

INDUSTRY INSIGHT CC

Construction Business Intelligence

Consulting Engineers South Africa (CESA)

Quality

Survey:

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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 5507 employees over the 6 months between January – June 2014. Majority of the firms employ less than 20 people (49 percent), followed by 37 percent employing between 10 and 20 and 14 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	% of total number of firms in June 2014 sample
>100	15.4%	20.0%	19.7%	14.9%	10.5%	14.0%
Between 20 and 100	35.2%	29.5%	36.8%	41.8%	40.4%	36.8%
Less than 20	49.5%	50.5%	43.4%	43.3%	49.1%	49.1%
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%

Question 2

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

- Unsatisfactory
- Satisfactory
- Good
- Exceptional

There was a 97 percent positive nett response rate from firms satisfied with general and directorate services, and a 96,6 percent positive nett response with regards to CESA as a body. Overall the ratings moderated slightly from the December 2013 but remains close to a 100 percent satisfaction rate.

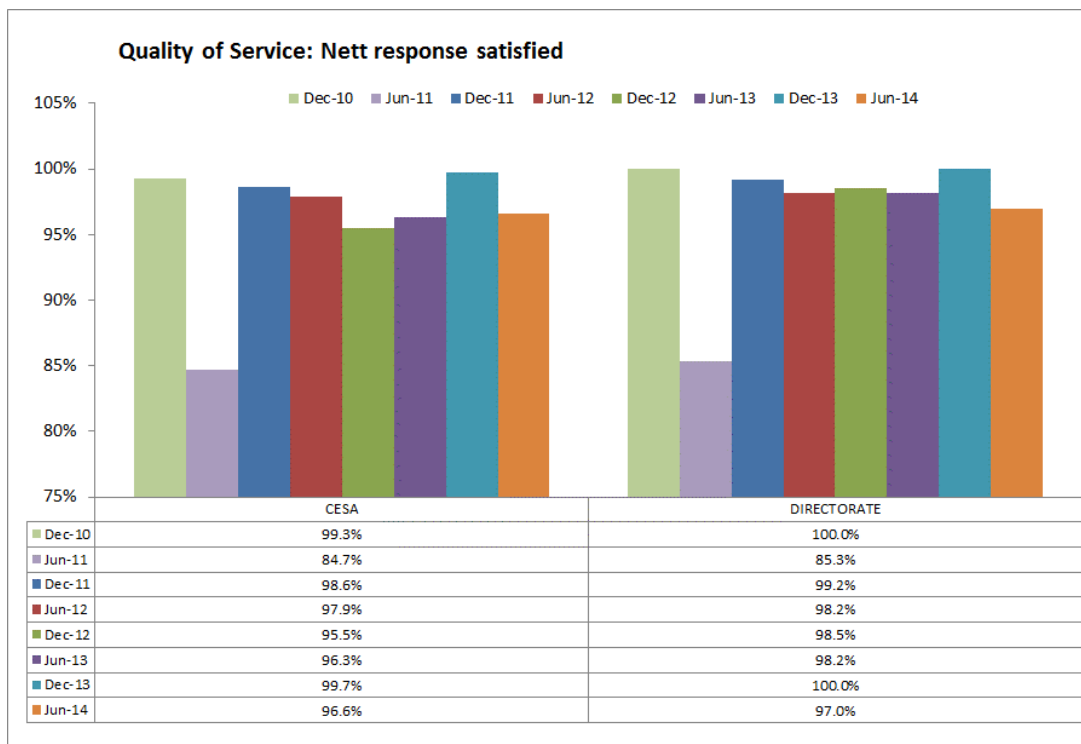


Figure 1: Nett response rate CESA and Directorate service

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

	Jun08	Dec08	Jun09	Dec-09	Jun-10	Dec-10	Jun-11	Dec-11	Jun-12	Dec-12	Jun-13	Dec-13	Jun-14
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%	95.0%

Members are confident that CESA is addressing their industry needs, averaging 95,0 percent, although this was lower compared to 97,8 percent reported in the December 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 78 percent (up from 77 percent in the previous survey) and 79 percent, from 78 percent respectively.

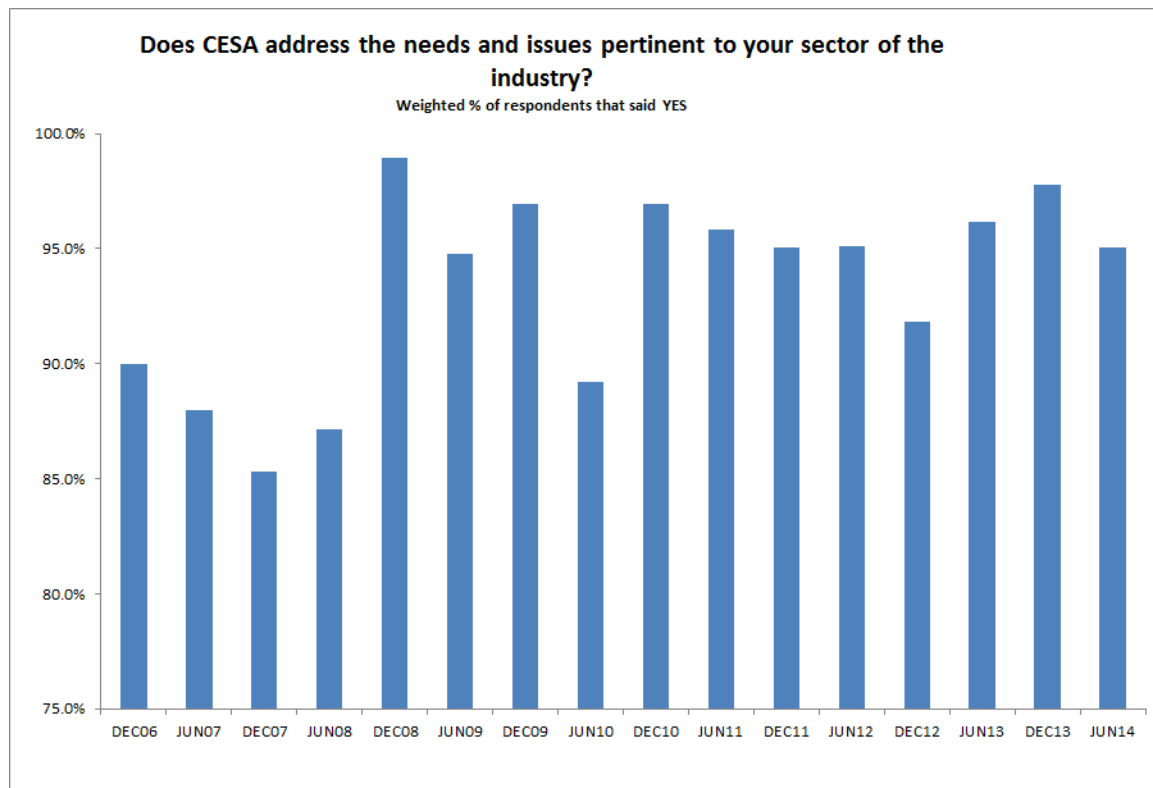


Figure 2

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%
June 2014	4.0%	65.1%	30.9%	0.0%

The nett satisfaction rate moderated to 92,0 percent from 99,1 percent and 96 percent in the previous two surveys. The bulk of respondents reported a satisfactory level (65 percent), compared to 78 percent in the previous survey, while 31 percent rated levels as “Good”, compared to 20 percent in the previous survey.

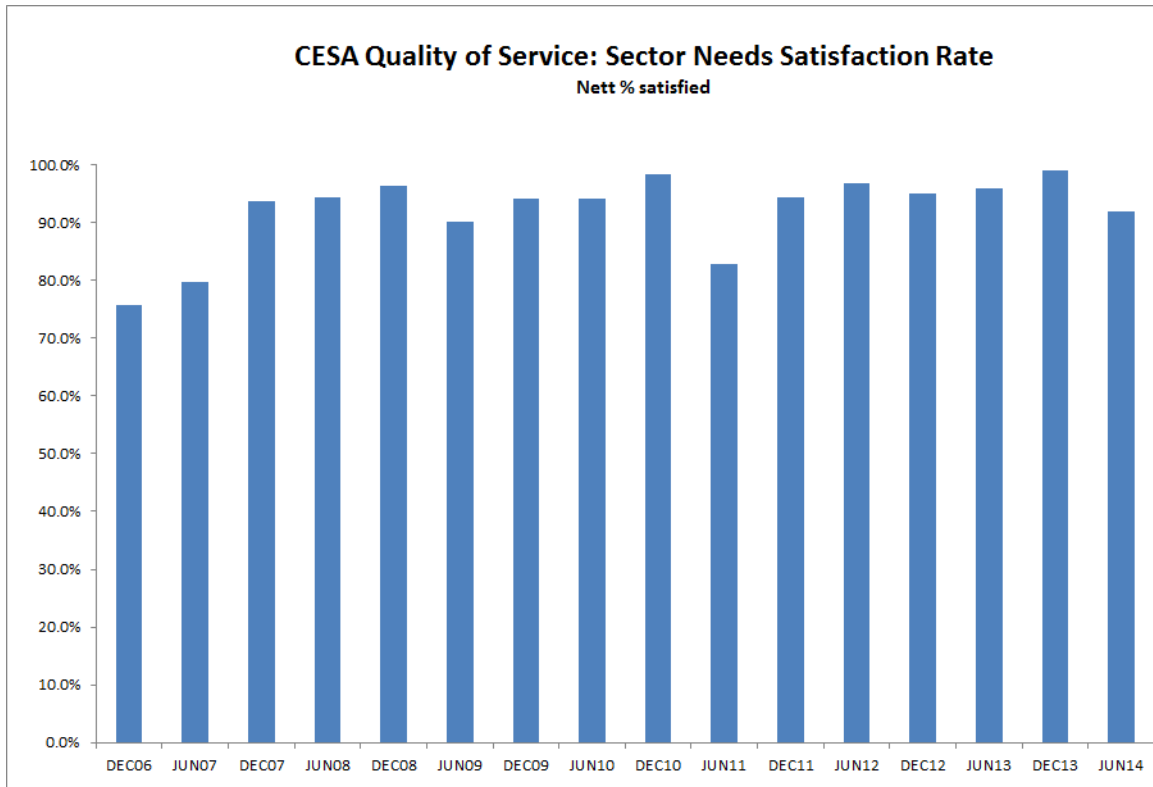


Figure 3

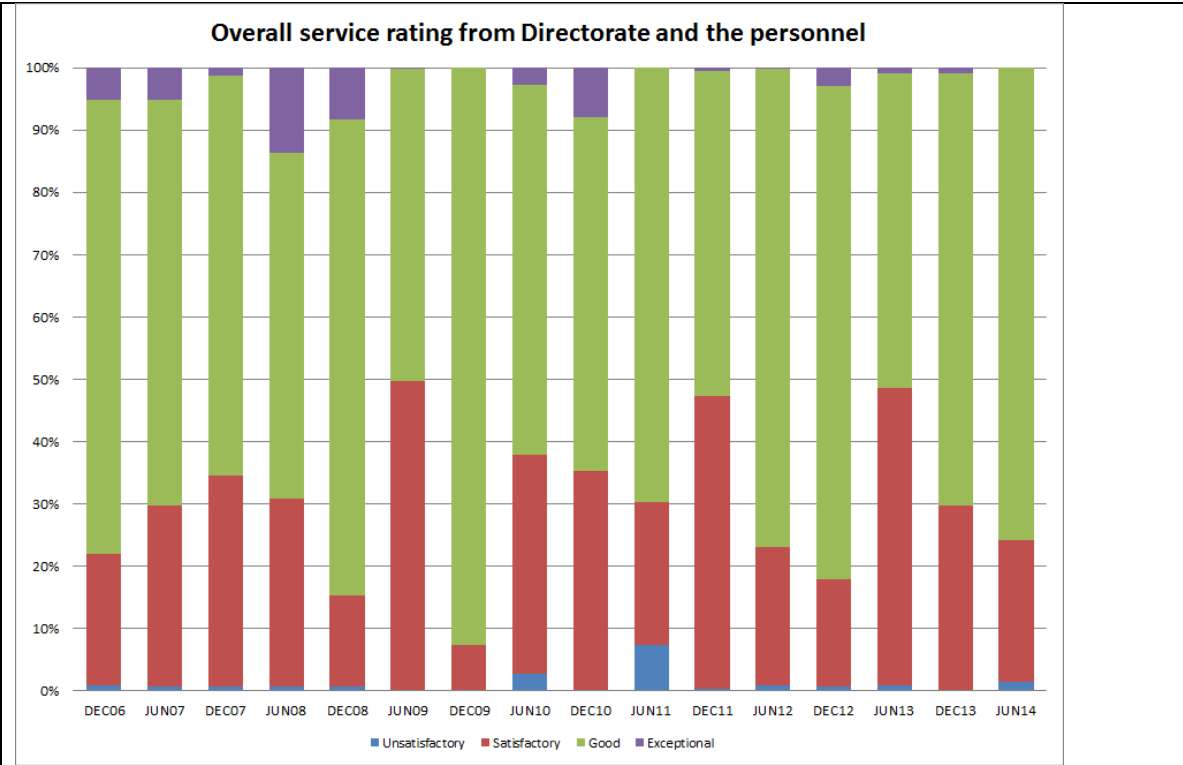


Figure 4

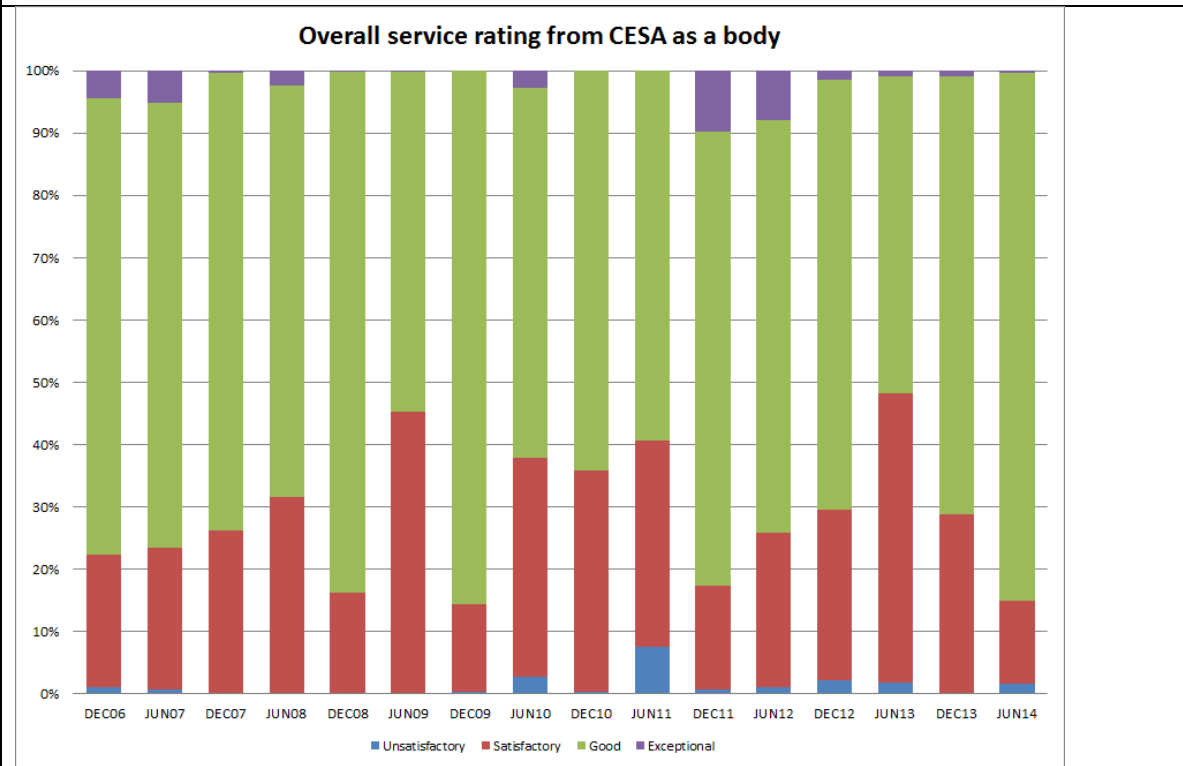


Figure 5

Benefits

Question F4

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

- Yes
- No

Majority of responding firms, 98,8 percent were aware of the benefits of being a CESA member, compared to 99,2 percent in the previous survey. The rate amongst medium size firms (employing between 20 and 100 people) was 97 percent, still better than June 2013 (81 percent), but lower than the 100 percent reported in the December 2013 survey. The rate amongst smaller firms improved slightly to 87 percent, from 83,3 percent in the previous survey.

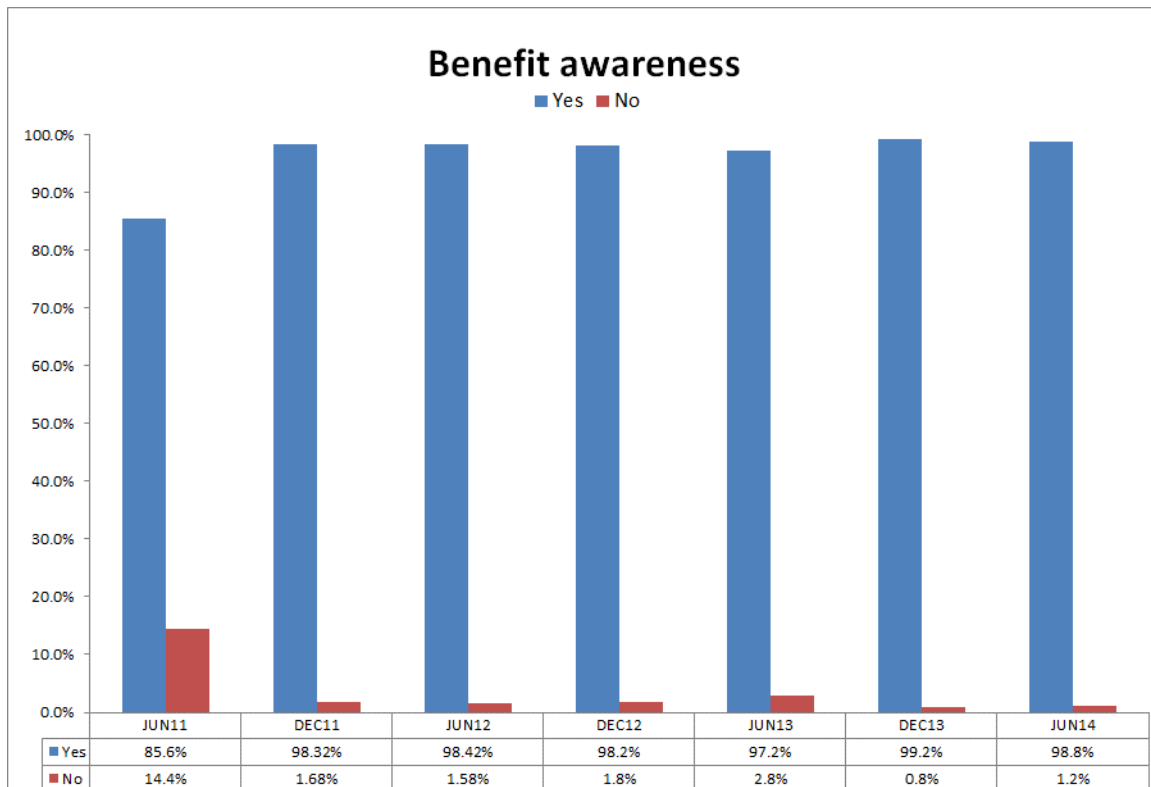


Figure 6

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

- Keep up the good work
- No further comments

Medium size : 20 – 100 people

- Fee scales released has caused confusion in the market and are out of step with practice in building industry
- No responses to emails, feedback slow.
- More involvement at branch level
- 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.
- CESA should use the directorate or external service providers to carry out research that would be beneficial to the sector in planning strategies for growth.
- We need an organisation with teeth that can fight for its members and create unity amongst its members especially with regard to the tendering issue.

Small size: < 20 people

- Spread out the courses to the Eastern Cape.
- If the majority of CESA members are SME , then the secretarial should have a programme to address their needs. This survey should be in electronic form to avoid using paper
- Protect us from the fraud & corruption. Ensure only registered companies are appointed. Too many companies not having the relevant qualification/experience damage the profession. Their work quality is pathetic and services can therefore not be properly....*comment received as incomplete via on-line service*

Response rate by firm size

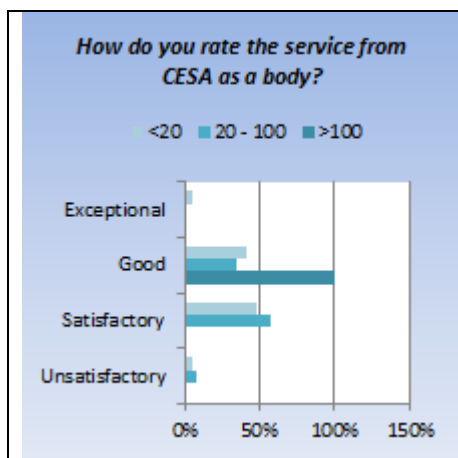


Figure 7

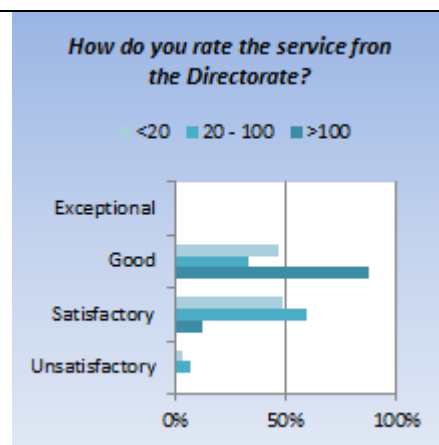


Figure 8

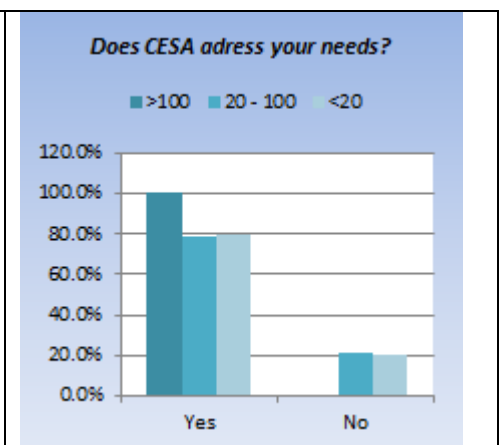


Figure 9

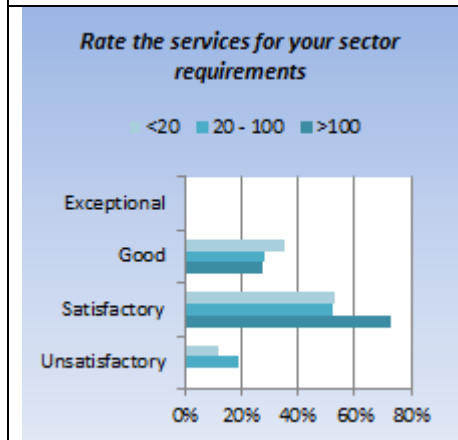


Figure 10

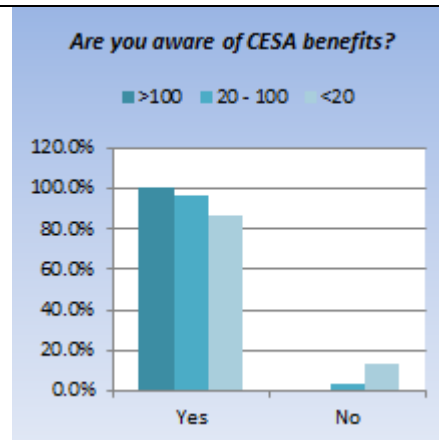


Figure 11

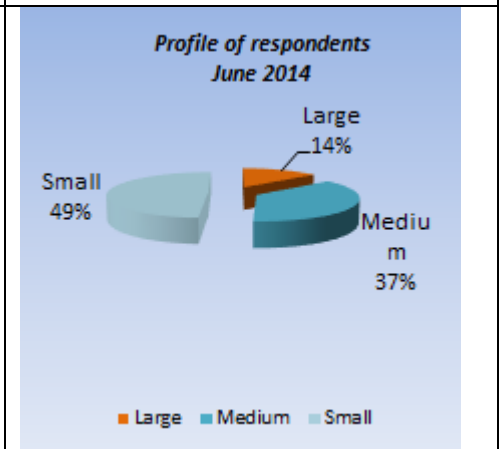


Figure 12

Conclusion

Medium to smaller firms played a bigger role in this survey, compared to previous survey, contributing to 86 percent of the responses.

Although there was a slight moderation in the nett satisfaction rate of services provided by both CESA in general and the directorate, there was an increase in those that reported better than satisfactory services, but this was offset by a small increase in those that are unsatisfied with the service provided. There was also a small downward adjustment in the how participating firms perceive the association to be addressing pertinent issues in the industry, but is still high at 95 percent satisfaction, while an increasing number of firms were more than satisfied with how these issues are being addressed. There was also an increase in the percentage of firms that felt issues were not satisfactorily dealt with, but fortunately these represented only 4 percent. The highest level of dissatisfaction continues to emanate from medium and smaller firms.

While the issue of tendering remains a pressing one, there is a growing need for the association to create a more united platform in the industry, where associations can work together and collectively deal with issues that affect the construction industry as a whole. Furthermore it is important that CESA continues to fight against fraud and corruption as this is seen as an important member benefit, although members would probably like to see a more decisive stance taken, including dealing with unscrupulous non-CESA members.