

INDUSTRY INSIGHT CC

Construction Business Intelligence

Consulting Engineers South Africa (CESA)

Quality Survey: December 2012

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 7 667 employees over the 6 months between July - December 2012. Majority of the firms employ less than 20 people (43,4%), followed by 36,8% employing between 20 and 100 and 19,7% more than 100 people.

Profile of respondents

Table 1: Profile of respondents

Employment	% of total number of firms in June 2011 sample	% of total number of firms in December 2011 sample	% of total number of firms in June 2012 sample	% of total number of firms in December 2012 sample
>100	28.3%	15.4%	20.0%	19.7%
Between 20 and 100	39.1%	35.2%	29.5%	36.8%
Less than 20	32.6%	49.5%	50.5%	43.4%
Total	100.0%	100.0%	100.0%	100.0%

Overall service of the Association and it's 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%
June 2012 Surveys				
CESA	1.1%	24.9%	66.2%	7.9%
Directorate	0.9%	22.2%	76.6%	0.2%
December 2012 Surveys				
CESA	2.3%	27.3%	68.9%	1.5%
Directorate	0.7%	17.2%	79.1%	2.9%

Question 2

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

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

There was a 98,2% positive nett response rate from firms satisfied with general and directorate services, compared with a slightly lower rate of 79,9% with regards to CESA as a body. Overall the ratings improved since the June 2011 survey, but was slightly lower compared to the December 2011 survey.

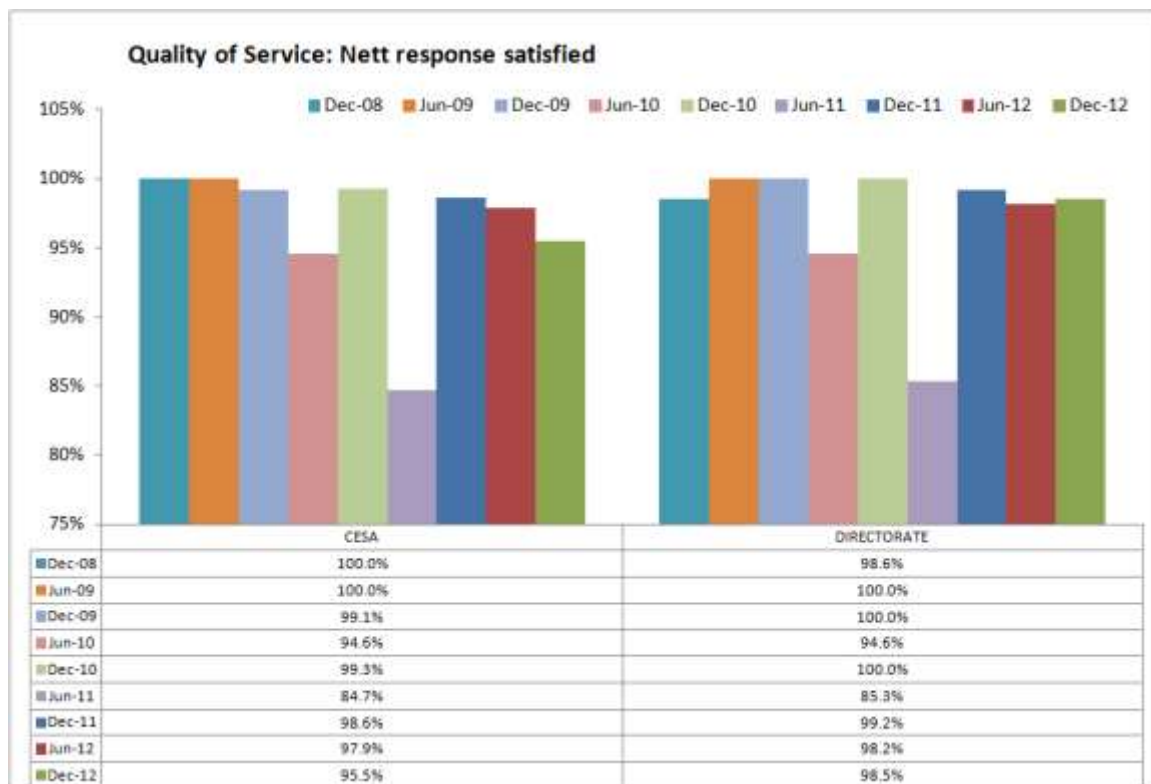


Figure 1: Nett response rate CESA and Directorate services

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	Jun-12	Dec-12
Weighted	85.3%	87.1%	98.9%	94.8%	96.9%	89.2%	96.9%	95.9%	95.1%	95.1%	91.8%

Members are confident that CESA is addressing their industry needs, but averaged a lower 91,8% for the last six months of 2012, from an average of 95,1% in the first six months. Interesting perhaps to note here, is 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 73% (from 83%) and 85% (from 88%) respectively.

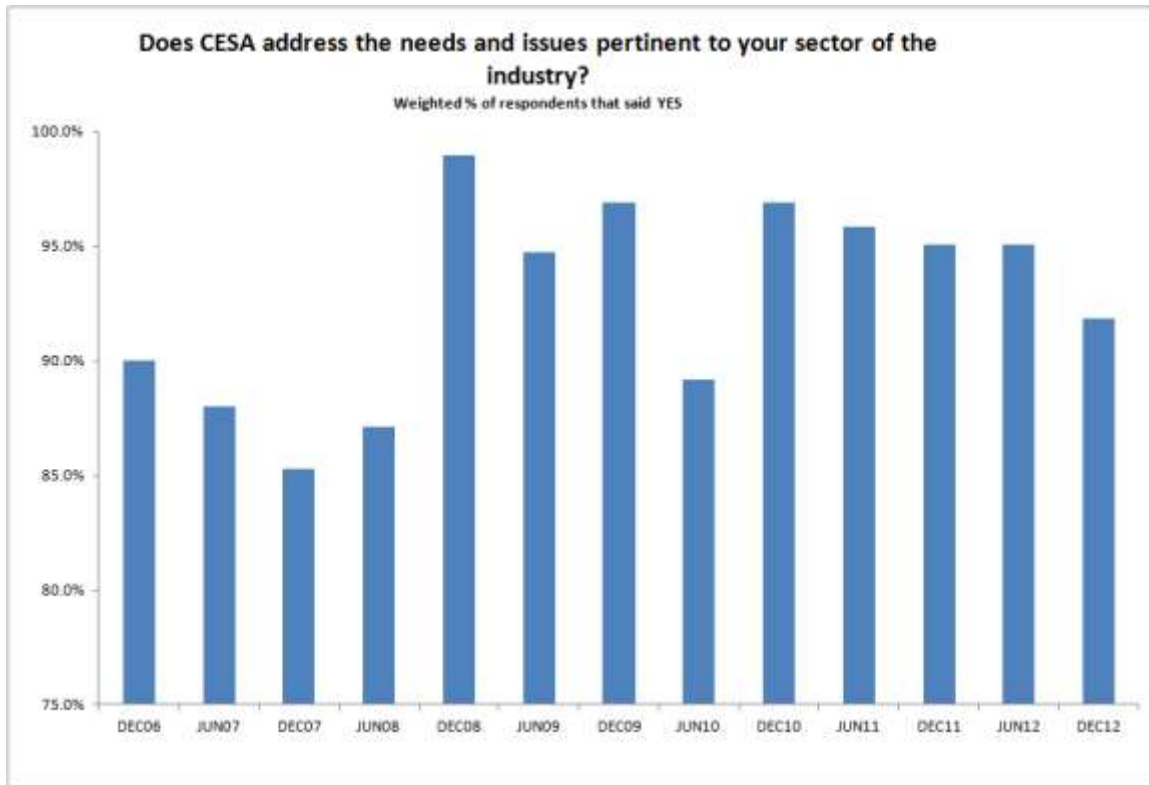


Figure 2

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%
June 2012	1.6%	21.8%	76.1%	0.5%
December 2012	2.5%	26.7%	70.5%	0.3%

The nett satisfaction rate moderated slightly to 95,0% (from 96,8%) in the last 6 months of 2012, as a higher percentage reported services as being “satisfactory” (from 21,8% to 26,7%) as opposed to “good” (from 76% to 70%) in the December 2012 survey.

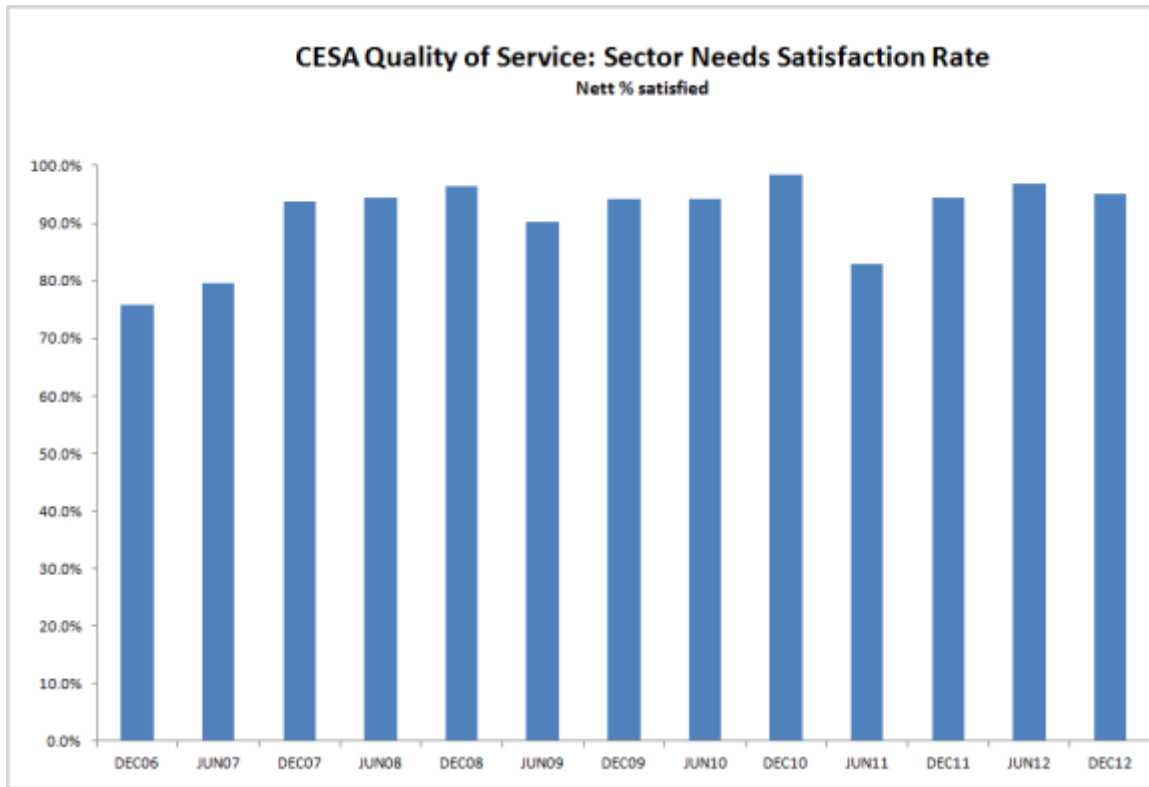


Figure 3

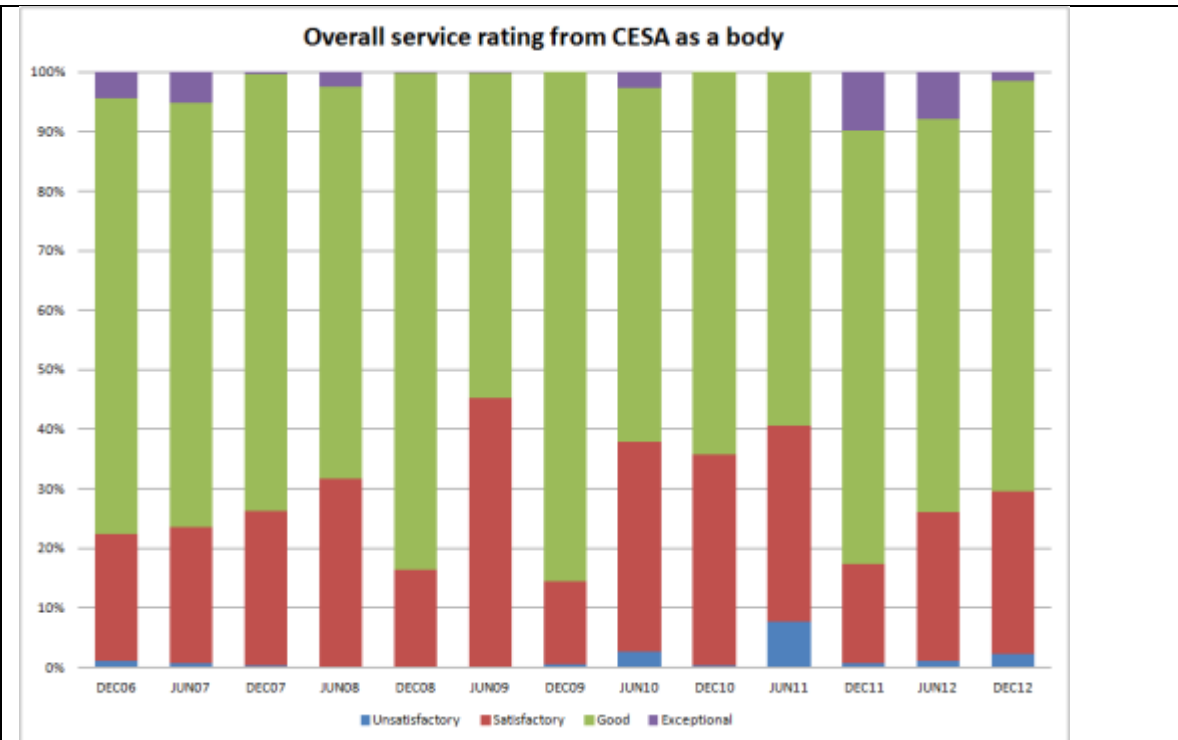


Figure 4

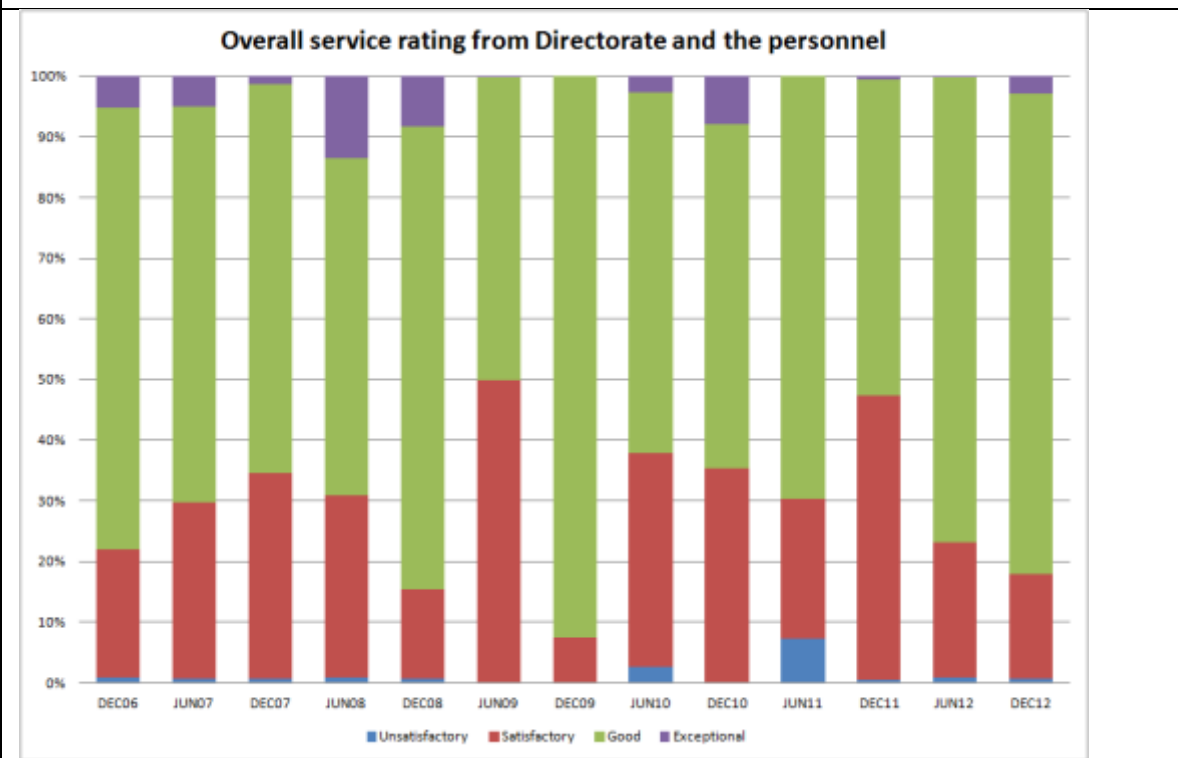


Figure 5

Benefits

Question F4

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

- Yes
- No

Majority of responding firms 98% 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 88% (on par with the previous survey). Majority of smaller firms also had an awareness of benefits (97%).

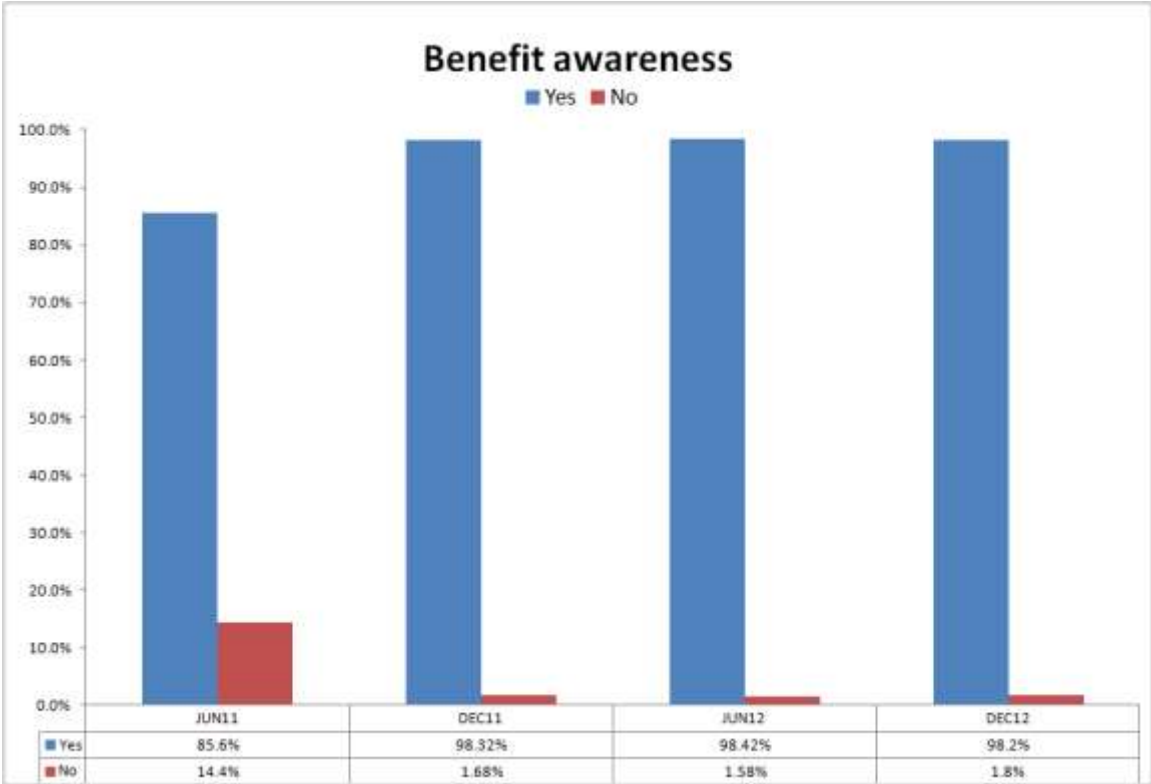


Figure 6

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.

Larger firms > 100 people

- No comment

Medium size : 20 – 100 people

- Sort out the fee structure
- Provide a Tender Bulletin for all services and not only SANRAL
- Take action against corrupt firms

Small size: < 20 people

- There needs to be a system where members can alert CESA about possible corruption in the tender procedure, and where these cases can then be investigated by CESA
- Please have more courses annually
- Need to recognise field of project management as a stand alone discipline

Response rate by firm size

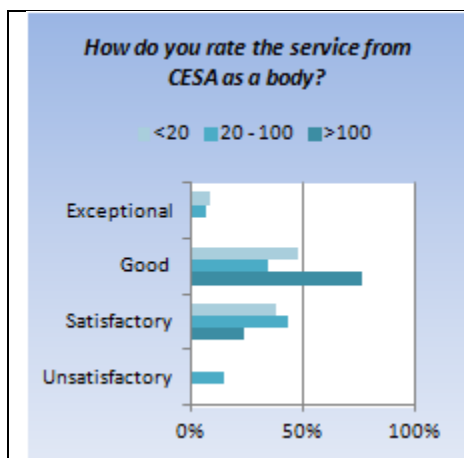


Figure 7

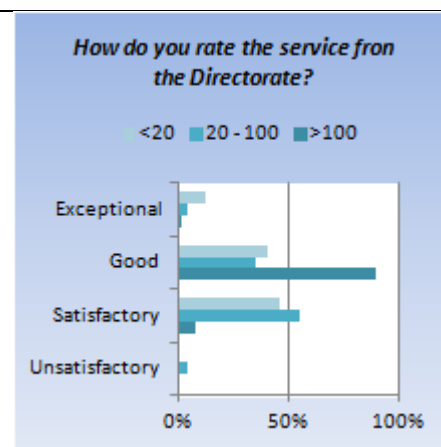


Figure 8

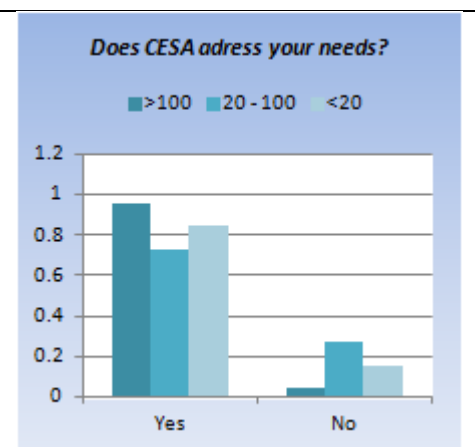


Figure 9

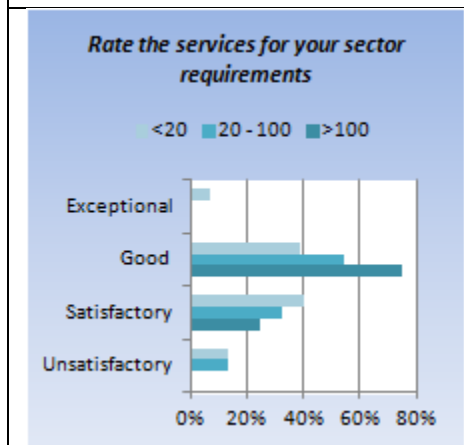


Figure 10

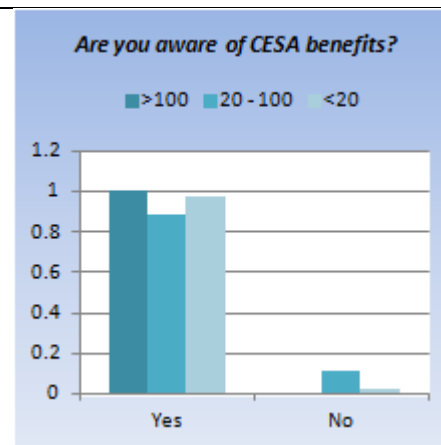


Figure 11

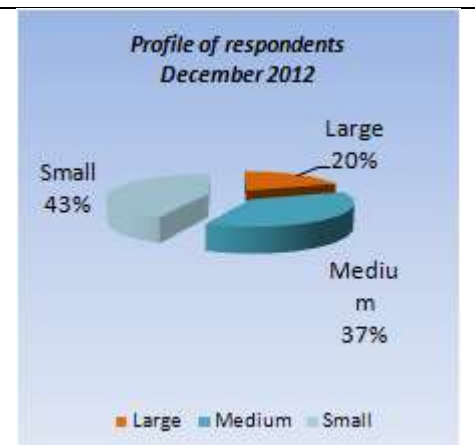


Figure 12

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.