Natural Turf in Australia: What the Evidence Tells Us

TU24004 Usage, Attitudes and Contribution of Natural Turf

18 August 2026

Agenda

1. Where is the market opportunity?
   Residential demand and conversion

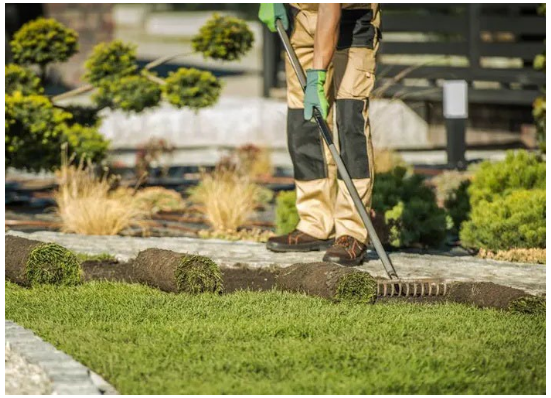
2. Turf beyond the backyard
   What communities, sport and decision-makers value

3. The value of natural turf
   Economic contribution, Jobs, public value and green infrastructure

Biggest national study of natural turf – 2,500+ people

Who did we talk to?

1,025	986	603	31
Australians	Current and prospective buyers	Sporting participants and parents	Councils, landscapers, architects, developers, schools and sporting organisations



Hort Innovation TURF FUND

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Key findings

1. Australians already want natural turf

Demand is strong across homes, sport and community spaces.

2. We lose opportunities during comparison

Preference alone isn't enough to guarantee a sale.

3. Natural turf delivers far beyond the farm gate

It supports a $5.1 billion industry and creates around $42 billion in annual public value.

4. We now have the evidence

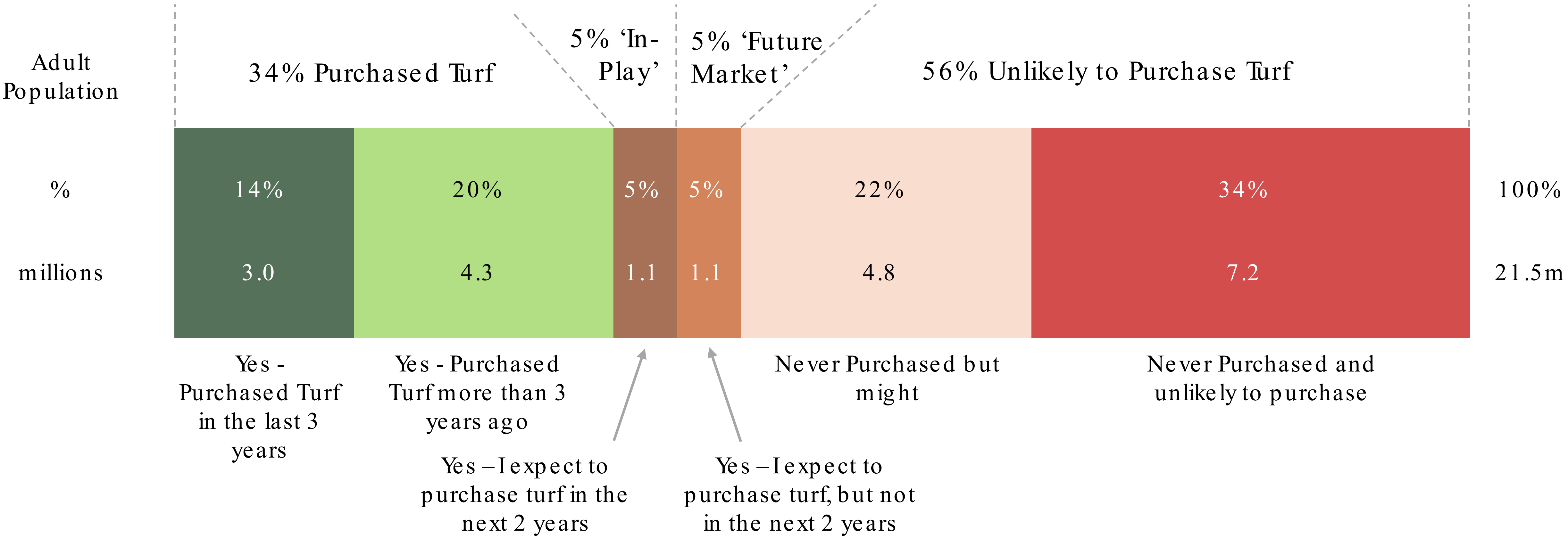
The industry has credible research to strengthen customer conversations.

1. Where is the market opportunity?

Residential demand and conversion

One in three Australian adults say they have personally purchased turf, including 14% in the past three years

Adult Population – Purchased or Intend to Purchase Turf
(%, millions people, nationally representative)



1.1 million Australians expect to buy turf in the next two years

Another 1.1 million expect to buy later

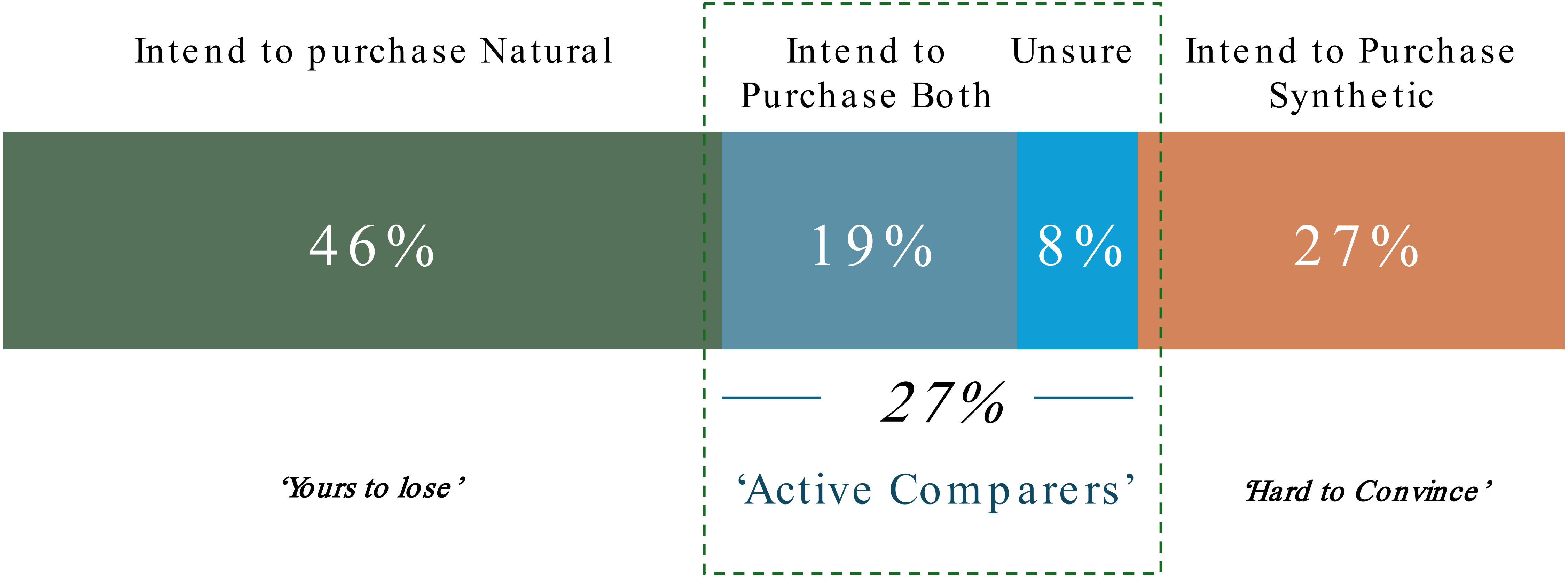
'In-Play'	'Future Market'
1.1m Australians	**1.1m** Australians
I expect to purchase turf in the next 2 years	I expect to purchase turf, but not in the next 2 years

Natural converts broadly in line with intention…
…but synthetic gains another 11 percentage points

	Natural Turf	Synthetic Turf
INTENT	46% intended	27% intended
PURCHASE	47% purchased	38% purchased
	+1% point	+11% point

Natural turf begins with a major preference advantage

'In-Play' – 1.1m Australians



The customers we need to win are the 27% still comparing or unsure

Winning Active Comparers is the largest conversion opportunity

'Active Comparer'

"I want to make the right choice for my family —without creating headaches down the track."

- 57% have children
- 77% have pets in the household
- 49% like the look of natural turf
- 72% worry about maintenance
- 60% are influenced by what their neighbours choose

51% of people choose natural because it looks good

Natural turf...

1. Looks Better

- Looks good (51%)
- Adds value to property (25%)

2. Feels Better

- Feels good underfoot (36%)
- Cooler underfoot (32%)

3. Better for Families

- Better for pets (31%)
- Better for kids (22%)

52% of people consider synthetic because it's easy to maintain

1. Easy	'It's easy to maintain' (52%)
2. Consistent	'It always looks good' (38%)
3. Predictable	'It withstands wear and tear' (20%)

Natural's biggest problem is maintenance. Synthetic's is acceptability.

Natural turf has problems we can help customers manage. Synthetic has characteristics that cannot easily be changed.

Natural: Concerns we can solve

Maintenance (44%)

and water usage (30%)

Site suitability (25%)

Durability (16%) and cost (19%)

Synthetic: Concerns inherent to the product

Artificial look (45%)

and heat (30%)

Microplastics (30%) and environmental concerns (25%)

Replacement (23%) and disposal (20%)

	Natural	Synthetic
# Concerns	2.7	3.7

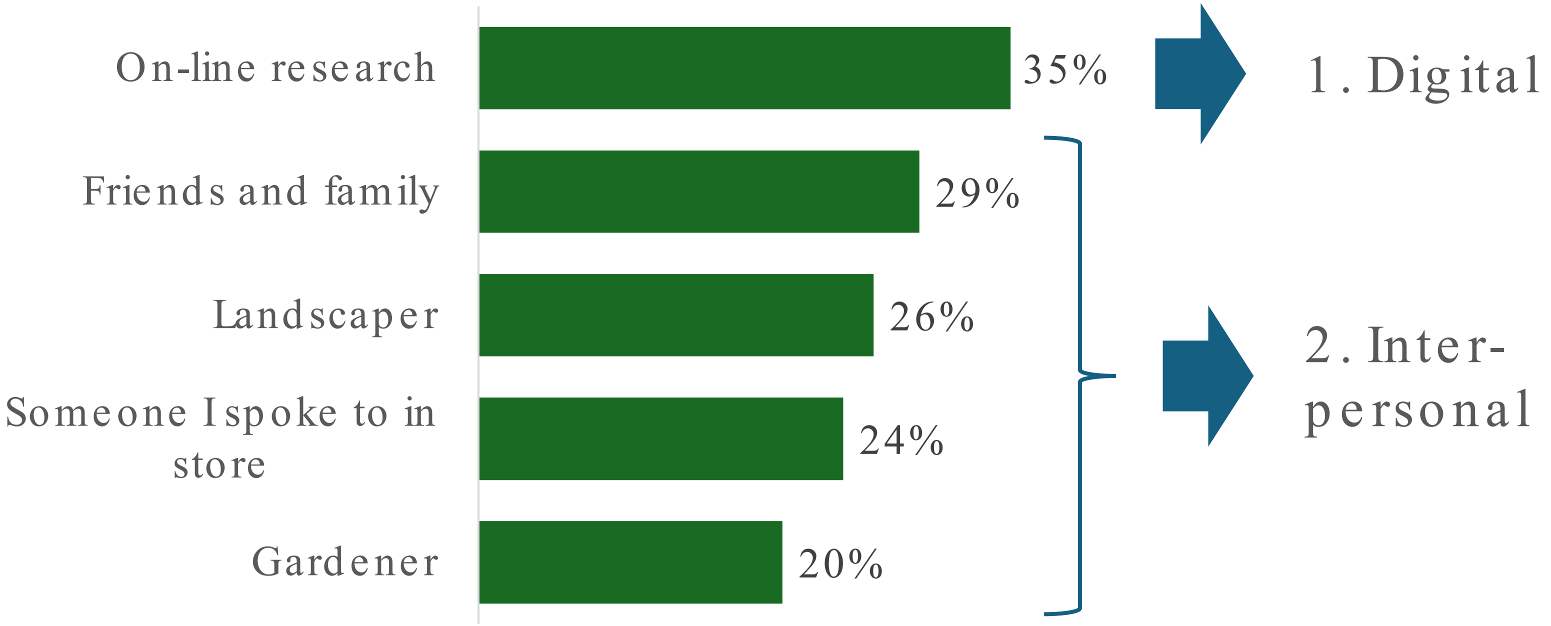
So, where can we make the difference?

First: customers decide quickly

1.6

Average number of information touchpoints

Top 5 Sources of Information (for natural):



There are only one or two chances to influence the sale

Natural turf has a much more diverse purchase pathway—with a significant role for growers and expert-led channels.

Where Purchased:

Natural turf

50%

Personal advice channels
- Trust and expert advice

Includes:
19% Directly from growers[1]
13% from smaller retailers
10% through landscapers

Synthetic turf

39%

Large retailer
= more 'off-the-shelf'

1 Purchase channel reported by consumers; not share of grower sales volume.

What the residential data tells us

Natural starts ahead

46% intend natural vs 27% synthetic

Synthetic gains during comparison

+11 percentage points vs +1 for natural

The trade-off is clear

Natural wins on look, feel and family; synthetic on ease and predictability

Decisions happen quickly

Just 1.6 information touchpoints on average

Purchase pathways differ

Natural has a more diverse route to market, including 19% buying directly from growers

2. Turf Beyond the Backyard

What communities, sport and decision-makers value

76% prefer natural turf in community spaces

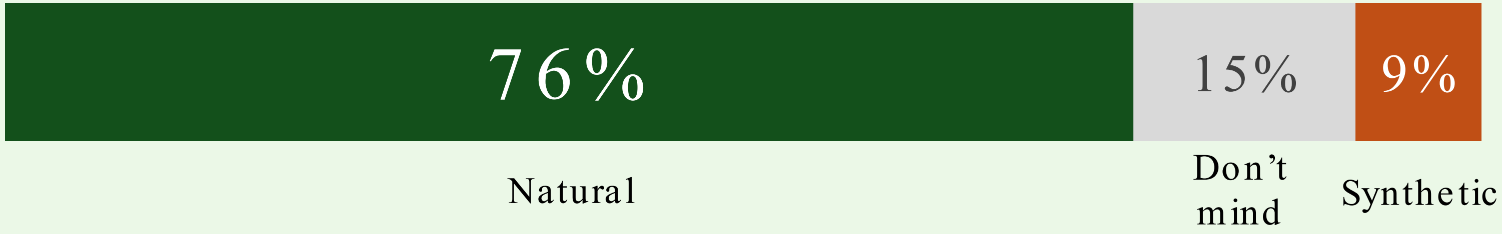
Stated User Preference

3 in 4
Players prefer natural (over synthetic)

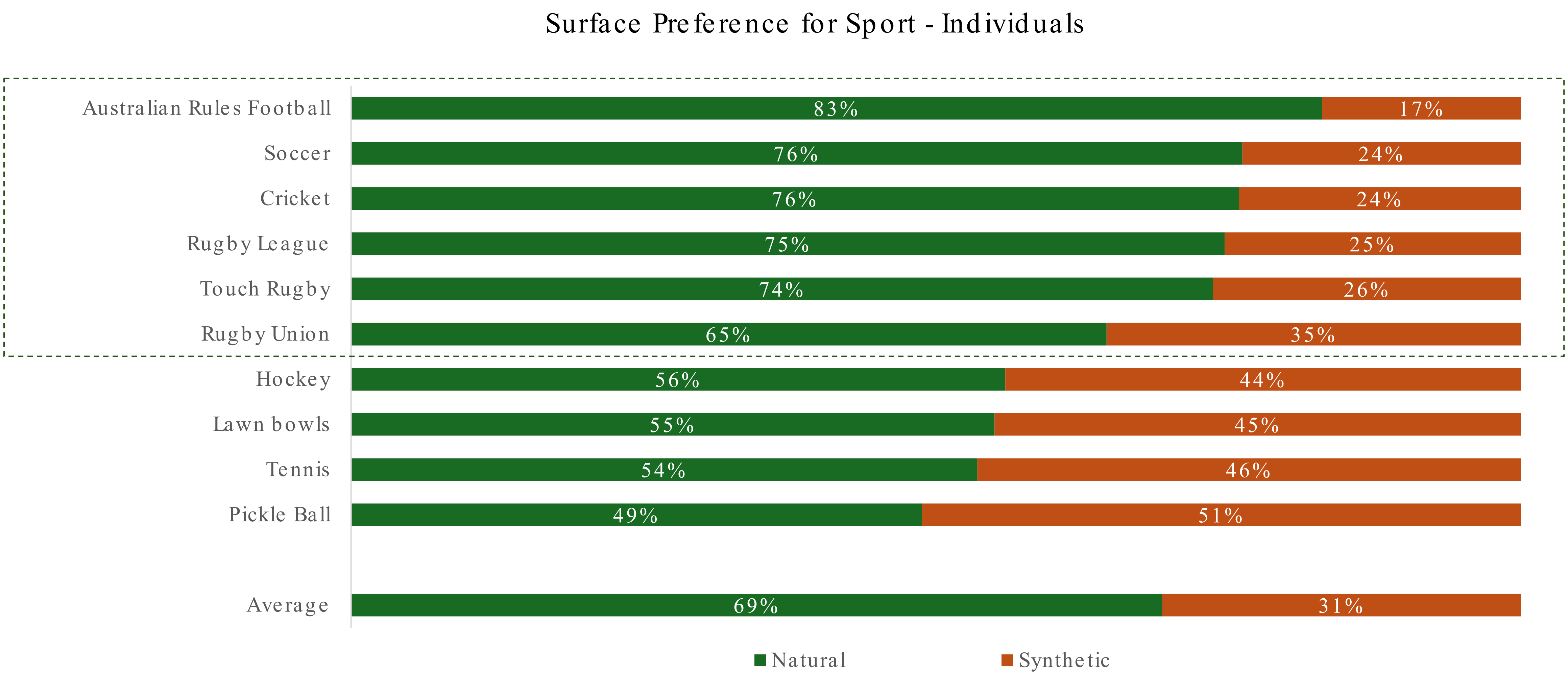
83%
of Australian Rules players prefer natural (the highest preference)

81%
Parents prefer their children to play soccer on natural turf

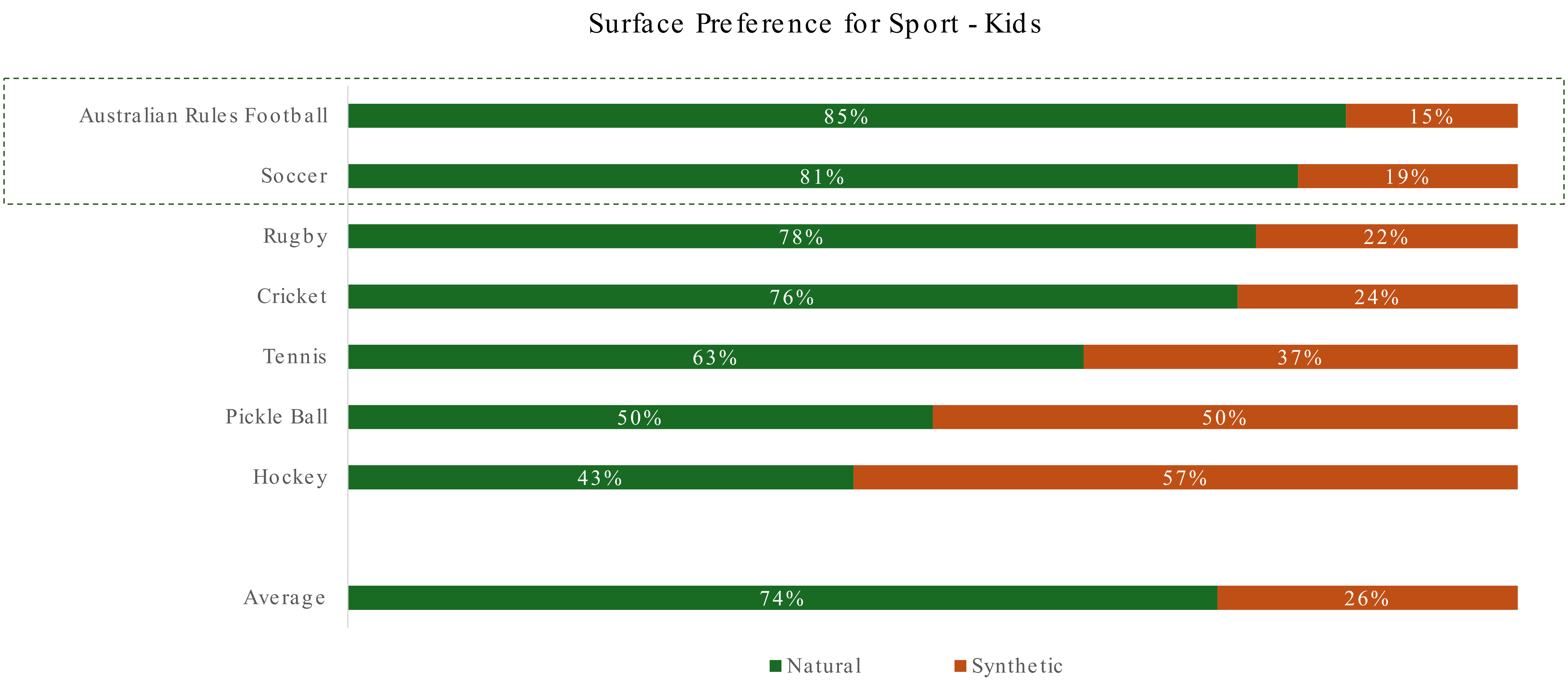
Surface preference



Preference for natural turf is high amongst the large team sports with an average of 3 out of 4 people saying they prefer to play on natural



For kids, preference for natural turf is even higher, with 4 out of 5 parents saying they prefer their kids to play AFL or Soccer on natural turf sporting fields



Well-managed fields can typically sustain around 40–50 hours/week, while many community sites use around 35–45 hours/week.

Key Facts: Usage and Capacity

Well-managed natural turf can typically sustain:	~40–50 hrs/week (Context dependent)
Typical community field usage:	~35–45 hrs/week (Range ~20 to 60+ hrs/week)

Implication

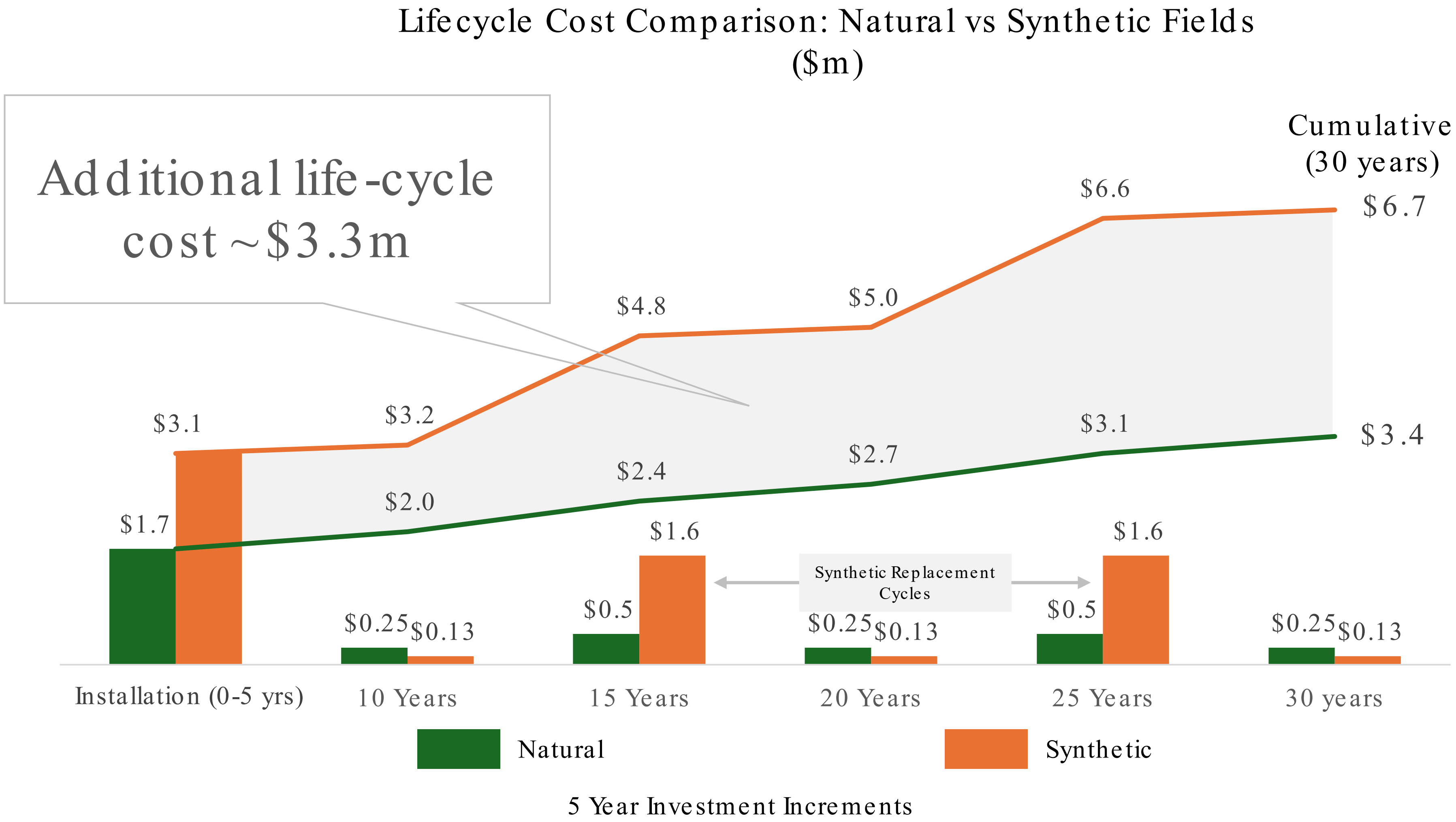
High-pressure sites

- Land constrained
- Very high usage
- Synthetic may be appropriate in some high-pressure sites

Most other sites

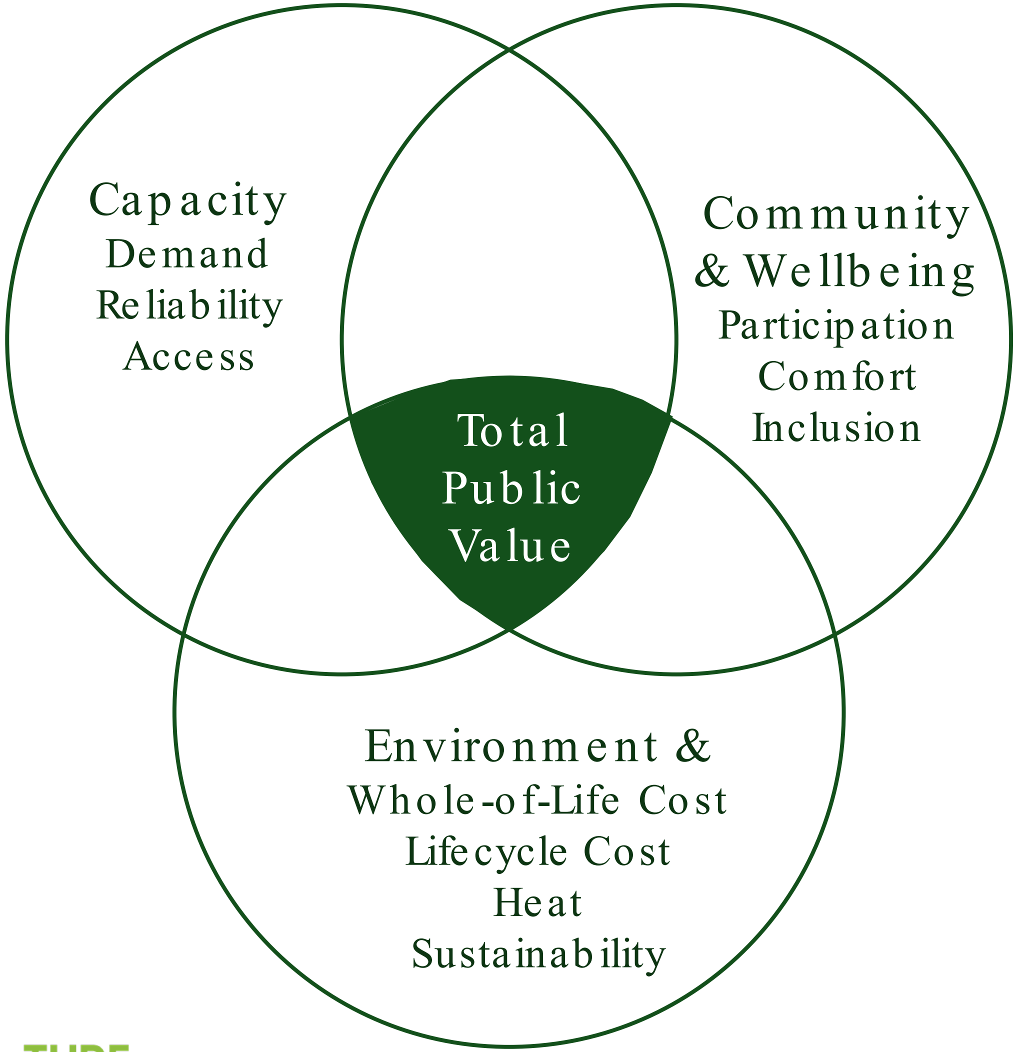
- Improve drainage
- Improve irrigation
- Improve lighting, maintenance and scheduling

Synthetic fields require ~$3.3m more lifecycle investment per field over 30 years (~2× higher cost)



~2x higher

The right surface is the one that creates the most total value —not simply the most playing hours



The objective isn't maximum capacity.

It's maximum public value.

3. The Public Value of Natural Turf

Economic contribution, Jobs, public value and green infrastructure

~$5.1 billion | ~15,500 jobs

The Australian turf industry contributes ~$5.1 billion to the Australian economy every year and supports ~15,500 jobs

Natural turf is a major Australian industry

~$5.1 billion ~15,500 jobs

	Farm-Gate	Downstream Economy
$m pa	$332.8	$4.8bn
FTEs	1,345	14,200

Direct Contribution | Lawn Care Equipment | Lawn Maintenance Service | Induced

Natural turf's economic footprint is overwhelmingly downstream

Downstream Services & Retail Economy

~$4.8 billion | ~14,200 jobs

Lawn Care Equipment	Lawn Maintenance Service	Induced
~$2.49bn	~$2.25bn	~$64m
~4,100 FTEs	~9,800 FTEs	~300
26% of total jobs[1]	63% of total jobs	2%

This footprint is service-led, SME-intensive and regionally distributed.

1. % of total 15,500 jobs including direct

~$42 billion

Economic, environmental and social value enabled by natural turf

Natural turf creates far more value than its sale price

~$42 billion annually

Natural turf is also one of Australia's most valuable pieces of green infrastructure

Environmental Impact

Health & Exposure Impacts

- Its 10–30°C cooler
- No microplastic infill or polymer shedding
- Improves local air quality

Infrastructure & Risk Function

- Low-threat vegetation for bushfire planning
- Protects against erosion & stabilises soil
- Supports stormwater management and drainage resilience

Natural turf is part of Australia’s sporting identity

Five takeaways

1. Demand is strong

1.1m intend to buy turf in the next 2 years

2. Comparison is the battleground

Synthetic gains 11 percentage points

3. Confidence converts

Customers use just 1.6 information sources.

4. Turf is more than farm gate production

$5.1bn industry contribution. $42bn public value.

5. We now have evidence to use

In customer conversations, business decisions and industry communications.

Our challenge isn't creating demand. It's giving Australians the confidence to choose natural turf.

Please go to

Hort HQ

to find out more