

The Value, Demand and Decision Drivers for Natural Turf in Australia

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

Natural turf plays a vital role in Australia's communities, economy and environment. Across residential, community and sporting settings, the research shows strong public preference for natural turf and demonstrates that it delivers significant economic, environmental and social value. While synthetic surfaces can provide benefits in some high-intensity or land-constrained situations, natural turf consistently generates broader long-term benefits often overlooked in planning and investment decisions.

A Critical Community Asset

Natural turf underpins everyday life across Australia. It supports parks, sports fields, schools, residential landscapes and community open spaces that Australians use for recreation, physical activity and social connection. The research found that 97% of Australians regularly use community spaces and 84% participate in sport or physical activity annually, highlighting the importance of green spaces to community wellbeing.

Public preference for natural turf is strong and consistent. Approximately three-quarters of Australians prefer natural turf in community spaces and organised sport, with preference driven by comfort, cooler temperatures, playability, aesthetics, wellbeing and environmental benefits. Parents also place substantially greater value on children playing on natural turf than synthetic alternatives.

Economic, Environmental and Social Value

Natural turf generates substantial economic activity throughout Australia. The industry contributes approximately \$5.1 billion annually to the Australian economy and supports around 15,500 jobs, with much of this activity occurring through downstream sectors such as landscaping, maintenance and related services.

Its broader contribution is even more significant. Natural turf is estimated to deliver approximately \$42 billion each year in combined economic, environmental and social value, including benefits from sport participation, community wellbeing, residential amenity and avoided lifecycle costs.

Natural turf also functions as important green infrastructure, helping to cool urban environments, improve air quality, store carbon, absorb rainfall, reduce runoff and stabilise soil, while avoiding many of the environmental concerns associated with synthetic surfaces. These benefits support healthier communities, greater environmental resilience and more liveable cities.

Residential Market Insights

Residential research reveals that demand for natural turf is already strong. More than one million Australians are actively considering purchasing turf in the next two years, with natural turf holding a clear advantage in initial preference and purchase intent.

Natural turf is primarily chosen because of its appearance, contribution to property value, comfort and connection to nature. However, during the final stages of decision making, practical considerations such as maintenance, convenience and water use become more influential, allowing synthetic turf to win a disproportionate share of undecided buyers.

The key growth opportunity is therefore not creating demand, but helping consumers overcome practical concerns and convert existing preference into purchase. Trusted recommendations from landscapers, growers, friends and family are particularly influential because purchase journeys are often short and involve only a small number of information sources.

Community and Sporting Infrastructure Decisions

In community and sporting settings, decision makers are often balancing participation growth, infrastructure capacity, budgets and community outcomes. While synthetic surfaces can provide higher peak capacity and scheduling certainty in some circumstances, the research suggests that well-managed natural turf can often meet typical levels of community demand.

Importantly, many perceived shortcomings of natural turf are linked to underinvestment in maintenance, drainage, irrigation and technical capability rather than limitations of the surface itself.

The research also found that natural turf provides wider public benefits that are rarely captured in traditional business cases, including informal recreation, urban cooling, environmental services and community wellbeing. When these outcomes are considered with financial performance, natural turf delivers greater public value.

In addition, synthetic fields are estimated to require significantly more lifecycle investment over 30 years, equivalent to roughly double the cost of natural turf.

Conclusion

Across the research, a consistent picture emerges. Australians value natural turf, prefer natural turf and derive substantial benefits from natural turf. It supports jobs and economic activity, contributes an estimated \$42 billion in broader societal value, enables community participation and delivers important environmental outcomes.

While synthetic turf has a role in specific high-demand environments, the evidence indicates that natural turf delivers greater overall economic, environmental and social value.

