. Insist on Gazetted fees to be applied and promote the use of the roster system as previous done by eg. National public works department.
- Assist small consultants
- Focus more on local government and government departments in terms of correct tender procedures and tender adjudication. This should also address the issue of fee structures.
- Communicate the benefits of being a member of CESA.
- Please add some indication of this type of work in row D civil under definitions.

Response rate by firm size

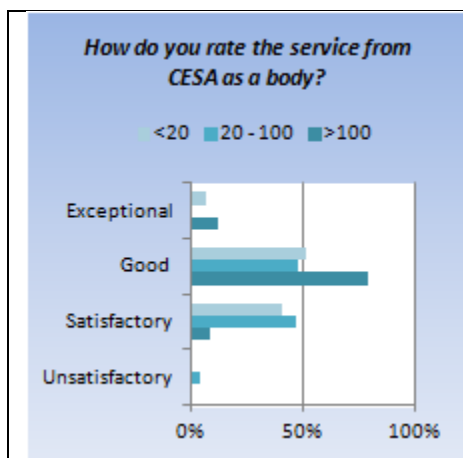


Figure 7

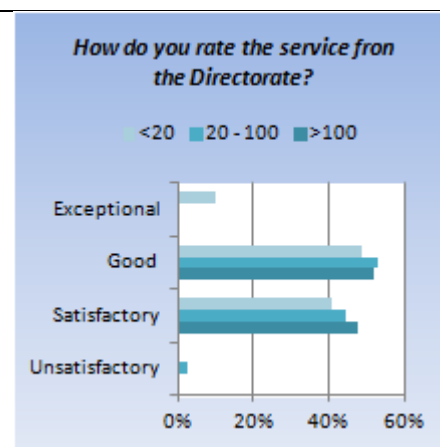


Figure 8

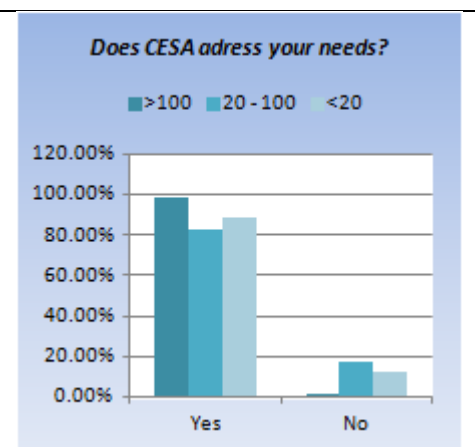


Figure 9

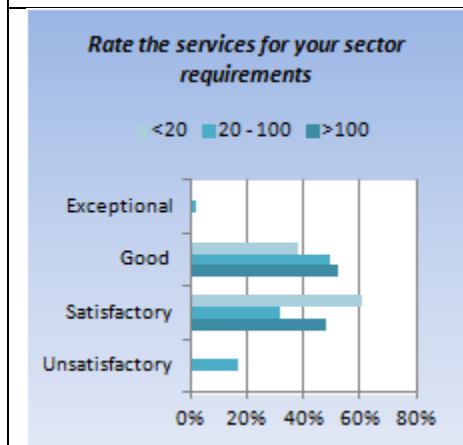


Figure 10

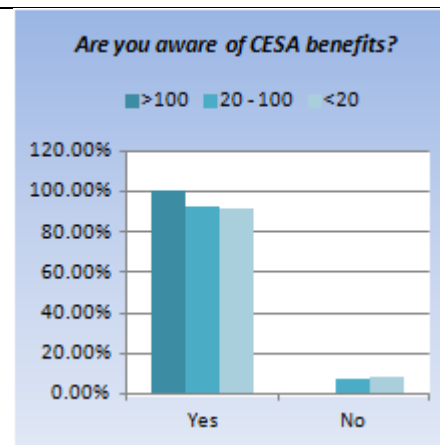


Figure 11

Conclusion

Medium to smaller firms played a bigger role in this survey, compared to previous survey, contributing to 84% of the responses.

*

Overall, larger firms are more satisfied with CESA' services compared to the medium and smaller size companies, where a more direct focus on specialist areas are required. Medium and smaller firms are less aware of the benefits of being a CESA member, although this rating is also above 80%. The benefits are more obvious to larger firms.