

**INDUSTRY INSIGHT CC**

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Construction Business Intelligence

**Consulting Engineers South Africa (CESA)**

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Quality Survey: December 2013

QUALITY OF SERVICE SURVEY: DECEMBER 2013

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# Table of Contents

<b>CONSULTING ENGINEERS SOUTH AFRICA (CESA)</b>	<b>0</b>
<b>BACKGROUND AND METHODOLOGY</b>	<b>2</b>
<b>OVERALL SERVICE OF THE ASSOCIATION AND IT'S DIRECTORATE</b>	<b>3</b>
<b>RELEVANCE TO INDUSTRY NEEDS</b>	<b>5</b>
<b>BENEFITS</b>	<b>9</b>
<b>SUGGESTIONS</b>	<b>10</b>
<b>RESPONSE RATE BY FIRM SIZE</b>	<b>11</b>
<b>CONCLUSION</b>	<b>12</b>

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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 5507 employees over the 6 months between July – December 2013. Majority of the firms employ less than 20 people (49 percent), followed by 40 percent employing between 10 and 20 and 10,5 percent employing more than 100 people.

### Profile of respondents

**Table 1: Profile of respondents**

Employment	% 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	% of total number of firms in June 2013 sample	% of total number of firms in December 2013 sample
>100	15.4%	20.0%	19.7%	14.9%	10.5%
Between 20 and 100	35.2%	29.5%	36.8%	41.8%	40.4%
Less than 20	49.5%	50.5%	43.4%	43.3%	49.1%
Total	100.0%	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

**Table 2: Question 1 and 2**

	Unsatisfactory	Satisfactory	Good	Exceptional
<b>December 2006 Survey</b>				
CESA	1.0%	21.3%	73.12	4.4%
Directorate	0.8%	21.1%	72.8%	5.2%
<b>June 2007 Survey</b>				
CESA	0.7%	22.8%	71.3%	5.1%
Directorate	0.7%	29.0%	65.2%	5.1%
<b>December 2007 Survey</b>				
CESA	0.3%	26.0%	73.4%	0.3%
Directorate	0.7%	33.9%	64.1%	1.3%
<b>June 2008 Survey</b>				
CESA	0.09%	31.6%	65.9%	2.4%
Directorate	0.8%	30.1%	55.5%	13.6%
<b>December 2008 Survey</b>				
CESA	0.00%	16.28%	83.53%	0.19%
Directorate	0.72%	14.68%	76.25%	8.35%
<b>June 2009 Survey</b>				
CESA	0.0%	45.2%	54.6%	0.2%
Directorate	0.0%	49.8%	50.0%	0.2%
<b>December 2009 Survey</b>				
CESA	0.4%	14.0%	85.6%	0.0%
Directorate	0.0%	7.4%	92.6%	0.0%
<b>June 2010 survey</b>				
CESA	2.7%	35.1%	59.5%	2.7%
Directorate	2.7%	35.1%	59.5%	2.7%
<b>December 2010 survey</b>				
CESA	0.0%	42.1%	57.9%	0.0%
Directorate	0.0%	39.5%	57.9%	2.6%
<b>June 2011 surveys</b>				
CESA	7.6%	33.0%	59.3%	0.0%
Directorate	7.3%	22.9%	69.7%	0.0%
<b>December 2011 Surveys</b>				
CESA	0.7%	16.7%	72.8%	9.8%
Directorate	0.4%	47.0%	52.1%	0.6%
<b>June 2012 Surveys</b>				
CESA	1.1%	24.9%	66.2%	7.9%

Directorate	0.9%	22.2%	76.6%	0.2%
<b>December 2012 Surveys</b>				
CESA	2.3%	27.3%	68.9%	1.5%
Directorate	0.7%	17.2%	79.1%	2.9%
<b>June 2013 Surveys</b>				
CESA	1.9%	46.4%	50.8%	1.0%
Directorate	0.9%	47.7%	50.4%	1.0%
<b>December 2013 Surveys</b>				
CESA	0.1%	28.7%	70.1%	1.0%
Directorate	0.0%	29.7%	69.3%	1.0%

*Question 2*

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

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

There was a 100 percent positive nett response rate from firms satisfied with general and directorate services, and a 99,7 percent positive nett response with regards to CESA as a body. Overall the ratings improved in both instances compared to the June 2013 survey.

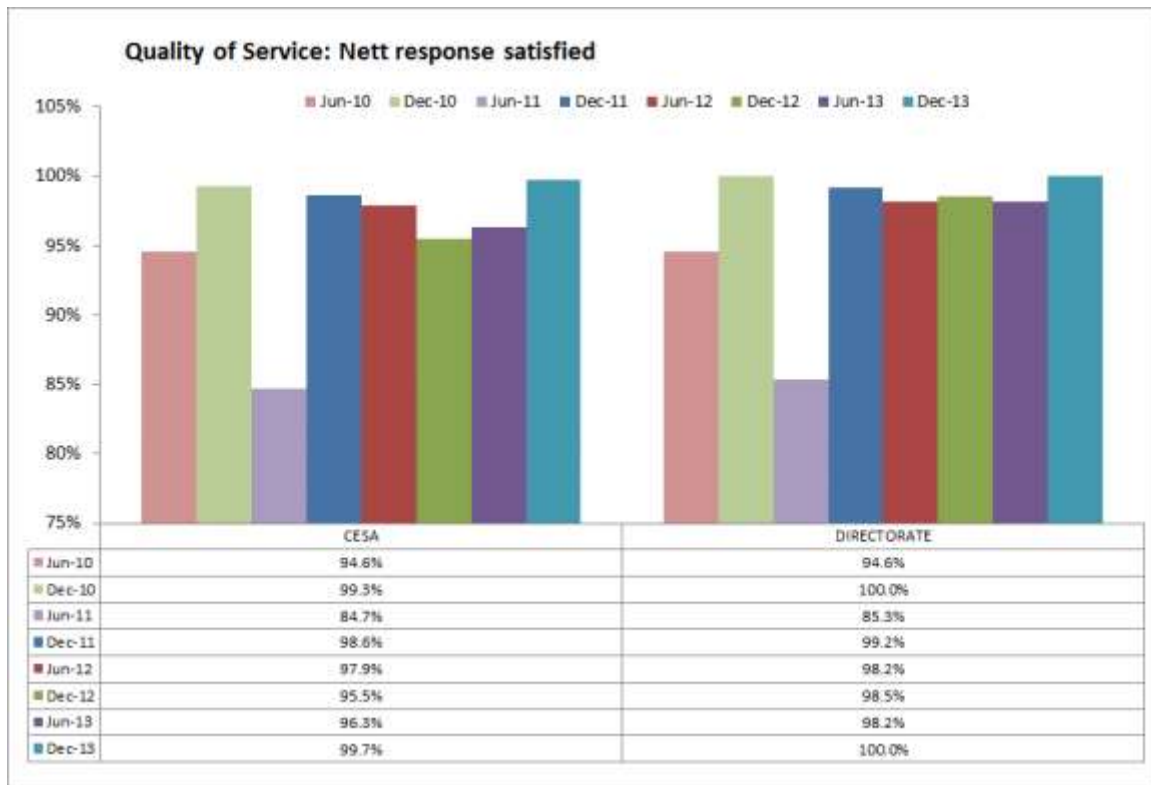


Figure 1: Nett response rate CESA and Directorate services

## Relevance to industry needs

### Question 3a

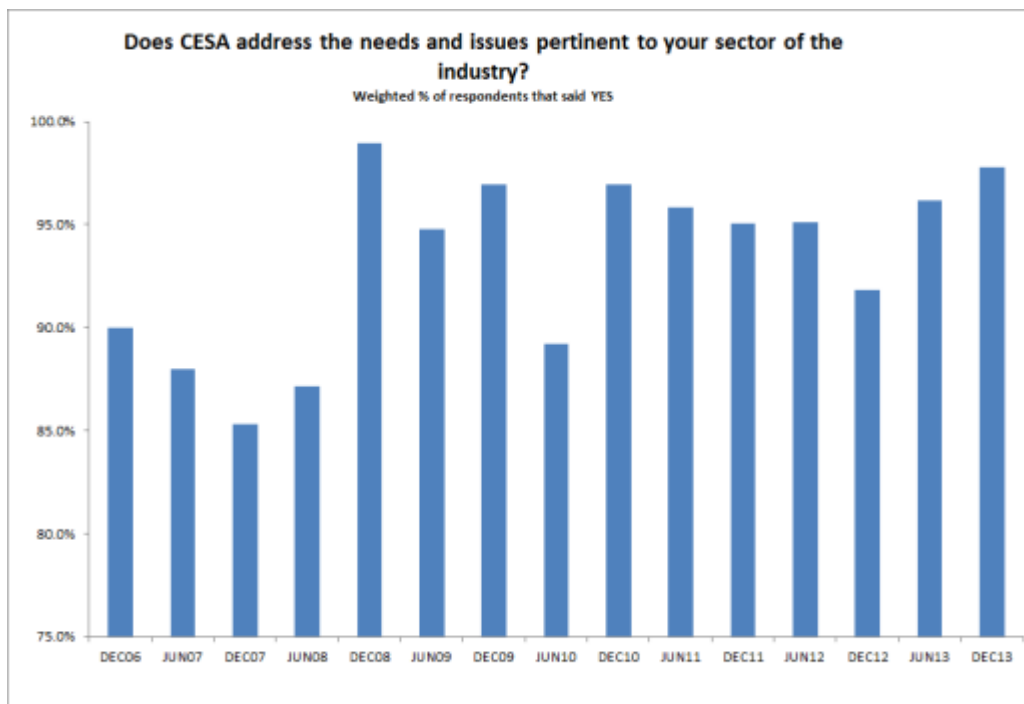
Does the Association focus on addressing the needs and issues pertinent to your **sector** of the industry:

- Yes
- No

**Table 3: Question 3a**

	Jun08	Dec08	Jun09	Dec-09	Jun-10	Dec-10	Jun-11	Dec-11	Jun-12	Dec-12	Jun-13	Dec-13
Weighted	87.1%	98.9%	94.8%	96.9%	89.2%	96.9%	95.9%	95.1%	95.1%	91.8%	96.1%	97.8%

Members are more confident that CESA is addressing their industry needs, averaging 97,8 percent, compared to 96,1 percent in the June 2013 survey. 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 77 percent (up from 73 percent in the previous survey) and 78 percent, from 83 percent 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%
June 2013	2.0%	88.1%	9.3%	0.7%
December 2013	0.4%	78.3%	20.3%	1.0%



The nett satisfaction rate improved to 99,1 percent from 96 percent in June 2013, and 95 percent in the previous survey. The bulk of respondents reported a satisfactory level (78 percent), compared to 88 percent in the previous survey, while 20 percent rated levels as “Good”, compared to 9 percent in the previous survey.

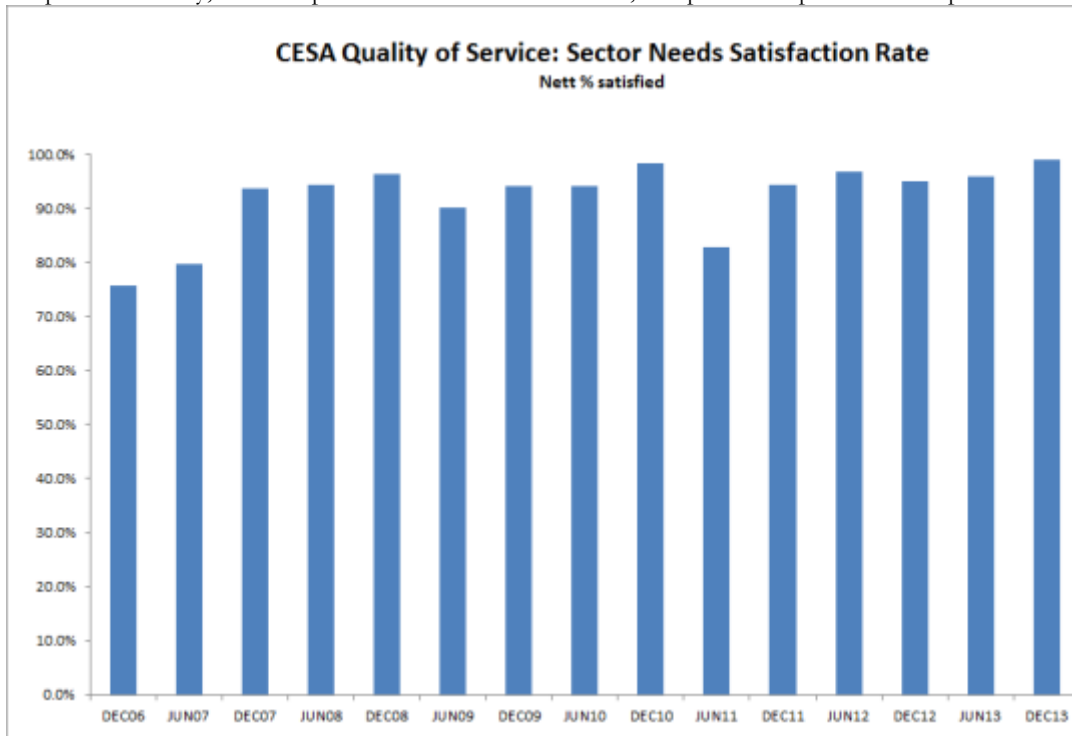


Figure 3

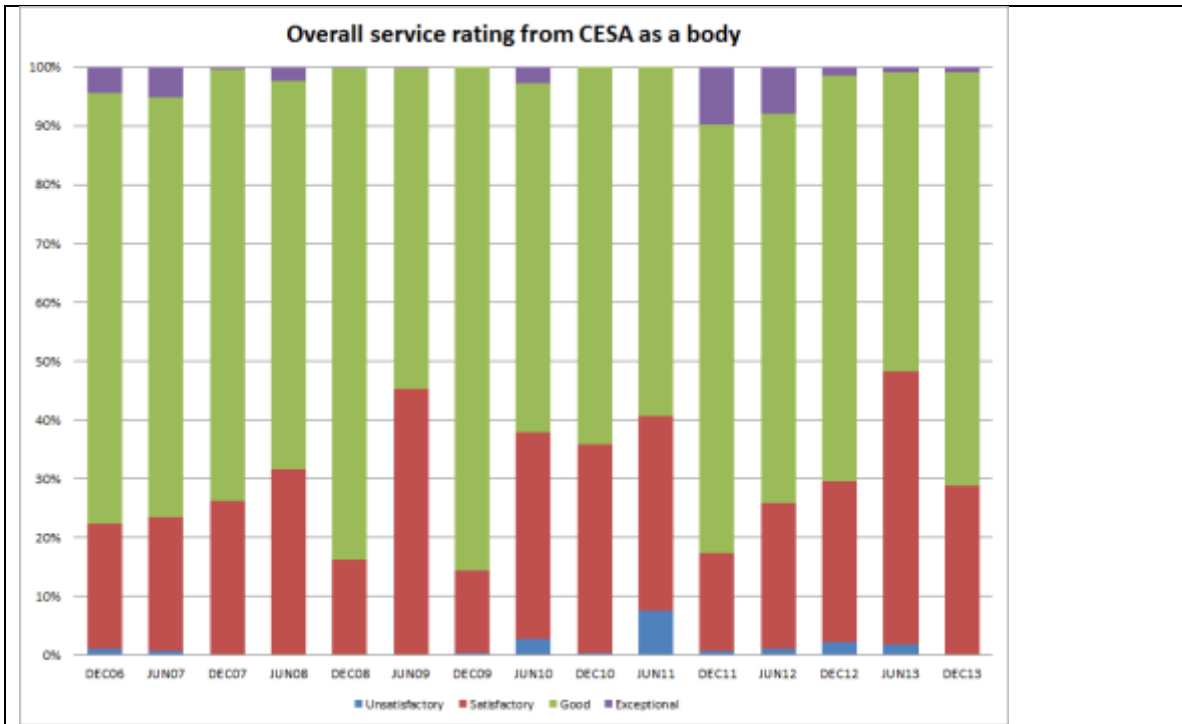


Figure 4

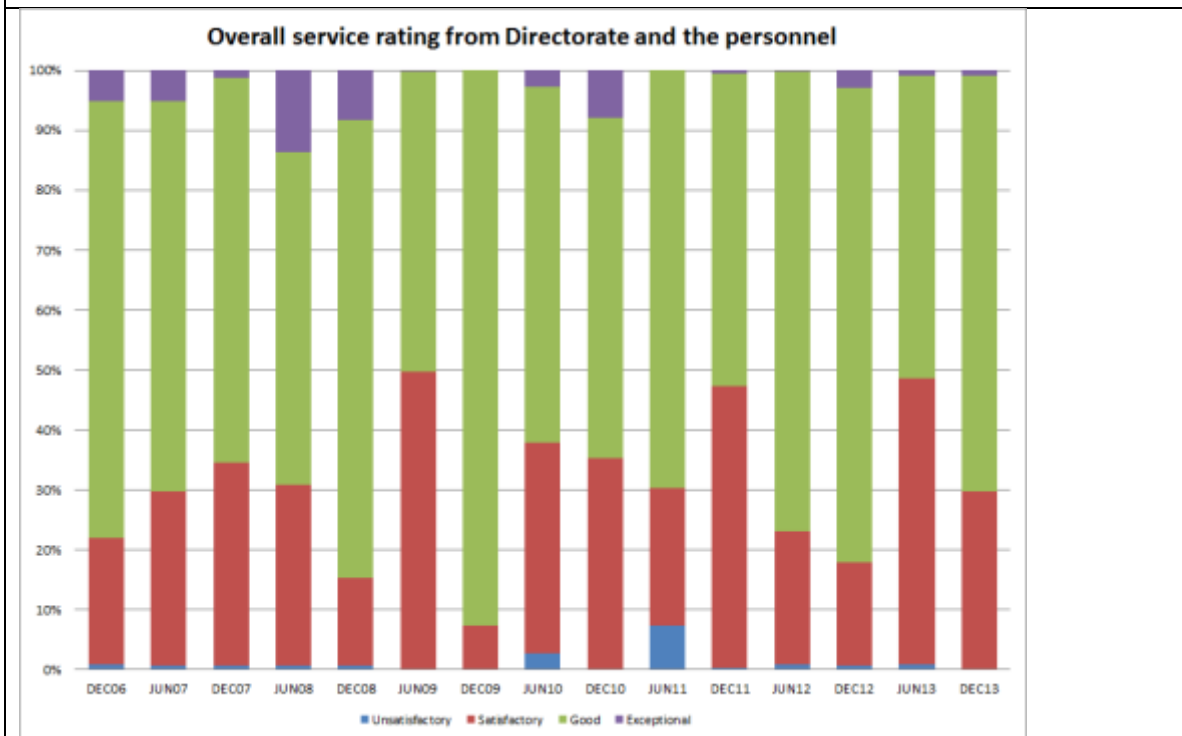


Figure 5

## Benefits

### Question F4

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

- Yes
- No

Majority of responding firms, 99,2 percent were aware of the benefits of being a CESA member, compared to 97,2 percent in the previous survey. The rate amongst medium size firms (employing between 20 and 100 people) improved from 81 percent in the June 2013 survey, to 100 percent in the current survey, while the rate amongst smaller firms moderated from 95,7 percent to 83,3 percent in the current survey.

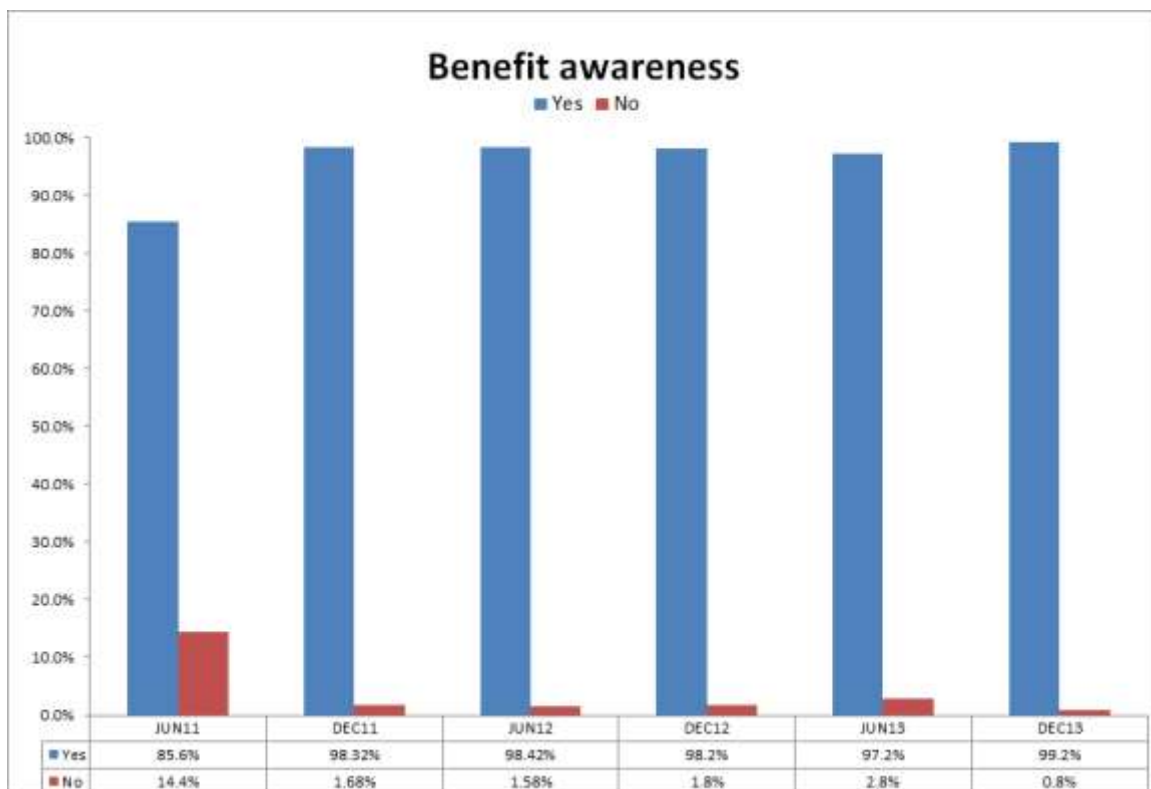


Figure 6

## **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**

- Resolve the Fee Structure
- Please forward tender notifications, other than SANRAL

#### **Medium size : 20 – 100 people**

- More intense involvement in fee and tender issues and less in marketing the CESA school of consulting engineers
- Would like to see more cohesion between major industry players and reduction in duplication of efforts to advance the interests of the sector
- 

#### **Small size: < 20 people**

- Unrealistic low tendering for fees detrimental for industry
- Reduce no of emails regarding training
- Offer training in smaller centres not just in Cape Town and Johannesburg
- Keep up the good work and please keep these surveys as simple as possible – no more acronyms!

Response rate by firm size

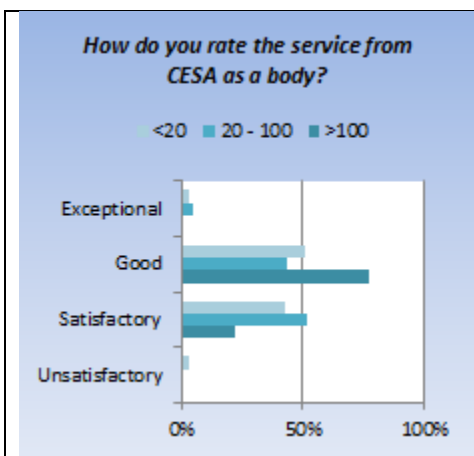


Figure 7

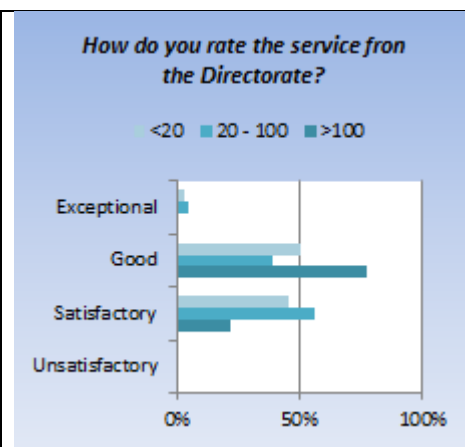


Figure 8

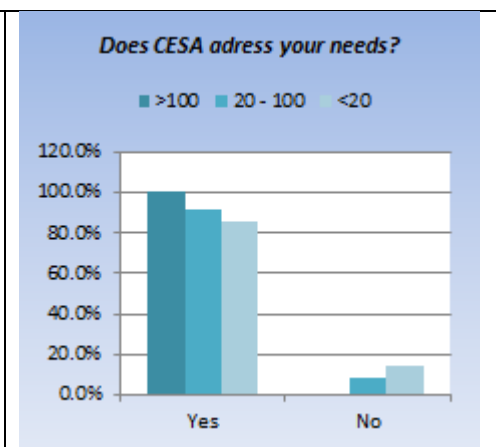


Figure 9

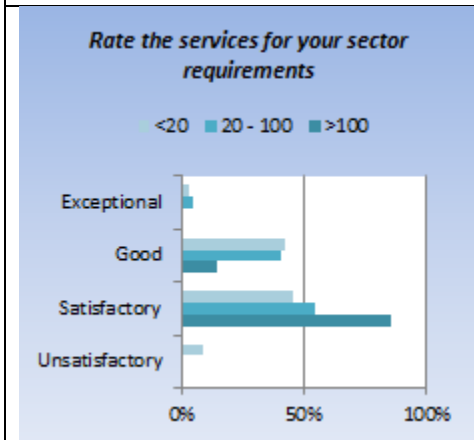


Figure 10

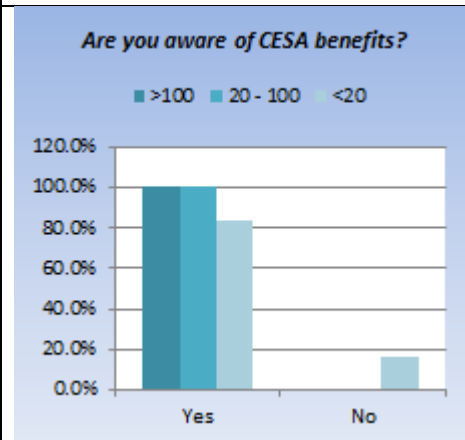


Figure 11

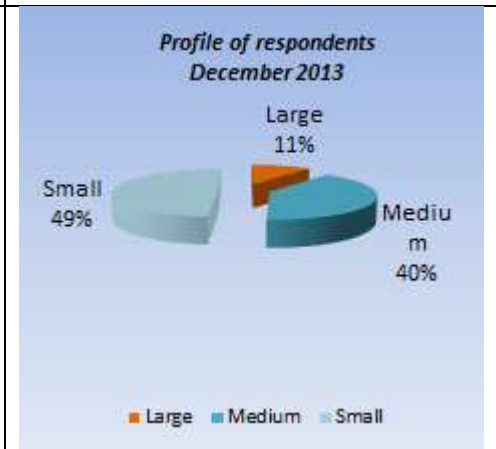


Figure 12

## **Conclusion**

Medium to smaller firms played a bigger role in this survey, compared to previous survey, contributing to 85 percent of the responses.

Majority of ratings have improved, including services of CESA as a body and the directorate. Ratings in terms of how focussed the CESA is in addressing pertinent needs have also improved. It would seem that issues surrounding tender prices and training remain the most pressing at the moment, while a point made in terms of greater cohesion between industry players may be valid one considering the generic issues affecting stakeholders across the sector, for example the non-performance of certain government departments in terms of infrastructure expenditure and the slow roll out of SOE's contracts.