

INDUSTRY INSIGHT CC

Construction Business Intelligence

Consulting Engineers South Africa (CESA)

Quality Survey: June 2012

QUALITY OF SERVICE SURVEY: DECEMBER 2011

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Table of Contents

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



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 10 705 employees over the 6 months between January and June 2012. Majority of the firms employ less than 20 people (50,5%), followed by 29,5% employing between 20 and 100 and 20% 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
>100	28.3%	15.4%	20.0%
Between 20 and 100	39.1%	35.2%	29.5%
Less than 20	32.6%	49.5%	50.5%
Total	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%

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.

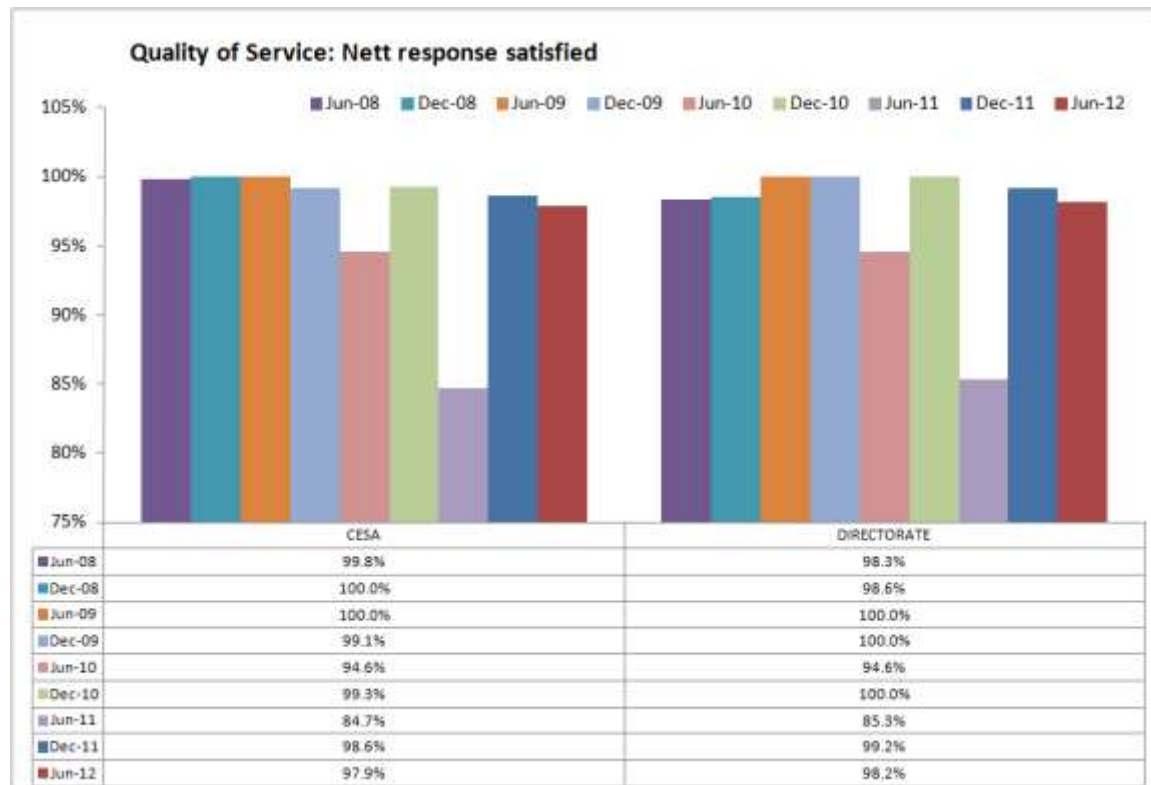


Figure 1: Nett response rate CESA and Directorate services

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
Weighted	85.3%	87.1%	98.9%	94.8%	96.9%	89.2%	96.9%	95.9%	95.1%	95.1%

Members are confident that CESA is addressing their industry needs, which averaged 95,1% for the second consecutive survey, compared to 95,9% in the June 2011 survey. Interesting perhaps to 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 83% (from 82%) and 88% (unchanged from previous survey) respectively.

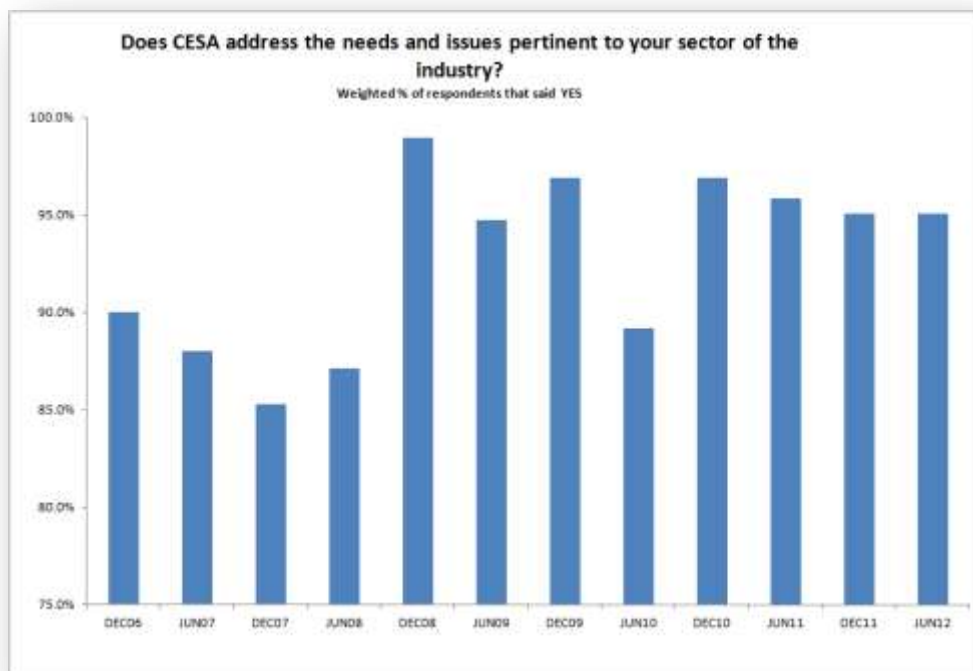


Figure 2

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%

The nett satisfaction rate improved to 96,8% from 94,5% and 82,8% in the two preceding surveys., as a higher percentage reported services as being good (76% vs 50,8% and 22,4% in the two preceding surveys).

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

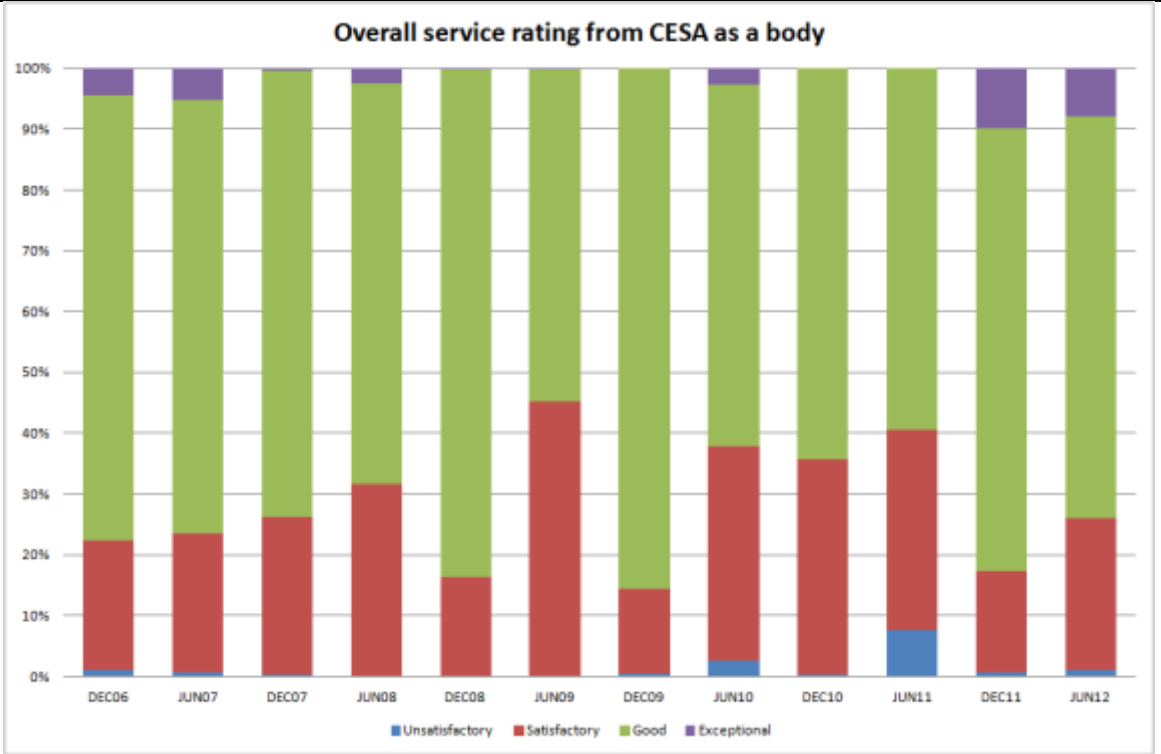


Figure 4

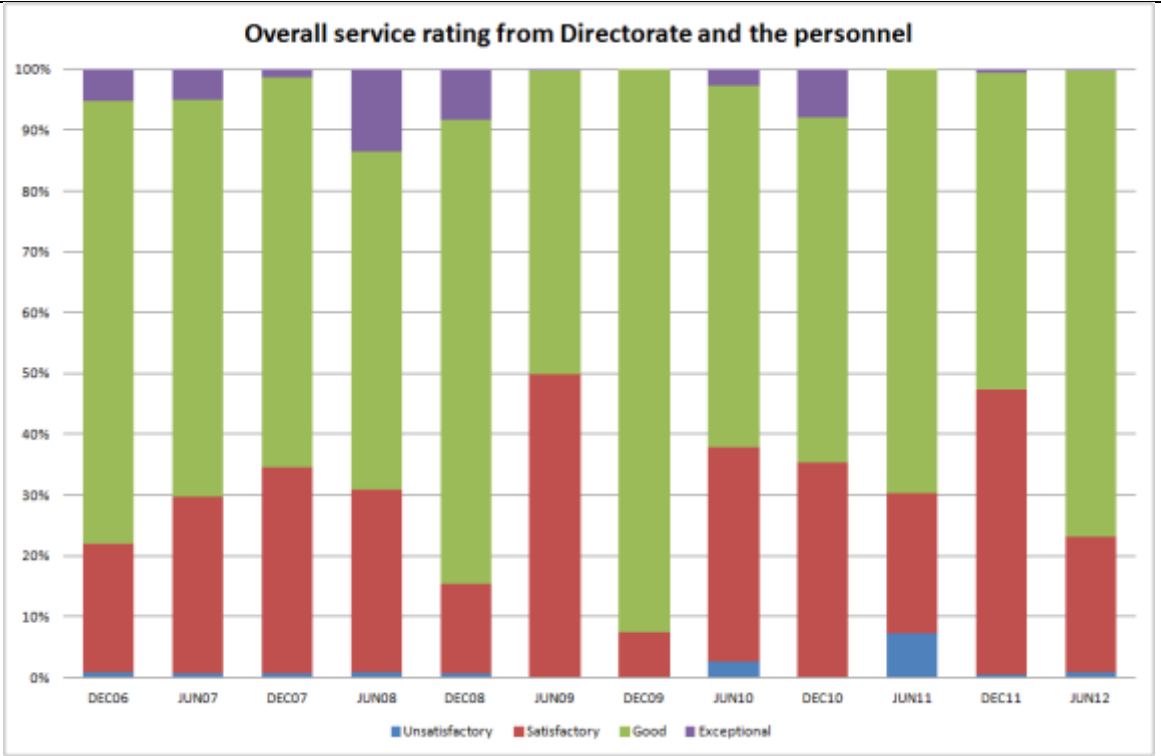


Figure 5

Benefits

Question F4

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

- Yes
- No

Majority of responding firms 94,4% 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%, but it was still an improvement on the 77,2% reported during the December 2011 survey.

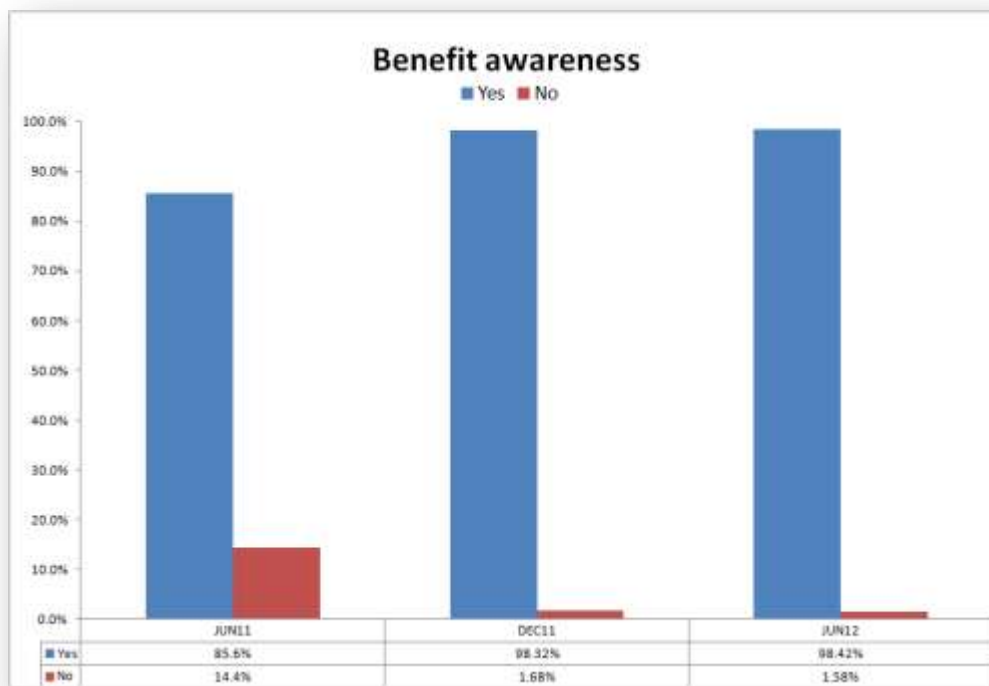


Figure 6

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

- Support to put pressure on clients to implement BBBEE charter
- The issue of non-payment in the public sector and fee discounting is not improving despite CESA efforts to date
- Communicate with members with regard to issues at hand.

Medium size : 20 – 100 people

- The only person who has helped us was Mr. Mayne who tried to help-in general. We find CESA expensive and anything really helpful is at an additional cost.
- F3-Cannot vote yes/no. An effort is made but not bold enough to create changes.(eg. compare to how medical equivalent is serving their members).we need an organisation with teeth that can fight for its members and create unity among its members
- Insist on gazetted fees to be applied and promote use of the roster as previously done by National Department of Public works.

Small size: < 20 people

- Assist small consultants in all fields. Assist with more vigour fighting fraud at municipalities. Assist CESA members fight appointment of unregistered firms to undertake work for engineers.
- Improved communication with its member firms. Fee discounting to be addressed.
- More direct assistance with matters that influence the companies profitability and image to clients.
- Please have more courses annually and always update us on changes in regards to CESA.
- Follow up when notified of tender problems/possible corruption with clients.
- Assist to investigate corruption in all government sectors.

Response rate by firm size

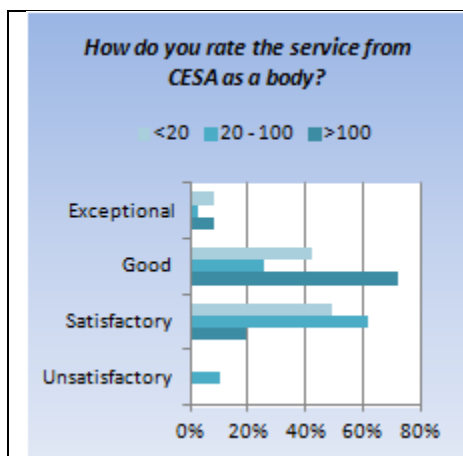


Figure 7

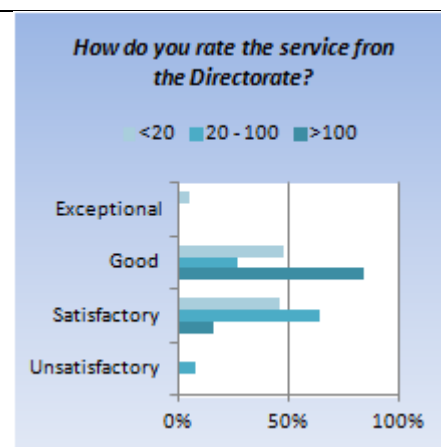


Figure 8

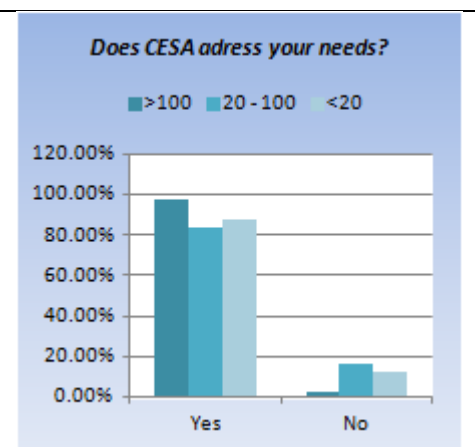


Figure 9

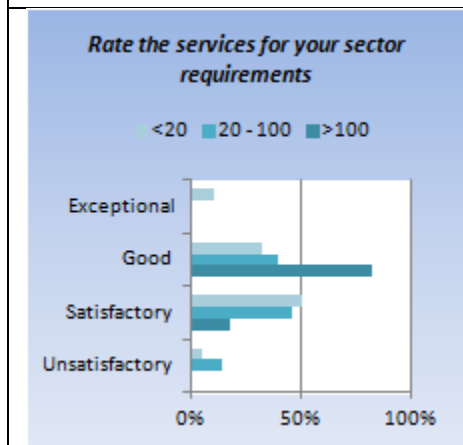


Figure 10

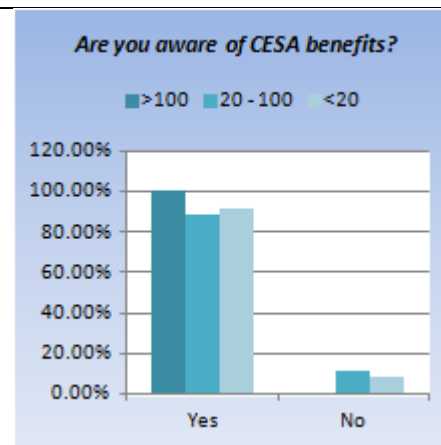


Figure 11

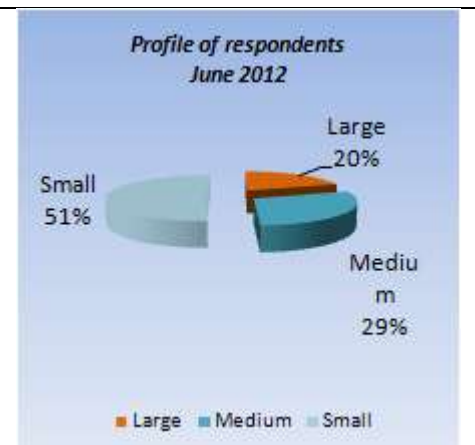


Figure 12

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.