

The 2023 LA Barometer: Industry, People, Environment

IFLA-APR surveyed 100+ CEO's of landscape architect firms in the Asia Pacific and asked them about the current challenges. The result concludes clearly certain findings on the industry challenges in terms of opportunity, people and environment. Most of the respondents have 10 or more years in the industry. The respondents were pretty balanced across the region that IFLA-APR serves. We thank and recognize those who took their time to participate and hope that the results will be helpful to benchmark against the industry.

THE COVID-19 impact in APAC

It appears that 65% of the industry surveyed has an extensive to severe impact on business during the years 2020 and 2021. 40% of them indicated that they are still in the recovery stage of the pandemic. The expectation is that the impact will last at least 3 more years.

Business is growing in APAC

35% of the industry foresees good growth in the coming 3 years, despite the pandemic and economic challenges. It is difficult to derive if this is benchmarked against 2020 and 2021 business, but the outlook appears positive. Not to mention that another 20% considers the 3-year outlook as neutral, allowing us to conclude that growth is expected to continue over the coming years. What drives this view appears to be “demand”, as well as “government spending” with “climate change” as a strong 3rd. Clearly we can do more in-depth surveying on the drivers in the future.

What worries the average CEO?

However, the industry certainly has its concern. Aside from the economic uncertainties and the rise of interest rates, there are concerns about “Government Spending” that might drive down demand in the immediate future. This can be fueled by the cost of the Pandemic to governments globally.

Interesting, “people” was highlighted as a threat due to the changing labor markets post covid. Also “Climate change” was seen as something that can negatively impact the business outlook.

Employment in the industry

Half of the industry is concerned about talent supply whilst the other half seem to be comfortable with their team needs. The industry is overall positive with the upcoming talent pool of new graduates, which recognizes the expansion of schools across the region and the increased interest in the profession. As a sub-note we have to mention that the term “undervalued” was repeated regularly which confirms that the industry as a whole should continue to strengthen its recognition and value in the design and urban planning sectors.

The industry is mostly back to the office in 2023, or works in a hybrid fashion, with just over 10% still working remotely.

The SUSTAINABILITY inequality

Even though the majority of LA's consider that Sustainability and Climate Change is on top of their agenda, it appears not to carry that same weight with our clients. Only around 30% of the clients appear to consider Climate Change as part of the project mandate. It again re-affirms that we need to continue to echo our positive impact in project planning and execution on more than just communities.

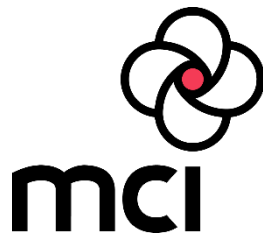
The next game changer for Landscape Architects

The industry clearly sees that computing power and new technologies will bring impactful changes in the near future. This is seen through the development of AI and 3d modelling tools and resources to index plants and characteristics. In short, there is enough here to hold a few conferences of idea sharing and want lists.

IFLA Report 2023

Market Analysis

January 10th 2023



IFLA ASIA-PACIFIC
INTERNATIONAL FEDERATION
OF LANDSCAPE ARCHITECTS

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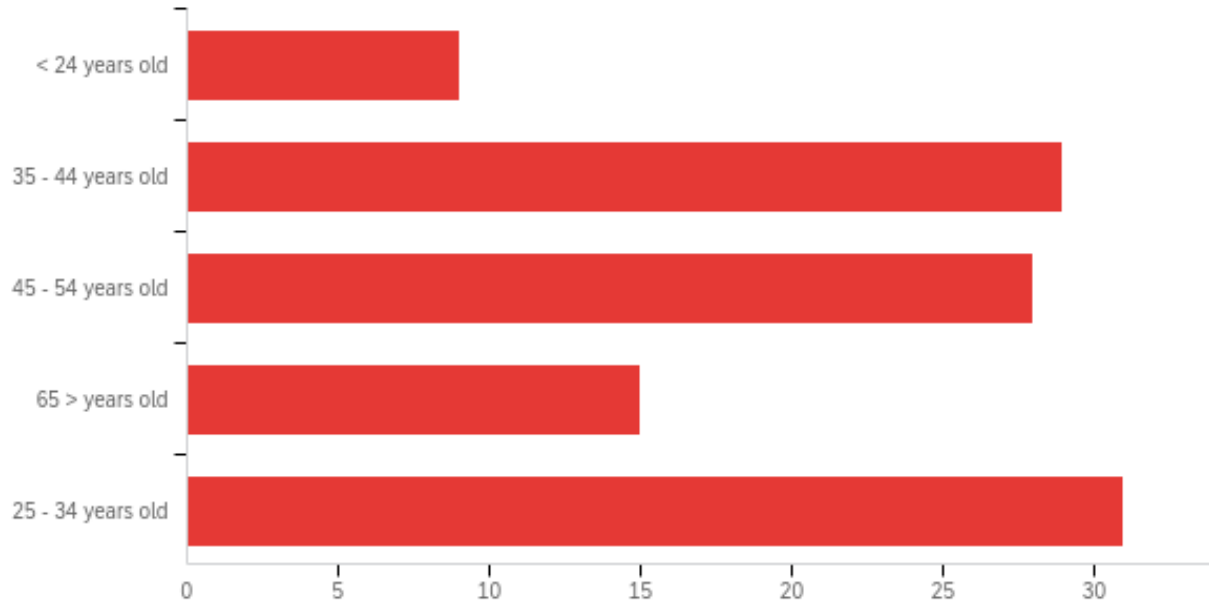
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Architects 2022

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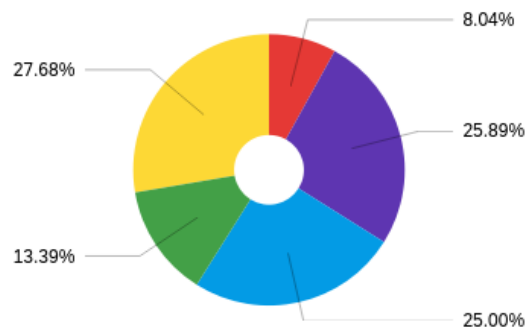
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1. PROFILING QUESTIONS

1.1 AGE – WHAT IS YOUR AGE?

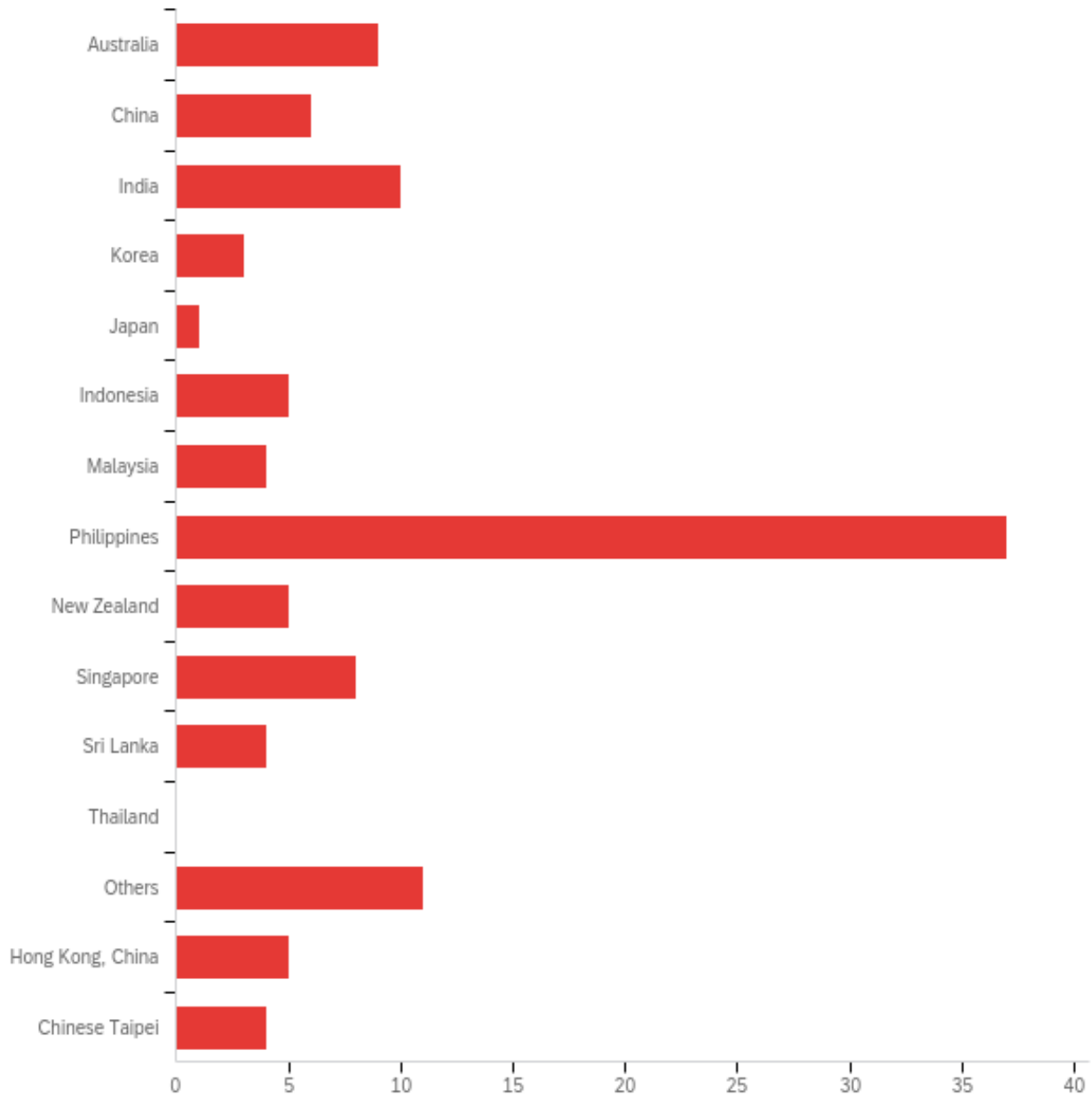


#	Answer	%	Count
1	< 24 years old	8.04%	9
2	35 - 44 years old	25.89%	29
3	45 - 54 years old	25.00%	28
6	65 > years old	13.39%	15
8	25 - 34 years old	27.68%	31
	Total	100%	112



■ < 24 years old
 ■ 35 - 44 years old
 ■ 45 - 54 years old
 ■ 65 > years old
 ■ 25 - 34 years old

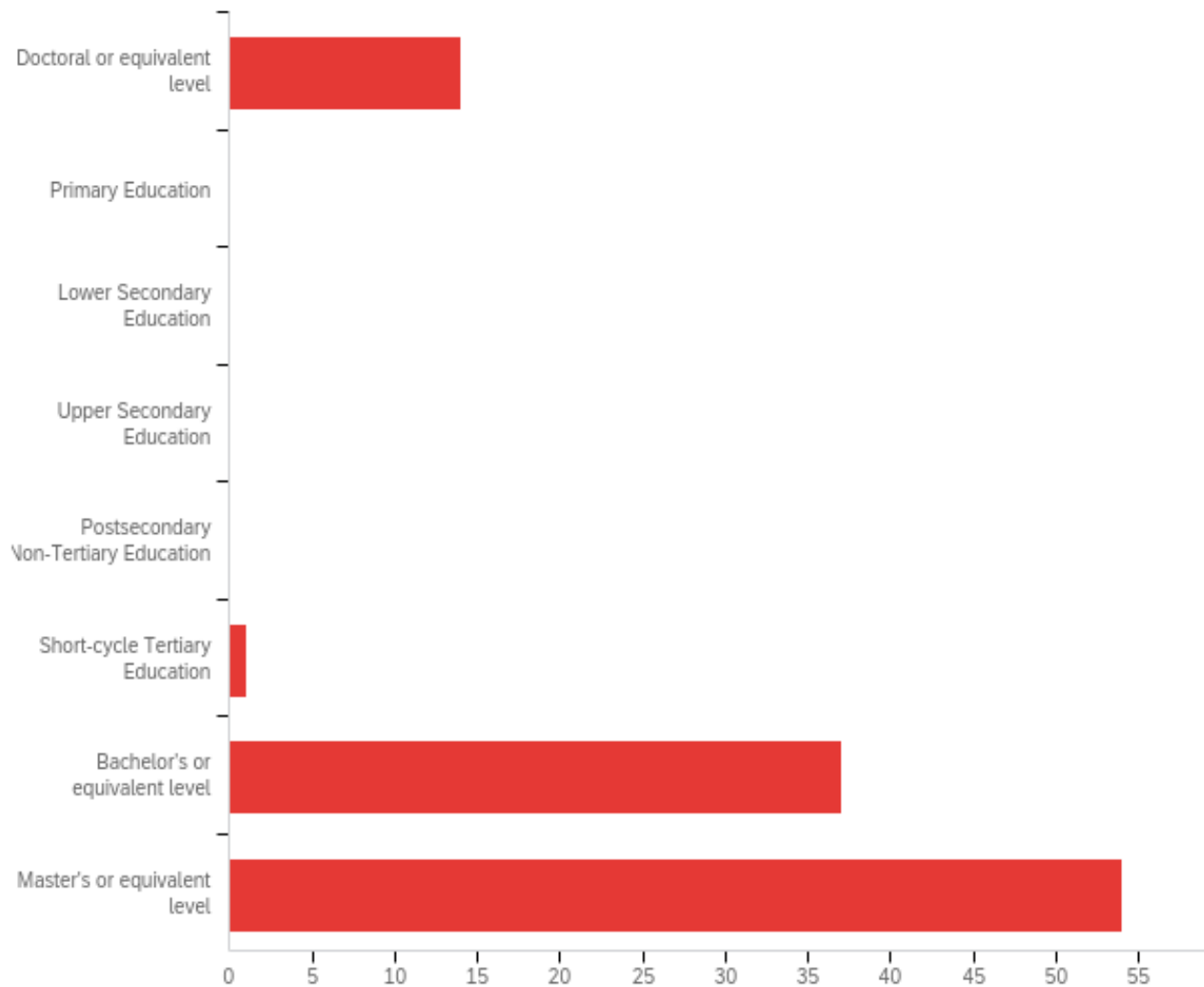
1.2 COUNTRY - IN WHICH TERRITORY ARE YOU LOCATED?



Internal use

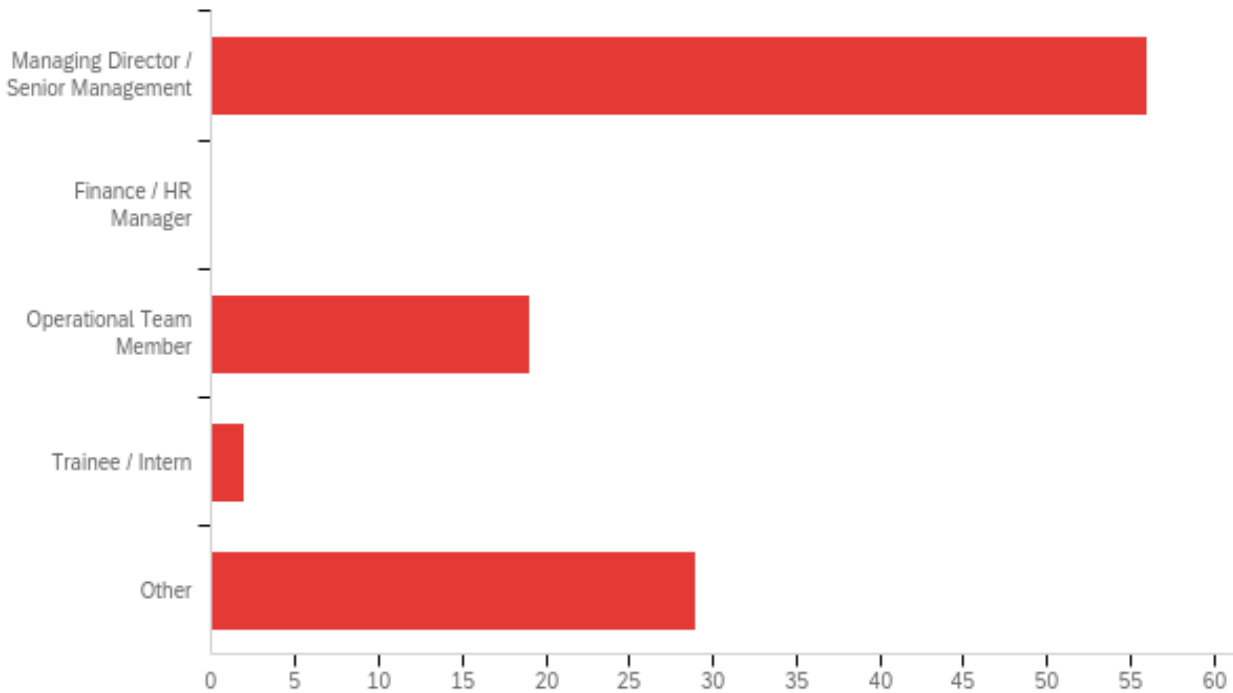
#	Answer	%	Count
1	Australia	8.04%	9
2	China	5.36%	6
3	India	8.93%	10
4	Korea	2.68%	3
5	Japan	0.89%	1
6	Indonesia	4.46%	5
7	Malaysia	3.57%	4
8	Philippines	33.04%	37
9	New Zealand	4.46%	5
10	Singapore	7.14%	8
11	Sri Lanka	3.57%	4
12	Thailand	0.00%	0
13	Others	9.82%	11
14	Hong Kong, China	4.46%	5
15	Chinese Taipei	3.57%	4
	Total	100%	112

1.3 EDUCATION - WHAT IS YOUR HIGHEST EDUCATIONAL LEVEL?



#	Answer	%	Count
13	Doctoral or equivalent level	13.21%	14
19	Primary Education	0.00%	0
20	Lower Secondary Education	0.00%	0
21	Upper Secondary Education	0.00%	0
22	Postsecondary Non-Tertiary Education	0.00%	0
23	Short-cycle Tertiary Education	0.94%	1
24	Bachelor's or equivalent level	34.91%	37
25	Master's or equivalent level	50.94%	54
	Total	100%	106

1.4 POSITION - WHAT POSITION ARE YOU CURRENTLY FULFILLING?



#	Answer	%	Count
4	Managing Director / Senior Management	52.83%	56
5	Finance / HR Manager	0.00%	0
6	Operational Team Member	17.92%	19
7	Trainee / Intern	1.89%	2
8	Other	27.36%	29
	Total	100%	106

Q4 Position_Other

Other - Text

Project assistant

Consultant

student

Consultant

design firm

Freelance Landscape Architect

Director of Administrative Office

research assistant

LECTURER

Mid management

Manager/Owner

Freelancer

Project Team

retired

Freelancer

Self employed firm

Assistant Professor

Faculty Member

Owner

Freelance

Currently unemployed

Design Specialist

Supervisor level

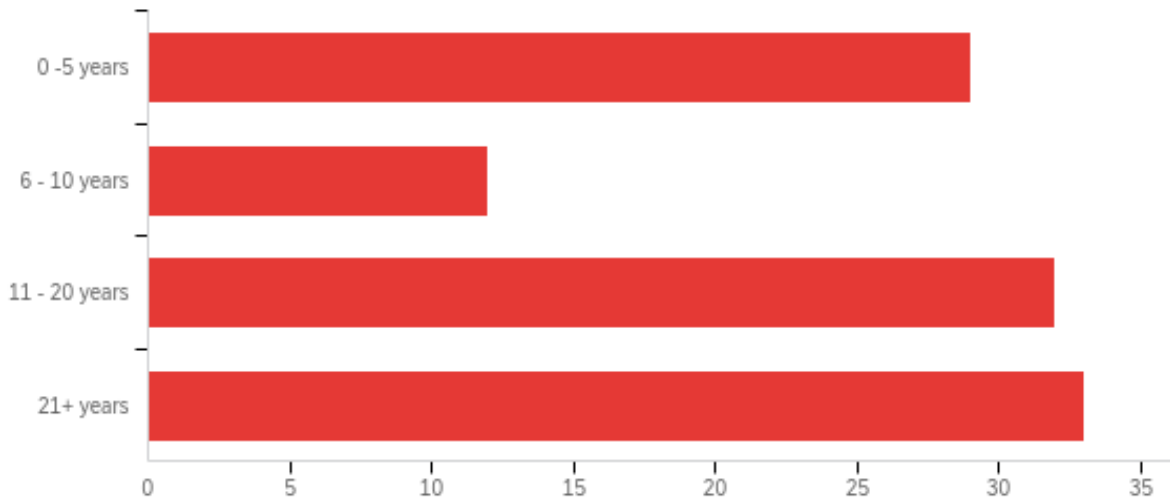
Partner

Landscape architect

Officer

Freelance

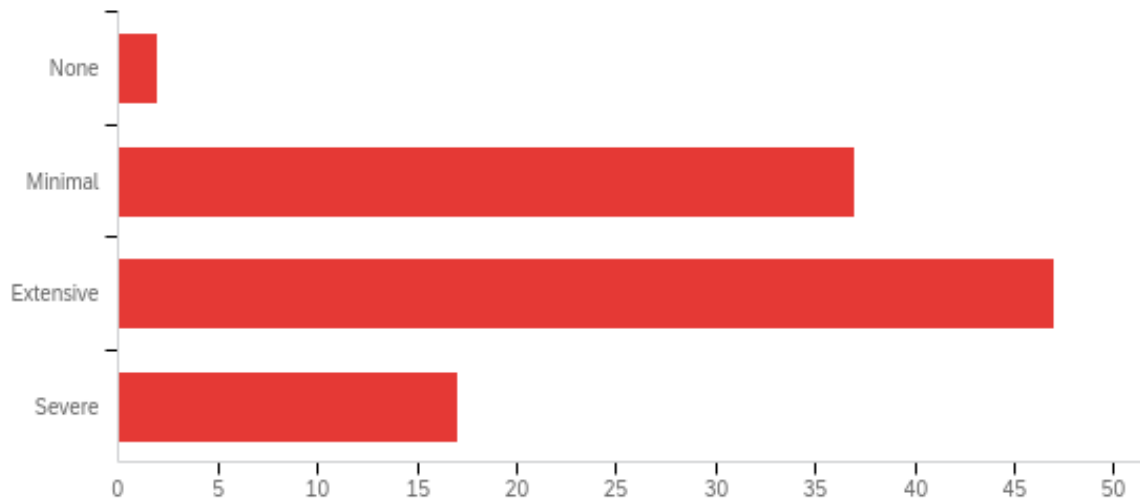
1.5 YEARS LA - HOW LONG HAS YOUR COMPANY BEEN PART OF THE LANDSCAPE ARCHITECTURE INDUSTRY?



#	Answer	%	Count
1	0 - 5 years	27.36%	29
2	6 - 10 years	11.32%	12
3	11 - 20 years	30.19%	32
4	21+ years	31.13%	33
	Total	100%	106

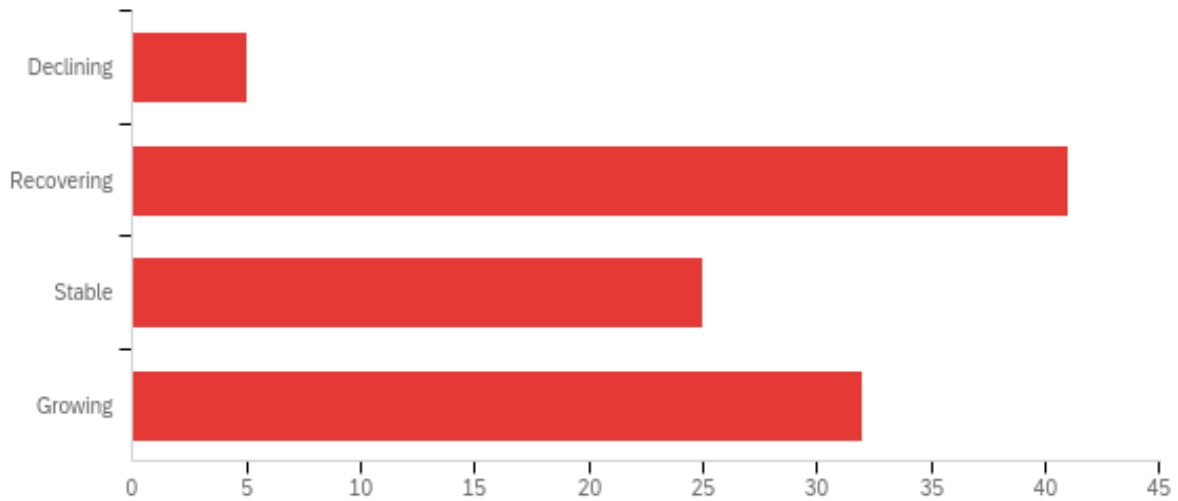
2 MARKET QUESTIONS

2.1 COVID-19 - HOW DO YOU RATE THE IMPACT OF COVID-19 ON YOUR BUSINESS OVER THE PAST TWO YEARS?



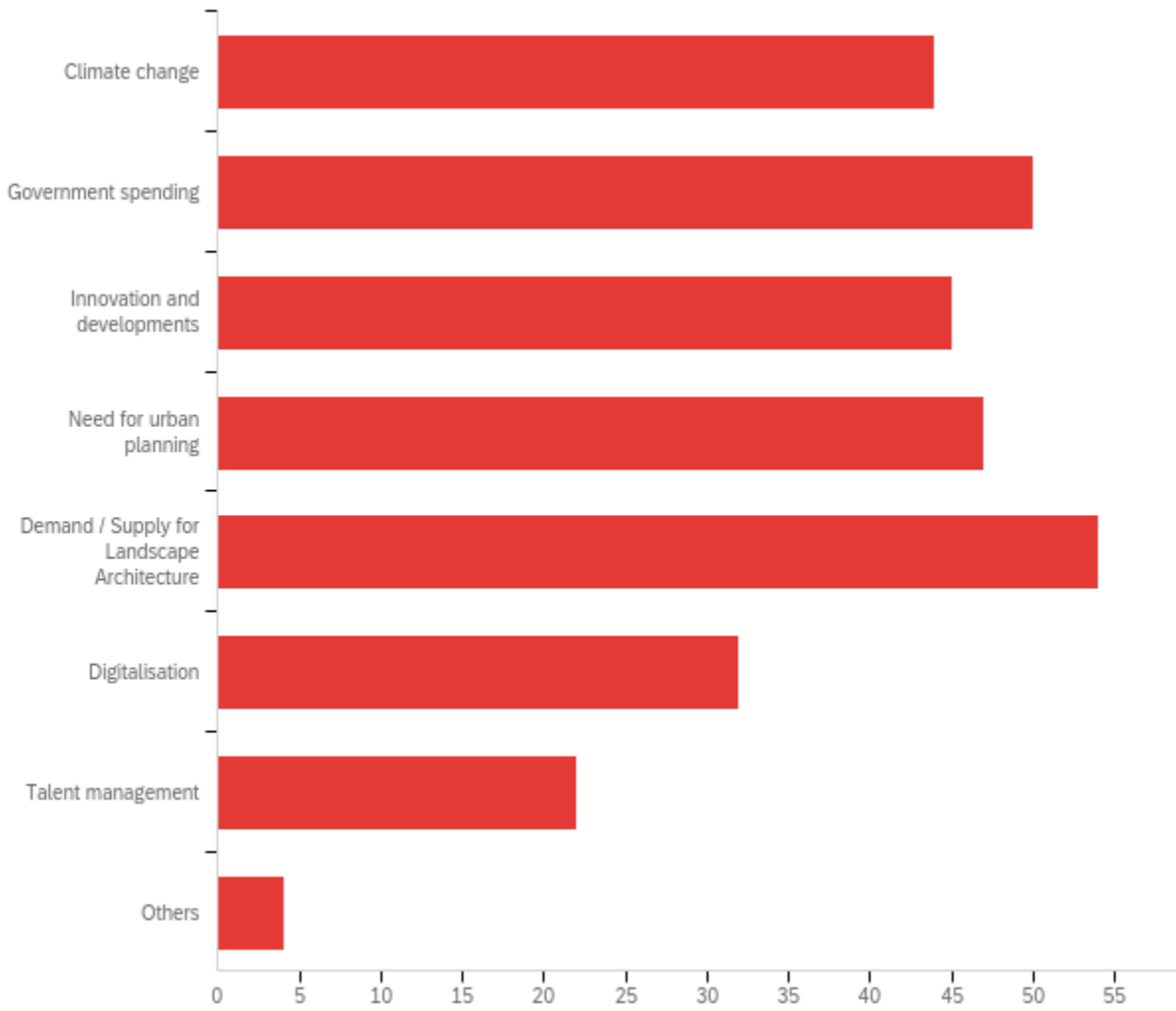
#	Answer	%	Count
1	None	1.94%	2
2	Minimal	35.92%	37
3	Extensive	45.63%	47
4	Severe	16.50%	17
	Total	100%	103

2.2 GROWTH - HOW DO YOU FORESEE YOUR BUSINESS GROWTH OVER THE UPCOMING 3 YEARS?



#	Answer	%	Count
1	Declining	4.85%	5
2	Recovering	39.81%	41
3	Stable	24.27%	25
4	Growing	31.07%	32
	Total	100%	103

2.3 POSITIVE AFFECT - WHAT DO YOU RATE AS THE BIGGEST INFLUENCE THAT CAN AFFECT YOUR FUTURE OUTLOOK?



#	Answer	%	Count
8	Climate change	14.77%	44
9	Government spending	16.78%	50
10	Innovation and developments	15.10%	45
11	Need for urban planning	15.77%	47
12	Demand / Supply for Landscape Architecture	18.12%	54
13	Digitalisation	10.74%	32
14	Talent management	7.38%	22
15	Others	1.34%	4
	Total	100%	298

Q8 Positive Affect_Others

Others - Text

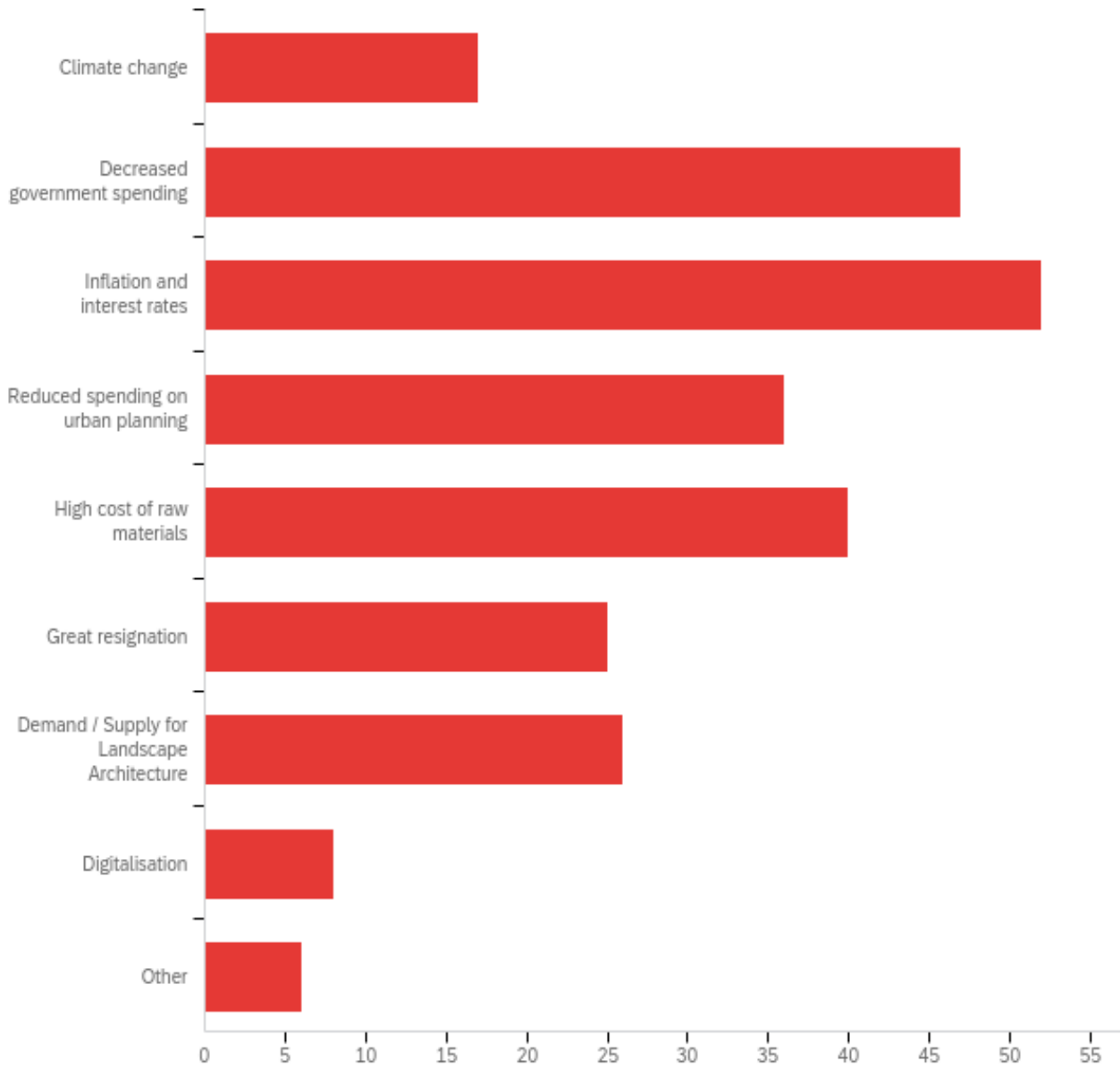
rural planning and design

more schools for LA program

Proactive advocacy by LA's and runs on the board

Biodiversity protection

2.4 NEGATIVE EFFECT - WHAT DO YOU RATE AS THE BIGGEST INFLUENCE THAT CAN AFFECT YOUR OUTLOOK?



#	Answer	%	Count
4	Climate change	6.61%	17
5	Decreased government spending	18.29%	47
6	Inflation and interest rates	20.23%	52
7	Reduced spending on urban planning	14.01%	36
8	High cost of raw materials	15.56%	40
9	Great resignation	9.73%	25
10	Demand / Supply for Landscape Architecture	10.12%	26
11	Digitalisation	3.11%	8
12	Other	2.33%	6
	Total	100%	257

Q9 Negative Effect_12_TEXT - Other

Other - Text

SUPER LOW SALARY

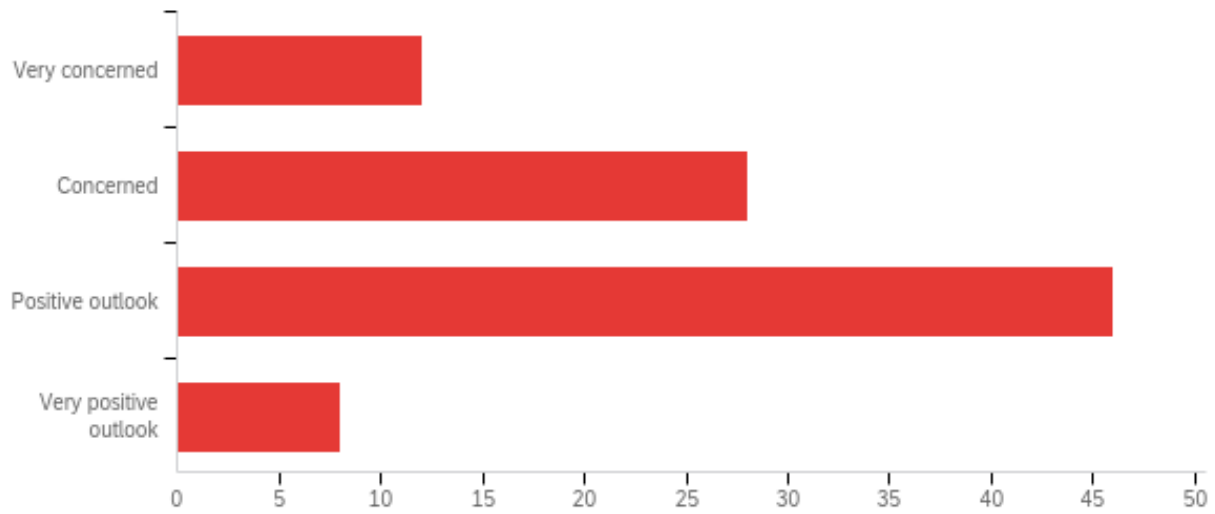
spread of virus

lack of adequate LA expertise

Inability of LA's to be proactive and innovative

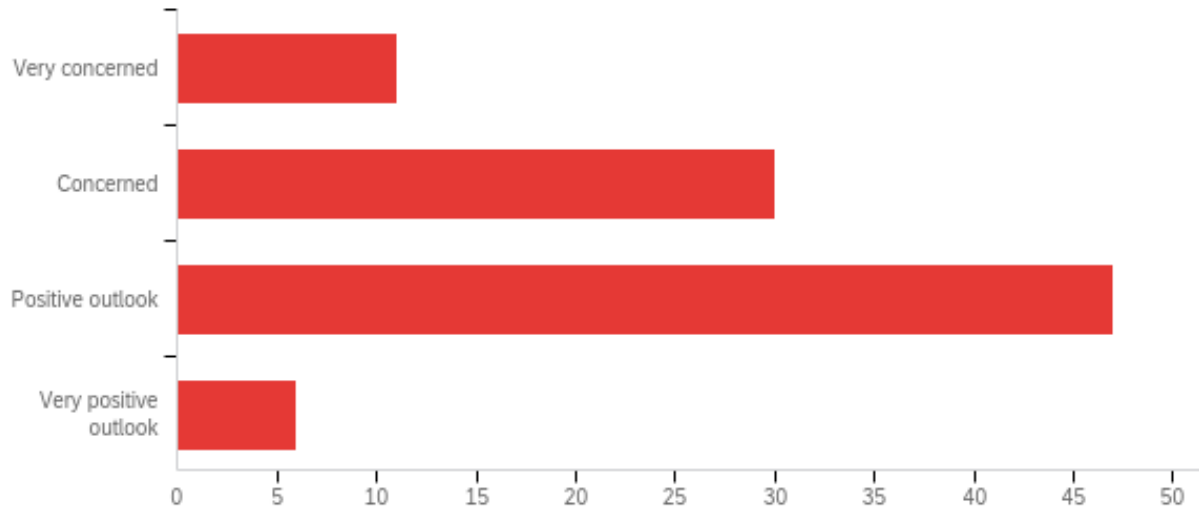
Landscape architecture and what it costs is highly undervalued. Non landscape architects plant gardens but do not innovate nor respond to climate change. But they cost much less!

2.5 TALENTS - TO WHAT EXTENT ARE YOU CONCERNED ABOUT THE ABILITY TO ATTRACT TALENTS TO YOUR COMPANY?

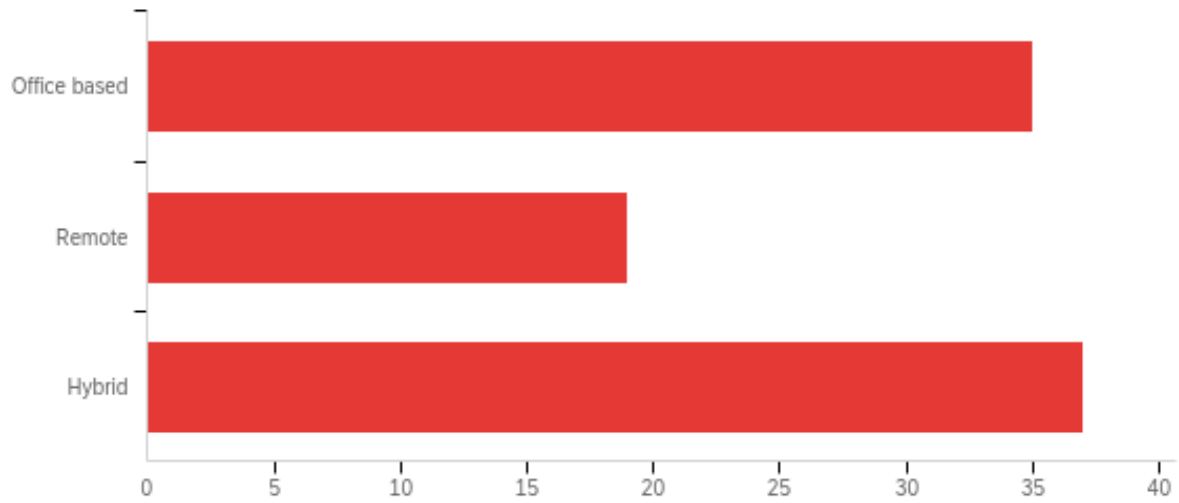


#	Answer	%	Count
1	Very concerned	12.77%	12
2	Concerned	29.79%	28
3	Positive outlook	48.94%	46
4	Very positive outlook	8.51%	8
	Total	100%	94

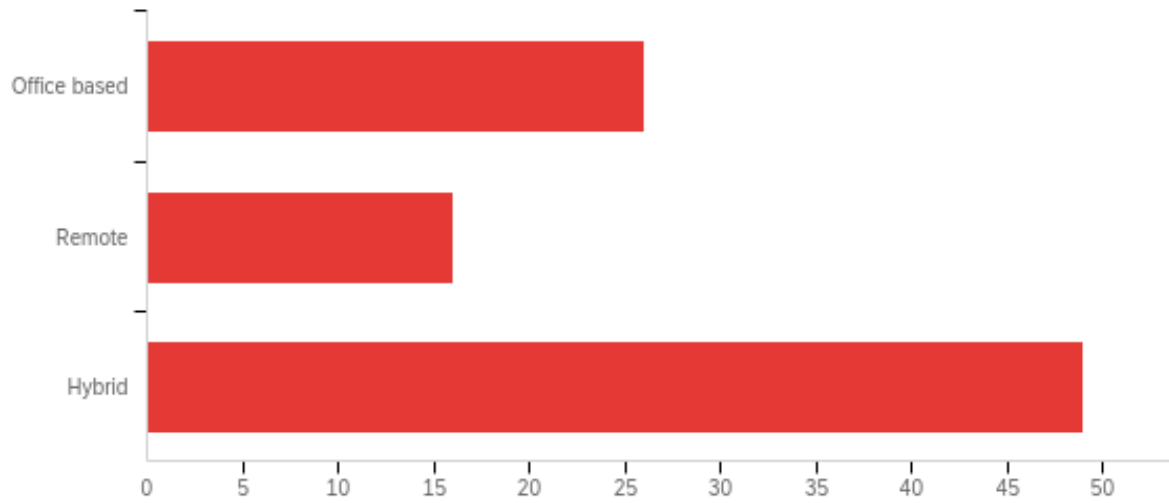
2.6 TALENTS - TO WHAT EXTENT ARE YOU CONCERNED ABOUT ATTRACTING ENOUGH NEW TALENT TO STARTING POSITIONS?



#	Answer	%	Count
1	Very concerned	11.70%	11
2	Concerned	31.91%	30
3	Positive outlook	50.00%	47
4	Very positive outlook	6.38%	6
	Total	100%	94

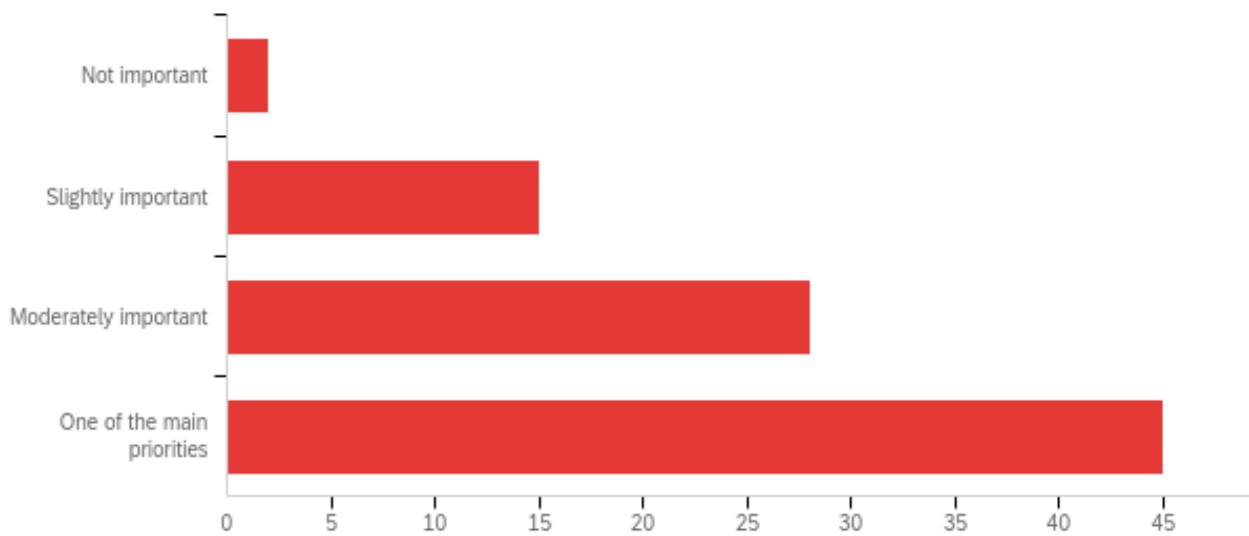
2.7 LOCATION - WHAT IS YOUR CURRENT WORKING LOCATION WITHIN YOUR ORGANISATION?

#	Answer	%	Count
1	Office based	38.46%	35
2	Remote	20.88%	19
3	Hybrid	40.66%	37
	Total	100%	91

2.8 LOCATION - WHERE ARE YOU EXPECTING YOUR WORKING LOCATION TO BE IN TWO YEARS?

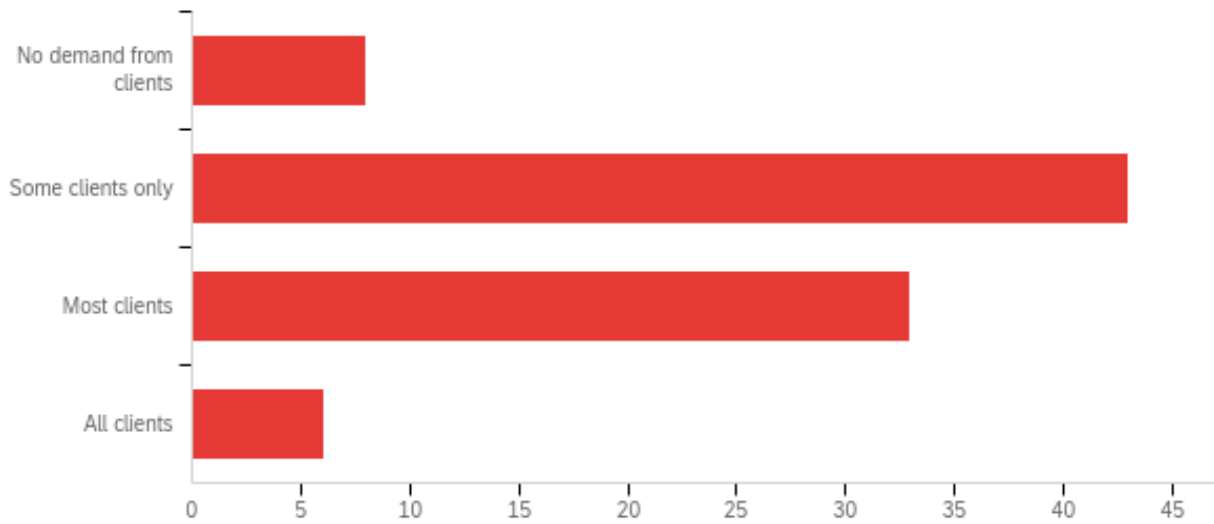
#	Answer	%	Count
1	Office based	28.57%	26
2	Remote	17.58%	16
3	Hybrid	53.85%	49
	Total	100%	91

2.9 SUSTAINABILITY - HOW HIGH IS SUSTAINABILITY AND CLIMATE CHANGE MANAGEMENT A KEY DRIVER WITHIN YOUR ORGANIZATION?



#	Answer	%	Count
1	Not important	2.22%	2
2	Slightly important	16.67%	15
3	Moderately important	31.11%	28
4	One of the main priorities	50.00%	45
	Total	100%	90

2.10 SUSTAINABILITY - TO WHAT EXTENT DO YOUR CUSTOMERS DEMAND SUSTAINABILITY AND CLIMATE CHANGE MANAGEMENT IN THEIR PROJECT PLANNING?



#	Answer	%	Count
1	No demand from clients	8.89%	8
2	Some clients only	47.78%	43
3	Most clients	36.67%	33
4	All clients	6.67%	6
	Total	100%	90

2.11 TECHNOLOGY - WHAT KIND OF TECHNOLOGIES DO YOU THINK WILL BECOME A GAME-CHANGER FOR THE LA INDUSTRY?

What kind of technologies do you think will become a game-changer for the LA industry?

No idea

high-quality 3d rendering apps

3D modeling

sustainable building technologies

Resilient Technologies

Revit

enhancing of sustainable technologies when it comes to solar, wind, hydro electricity and renewable resources.

Digitalization of documents, Modern technologies integrated in the design and collaboration of LA with other professionals (as other professionals were being aware of the role of LA's in the sustainability of projects).

AI

Finding climate friendly and sustainable solutions in the landscape design

VR and AR

Rain water collection and water treatment technologies

Monitoring platform

AI

block chain

AI

digitization

Multi-disciplinary design approach specifically in terms of GIS survey, climate change information and integration, disaster risk reduction coordination with local government units, and regional and national resiliency coordinating plan.

I have no idea.

BIM

Plant installation technologies

better understanding of landscape systems in a climate changing world

Artificial Intelligence in Design

Artificial Intelligence

GIS

Evidence-based modelling software related to such as water & temperature BIM etc.

BIM for designers, tree extraction machines for construction, cheaper alternative sources of energy and more involvement of LA in the circular economy.

Mostly digitalization and LA engineering

Parametric Tech, Construction Tech, Materials

Carbon sequestration measurement

digitalization and innovation

Efficient internet

Competing with AI tools

Digital info

IT

Technologies about maintenance the plants

don't think that technology will provide a 'game-changer'

Remote sensing AI technologies

Integrating sustainability aspects in all designs

BIM/ REVIT

a tool we are developing that will provide GHG conversion data

Softwares in Designing & Machinery during execution & Automation during Maintenance.

Sustainability modelling

Picking up a pencil! Learning Horticulture

交通

Digitalization

AI

automation of design and development

VR

BIM

The availability of mature trees for replanting.

nature based biometrics, artificial intelligence, robotics, quantum physics & technologies, fision energy and neurosciences

BIM

digitalization

No comment

Green infrastructure

Water Supply technology

Big Date Analysis

3D scanner of open space

Access to multi-disciplinary data in a form consumable by LA's eg LIDAR and suites of data in consumable form, 3D cross disciplinary etc

Impact analysis of planning and design results using big-data and ai-based tools.

Robotic Draftsman and Remote sensing Technologies to reduce manpower cost

sustainable concrete substitutes

in visualization, we need VR and AI. because VR and AI can give understanding to people better than 2D. in relation with climate change, the technology of rain garden, is important. because each garden/landscape need to have function of rain garden to manage water and environment

Better office/car share system to reduce needs for personal/public spaces and cars in the public realm.

AI

Simplified metrics on the economic, health and climate benefits of landscape architect projects. Current metrics are too complicated, and simplified ones may not be possible. It may be more realistic to see changes in government policies and processes as a result of advocacy on the benefits.

BIM AI

GIS Data availability, Plant Kit etc

GIS data

blue green infrastructure

Augmented reality

AI to predict user behaviour in a space and designed nature on users.

Materials

Smart Green Infrastructure technologies such as place-based AI & machine learning applications to tackle urban heat island impacts using smart sensor networks to improve landscape and human resiliency, reduce water demand and increase thermal comfort

Rendering

Q

AI

The LA industry must learn to be.... in my own words., to be...." the KEY consultant and LEAD consultant and teach clients the value of their Multidisciplinary skill set in Environmental analyses, site analysis and ability to "read" the land. NOT the last consultant to join the "team" to plant trees and shrubs. Personally me and my team have done this with great success for over 40 years and won numerous multi national awards (IFLA, ASLA, ILASA etc) for our large scale development projects and acting as Principal Agent managing and coordinating Multidisciplinary Planning and Design teams not only in South Africa but also China, Hong Kong , Greece and all over Africa.

Online coordinations and use of remote/ video conferencing apps and softwares

Software

BIM+GIS

Easy country/product specific carbon calculators

Sustainable Environmental solutions, Attractive Draining techniques, Hybrid traditional and modern methods,

AI