

Consulting Engineers South Africa (CESA)

Quality Survey: December 2014

Postnet Suite 152
Private Bag X3
Bloubergrant
7443

www.industryinsight.co.za

Cape Town Tel: 021 554 9646 Fax 021 554 9648
Johannesburg Tel/Fax: 011 431 3691

info@industryinsight.co.za

Email CESA at general@cesa.co.za

CESA Head Office contact information is available below. The CESA also has branches throughout South Africa.

Tel: +27 (011) 463 2022
Fax: +27 (011) 463 7383

Fullham House
Hampton Park North
20 Georgian Crescent
Bryanston
Johannesburg, South Africa

PO Box 68482
Bryanston
Johannesburg, South Africa
2021

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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 6003 employees over the 6 months between July - December 2014. Majority of the firms employ less than 20 people (47 percent), followed by 33 percent employing between 10 and 20 and 20 percent employing more than 100 people.

Profile of respondents

Table 1: Profile of respondents

Employment	% 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	% of total number of firms in June 2014 sample	% of total number of firms in December 2014 sample
>100	20.0%	19.7%	14.9%	10.5%	14.0%	20.4%
Between 20 and 100	29.5%	36.8%	41.8%	40.4%	36.8%	32.7%
Less than 20	50.5%	43.4%	43.3%	49.1%	49.1%	46.9%
Total	100.0%	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
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%
June 2013 Surveys				
CESA	1.9%	46.4%	50.8%	1.0%
Directorate	0.9%	47.7%	50.4%	1.0%
December 2013 Surveys				
CESA	0.1%	28.7%	70.1%	1.0%
Directorate	0.0%	29.7%	69.3%	1.0%
June 2014 Surveys				
CESA	1.7%	13.4%	84.7%	0.3%
Directorate	1.5%	22.6%	75.9%	0.0%
December 2014 Surveys				
CESA	1.2%	37.7%	60.8%	0.3%
Directorate	2.6%	41.1%	56.1%	0.2%

Question 2

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

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

There was a 94,7 percent positive nett response rate from firms satisfied with general and directorate services, and a 97,6 percent positive nett response with regards to CESA as a body. Overall the ratings moderated slightly from the June 2014 survey with regards to the general and directorate service (from 97 percent in the June 2014 survey), while the nett satisfaction rate in terms of the overall service improved from 96,6 percent in the June 2014 survey to 97,6 percent in the current survey.

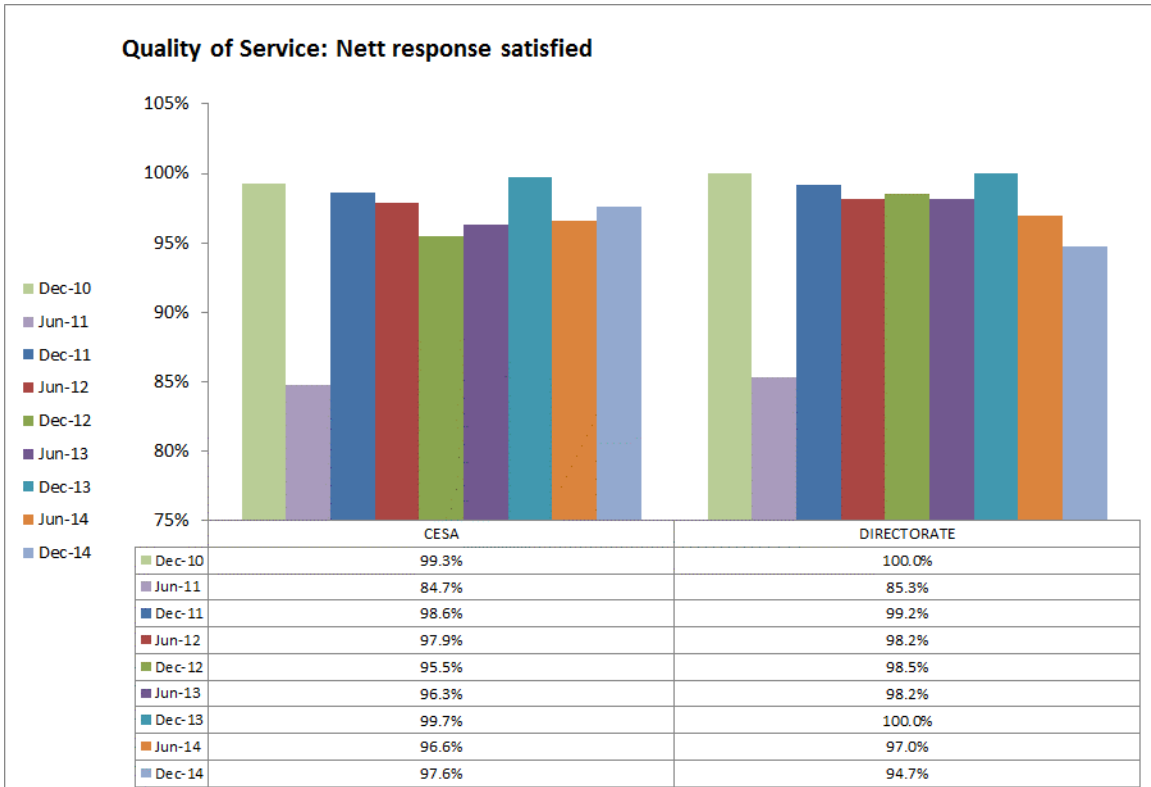


Figure 1: Nett response rate CESA and Directorate service

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

	Dec08	Jun09	Dec-09	Jun-10	Dec-10	Jun-11	Dec-11	Jun-12	Dec-12	Jun-13	Dec-13	Jun-14	Dec-14
Weighted	98.9%	94.8%	96.9%	89.2%	96.9%	95.9%	95.1%	95.1%	91.8%	96.1%	97.8%	95.0%	98.0%

Members are confident that CESA is addressing their industry needs, averaging 98,0 percent, which was an improvement from the 95 percent reported in the previous survey. Compared to the June 2014 survey, there was an improvement in the medium and smaller firms, although still lower compared to the 100 percent satisfaction rate reported by the larger firms. The satisfaction rate of medium firms was 83,1 percent, compared with 96,6 percent for smaller firms.

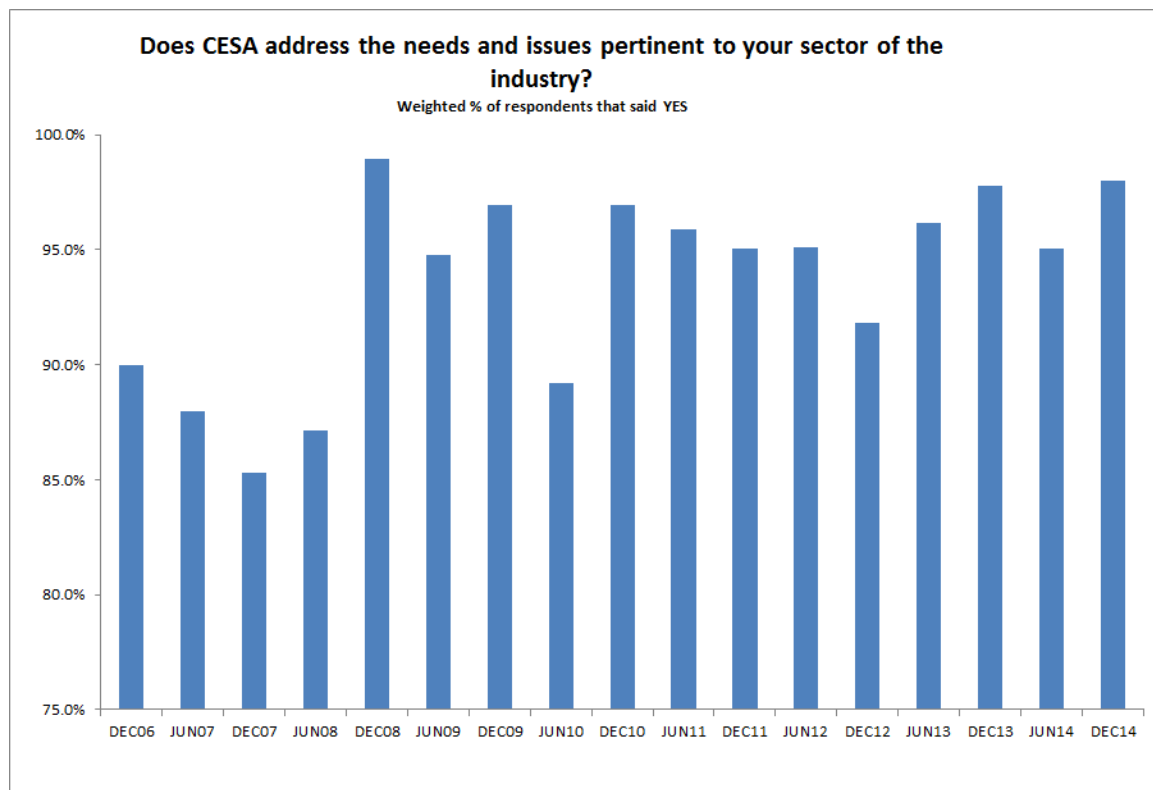


Figure 2

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%
June 2014	4.0%	65.1%	30.9%	0.0%
December 2014	0.0%	37.2%	62.8%	0.0%

The nett satisfaction rate improved to 100,0 percent in the current survey, compared to 92,0 percent and 99,1 percent in the previous two surveys. The bulk of respondents reported a better than satisfactory level of “Good”

(62,8 percent), compared to 30,9 percent in the previous survey, while 32 percent rated levels as “Satisfactory”, compared to 65 percent in the previous survey.

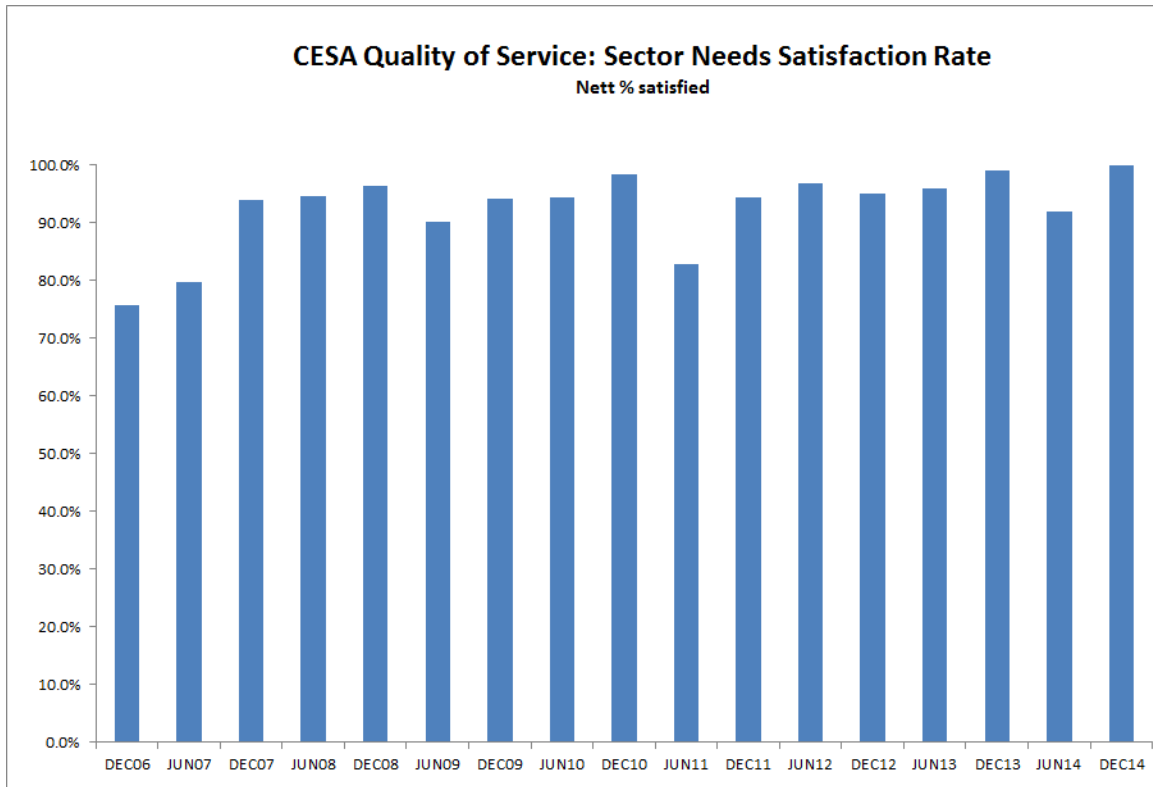


Figure 3

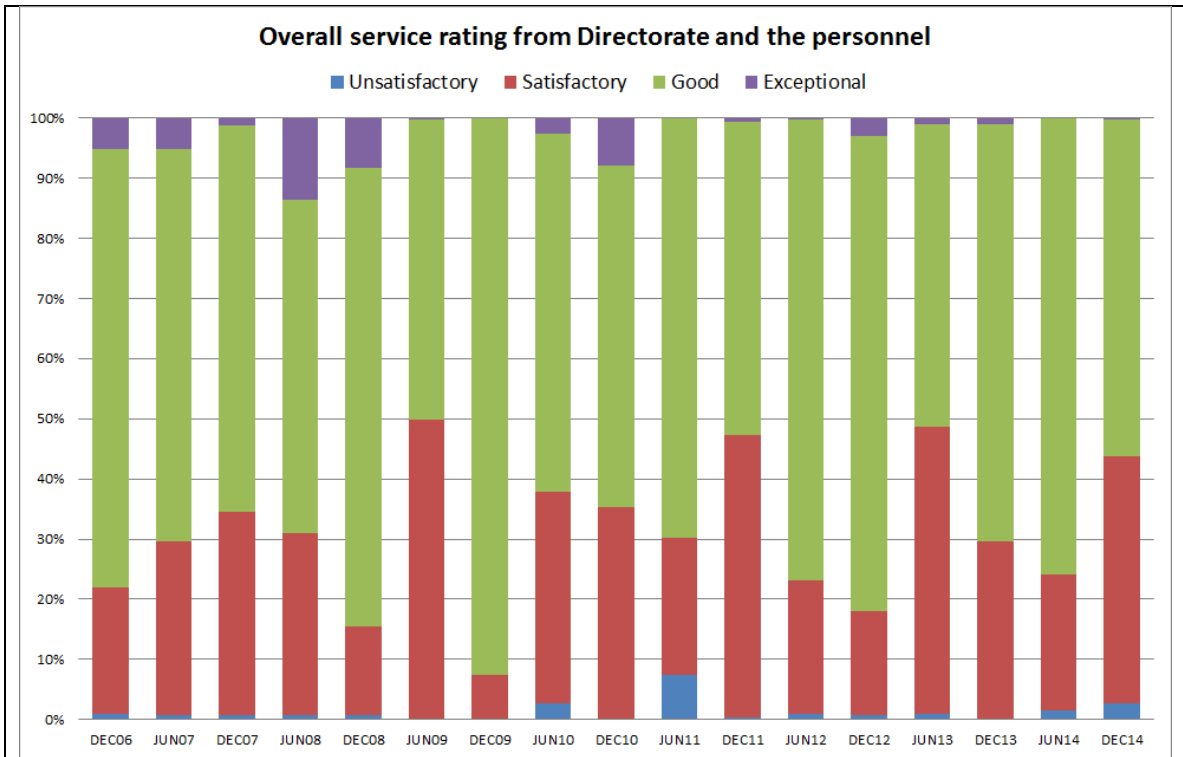


Figure 4

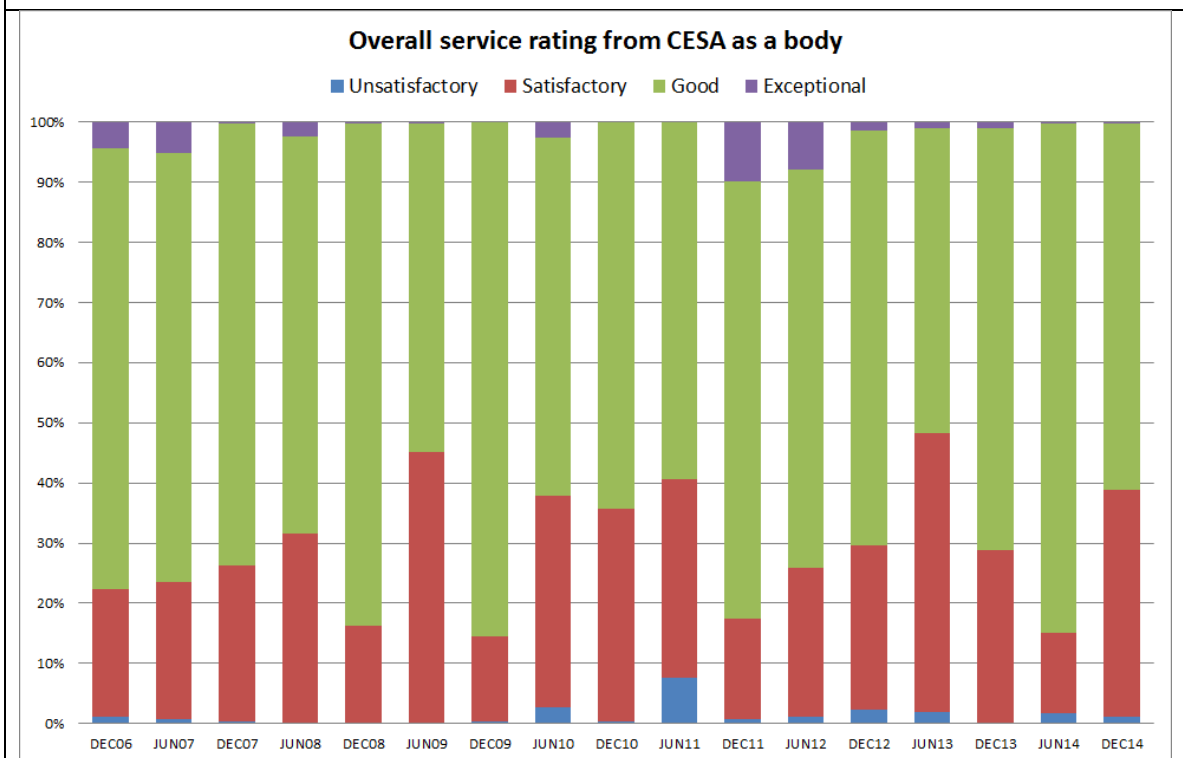


Figure 5

Benefits

Question F4

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

- Yes
- No

All of the responding firms, 100,0 percent were aware of the benefits of being a CESA member, compared to 98,8 percent in the previous survey.

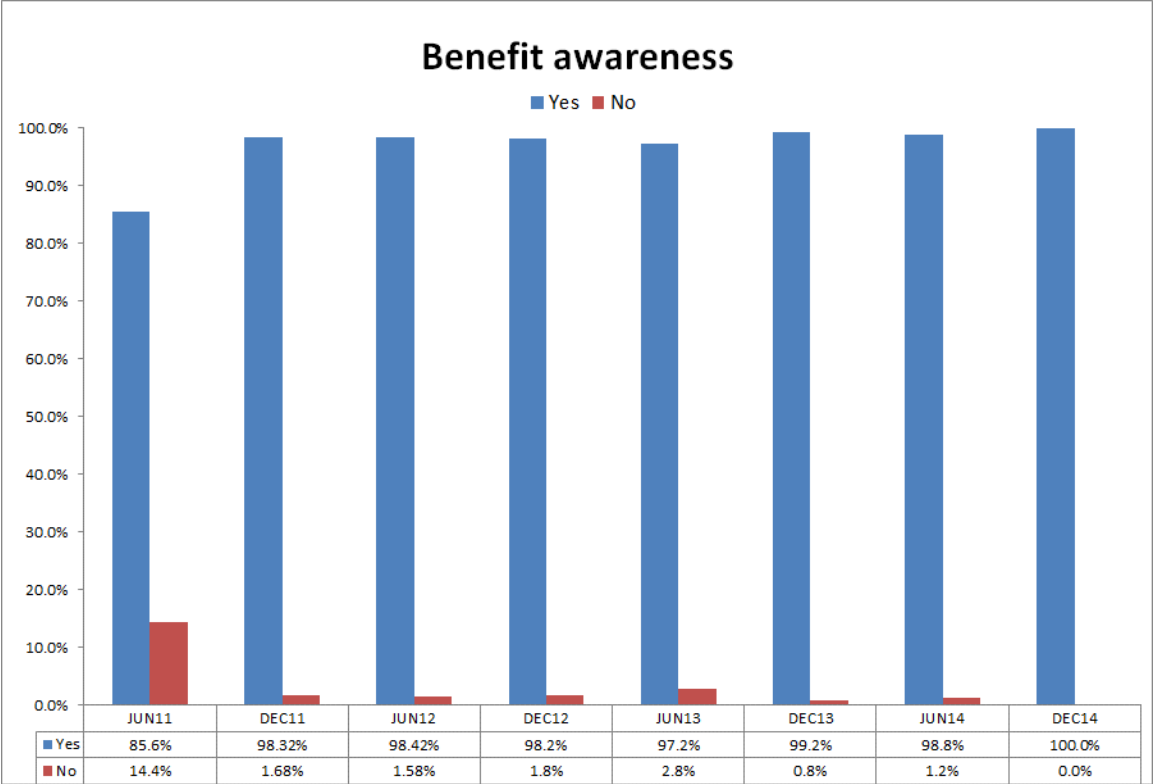


Figure 6

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

- No further comments were received.

Medium size : 20 – 100 people

- Administration within CESA has been poor over the last 12 months.
- Tendering for professional services is not favourable for our long term sustainability. The gazetted fees and/or a roster system as previously used is preferred.
- Do not make political statements without consulting members first.
- Do not support contentious matters like eTolling without consulting with members first.
- Do not create confusion with regarding to fee scales Inform about other tenders and not SANRAL only
- The discounting of fees is killing the industry and the quality of engineering work is declining.

Small size: < 20 people

- Please have more courses annually and always update us on changes in regards to CESA.
- The requirements for employment equity and broad based black economic empowerment are becoming more and more difficult to comply with by small and medium sized firms. What does CESA do to assist us in this respect?.

Response rate by firm size

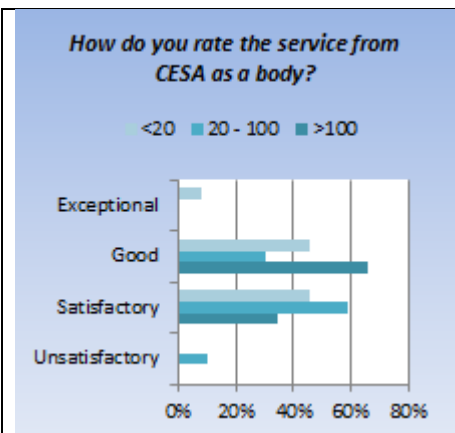


Figure 7

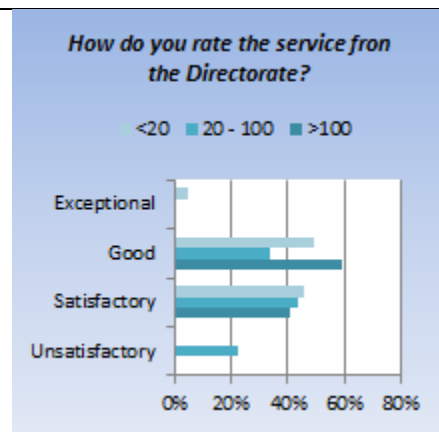


Figure 8

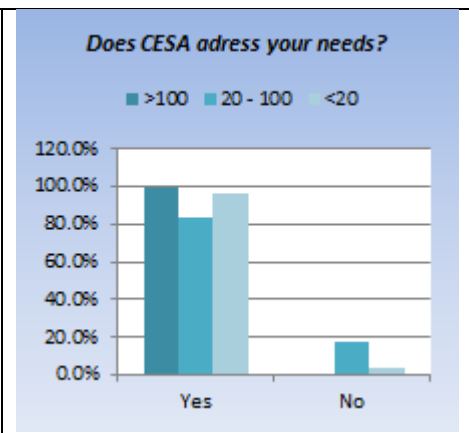


Figure 9

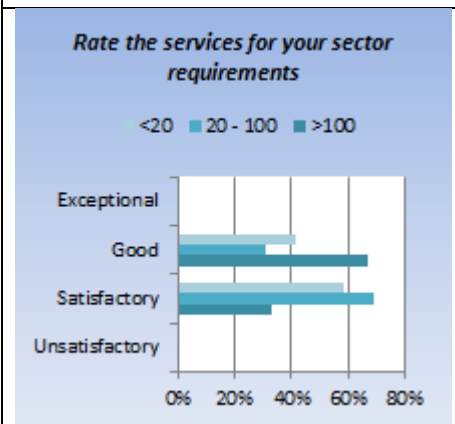


Figure 10

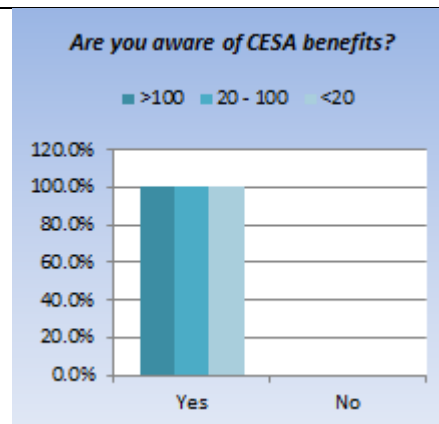


Figure 11

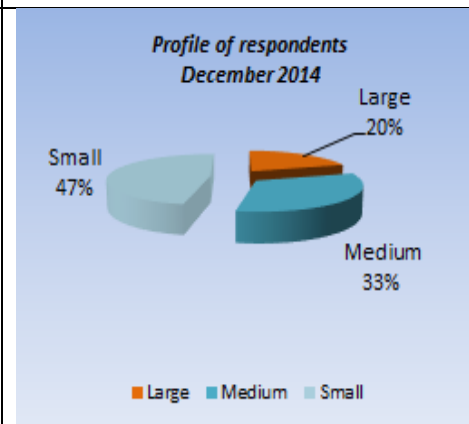


Figure 12

Conclusion

Medium to smaller firms played a slightly smaller role bigger role in this survey, compared to previous survey, contributing to 79,6 percent of the responses, but continue to represent the bulk of responses.

Although there was a slight moderation in the nett satisfaction rate of services provided by CESA's directorate, this was offset by an increase in the satisfaction rate with the overall service offered by CESA. This was accompanied by an improvement in how participating firms perceived the Association to be addressing pertinent issues in the industry, while an increasing number of firms were more than satisfied with how these issues are being addressed. Generally the highest level of dissatisfaction continues to emanate from medium and smaller firms, but here too we noted a marked improvement compared with previous surveys.

Comments were limited in this survey, but related mostly to the level of CESA's communication with members and difficulties experienced by firms to comply with BBBEE regulation, where members are perhaps seeking more proactive support from CESA.