

INDUSTRY INSIGHT CC

Construction Business Intelligence

Consulting Engineers South Africa (CESA)

Quality Survey: June 2013

QUALITY OF SERVICE SURVEY: JUNE 2013

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
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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 8834 employees over the 6 months between January - June 2013. Majority of the firms employ less than 20 people (43 percent), followed by 41 percent employing between 10 and 20 and 14,9 percent employing 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	% of total number of firms in June 2013 sample
>100	28.3%	15.4%	20.0%	19.7%	14.9%
Between 20 and 100	39.1%	35.2%	29.5%	36.8%	41.8%
Less than 20	32.6%	49.5%	50.5%	43.4%	43.3%
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
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%

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 percent positive nett response rate from firms satisfied with general and directorate services, compared with a slightly lower rate of 96,3 percent with regards to CESA as a body. Overall the ratings improved since the June 2011 survey, but was slightly lower compared to the December 2012 survey.

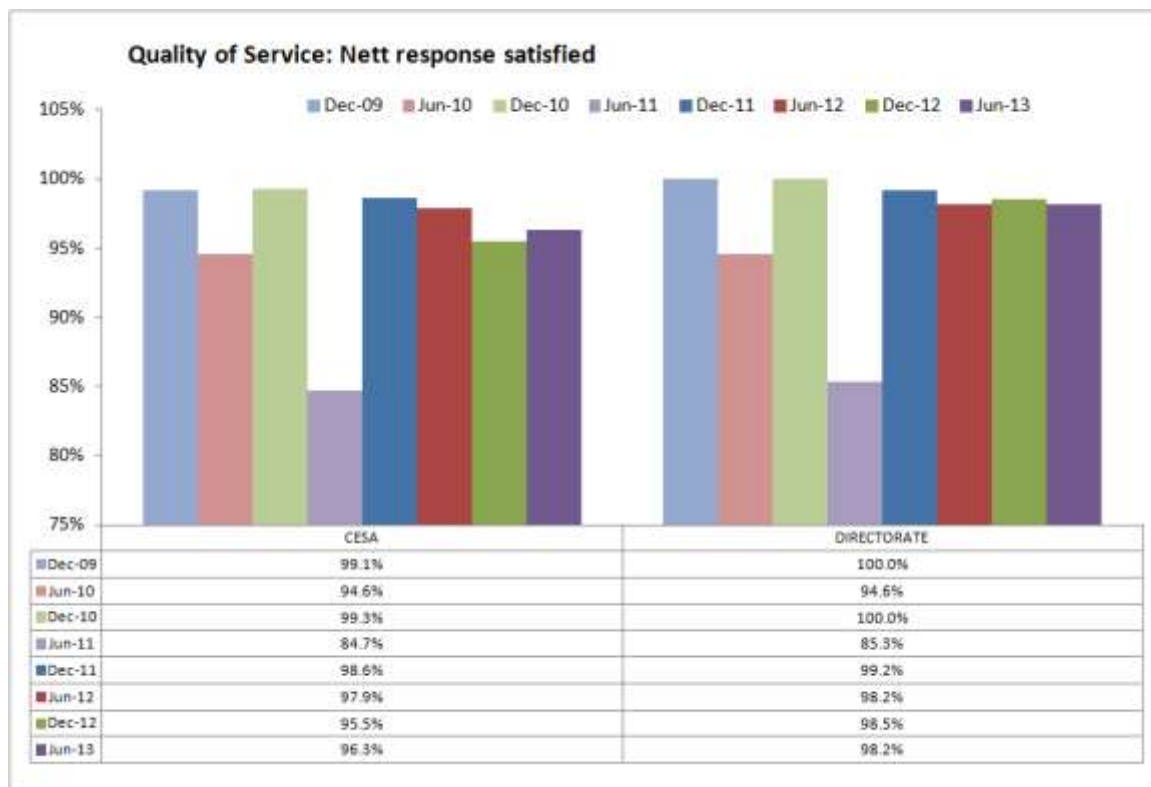


Figure 1: Nett response rate CESA and Directorate services

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	Jun-13
Weighted	85.3%	87.1%	98.9%	94.8%	96.9%	89.2%	96.9%	95.9%	95.1%	95.1%	91.8%	96.2%

Members are more confident that CESA is addressing their industry needs, averaging 96,2 percent, compared to 91,8 percent in the December 2012 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.

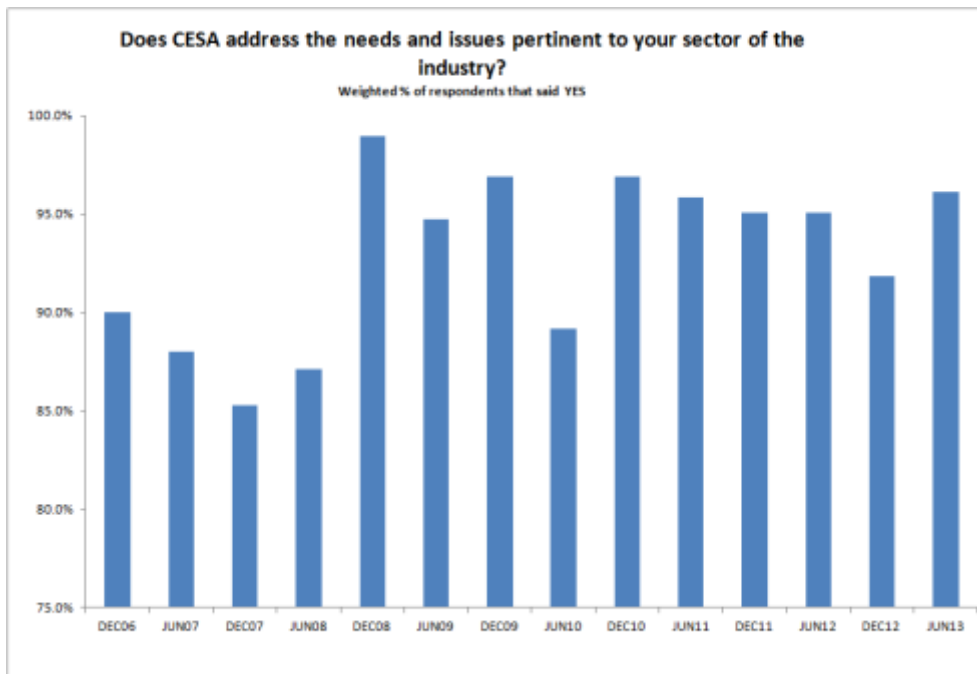


Figure 2

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%

The nett satisfaction rate improved to 96 percent as at June 2013 from 95 percent in the previous survey. A higher percentage of firms however reported services as being merely “satisfactory” (from 26,7 percent to 88 percent) as opposed to “good” , which dropped from 70,5 percent in the previous survey to just 9,3 percent in the June 2013 survey.

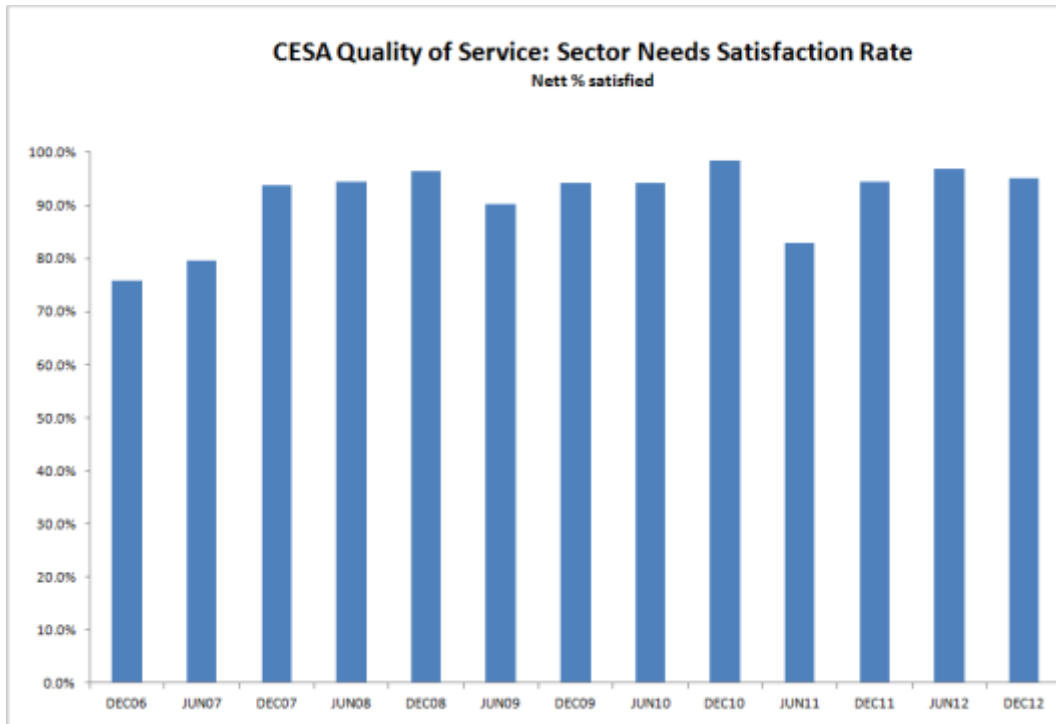


Figure 3

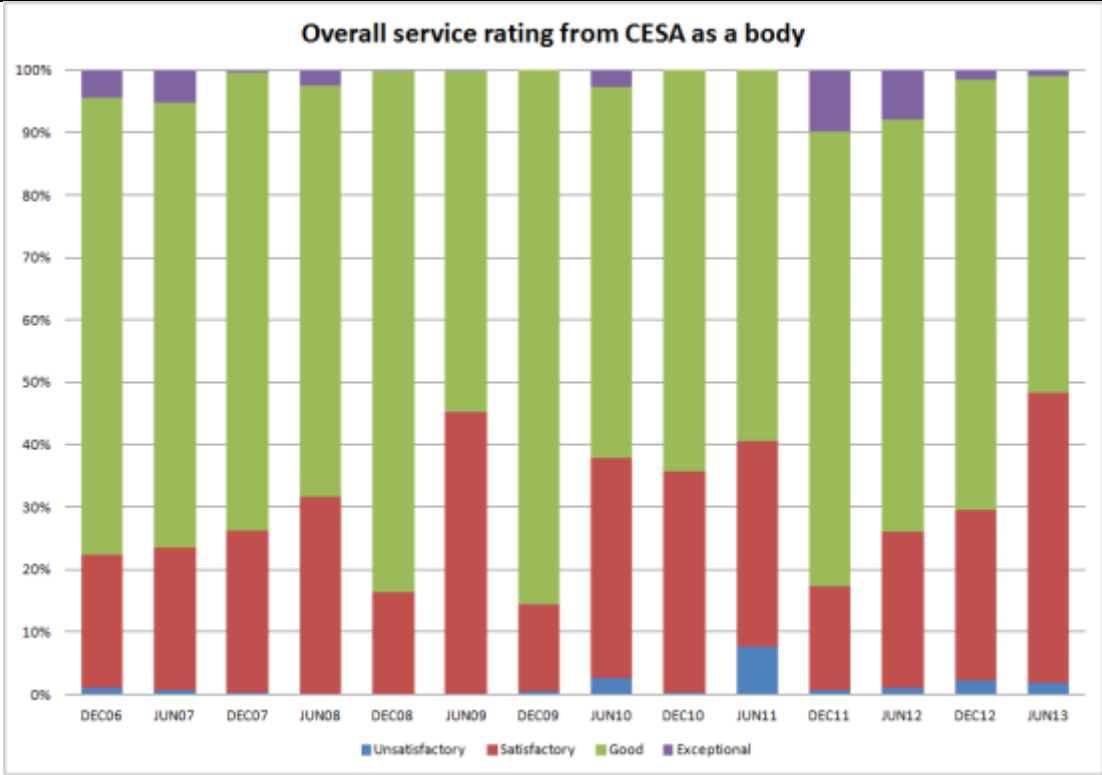


Figure 4

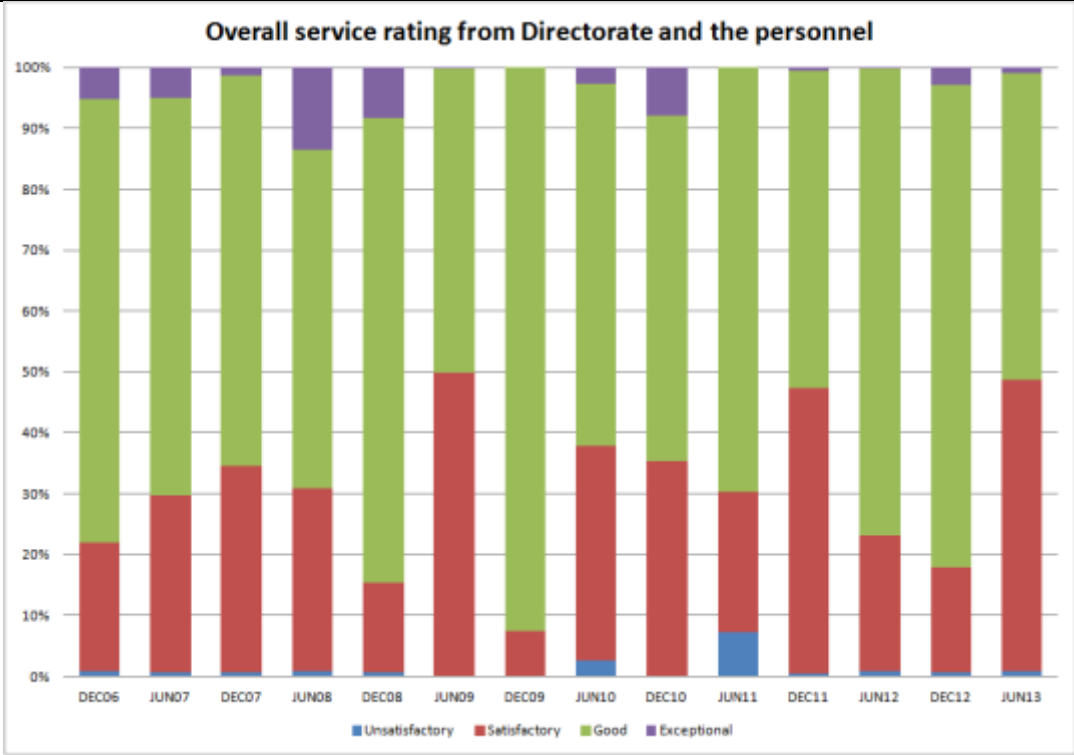


Figure 5

Benefits

Question F4

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

- Yes
- No

Majority of responding firms, 97 percent were aware of the benefits of being a CESA member, although this rate has dropped from 98,2 percent in the December 2012 survey. The rate amongst medium size firms (employing between 20 and 100 people) was the lowest (81 percent), compared to 95,7 percent for smaller firms).

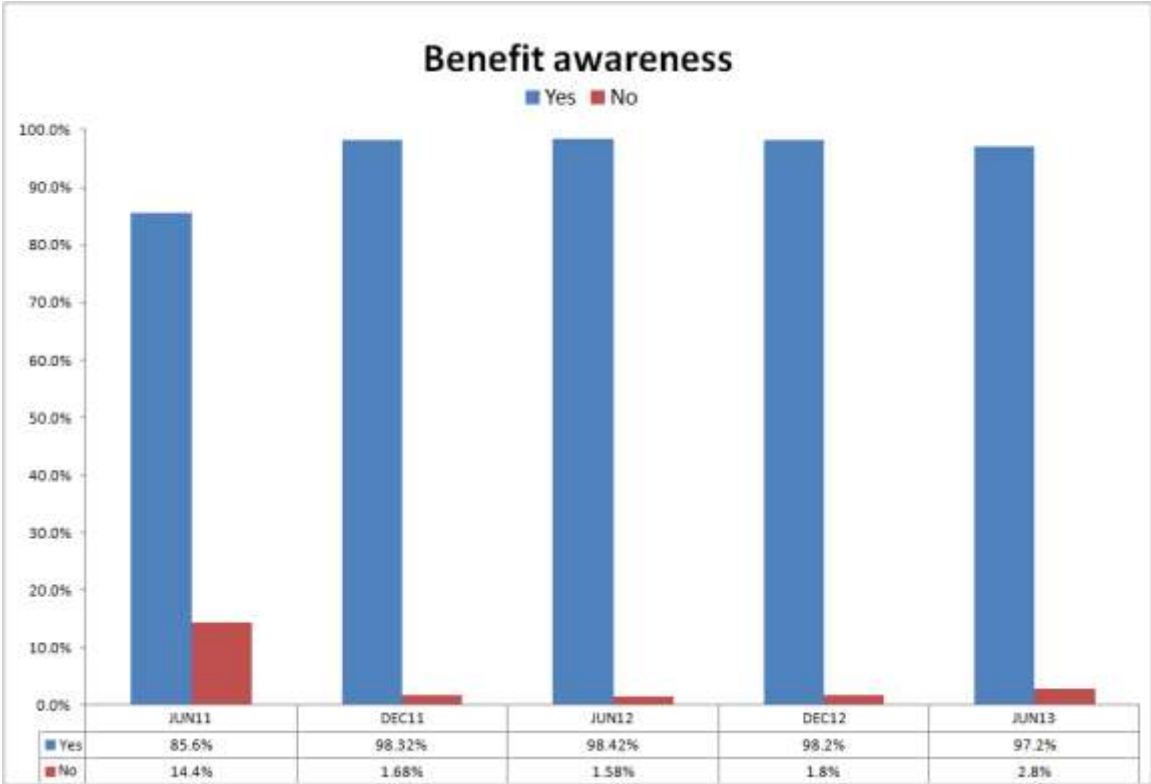


Figure 6

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

- We are concerned that conclusion on discussed Pricing Proposals is taking too long and the resultant dysfunctional pricing is retarding profitability and killing companies
- CESA to support adjudication of professional services.

Small size: < 20 people

- Small companies benefit very little from CESA membership. BEE is a serious problem for us as we fall under the construction industry which is totally unfair. What does CESA do in this regard?
- Recognition of project management as stand alone discipline
- Better fee structure and less discount
- A more aggressive stance against fee discounting.
- A more aggressive stance against unfair public procurement policies such as cpg targets.

Response rate by firm size

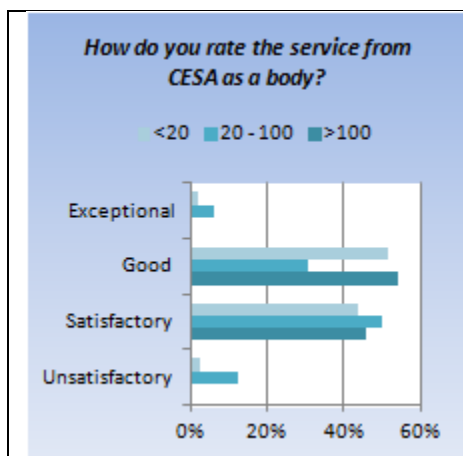


Figure 7

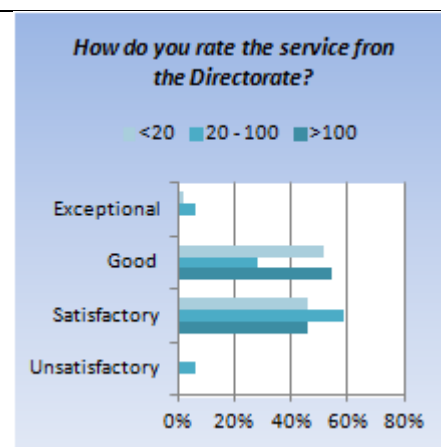


Figure 8

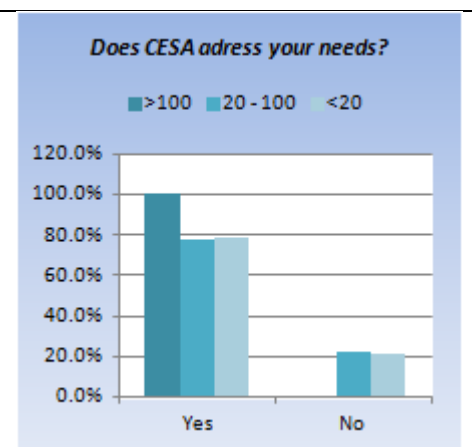


Figure 9

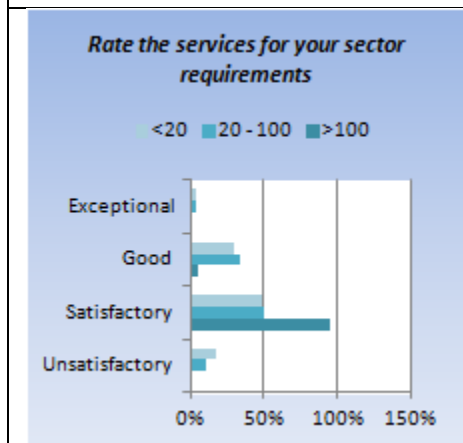


Figure 10

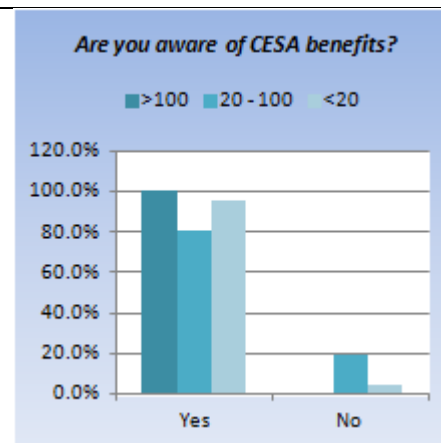


Figure 11

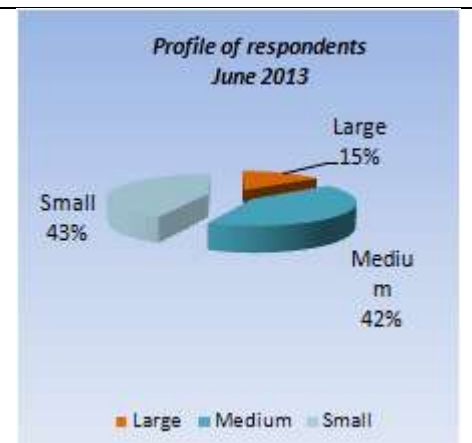


Figure 12

Conclusion

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

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 remains above 80 percent. The benefits are more obvious to larger firms.