

Community, Commercial and Sporting Demand for Natural Turf - Summary

Source: Greenfields Consulting (2026), TU24004 Usage, Attitudes and Contribution of Natural Turf

Key Research Question "How do we motivate decision makers to choose natural turf?"

This report examines how community, commercial and sporting stakeholders make decisions about natural and synthetic turf, highlighting the **scale of community demand, strong public preference for natural surfaces**, and increasing pressure on sporting infrastructure in some urban areas. While synthetic turf can provide higher peak capacity and scheduling reliability in constrained environments, **natural turf remains the preferred surface** for most users and **delivers broader environmental, social and community value**. The findings also suggest that immediate capacity pressures can sometimes outweigh wider community, environmental and lifecycle considerations in planning and investment decisions.

1. Community Demand and Capacity

Community sport and open spaces are core national infrastructure assets supporting participation, recreation and everyday wellbeing across Australia. More than **16,100 sports fields** operate nationally, while:

- **97% of Australians regularly use community spaces**
- **84% participate in sport or physical activity annually**

Demand patterns are uneven, with peak-time congestion often driving perceived shortages rather than total weekly use. Typical community field usage is approximately **35-45 hours per week**, while well-managed natural turf can often sustain **40-50 hours per week**, depending on site suitability, maintenance, drainage and scheduling practices.

This highlights that **well-managed natural turf** can **often meet typical community demand** and that synthetic surfaces are not the only pathway to increasing capacity.

2. User Preference and Public Value

Across organised sport and informal community settings, Australians show a strong preference for natural turf. The research found:

- **76% of Australians prefer natural turf in community spaces**
- **Around 3 in 4 players prefer natural turf for organised sport**
- **83% of Australian Rules players prefer natural turf**
- **81% of parents whose children play soccer prefer them to play on natural turf**

Preference is driven by **comfort, cooler temperatures, family usability, and perceived wellbeing and environmental benefits**. Parents also **value time children spend playing on natural turf** at approximately **twice** the level of synthetic surfaces, reinforcing that community outcomes are shaped not only by access, but by the quality of the experience.

3. Capacity vs Total Public Value

The research highlights that sporting field and community space decisions can sometimes prioritise sporting throughput which can unintentionally reduce broader community value. Sporting clubs often prioritise reliable playing hours and scheduling certainty, while councils must balance these priorities against environmental, financial and social outcomes.

Natural turf contributes broader community value through:

- Informal recreation and mixed community use
- Urban cooling and heat mitigation
- Stormwater absorption and soil stabilisation
- Lower environmental exposure risks

Many of these benefits are often excluded from capacity-led business cases, despite materially shaping community wellbeing and long-term liveability which increases **Total Public Value**.

4. Funding, Performance and Lifecycle Costs

The research found that underperformance of natural turf is often linked to capability and funding gaps rather than inherent surface limitations. Limited specialist expertise, underfunded maintenance and insufficient investment in drainage, irrigation and renovation can reduce natural turf field quality and carrying capacity.

While synthetic turf can provide higher peak capacity and all-weather reliability, it also requires substantially higher long-term investment. Synthetic fields are estimated to require approximately **\$3.3 million more lifecycle investment per field over 30 years**, representing roughly **double the long-term cost** of natural turf.

Equivalent investment in multiple natural turf upgrades can often improve capacity, flexibility and community access across a broader network of fields.

Conclusion

Community and sporting field decisions are increasingly complex, requiring stakeholders to balance participation growth, infrastructure capacity, financial constraints and broader community outcomes. While synthetic turf can play an important role in high-pressure or land-constrained environments, **natural turf remains the preferred surface for most users** and **delivers broader environmental, social and community value**.

The findings highlight the importance of **balancing capacity and reliability** with **broader community, environmental and long-term value** outcomes across the wider sporting and open space network, recognising that **natural turf delivers greater Total Public Value**.