

TU24004 Usage, Attitudes and Contribution of Natural Turf

Overall Findings Report
FINAL

May 2026

Executive Summary

Natural Turf Is Widely Preferred by Australians and Delivers Significant Economic and Public Value



Residential Demand and Surface Choice

1M+ Australians actively in-market and comparing turf options

- **46% intend to purchase natural** v **27% synthetic**
- **Natural converts** broadly in line with intent **(+1%)**
- **Synthetic** surfaces materially **over-convert** relative to intent **(+11%)**
- **Largest growth opportunity** lies among **"Active Comparers"**



Community and Sporting Participation

97% of Australians regularly use community spaces

84% of Australians participate in sport or physical activity annually

- **76%** of Australians prefer natural turf in community spaces
- **83%** of AFL players prefer natural turf
- **80%+** of parents whose children play soccer prefer natural surfaces



Industry Economic Contribution

\$5.1B annual contribution to the Australian economy

~15,500 jobs supported

- Economic activity spans **production, installation, maintenance and supply chains**
- Turf supports employment across **regional and metropolitan Australia**



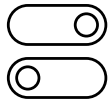
National Public Value

~\$42B estimated annual economic, environmental and social value (*NOT directly comparable to Industry Economic benefit*)

- Supports **community wellbeing, sporting participation and residential amenity**
- Contributes to **urban cooling, environmental performance and infrastructure resilience**
- Synthetic fields require **~\$3.3m more lifecycle investment per field over 30 years (~2x higher cost)**

Strategic Recommendations

This research confirms strong preference for natural turf across residential, community and sporting environments. Sustaining this position will depend on improving conversion outcomes, supporting key decision-makers and reinforcing natural turf's broader value in urban environments.



1.

Strengthen Conversion Among Active Surface Comparers

Key Insight

More than **1 million Australians are actively comparing surface options**, and synthetic surfaces can over-convert during the decision process due to perceived convenience and maintenance advantages.

Industry Focus

- Improve consumer understanding of **modern turf varieties and maintenance requirements**
- Address common misconceptions around **water use and upkeep**
- Provide practical guidance for **installation and long-term lawn performance**



2.

Equip Professionals Who Influence Surface Decisions

Key Insight

Surface choices are often **shaped by landscapers, architects, developers and contractors** across residential, school and community infrastructure projects.

Industry Focus

- **Provide design and specification guidance** for professionals
- **Share case studies** demonstrating successful natural turf outcomes
- **Improve awareness** of lifecycle performance and environmental benefits



3.

Reinforce Natural Turf as Urban Green Infrastructure

Key Insight

Natural turf delivers substantial environmental, social and economic value, including urban cooling, community wellbeing and infrastructure resilience.

Industry Focus

- **Communicate natural turf's \$42B annual public value and \$5.1B industry economic contribution**
- Position natural turf as **long-lived urban green infrastructure**
- **Continue building the evidence base** on lifecycle costs and environmental performance

Key Stakeholders – Insights and Industry Actions

Residential Users



Landscapers and Gardeners



Architects/ Developers



Local Government & Councils



Sporting Organisations & Clubs



Key Insights

Homeowners strongly prefer natural turf for aesthetics, play and lifestyle, but concerns about maintenance and water use can influence surface choices.

Landscapers strongly influence surface selection and installation quality in residential and commercial projects, often shaping client decisions at the point of delivery.

Architects and developers play a key role in determining landscape outcomes in new residential estates, schools and commercial developments. Surface choices are often made early in the design process.

Councils manage community sporting fields and public open space and **must balance usage demand, budgets and environmental outcomes.**

Natural turf remains the preferred playing surface for most sports, but capacity pressures can lead to consideration of synthetic alternatives.

Industry Action

Improve consumer awareness of modern turf varieties and practical maintenance approaches, while reinforcing lifestyle, cooling and usability benefits.

Strengthen professional knowledge of turf varieties, installation practices and maintenance advice to support confident installation and long-term performance.

Provide accessible design guidance, case studies and performance evidence demonstrating how natural turf contributes to urban cooling, amenity and livability outcomes in built environments.

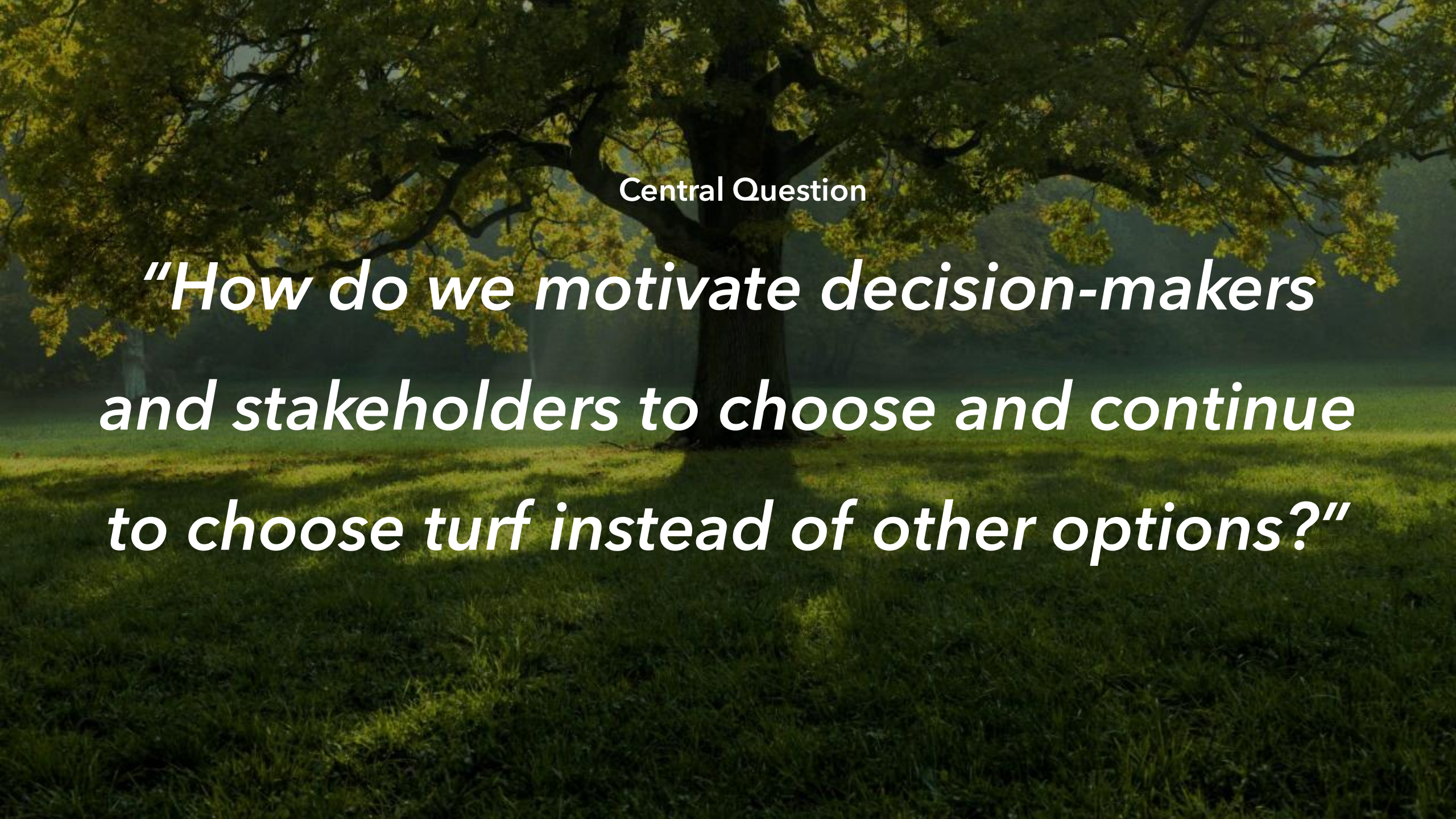
Ensure councils have access to clear, evidence-based information on lifecycle performance, environmental benefits and community outcomes associated with natural turf systems.

Support improved turf management practices and field design approaches that increase playable hours while maintaining natural playing surfaces.

These stakeholders would benefit from having access to this research

Contents

1. Project Context
2. Residential Decision Dynamics
3. Community, Commercial and Sporting Demand
4. Economic Contribution and Public Value

A large, leafy tree with a thick trunk stands in the center of a grassy field. The tree's branches spread out, casting a shadow on the grass. In the background, there are rolling green hills or mountains under a soft, hazy sky. The overall scene is peaceful and natural.

Central Question

“How do we motivate decision-makers and stakeholders to choose and continue to choose turf instead of other options?”

Who did we talk to?

n= 1,025

**Nationally Representative
Population**



Discovery

WHY? To establish incidence of people who have purchased or intend to purchase turf, and the frequency of usage of turf on sports fields and community spaces.

n= 986

**Residential consumers who
have purchased or are
intending to purchase turf**



Residential

WHY? To better understand the preferences, purchase drivers, barriers and perceptions of natural turf versus synthetic turf and other alternative surface materials

n= 603

**Individuals and parents of
kids who regularly play
sport on turf sports fields**



**Commercial
(Quant)**

WHY? To better understand the perceptions of natural turf versus synthetic turf and preferences for playing sport on each surface

n= 31

**Landscapers, architects,
developers, councils, sports
clubs and schools**
(See next page for details)



**Commercial
(Qual)**

WHY? To better understand the preferences and perceptions of natural turf versus synthetic amongst decision makers who work on government, commercial and residential projects

Who did we interview?

Total n=31 x 1 hour IDIs

n= 3

Education Institutions



We spoke to senior stakeholders at:

- 2 x large schools in Melbourne and Sydney
- 1 x State Department of Education

n= 5

Local Councils



We spoke to senior stakeholders in metro and rural Councils with a mix of both natural and synthetic turf sporting facilities and community spaces

n= 7

Sports Clubs



We spoke to senior stakeholders at:

- National level AFL and Cricket Australia
- State level Soccer
- Local level AFL and Soccer

n= 9

Architects/ Developers



Architects and Developers had a mix of experience across Government, Commercial and Residential projects in different states around Australia

n= 7

Landscapers



Landscapers were chosen based on recent experience in Government, Commercial and Residential projects that involved natural turf, and some exposure to synthetic turf



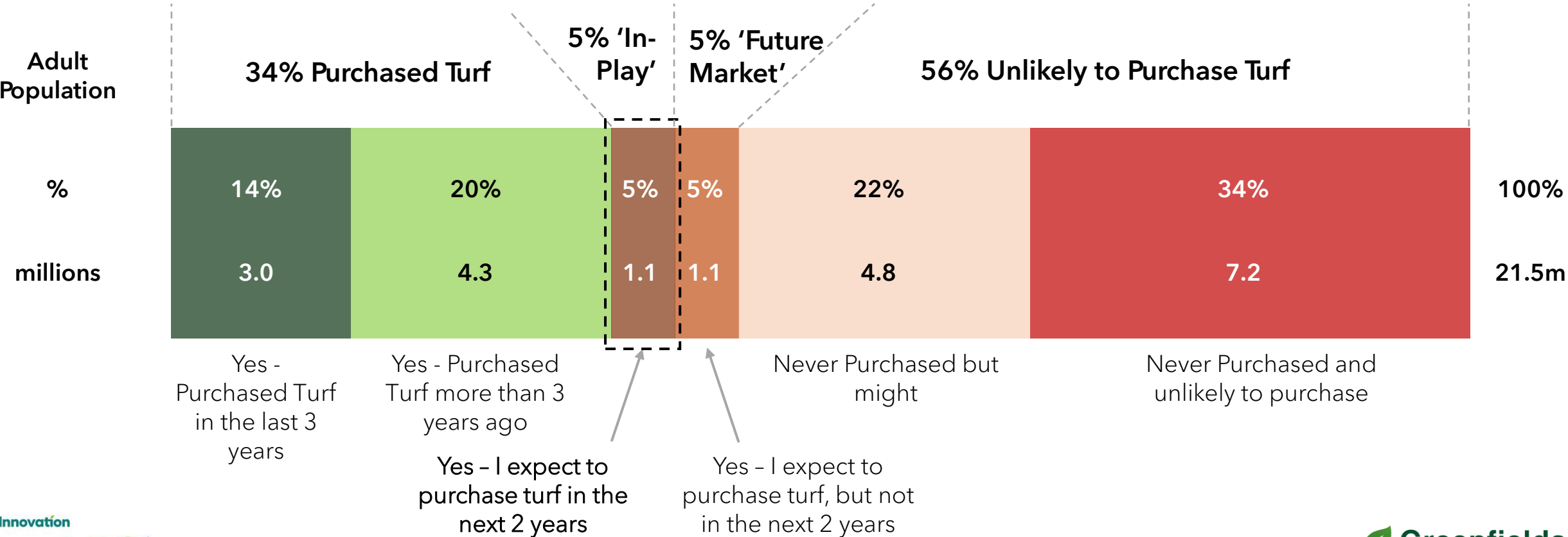
2. Residential Decision Dynamics

Why natural turf wins early – and where it loses momentum

More than 1 million Australians are actively weighing up turf options, making conversion the critical battleground for growth

One in three Australian adults say they have personally purchased turf, including 14% in the past three years. Looking ahead, 1 in 10 Australians are currently in the market, with **1 in 20 expecting to purchase within the next two years**. Being top of mind and easily accessible during this consideration phase is critical to influencing choice, maximising conversion, and growing market share.

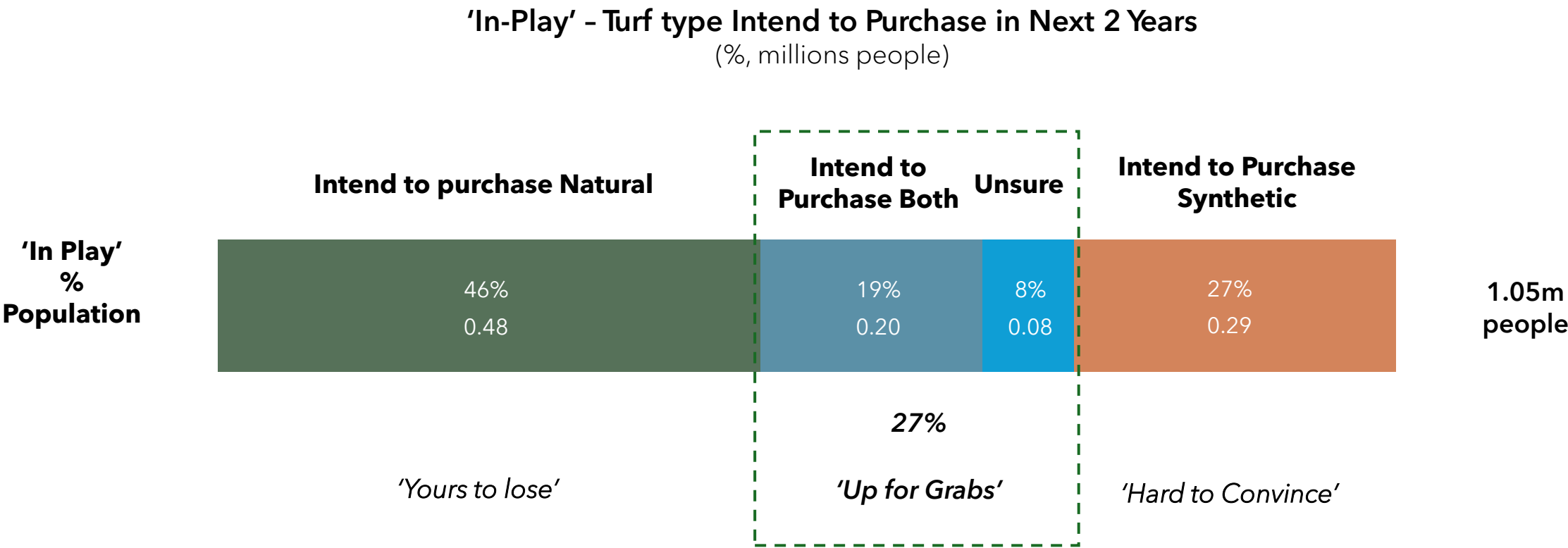
Adult Population - Purchased or Intend to Purchase Turf
(%, millions people, nationally representative)





Natural leads in early intent but 27% of shoppers remain contestable

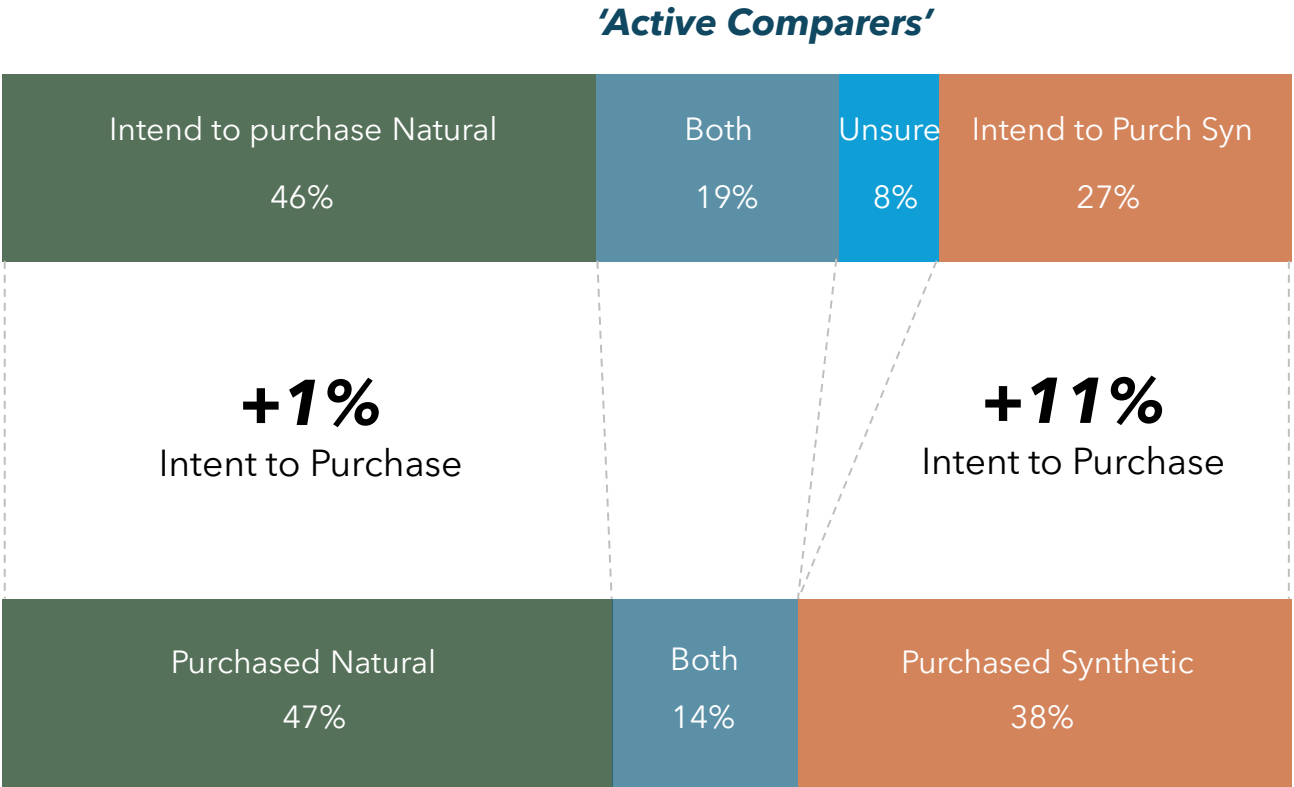
Natural turf holds a strong preference advantage among 'in-play' shoppers, with **46% already leaning natural**. Critically, over a **quarter of the market remains undecided**, presenting a **sizeable conversion opportunity** before purchase decisions crystalise.



Synthetic is winning the comparison phase, converting +11% above intent, while natural converts in line with intent (+1%), leaving share on the table

While **natural turf converts** slightly more buyers than intended (+1%), **synthetic converts** far more than its stated intent (+11%), particularly among undecided buyers. **Closing this intent-to-purchase gap** is the **single biggest opportunity** for natural turf to grow market share.

Intend to Purchase Turf in the next 2 years v Purchased Turf in the last 3 years



Over-conversion reflects movement from 'unsure/both' segments into synthetic at purchase

The Challenge

Natural converts roughly **in line with intent (+1%)**, while **synthetic** materially **over-converts (+11%)**.

The Opportunity

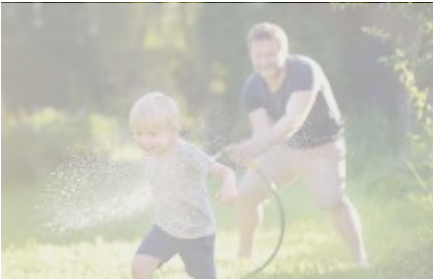
Natural turf's biggest growth opportunity is to **convert high-intent 'Active Comparers'**, **close the intent-to-purchase gap** and **unlock share growth**

Growth depends on winning 'Active Comparers' not persuading committed buyers.

Growth is not about persuading committed buyers, but about winning the comparison phase – where Active Comparers weigh natural against synthetic.

'In-Play' Personas

'Natural Nurturers'



Intend to purchase Natural

46% of 'In-Play' population
480k Australian Adults

'Active Comparers'



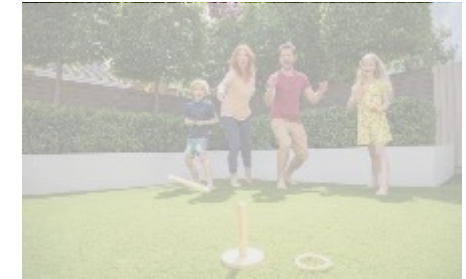
Intend to Purchase Both

19% of 'In-Play' population
200k Australian Adults

Unsure what to purchase

8% of 'In-Play' population
80k Australian Adults

'Practical Optimisers'



Intend to Purchase Synthetic

27% of 'In-Play' population
290k Australian Adults

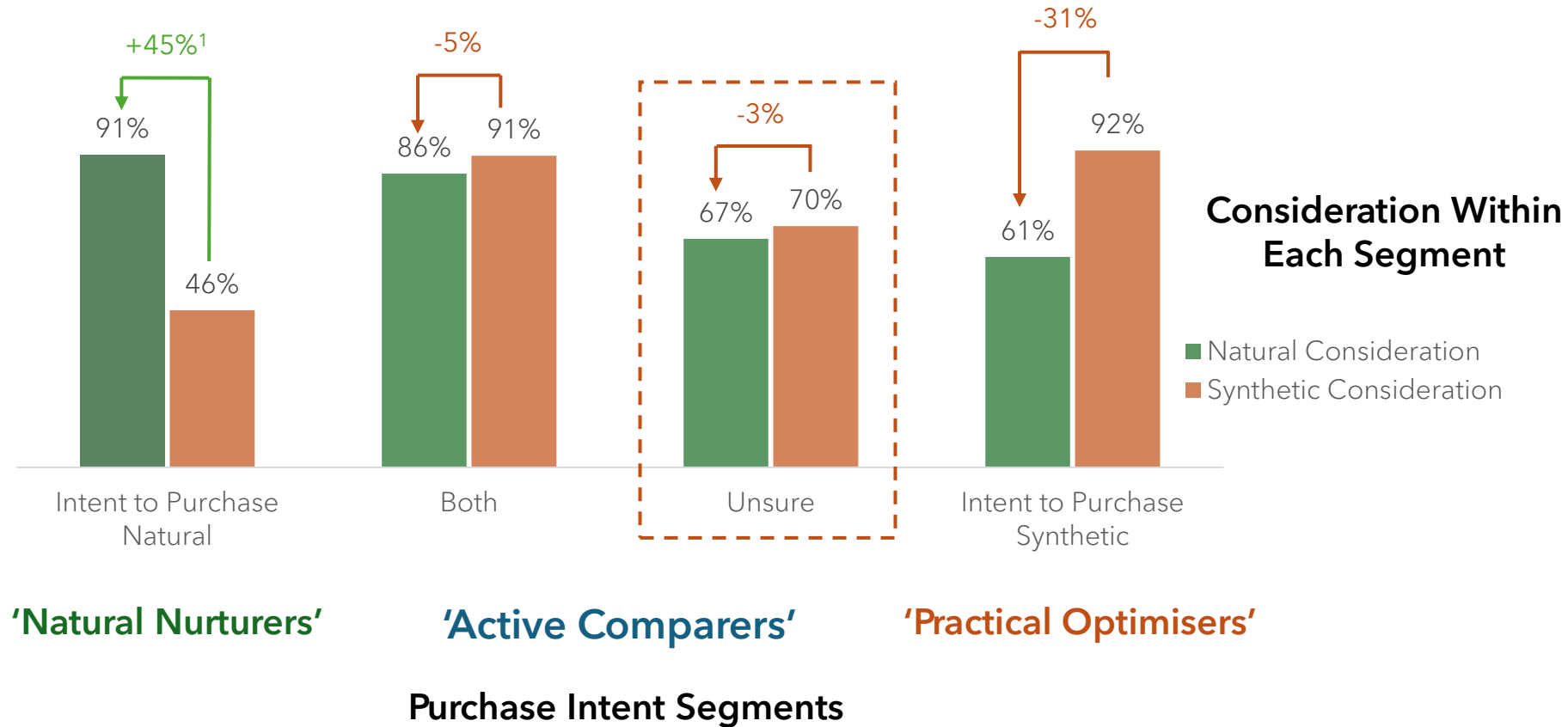
Natural turf wins with values-led buyers but loses momentum once practical comparison begins – making Active Comparers the critical growth opportunity.

Natural has a strong consideration lead among committed buyers but loses ground sharply amongst 'unsure' shoppers

Among buyers with **uncertain purchase intent**, consideration of **natural turf drops materially** and **falls behind synthetic once active comparison begins**. This makes the 'unsure' intent segment the critical battleground for improving natural turf consideration and conversion.



Consideration of natural vs synthetic within each purchase intent segment



The Opportunity

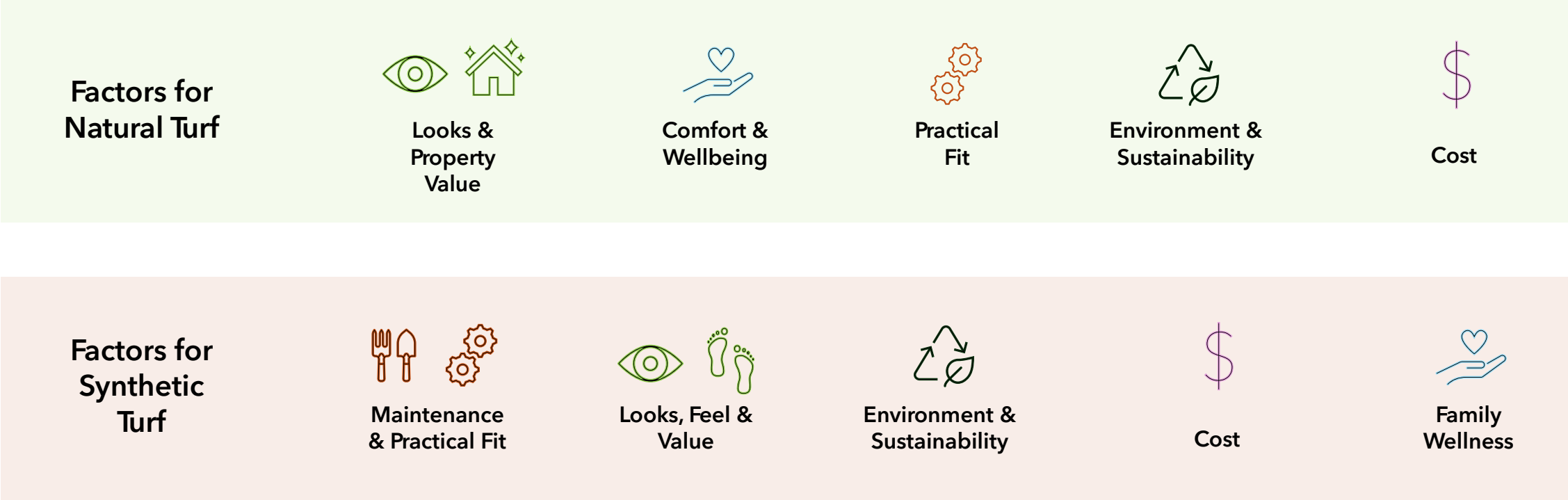
Driving consideration for natural turf amongst **high-intent consumers** who are **'unsure'** what to choose represents **the biggest opportunity for growth**

So, what drives consideration?

Looks is an underlying driver and aligns with looks, property value and resilience

Factor analysis groups the attributes buyers associate with turf into **five clear choice drivers for both natural and synthetic**. These **drivers explain why preferences diverge** as buyers move from early intent into active comparison.

Factors that Influence Consideration for Natural and Synthetic Turf



Consideration for natural turf is driven by looks and experience while synthetic is chosen for ease and consistency

Natural turf’s **consideration advantage** is driven by **emotional and sensory benefits** – how it **looks (51% - the largest by far), feels and supports wellbeing**. By contrast, **synthetic** turf gains ground on **practical reassurance**, with **maintenance, consistency and perceived ease becoming** decisive as comparison intensifies. This tension explains why natural leads early intent but loses momentum among uncertain buyers.

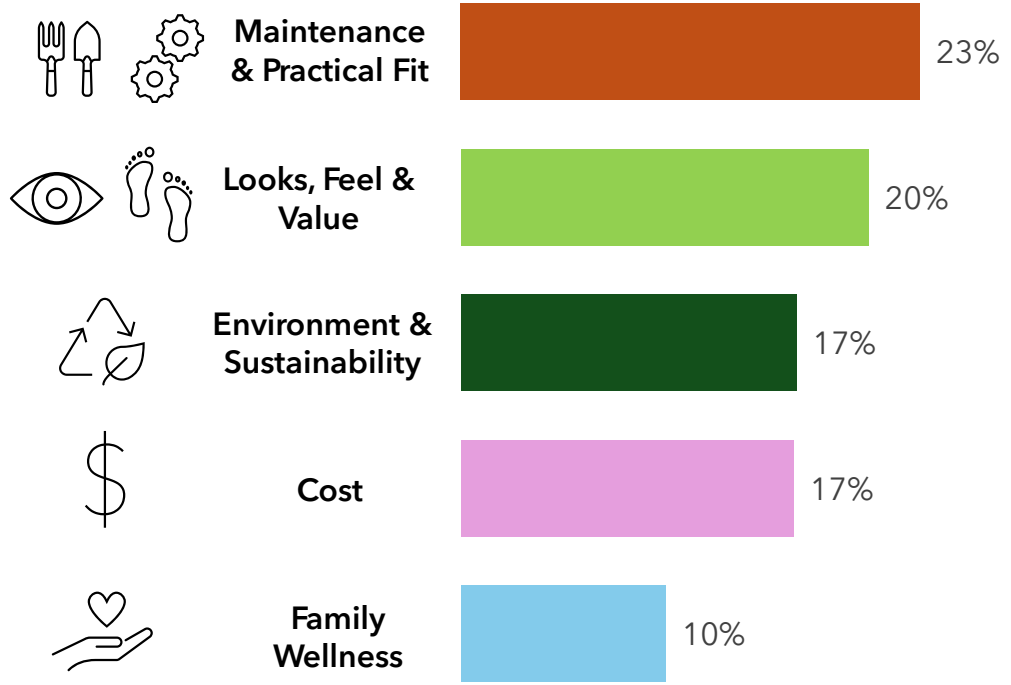
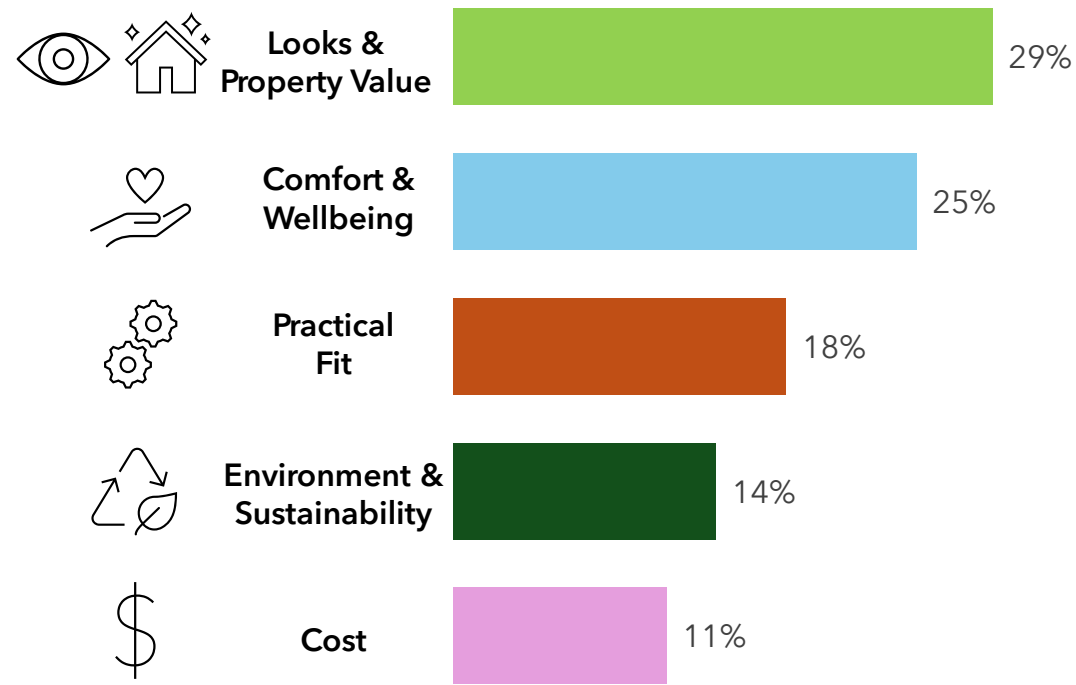
Factors that Influence Consideration of Turf



Natural Turf



Synthetic Turf



Natural turf's strength is led by appearance and sensory experience, with the risk being practical reassurance



Buyers are drawn to natural turf for how it looks, feels and supports comfort for families and pets. However, practical concerns around upkeep, durability and long-term value sit lower in the hierarchy, creating a clear opportunity to better translate emotional appeal into purchase confidence.

Reasons to Consider Natural Turf

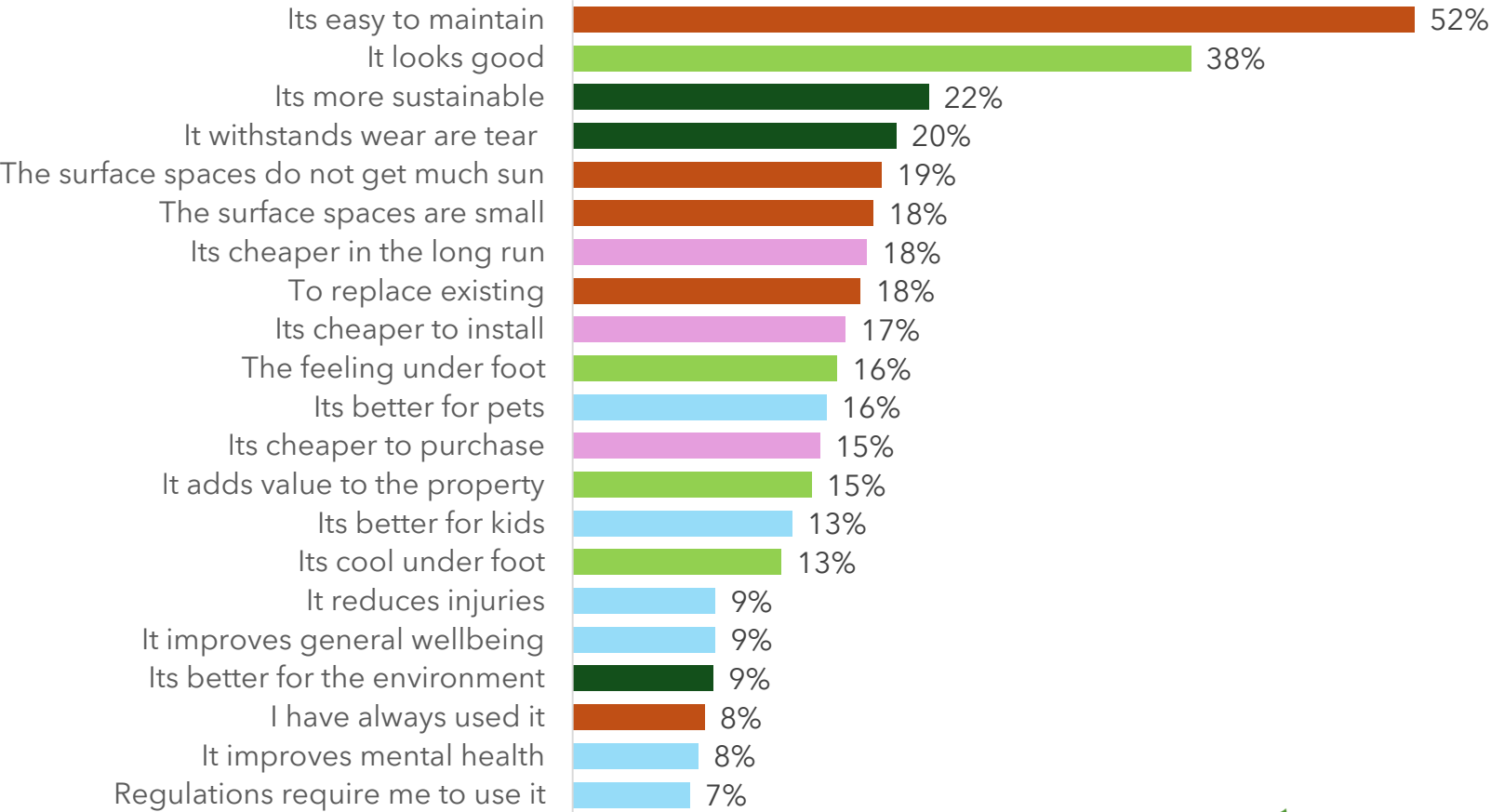


Synthetic turf consideration is driven by ease and predictability, with wellbeing a secondary concern



Ease of maintenance is the primary driver of synthetic turf consideration, reinforced by perceived durability, visual consistency and lower ongoing effort. These attributes position synthetic turf as a low-effort, predictable solution, particularly appealing where practicality and upkeep dominate decision-making.

Reasons to Consider Synthetic Turf



What We Heard from Industry: Why Residential Clients Choose Natural vs Synthetic Landscapers, architects and developers consistently describe a clear decision split

Clients **emotionally prefer natural** – but **practical constraints** often **determine the final decision**.

Natural Turf is Chosen for Experience & Lifestyle

Driven by emotional and sensory value

- Looks better and feels more authentic
- Preferred for families, children and pets
- Seen as healthier and cooler in warm climates
- Aligns with biophilic design and environmental values

"Clients mostly favour natural because it looks good and feels better."

"Natural is what families want when they can make it work."

Natural wins on aesthetics, comfort and wellbeing

Synthetic Turf is Chosen for Practical Reassurance

Driven by maintenance and site constraints

- Low upkeep and perceived convenience
- Works in shade, small courtyards and high-traffic areas
- Chosen when mowing, access or time is a constraint
- Viewed as consistent and predictable

"If the space is shady or they can't maintain it, we go synthetic."

"It's about practicality, not preference."

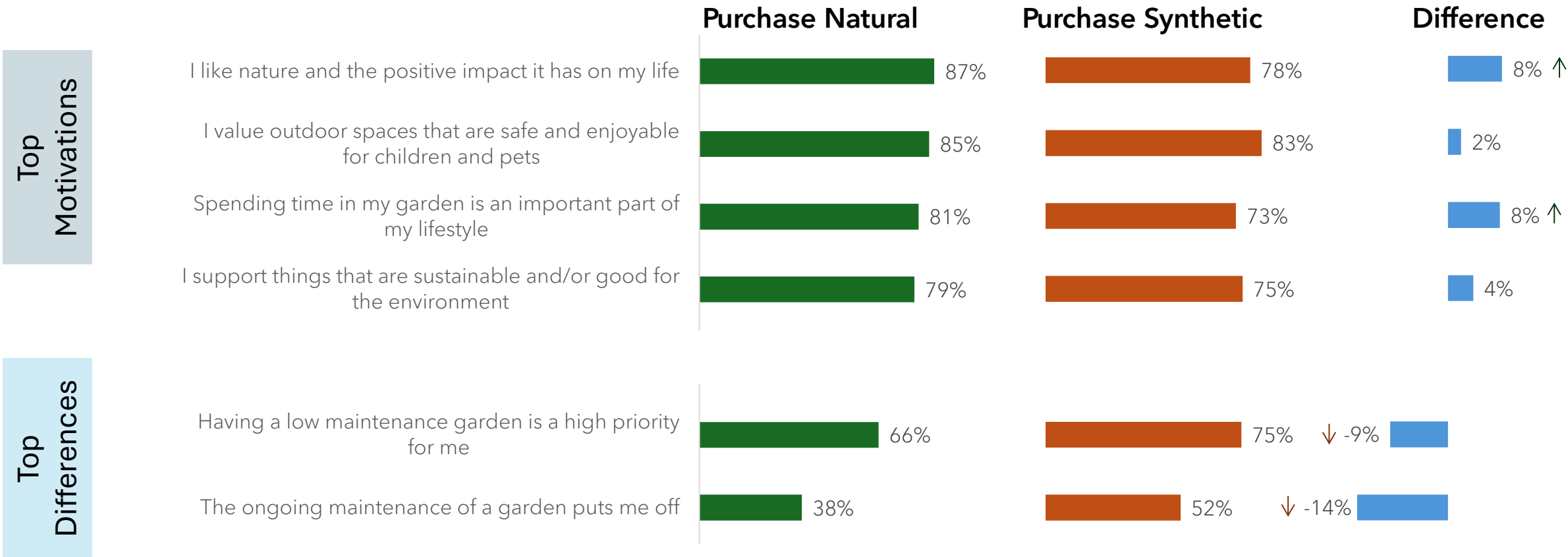
Synthetic wins on maintenance, durability and practical fit

Stepping back, natural turf buyers are motivated by connection, enjoyment and family wellbeing – not by low maintenance



Natural turf buyers are primarily motivated by **emotional and values-based drivers** – **connection to nature, pride in outdoor spaces, and creating safe, enjoyable environments for children and pets**. Maintenance is not a primary deterrent for this group. This indicates that natural turf should be positioned around experience, **authenticity and lifestyle benefits**, with upkeep framed as a manageable and worthwhile trade-off rather than a barrier.

Motivations
(Q: What motivated you to purchase turf?)



And what stops purchase?

Synthetic's barriers are intrinsic while natural's are manageable

Natural turf's barriers are **practical and manageable**, while synthetic turf's barriers are ***intrinsic to the product*** – creating a strategic opportunity to win on ***health, authenticity and environmental reassurance***.

Factors for Barriers to Purchasing Natural or Synthetic Turf

Factors for Barriers to Purchasing Natural Turf



Maintenance Burden



Site & Family Constraints



Environmental Disadvantage

Factors for Barriers to Purchasing Synthetic Turf



Artificial Look & Feel



Health & Environmental Harm



Cost & Replacement Risk

Natural turf can win by solving practical frictions, while synthetic is constrained by inherent objections

Barriers to natural turf are *largely practical and situational*, centered on maintenance effort and site suitability, and *can be actively addressed through reassurance, guidance and product choice*. In contrast, **objections to synthetic** turf are *intrinsic to the product* itself, including artificial look and feel, health and environmental concerns, and long-term replacement risk, creating a *clear opportunity for natural* to convert by *reducing friction* rather than changing the product.

Factors for Barriers to Purchasing Natural or Synthetic Turf



Natural Turf



Maintenance Burden



26%



Site & Family Constraints



17%



Environmental Disadvantage



11%



Synthetic Turf



Artificial Look & Feel



35%



Health & Environmental Harm



24%



Cost & Replacement Risk

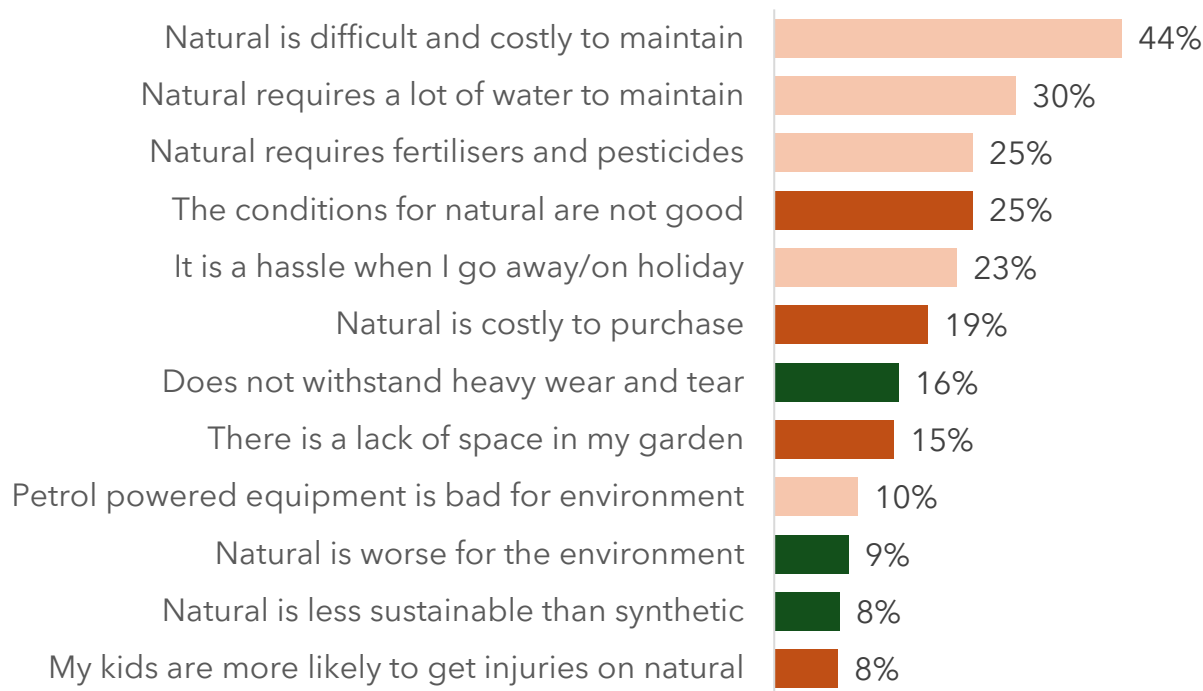


21%

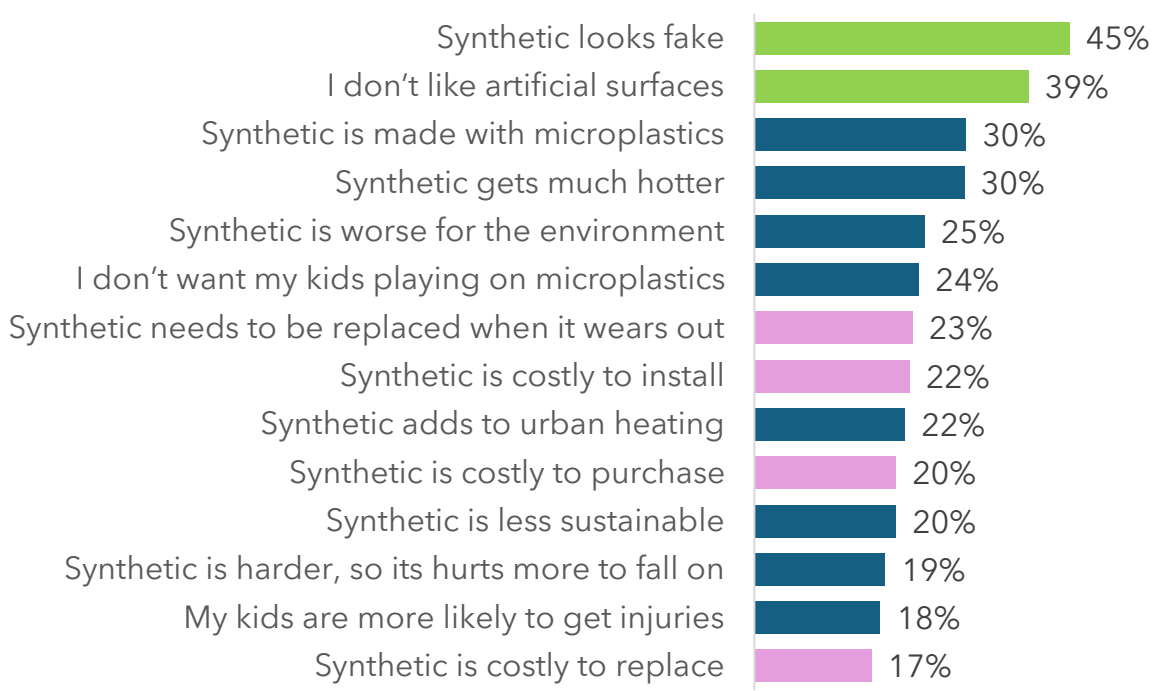
Barrier asymmetry creates a clear conversion advantage for natural turf

Because **natural turf's barriers are trade-offs that can be managed**, while **synthetic turf's objections go to acceptability and trust**, natural holds the stronger position at the point of comparison, provided **practical concerns are addressed before convenience narratives dominate**.

Barriers to Purchasing Natural



Barriers to Purchasing Synthetic



From consideration to action: how turf choices are ultimately made

Final choice is typically determined in a **short, high-impact comparison phase**.

The Decision System

Motivations
(Values & needs)

**Why does this
matter to me?**

Motivation shapes direction but final choice is determined in a short, high-impact comparison phase.

Consideration
(Drivers & barriers)

**What feels
acceptable - or
risky?**

Decision Triggers

**Inspiration • Information •
Purchase Pathways**

Decisions are shaped through a small number of high-impact touchpoints – making early moments disproportionately influential.

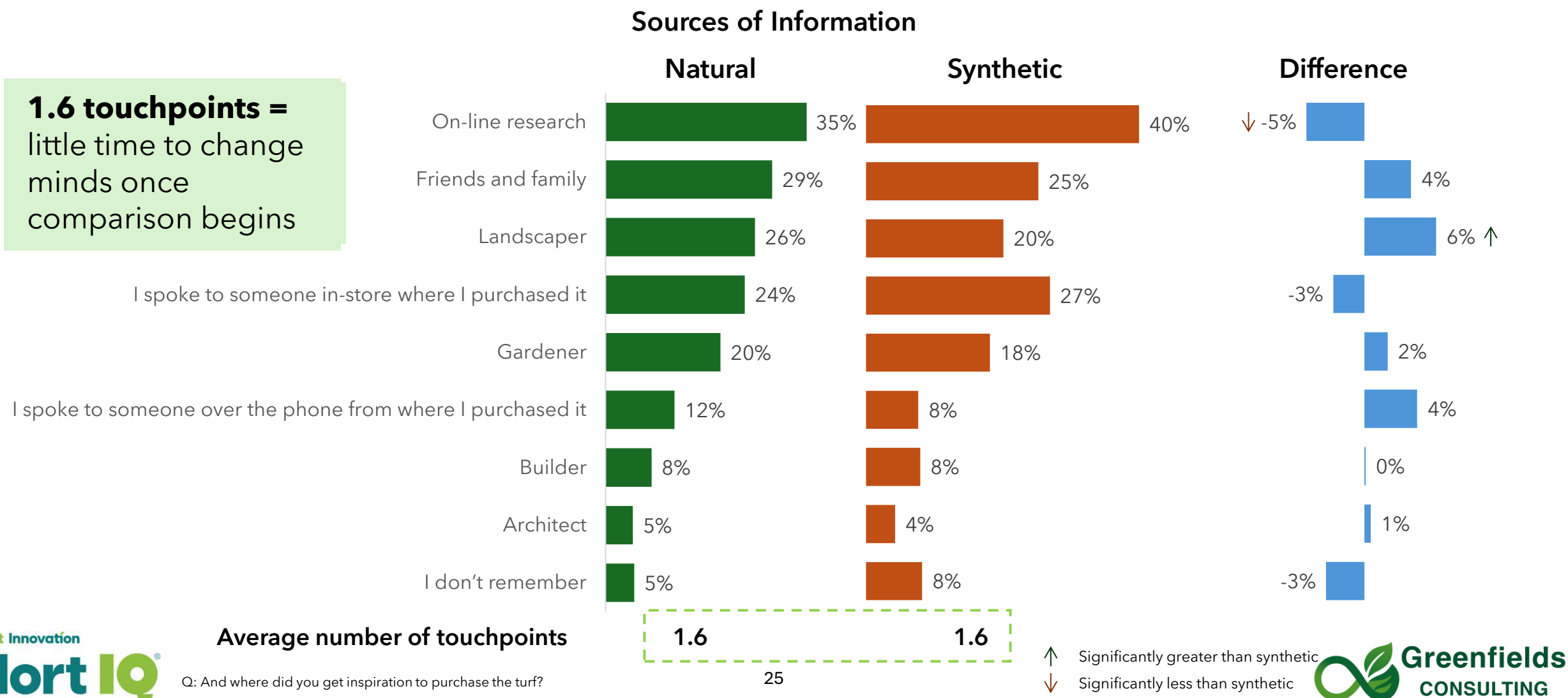
Purchase

Final Choice

The decision journey is short – making early reassurance disproportionately powerful

Most buyers rely on just **one or two information sources**, indicating a **short, highly compressed decision journey**. This places outsized importance on being visible, credible and persuasive at the earliest digital and interpersonal touchpoints, before preferences harden.

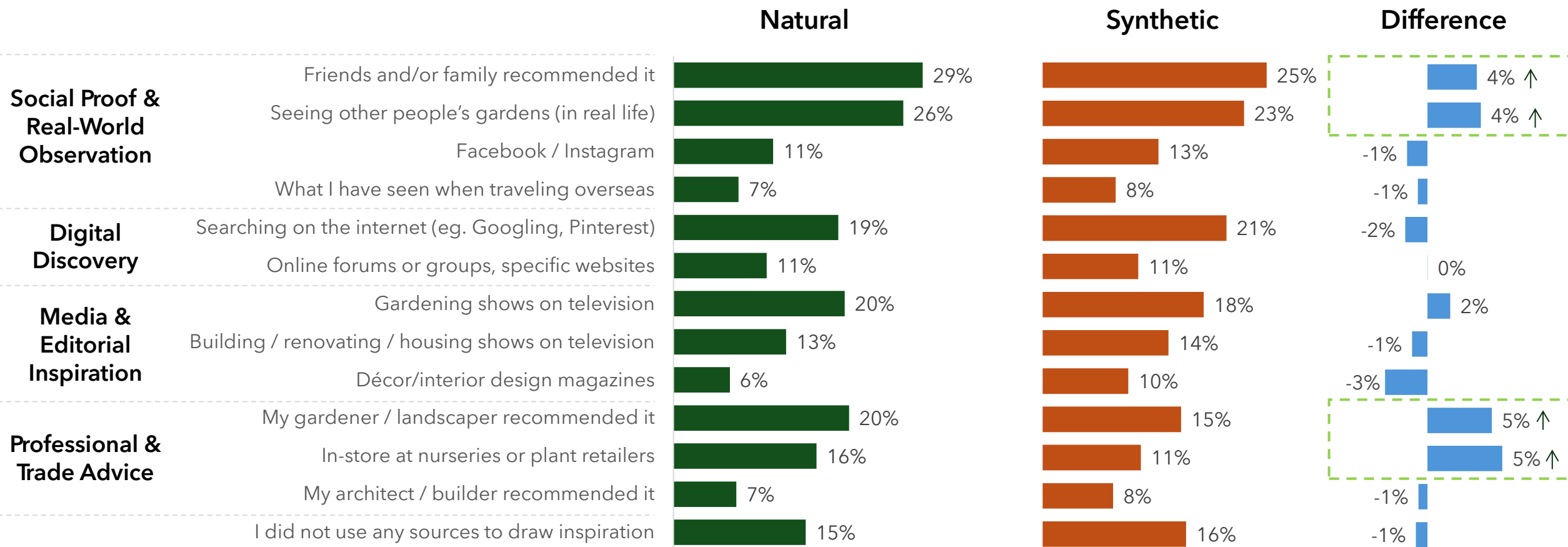
1.6 touchpoints =
little time to change
minds once
comparison begins



Early inspiration is social but professional advice tips decisions toward natural

Real-world observation and word-of-mouth dominate inspiration for both turf types, particularly seeing other gardens and recommendations from friends and family. However, professional and trade advice plays a disproportionately stronger role for natural turf, reinforcing trust and credibility at key decision moments.

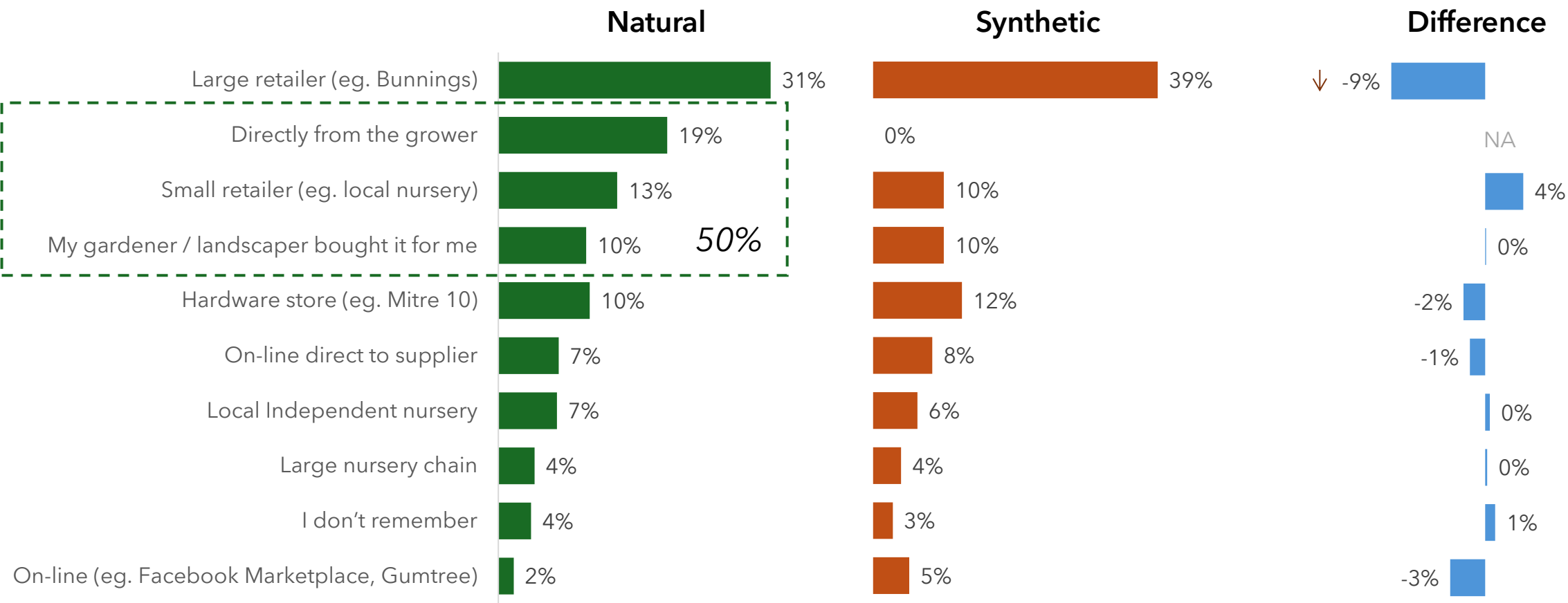
Sources of Inspiration



Where people buy reinforces how they decide: synthetic is retail-led, natural is trust-led

Synthetic turf is most often purchased through large retailers, reflecting its more standardised, off-the-shelf nature. In contrast, natural turf shows a meaningful share purchased directly from growers, signaling trust in expertise, freshness and suitability – and highlighting the strategic value of protecting and amplifying grower-led pathways.

Where Purchased



Natural's advantage lies in expert-led pathways which must be protected and amplified.

Q: Do you remember where you purchased the turf?

↑ Significantly greater than synthetic
↓ Significantly less than synthetic

When landscapers purchase turf, freshness drives default choice, while convenience drives exception

Channel choice follows a **clear hierarchy: trust and freshness first, convenience only when urgency rises.**

Decision logic behind landscaper turf purchasing

FRESHNESS



CONVENIENCE

Direct From Growers

Local Nurseries / Retailers

*Large Retailers
(e.g. Bunnings)*

When used:	Planned jobs / larger orders	Short notice / small jobs	Urgent / last-minute
Preference:	High (Default)	Medium (Situational)	Low (Exception Use)
Why preferred:	- Fresher turf → better performance outcomes - Trusted relationships and reliable supply - Competitive pricing at scale	- Acceptable freshness - Convenience - Personal relationships	- Immediate access - Competitive pricing
Barriers:	Less convenient for urgent, small jobs	- Limited range - Inconsistent availability	- Perceived lack of freshness - Quality uncertainty (“don’t know how long it’s been there”)

Natural turf’s advantage depends on protecting grower-led pathways – urgency shifts share toward retail-led channels.

There are two growth engines – immediate conversion and long-term norm setting

1.1 million Australians are actively in-market and making turf decisions within the next two years, while a **further 1.1 million intend to purchase beyond this timeframe**. This distinction matters: the in-play market represents the immediate conversion battleground, while the future market is where norms, defaults and perceptions are formed well before active comparison begins.

Total Intending Market

'In-Play' Conversion Battle

1.1m Australians (5%)

People intending to purchase turf in the next 2 years

- Fully analysed in this study
- Personas and segments built here
- Primary conversion battleground

'Future Market' Belief Formation Battle

1.1m Australians (5%)

People intending to purchase turf, but not within the next 2 years

- Earlier stage of the decision journey
- Not yet actively comparing options
- Influenced by norms, defaults and education

Tom, Active Comparer

This is where the battle is won or lost

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



Age: Early 40s

Life stage: Family with school aged kids

Home: House with front/back yard and/or courtyard/garden

Outdoor Area: Medium lawn area

Pets: Yes

Bio

Tom sees his garden as an important part of family life, but one that needs to be practical as well as enjoyable. With school-aged kids and a busy household, the outdoor space has to be safe, comfortable and add value to the home, without becoming a source of stress.

He takes a considered approach to decisions, actively comparing options and paying attention to what other families and neighbours choose. Tom is attracted to natural turf for its look, feel and family-friendly benefits, but he wants confidence that maintenance will be manageable. For Tom, making the right choice means balancing lifestyle benefits today with reassurance it won't create problems later.

Motivators

- **Connection to nature:** Real grass supports family wellbeing
- **Home pride:** The garden reflects his values and lifestyle
- **Family safety:** Safe, comfortable space for kids and pets
- **Confidence in choice:** Compares options and looks to what others choose

Consideration Drivers

- **Looks & feel:** Natural turf looks better and feels right underfoot
- **Family & pet comfort:** Cooler, softer and safer for kids and pets
- **Adds value:** Enhances the look and resale value of the home
- **Manageable upkeep:** Seen as relatively easy to maintain, not effortless but acceptable

How to Engage with Tom

- **Lead with real-world proof:** Show authentic family homes using natural turf in everyday life
- **Anchor on look & feel:** Emphasise how natural turf looks better and feels right underfoot
- **Reassure on family safety:** Highlight comfort, cooling and suitability for kids and pets
- **Frame maintenance as manageable:** Provide simple guidance and reassurance, not denial of effort
- **Reinforce value:** Connect natural turf to home pride and long-term property appeal
- **Be present early:** Influence Tom before convenience narratives around synthetic turf dominate

What does this mean for the residential market?

Natural wins intent. Synthetic wins comparison. The battleground is comparison.

Inspiration (Natural Leads) —→ **Comparison (Synthetic Leads)** —→ Purchase

Natural Wins Early

Strong emotional leadership

- Wins on look, feel and family wellbeing
- Aligns with home pride and lifestyle values

Clear intent advantage

- 46% of in-play buyers lean natural
- Leads in inspiration and trusted recommendation

Natural Loses Ground in Comparison

Practical reassurance gap

- Maintenance, durability and water use become decision drivers
- Synthetic narratives around ease gain traction

Conversion gap emerges

- Natural converts broadly in line with intent (+1%)
- Synthetic materially over-converts (+11%)

The opportunity is not to create demand – it is to defend high-intent buyers during the comparison phase.

Residential Decision Dynamics – Key Takeaways

Natural turf wins on preference and intent – but growth is decided in comparison

1. Natural leads early but conversion is fragile

- 46% of in-play buyers lean natural.
- Yet natural converts only in line with intent (+1%), while synthetic over-converts (+11%).

2. The battleground is the 'Active Comparer'

- Over a quarter of in-play buyers are undecided or actively comparing.
- Winning the practical comparison phase determines share.

3. Emotion drives intent. Practicality drives purchase.

- Natural wins on look, feel, family wellbeing and lifestyle values.
- Synthetic gains ground on maintenance, durability and perceived ease.

4. Barrier asymmetry favours natural – if friction is reduced

- Natural's barriers are practical and manageable.
- Synthetic's objections are intrinsic (artificial feel, heat, microplastics, replacement risk).

5. Decisions are compressed and trust-led

- Most buyers rely on 1-2 touchpoints.
- Early reassurance and credible proof disproportionately shape final choice.

Residential Decision Dynamics – Strategic Implications and Recommendations

Close the comparison gap by pairing emotional leadership with practical proof

1. Defend emotional leadership – but pre-empt doubt

- Lead with look, feel, family wellbeing and lifestyle value.
- Proactively address maintenance, water and durability before comparison begins.

2. Win the practical comparison phase

- Arm growers, retailers and digital channels with clear, simple proof that practical concerns are manageable.
- Make reassurance visible at the moment of evaluation – not after.

3. Exploit structural weaknesses in synthetic

- Confidently reinforce cooling, environmental and health advantages.
- Highlight intrinsic trade-offs (heat, artificial feel, microplastics, replacement cycles).

4. Be present at the first high-impact touchpoint

- Decisions are compressed; 1-2 touchpoints shape outcomes.
- Prioritise visibility and credibility in early digital and interpersonal channels.

5. Anchor growth in trusted pathways

- Leverage growers, landscapers and real households as proof.
- Protect and amplify trust-led purchase routes versus retail commoditisation.

A background image of children playing soccer on a grassy field. Several children in red jerseys are in the foreground, with one child in the center kicking a ball. Other children in blue jerseys are visible in the background. The image is dimmed to allow text to be overlaid.

3. Community, Commercial and Sporting Demand

Where capacity drives decisions – and where value is left on the table

Community sport and open space are core national infrastructure assets – with economic, environmental and social impact

These assets serve almost all Australians, every week – supporting organised sport, informal recreation and everyday wellbeing.

Scale

16,100+

Sports fields nationally



Reach

97%

of Australians regularly use
community spaces



Participation

84%

of Australians participate in sport or
physical activity annually



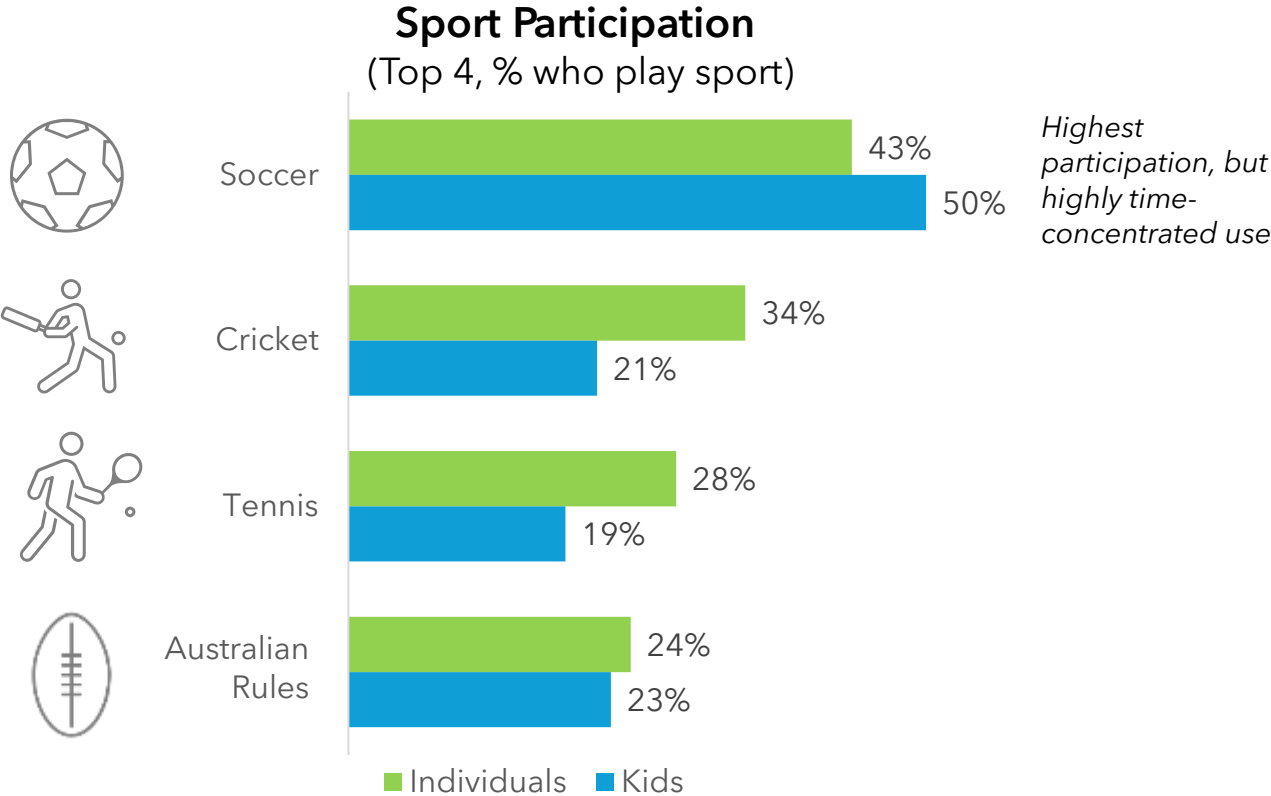
*Decisions about these spaces shape participation,
wellbeing and community value for decades.*

This points to a
broader concept:
Total Public Value

Despite near-universal use, demand on fields is uneven and highly concentrated

Organised sport concentrates demand into fixed times and locations, while everyday community use is broad and ongoing – creating very different capacity pressures. **Participation ≠ peak-time demand**

Time-bound, structured demand



Dispersed informal demand



Capacity pressure is driven by when and how fields are used – not just how many people use them

Capacity pressure is real – but highly uneven across councils and locations

While some councils face genuine constraints driven by land scarcity and peak-time demand, many others operate within the sustainable capacity range of well-managed natural turf.

Inner-city vs Regional / lower-density councils

High-pressure environments (Inner-city, land-constrained councils)



Characteristics

- Limited land availability
- High participation density
- Peak-time congestion (evenings / weekends)
- Short recovery windows
- Greater sensitivity to weather disruption

Capacity implication:

Natural turf may require targeted intervention to meet demand

Observed usage in many councils sits within the sustainable capacity range of well-managed natural turf – despite perceptions of widespread shortage

Perceived capacity shortages are often driven by **peak-time congestion** – **not total weekly demand**

Typical community field usage: **~35-45 hrs/week¹**

Well-managed natural turf can typically sustain **~40-50 hrs/week²** (context-dependent)

Low-pressure environments (Regional and less dense councils)



Characteristics

- More land availability
- Lower peak-time congestion
- More flexible scheduling
- Longer recovery windows
- Greater scope for turf optimisation

Capacity implication:

Well-designed natural turf can meet typical usage needs

Implication: Capacity decisions should be grounded in demonstrated usage patterns – not perceived peak pressure alone

1: Observed usage varies widely by location (~20 to 60+ hrs/week), with many councils clustering within the 35-45 hr range"

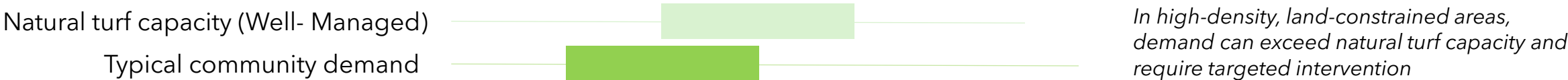
2: Lower ranges (e.g. ~20-30 hrs) typically reflect constrained maintenance or site conditions – not best-practice performance

Capacity differences between natural and synthetic turf are often overstated

While synthetic fields can support higher use, the effective capacity of natural turf varies widely – and is frequently underestimated in community and junior sport contexts.

What’s often assumed vs What the evidence shows

Common assumptions	Evidence based reality
What we often hear <i>“Synthetic fields deliver the equivalent of multiple natural fields”</i> <i>“Natural turf can only handle ~20 hours per week”</i> <i>“Rain makes natural fields unusable”</i> <i>“Synthetic is the only way to increase capacity”</i>	What the evidence consistently shows • Capacity constraints are driven by peak-time clustering, not total weekly hours • In some cases (particularly soccer), capacity requirements can be overstated relative to actual usage in some contexts • Typical community field demand often sits within or below synthetic maximum capacity • Well-managed natural turf can sustain ~40-50 hours/week (context-dependent) • Drainage, lighting, maintenance and scheduling materially affect natural turf performance <i>The gap between perceived need and actual usage is often the critical driver of infrastructure decisions</i>

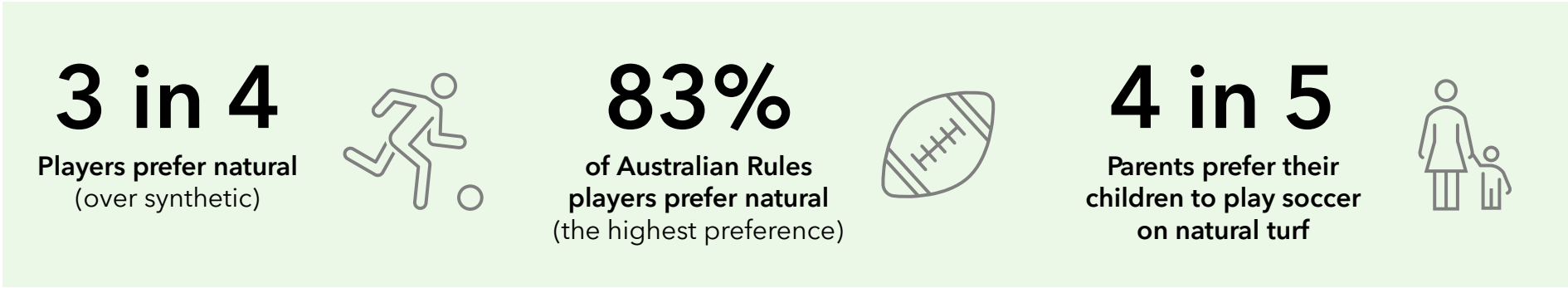


*The key question is not “Which surface delivers the most hours?” but
“What level of capacity is actually required based on real usage?”*

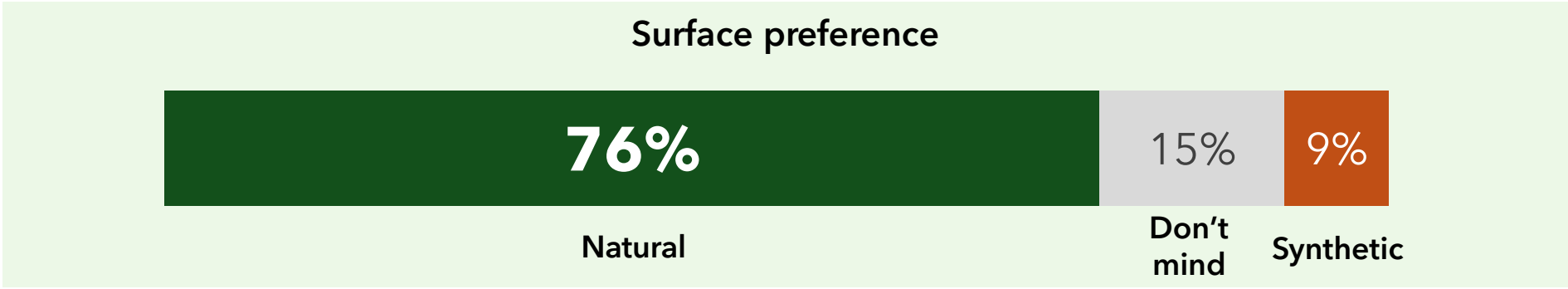
When asked directly, users overwhelmingly prefer natural turf across sport and community use

Across organised sport and informal community settings, natural turf is preferred for comfort, heat performance and everyday usability – particularly for children and families.

Stated User Preference



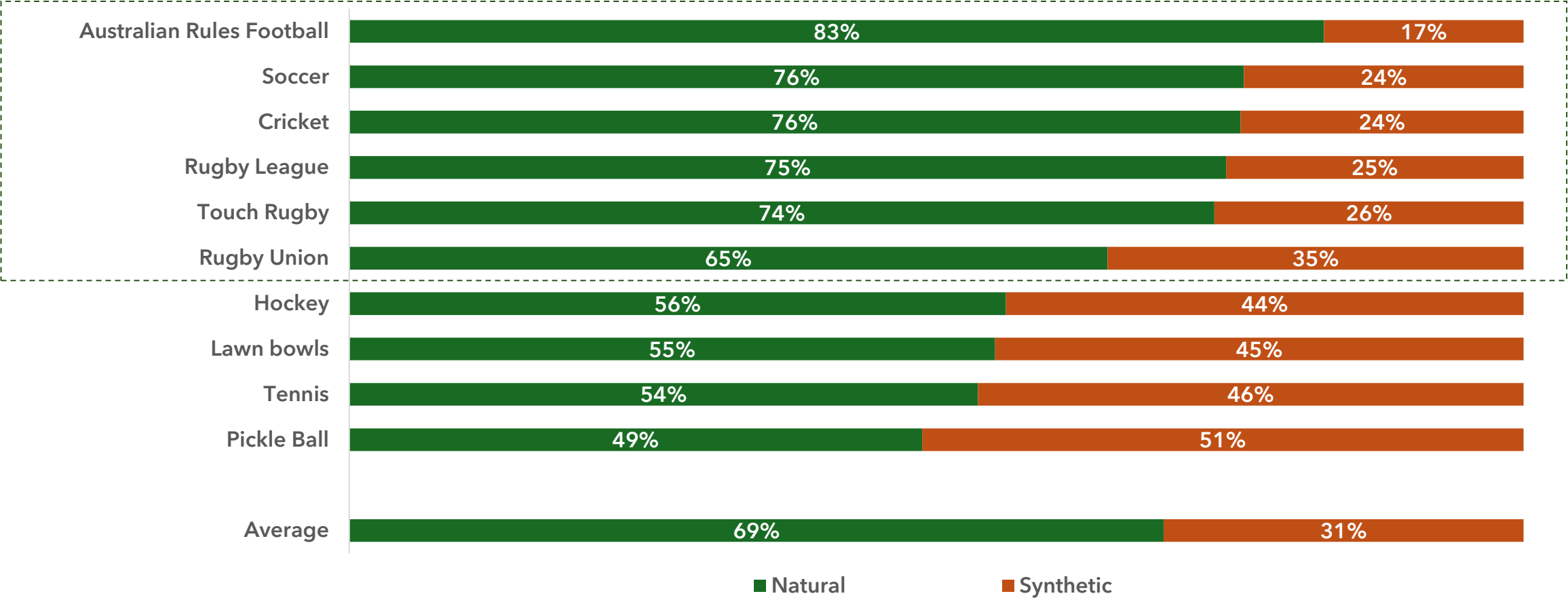
Note: Injury incidence is broadly similar across surfaces; preference is driven by comfort, feel underfoot and heat performance rather than injury risk.



Optimising purely for peak sporting capacity risks undervaluing the surfaces most people prefer and use most often.

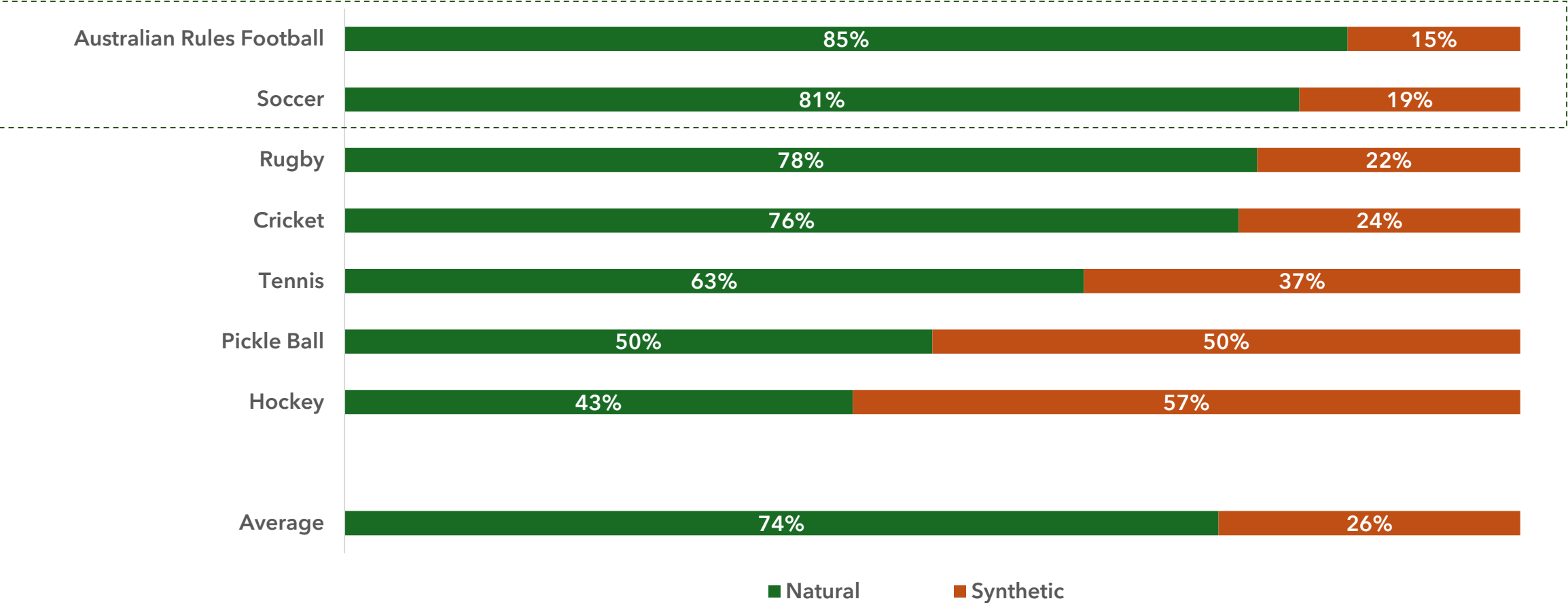
Preference for natural turf is high amongst the large team sports with an average of 3 out of 4 people saying they prefer to play on natural

Surface Preference for Sport - Individuals



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

Surface Preference for Sport - Kids



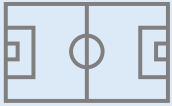
Optimising for one stakeholder can unintentionally reduce total community value

When surface decisions are driven primarily by peak sporting throughput, broader community, environmental and long-term value can be displaced.

Trade-off Framework

Sporting Clubs

(High influence, narrow objective)



Primary objective

- Maximise reliable playing hours
- Minimise cancellations
- Support participation growth and revenue

What works well

- High utilisation
- Predictable scheduling
- Consistency across seasons

Synthetic fields increase organised sport availability — but are less suited to informal, mixed-use community activity.

Risk if over-weighted

- Decisions optimise for peak demand only

Council Decision

(The balancing role)



Council Responsibility

- Serve multiple user groups
- Manage long-lived public assets
- Balance cost, wellbeing and environmental outcomes

Decision Tension

Capacity vs Total Public Value

Whole-of-life costs and replacement cycles can outweigh short-term utilisation gains.

Broader Community

(Large, diffuse stakeholder)



What Communities Value

- Comfort and heat performance
- Everyday usability
- Children's play and informal access
- Environmental amenity

Risk if under-weighted

- Reduced informal use and broader social return

Increasing sporting throughput does not automatically maximise social, environmental or economic return

Important social and environmental benefits are often excluded from capacity-led decisions

When surface decisions focus narrowly on peak sporting throughput, councils may miss opportunities to deliver broader wellbeing, environmental and long-term public value.

The 'Missed' Opportunity

Social Value

Social value is often under-weighted

Parents value time their children spend playing on natural turf

2x

as highly as time spent on synthetic.

(based on stated value of time spent on natural v synthetic)



- Reflects comfort, trust and perceived wellbeing
- Particularly important for junior and community sport
- Signals quality of experience, not just access

Decisions optimised for throughput risk undervaluing the experiences families care most about.

Environment & Community

Environmental and community co-benefits are often excluded



- **Cooling and heat mitigation** in public spaces
- **No microplastic shedding** into soil and waterways
- **Supports soil health, drainage and urban greening**
- **Better suited to informal, mixed community use**

These co-benefits deliver value beyond sport – but are rarely captured in capacity-led business cases.

When these benefits are excluded, surface decisions risk optimising for utilisation rather than Total Public Value.

Natural turf performance is constrained by capability and funding gaps – not surface choice

When councils lack specialist expertise and sustained funding, turf performance falls below its potential

The 'Capability & Funding Gap'

Root Causes (Leads to)

Council Capability (Often Limited)

- Specialist expertise in **turf construction, drainage and soils** varies
- Maintenance does not consistently reflect **best-practice agronomy**
- Procurement often prioritises **capex over lifecycle performance**
- Limited access to **turf management expertise and performance data**

Maintenance Resourcing (Often Underfunded)

- Insufficient funding for:
 - Regular renovation (aeration, topdressing, re-turfing)
 - Irrigation and water management
 - Skilled maintenance staff
- Funding prioritises **new fields over maintaining existing ones**
- Performance expectations exceed **operating investment**

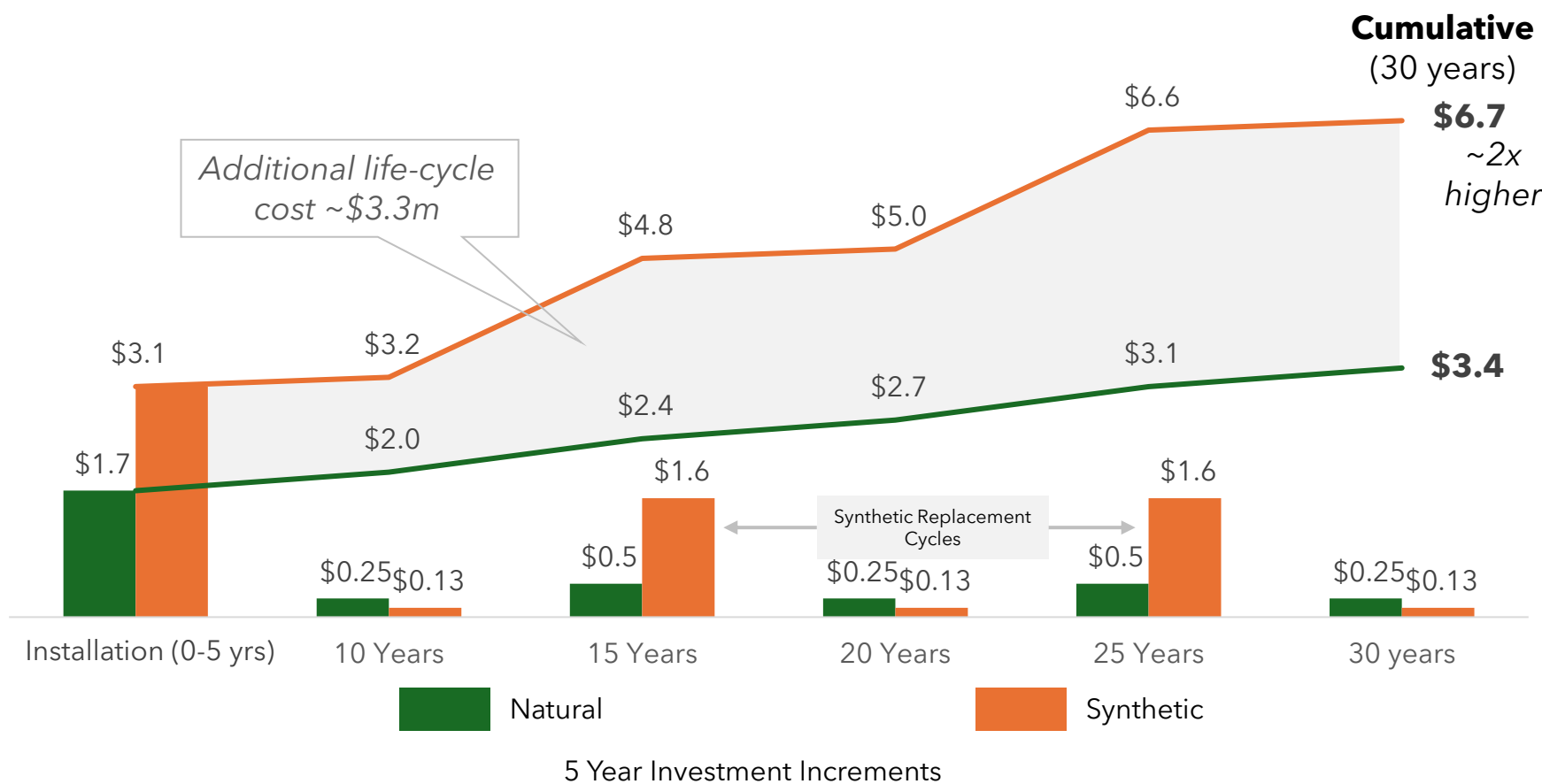
Resulting Reality

- Declining turf quality and resilience
- Lower carrying capacity than design potential
- Increased closures and inconsistent playability
- Perception that natural turf "can't keep up" becomes self-reinforcing

Constrained performance is typically a capability and funding issue – not a limitation of natural turf itself.

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

Lifecycle Cost Comparison: Natural vs Synthetic Fields (\$m)



	Natural	Synthetic
Initial Installation	~\$1-2m	\$2-4m
Major Renewal (~8-12 yrs)	\$0.25m	\$1-2m
Maintenance (\$m, pa)	\$0.05	\$0.025
Peak Usage Capacity (per week)	50	70

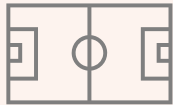
Investment Implication

The additional lifecycle cost¹ of **one synthetic field** can fund upgrades to **multiple natural fields**² – often delivering greater total system capacity

The same investment can deliver very different system outcomes

Synthetic fields provide unmatched reliability in high-pressure environments – but are often over-applied relative to actual demand

Single Asset Strategy (1 x Synthetic Field)



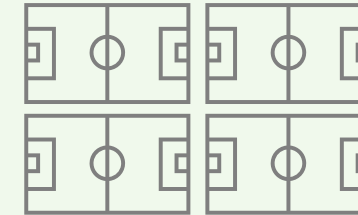
- ~\$6.7m lifecycle cost (30 years)
- High peak capacity in one location
- Concentrated usage and wear
- Targets capacity at a single high-demand site

Synthetic fields provide higher reliability and all-weather access, which may be required in high-demand locations

Same Total
Investment

1 Site
vs
Multiple Sites

Network Capacity Strategy (Multiple Natural Turf Upgrades)



- Equivalent investment (~\$6-7m)
- Upgrade¹ 2-4 fields depending on site condition and upgrade scope
- Increases total usable capacity across the network
- Greater flexibility, resilience and community access

The question is not “Which surface?” – but “How do we maximise capacity across the whole system?”

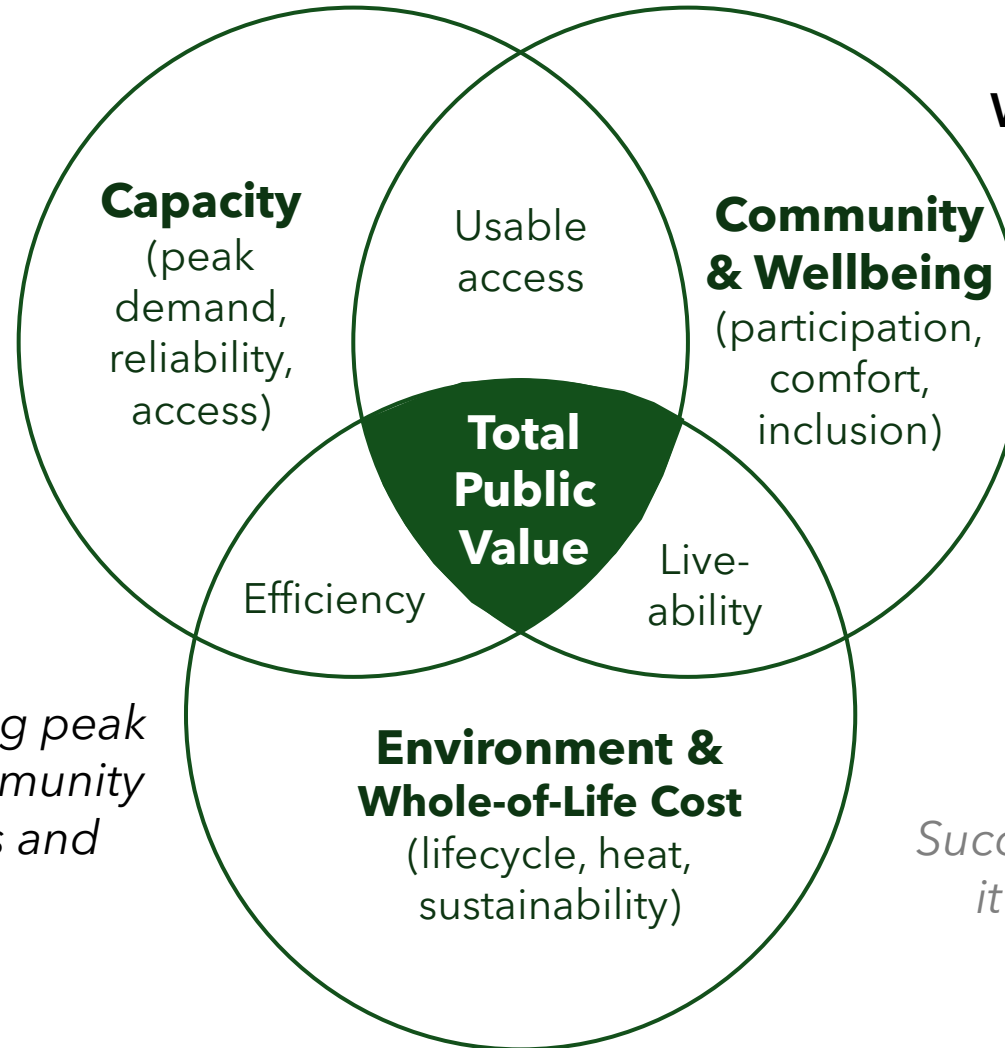
The opportunity: move beyond 'either/or' to place-based, evidence-led decisions

The right solution depends on context – not a single 'best' surface

What this means for decisions

- Focus on Total Public Value (not just hours)
- Match surface to context – avoid one-size-fits-all
- Optimise natural turf before replacement

In practice, this means balancing peak demand, access reliability, community use, environmental outcomes and long-term cost



Where each surface performs best

Natural turf:

- Community / junior use
- Environmental outcomes
- Land allows recovery

Synthetic turf:

- Land constrained
- Demand exceeds capacity
- All-weather reliability needed

Success is not maximising utilisation – it's maximising total public value

From capacity-led decisions to value-led investment.

Translating Total Public Value into practical decision-making

Decision Framing

1

Balance All Three Dimensions

Explicitly assess Capacity, Community & Wellbeing, Environment & Whole-of-Life Cost in every decision.

2

Match the Surface to the Place

Base decisions on demonstrated local demand, constraints and user profile.

Optimisation

3

Optimise Before Replacing

Test design, drainage, lighting and maintenance improvements before full conversion.

Objective:

*Maximise Total Public Value –
not just utilisation.*

Financial Discipline

4

Model Whole-of-Life Investment (10-30 Years)

Assess capital, renewal cycles, maintenance and disposal together.

Targeted Deployment

5

Use Synthetic Where Constraints are Genuine

Use synthetic only where constraints are demonstrably genuine – not assumed.

Community, Commercial and Sporting Demand – Key Takeaways

Community field investment decisions are more nuanced than a simple natural vs synthetic choice

1. Demand is uneven – not universal

- Capacity pressure is concentrated in specific locations and peak windows.
- Well-managed natural turf can meet most typical community demand (~40-50 hrs/wk)

2. Utilisation is not the same as public value

- Organised sport throughput captures only part of community benefit.
- Informal access, children's participation, comfort and heat performance materially shape outcomes.

3. User preference is consistently in favour of natural turf

- Majority of players and community users prefer natural.
- Parents place ~2x greater value on time children spend on natural.

4. Whole-of-life costs materially change decisions

- Synthetic fields offer higher peak capacity
- But require significantly higher long-term investment.

5. Community and environmental value is often excluded

- Informal use, cooling and access are undervalued
- These materially affect total public value.

Community, Commercial and Sporting Demand – Strategic Implications

Applying evidence to assist decision making

1. Shifting the decision frame

- Shift from “maximising hours delivered” to “maximising Total Public Value”.
- Explicitly assess Capacity, Community & Wellbeing, and Whole-of-Life Cost together.

2. Target investment where pressure is genuine

- Prioritise synthetic surfaces only where peak demand consistently exceeds natural capacity.
- Avoid blanket conversion programs not supported by location-specific demand evidence.

3. Optimise existing natural assets before replacement

- Test drainage, lighting, scheduling and maintenance upgrades first.
- Increase usable capacity through incremental investment before full replacement.

4. Consider long-term financial exposure

- Assess capital, renewal, maintenance and disposal over a 10–30 year horizon.
- Recognise that fixed replacement cycles create recurring future budget commitments.

5. Protect environmental and community value

- Incorporate urban cooling, informal access and youth participation into business cases.
- Ensure surface choices align with broader livability and climate resilience goals.



4. Economic Contribution and Public Value

The economic ecosystem behind turf – and the value at stake

~\$5.1 billion

~15,500 jobs

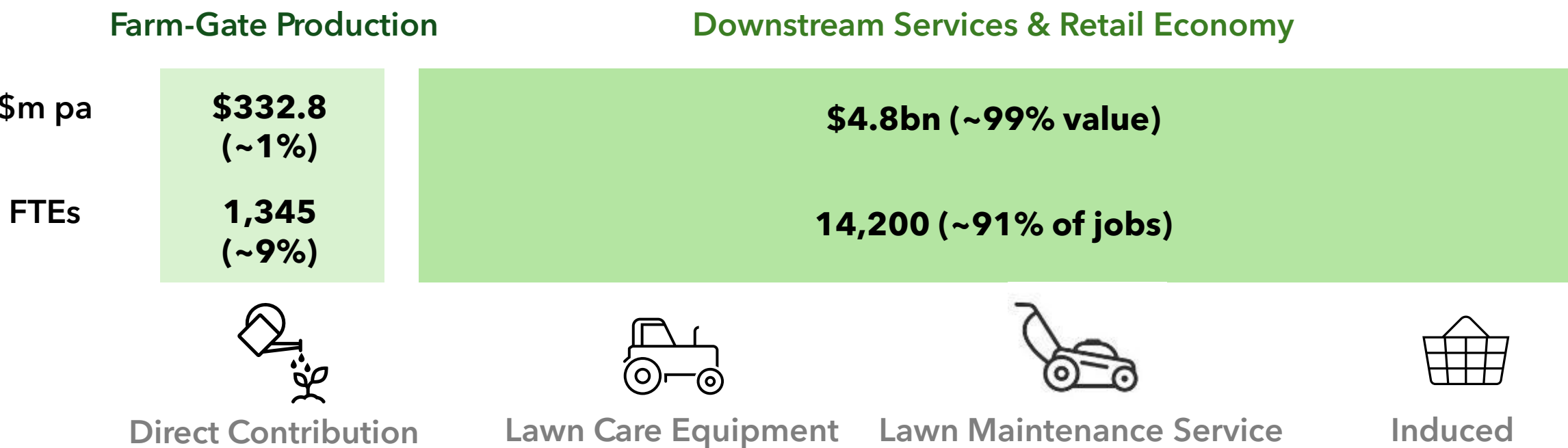


The *Australian Turf Industry* contributes **~\$5.1 billion** to the **Australian economy every year** and supports **~15,500 jobs**

Natural turf underpins a \$5bn service economy – not just a production sector.

Decisions affecting turf production have economic consequences that ripple through a much larger services and employment ecosystem.

~\$5.1 billion | **~15,500 jobs**



Only 1% of economic value sits at the farm gate – nearly 90% of employment sits downstream.

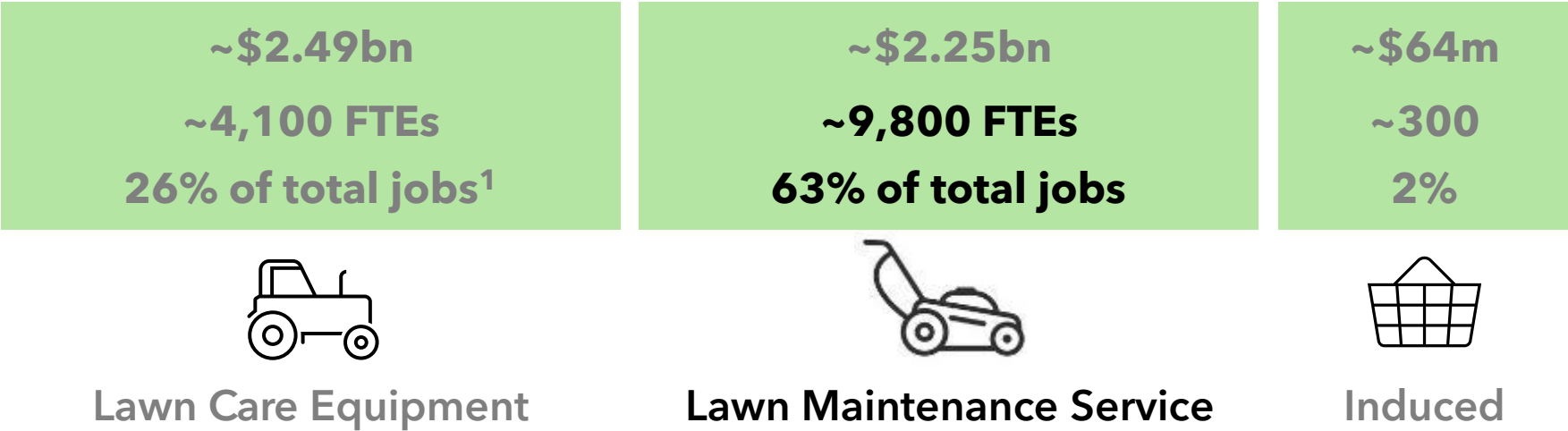
Note: Induced contribution refers to the economy-wide flow-on activity generated by household spending supported by turf industry income and employment

Natural turf's economic footprint is overwhelmingly downstream

The majority of economic activity is labour-intensive, locally embedded and SME-driven.

Downstream Services & Retail Economy

~\$4.8 billion | **~14,200 jobs**



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

Surface choices shape employment, small business and regional economies

Most economic activity linked to turf is embedded in services, retail and local employment.

Why This Economic Footprint Matters

1

Employment is local and service-led

- ~90% of jobs sit downstream in maintenance, retail and equipment
- Employment is SME-driven and regionally distributed
- Impacts flow through small businesses – not just growers

2

Substitution reshapes the service economy

- Surface choices influence ongoing maintenance demand
- Retail, contractor and equipment activity depend on natural turf ecosystems
- Changes affect recurring service employment – not just installation

3

Policy and procurement choices ripple outward

- Public surface decisions shape private sector demand
- Infrastructure settings influence employment intensity
- Whole-of-economy impacts exceed farm-gate metrics

Natural turf should be assessed as essential service infrastructure – not solely as agricultural production.



Natural turf enables ~\$42 billion in annual Public Value

Participation | Wellbeing | Amenity | Environment | Avoided Costs

Natural turf can be treated as essential green infrastructure — not merely a surface choice

Where the ~\$42 billion in public value comes from

The majority of value is generated through frequent participation and everyday community use.

~\$42 billion annually



Note: Categories reflect distinct value streams and are not directly comparable to GDP measures.

Natural turf operates as distributed green infrastructure

Environmental performance has public health and fiscal implications.



Environmental Impact

Health & Exposure Impacts



Urban heat mitigation

- 10–30°C cooler than synthetic surfaces in peak heat
- Reduces heat stress exposure in schools and community spaces

Microplastics & end-of-life impacts

- No plastic infill or polymer shedding
- Avoids disposal and landfill risks at surface replacement

Carbon & air quality

- Sequesters carbon in soils and biomass
- Captures particulates and improves local air quality

Natural turf mitigates environmental and human exposure risks rather than creating them.

Infrastructure & Risk Function



Bushfire retardant classification (AS3959)

- Classified as low-threat vegetation
- Supports defensible space planning

Erosion & soil stabilisation

- Root systems bind soil and reduce runoff
- Protects infrastructure and landscapes

Stormwater management

- Permeable surface reduces runoff intensity
- Supports water infiltration and drainage resilience

Natural Turf operates as distributed green infrastructure embedded in communities.

Sport delivers the greatest public value – economically and culturally

Organised sport participation represents the single largest component of annual public value.

~\$20.4 billion annually¹



Sporting Utility

Participation at Scale

- Millions of Australians participate regularly in organised sport
- Value reflects **frequency × wellbeing impact**, not spectator spending
- Captures physical health, mental health and social cohesion benefits

Community Infrastructure

- Local fields underpin clubs, schools and volunteer networks
- Enable youth development and lifelong participation pathways
- Support inclusive access across regions and socio-economic groups

Enabling Iconic Sporting Moments (Qualitative)



- Community fields are the foundation of elite pathways
- Enable nationally significant sporting moments
- Strengthen identity, pride and intergenerational connection

Sporting participation is both a quantified economic asset and a foundational element of national identity.

Everyday green space underpins ~\$14.4bn in annual community wellbeing value

Frequent, informal use drives substantial public value beyond organised sport.

~\$14.4 billion annually¹



Community Wellbeing

Everyday Use at Scale

- Parks, school grounds and neighbourhood lawns are used daily
- Value reflects **frequency × wellbeing** impact
- Includes informal play, recreation and passive use

Mental health & psychological wellbeing

- Reduces stress and supports psychological wellbeing
- Encourages regular outdoor activity and time in nature
- Supports resilience through daily exposure to green space

Social Cohesion & Access Equality

- Supports equitable access to recreation across income groups
- Strengthens neighbourhood social networks and informal connection
- Provides universally accessible, shared public space

Everyday green space delivers sustained, population-level wellbeing benefits that accumulate through frequent use.

Lower whole-of-life surface costs contribute ~\$4.9bn in avoided expenditure annually

Natural turf often reduces long-term capital and replacement liabilities relative to alternatives.

~\$4.9 billion annually



Avoided Life-Cycle Costs

Lower Capital Intensity

- Natural turf installation typically lower upfront cost
- Avoids high base construction and synthetic system inputs
- Reduces embedded material intensity

Replacement & Disposal Cycles

- Alternative surfaces require full replacement every 8-12 years
- Disposal and landfill costs create recurring fiscal exposure
- Natural turf renewal is incremental rather than full-surface reset

Whole-of-Life Budget Stability

- Ongoing maintenance expenditure is predictable and service-based
- Avoids large cyclical capital spikes
- Reduces long-term asset write-down risk

Capital cost is not the primary cost driver – lifecycle replacement and disposal shape long-term fiscal exposure.

Green space amenity contributes ~\$2.8bn in annual property and urban value

Natural turf supports residential desirability, neighbourhood appeal and place quality.

~\$2.8 billion annually



Residential Amenity Value

Residential Capitalisation Effects

- Proximity to maintained green space positively influences property values
- Quality green space enhances curb appeal and saleability
- Amenity is capitalised into housing markets over time

Neighbourhood & Urban Appeal

- Green streetscapes enhance livability and perceived safety
- Supports place identity and local attractiveness
- Contributes to residential retention and community stability

Planning & Development Implications

- Green infrastructure supports premium positioning in new developments
- Enhances market absorption rates in residential projects
- Underpins urban greening and planning objectives

Amenity value is capitalised into property markets and reflected in urban desirability over time.

What does this mean for decision makers?

Natural turf can be treated as essential green infrastructure – not merely a surface choice

The economic, environmental and public value implications are structural and long-term.

1

Economic System Implications

- ~\$5.1bn industry contribution and ~15,500 jobs
- Employment is predominantly downstream and SME-based
- Surface decisions influence local service ecosystems

2

Public Value Dominates Market Value

- ~\$42bn in annual public value
- Participation, wellbeing and avoided costs drive impact
- Traditional procurement under-captures non-market benefits

3

Fiscal & Environmental Exposure

- Lifetime replacement cycles drive long-term budgets
- Heat, exposure and disposal risks have public health implications
- Green infrastructure supports resilience planning

4

Whole-of-System Assessment Required

- Capital cost is only one component
- Long-term maintenance, renewal and disposal matter
- Decisions should integrate economic, environmental and social outcomes

Surface decisions are infrastructure decisions – with long-term economic, fiscal and community consequences.

Economic Contribution and Public Value – Key Takeaways

Natural turf is a high-value public asset – not just a surface input

1. The majority of value sits outside the market

- ~\$42bn in annual public value reflects participation, wellbeing, amenity and avoided costs.
- This materially exceeds farm-gate output and is under-captured in procurement models.

2. Sporting participation is the single largest driver

- ~\$20.4bn linked to organised sport use nationwide.
- Value reflects frequency × wellbeing impact – not spectator economics.

3. Everyday green space delivers sustained population-level benefits

- ~\$14.4bn in community wellbeing value from parks, schools and neighbourhood lawns.
- Benefits accumulate through frequent, informal use.

4. Whole-of-life costs materially shape fiscal outcomes

- ~\$4.9bn in avoided lifecycle expenditure.
- Fixed replacement cycles create recurring capital exposure.

5. Environmental performance has public health and resilience implications

- Urban heat, stormwater and exposure risks affect community outcomes
- Green infrastructure contributes to long-term climate resilience

Economic Contribution and Public Value – Strategic Implications

Reframing surface decisions as infrastructure policy

1. **Surfaces can be treated as public infrastructure, not mere inputs**

- Turf decisions shape economic, social and environmental outcomes
- Surface choices can have broader asset and capital planning implications

2. **Whole-of-life financial investments make a difference**

- Capital, renewal, maintenance and disposal costs look different over the longer term
- Replacement-cycle liabilities are recurring fiscal commitments

3. **Capital substitution is a key consideration**

- Optimisation before conversion might yield greater public value
- Comparing natural and synthetic options on full lifecycle exposure, as well as upfront cost

4. **Differentiate structural vs cyclical demand**

- Using location-specific utilisation data can identify genuine structural pressure
- Over-investing in peak capacity that is not sustained may not be optimal for certain sites

5. **Environmental and wellbeing factors can make a difference**

- Heat mitigation, stormwater, carbon and exposure risk can be substantial
- Climate adaptation and long-term fiscal resilience objectives can come into play

A photograph of a sunset over a field of tall grass. The sun is low on the horizon, creating a warm orange and yellow glow. The grass in the foreground is dark and silhouetted. The word 'Appendix' is written in a large, white, serif font across the middle of the image.

Appendix

Background

- **Natural turf** is an **integral component of the urban landscape** in Australia, but is **often overlooked** and **undervalued** for its social, economic and environmental contributions.
- In July 2023, Hort Innovation published the Economic contribution of the Australian horticulture **(MT21010) project, conducted by the Centre for International Economics (CIE)**.
- According to the report, the Australian turf industry in 2020-21 had a gross value of production (**GVP**) of **\$308.0 million**, generated a **value-add** of **\$216.5 million**, and contributed **1,333 full-time equivalent** (FTE) positions.
- However, the **value** of the turf industry **extends beyond production**, encompassing ongoing economic, social, health, and environmental benefits from turf installation, maintenance, and rejuvenation.
- Building beyond previous research, this project seeks to determine the **Economic, Environmental, Social and Health contribution** of natural turf in Australia using robust industry data, economic valuation methods, and refinement of communications assets to highlight the full spectrum of benefits offered by turf products.
- In addition to the contribution study, this project aims to **understand usage preferences of natural turf grass versus alternatives** (artificial turf, hard landscaping, planting), as well as identify drivers of choice, barriers to use, and perceptions of turf compared to other options.





Objectives

- The **main objectives** of this project are to **improve decision-making in the Natural turf industry**, and **generate insights** that can **feed into the new strategic investment plan and marketing program for turf**.
- Critical to the success of this project is to **combine two areas** of research – the **Usage & Attitudes (U&A) Study** and **Contribution Study** - into a single integrated study to provide a comprehensive fact base for turf levy payers, industry stakeholders and value chain members to inform the industry's future strategy and communications.
- The **U&A component** of the project involved **quantitative research**, both nationally representative and with **residential buyers** and **commercial users** of turf (players and guardians of players), and **qualitative research** with **developers, architects and landscapers**.
- In addition, during the stakeholder interview phase, the project team identified the need to delve more deeply into the **usage preferences and decision drivers** of **councils, sports clubs and schools**, to enable a more holistic view across Australia.
- **The objective of this report is to bring together both components of the study and provide clear insights and recommendations for the turf industry and government decision makers.**

The Approach



1. Discovery

What we do

- Stakeholder Interviews
- Desk Research & Literature Review
- Nationally Representative Survey
- Residential Quantitative Survey
- Commercial Quantitative Survey
- Commercial Qualitative IDS

The Outcome

Clear understanding of the key questions and hypotheses that Hort Innovation and the turf industry would like answered.



2. Cultivate

What we do

- Modelling Contribution Study
- Cleaning and Weighting Data
- Advanced Analytics and Charting
- Detailed Reporting

The Outcome

Thorough analysis and synthesis of all research streams that deliver integrated insights and recommendations.



3. Harvest

What we do

- Summaries – U&A and Contribution Study
- Infographics
- Presentations
- Webinars

The Outcome

Clear and user friendly outputs and communication forums for turf levy payers, value chain members and other key stakeholders.

1. *Discovery*

Research Methodology

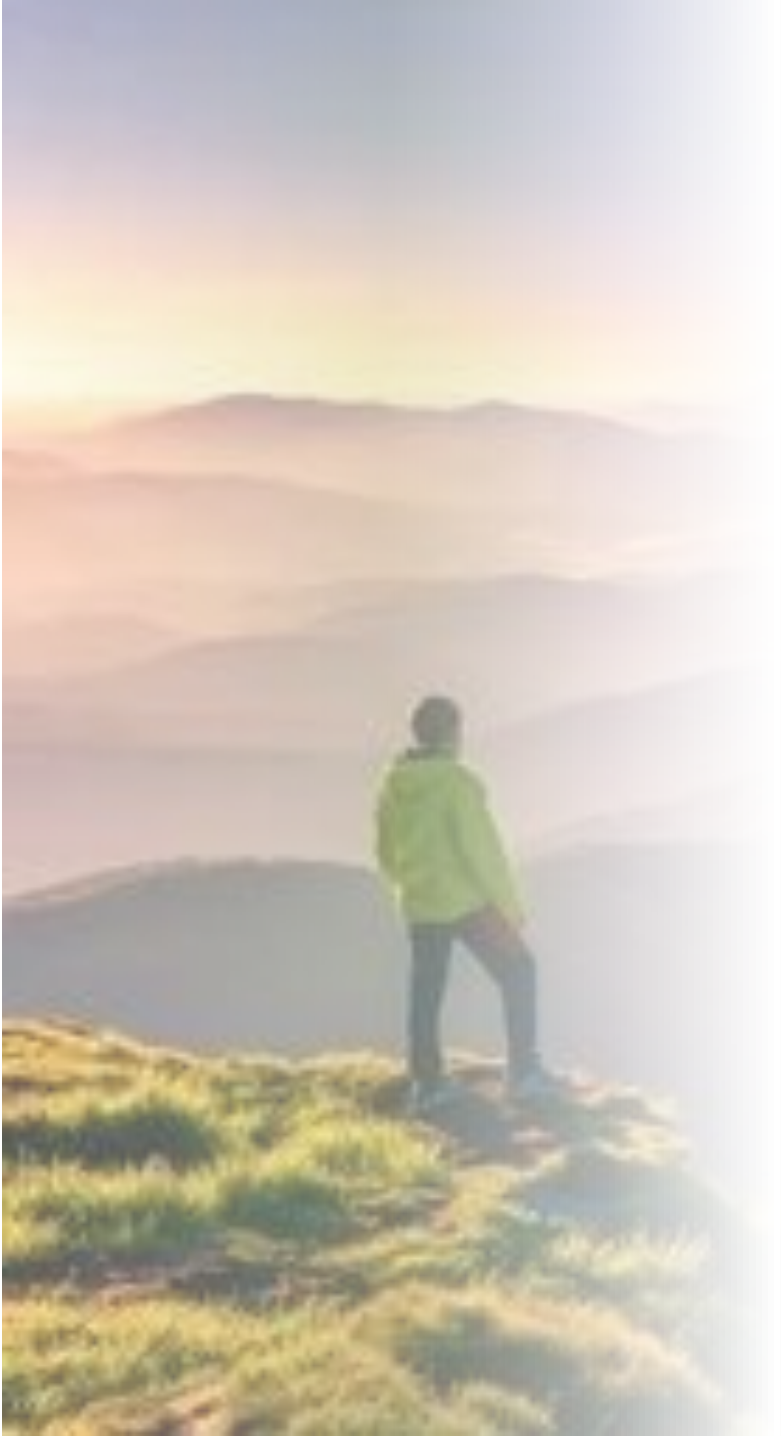
1.1 *Stakeholder Interviews*

- **17 x 1 hour interviews** with key stakeholders identified by Hort Innovation including members of the Turf SIAP and representatives from the Natural Turf Alliance

1.2 *Desk Research & Literature Review*

- **Dozens of Australian and international research publications, articles, and data sources** identified by Hort and the Turf Industry, and sourced by Greenfields Consulting were collected and reviewed as an input into the U&A surveys and the Economic, Environmental and Social contribution modelling.





1. *Discovery (cont...)*

Research Methodology

1.3 Nationally Representative Survey

- **10 min** online survey conducted in July /August 2025
- Nationally representative survey - age (18+), gender, location
- **n=1,025** completes after screen-outs and cleaning

1.4 Residential Quantitative Survey

- **20 min** online survey conducted in October 2025
- Nationally representative survey - age (18+), gender, location
- Screen in: Decision makers who have purchased turf in last three years or intend to purchase in next two years (for new build/renovation).
- **n=986** completes after screen-outs and cleaning

1. *Discovery (cont...)*

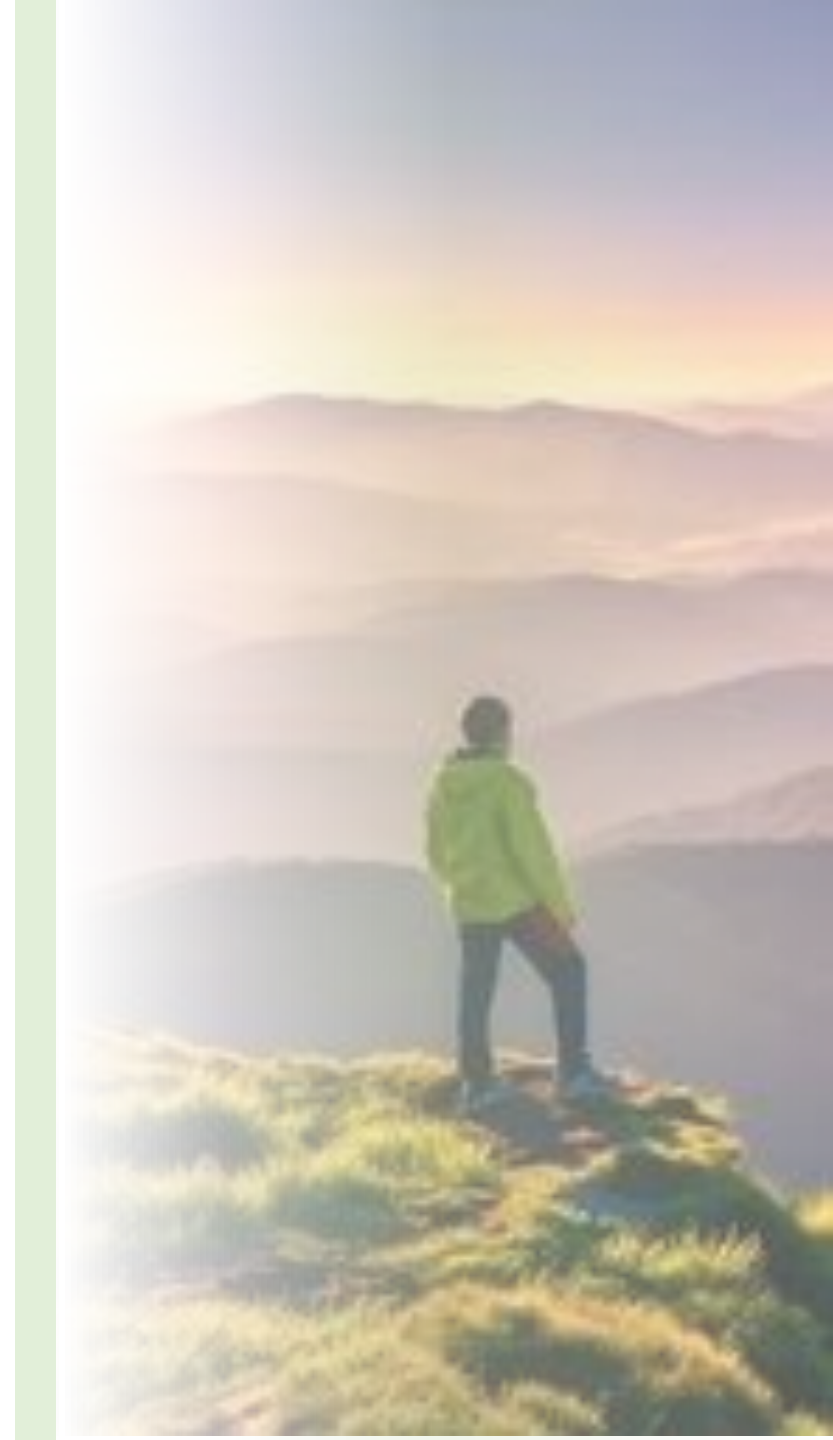
Research Methodology

1.5 *Commercial Quantitative Survey*

- **15 min** online survey conducted in October 2025
- Nationally representative survey - age (18+), gender, location
- Screen in: Individuals who have played regularly on turf sporting fields.
Parents/guardians of kids who have played regularly on turf sporting fields
- **n=603** completes after screen-outs and cleaning

1.6 *Commercial Qualitative In-depth Interviews (IDIs)*

- **31 x 1 hour** IDIs in total with a mix of Government, Commercial and Residential
 - **7 x Landscapers**
 - **9 x Architects/Developers**
 - **5 x Councils**
 - **7 x Sports Clubs** (National AFL and CA, state and local Soccer and AFL)
 - **3 x Education** (2 x schools, 1 x State Dept of Education)



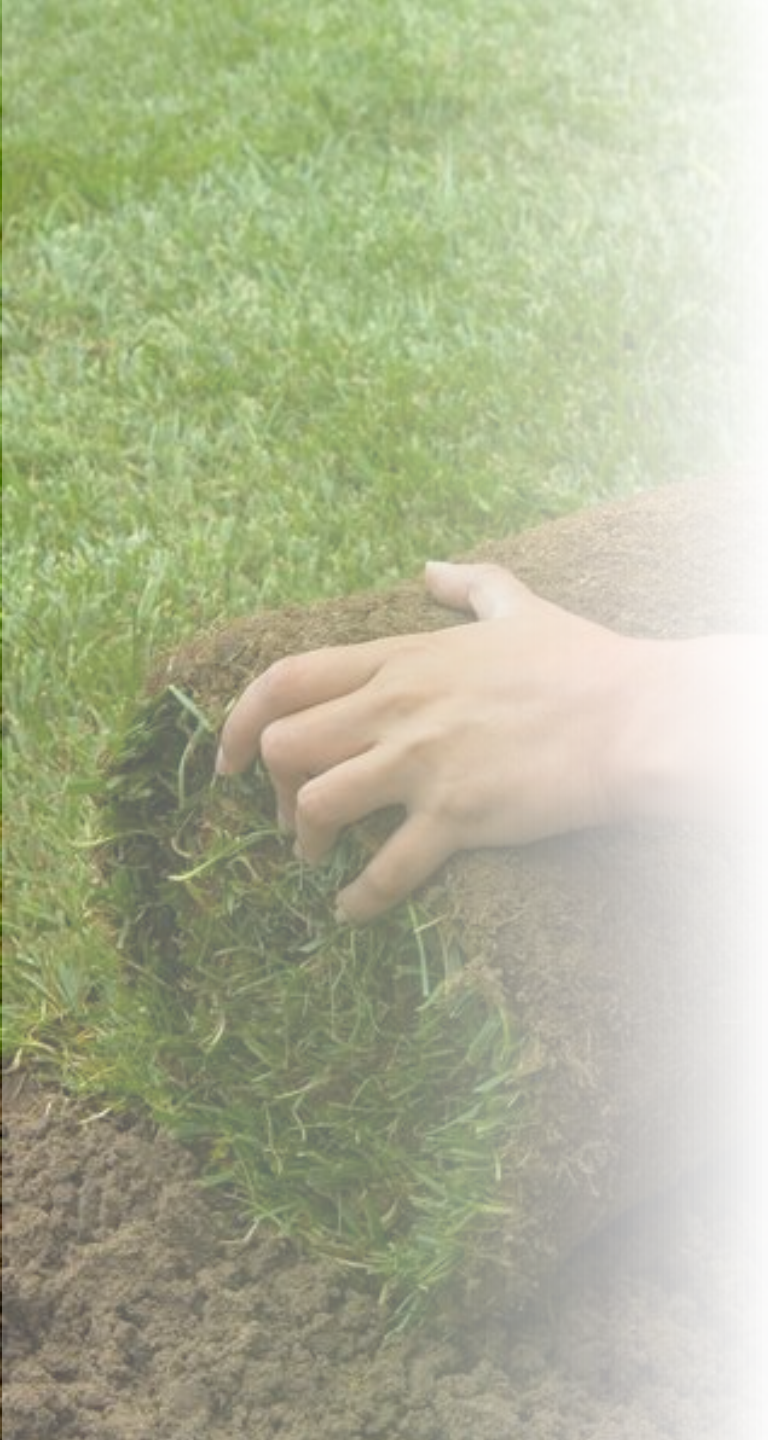
2. Cultivate

Analytics and Reporting Structure

2.1 Modelling Contribution Study

- Contribution modelling leverages the data collected and research reviewed in the desk research and literature review phase.
- The Contribution Model has **2 distinct and exclusive elements** (to avoid double counting and overlap in the concepts)
 - 1. Economic Contribution (\$bn pa, FTEs)** – measures the real commercial value that the turf industry and adjacent industries contribute to the economy, and the number of FTEs (Full time equivalent staff) that it employs.
 - 2. Economic, Environmental and Social Value (\$bn Value)** – measures the broader utility to all Australians and includes environmental impact, community wellbeing, sporting utility, property value uplift and avoided costs of alternative surfaces





2. Cultivate (cont...)

Analytics and Reporting Structure

2.2 Cleaning and Weighting Data

- *The data was checked for outliers, 'speedsters', and any anomalies that might suggest poor data quality, and 'unclean' respondent data was removed before weighting*

2.3 Advanced Analytics and Charting

- Greenfields Consulting used a range of suitable advanced analytics techniques, and fundamental critical thinking in the analytics and charting phase

2.4 Detailed Reporting

- The project will deliver outputs that are easy to understand, accessible to a wide variety of relevant stakeholders, and can be used to easily communicate the insights and recommendations within each report (including **U&A Findings Report, Contributions Report, Overall Findings Report**)

3. Harvest

Communications Methodology

3.1 Summaries

- **Two 4-page summaries** highlighting the **top 10** findings, implications, and recommendations for both the U&A and Contribution studies

3.2 Infographics

- **Ten one-page infographics** for dissemination to growers and/or stakeholder groups, presenting findings in a clear and engaging format, that bring the data to life (e.g. Quotes, graphics and data visualization)

3.3 Presentations

- **Three online presentations:** one for the U&A (public), one for the Contribution Study (public), and a combined presentation for the Turf Strategic Industry Advisory Panel.

3.4 Webinars

- **Two webinars** offering abridged versions of the presentations, delivered virtually.





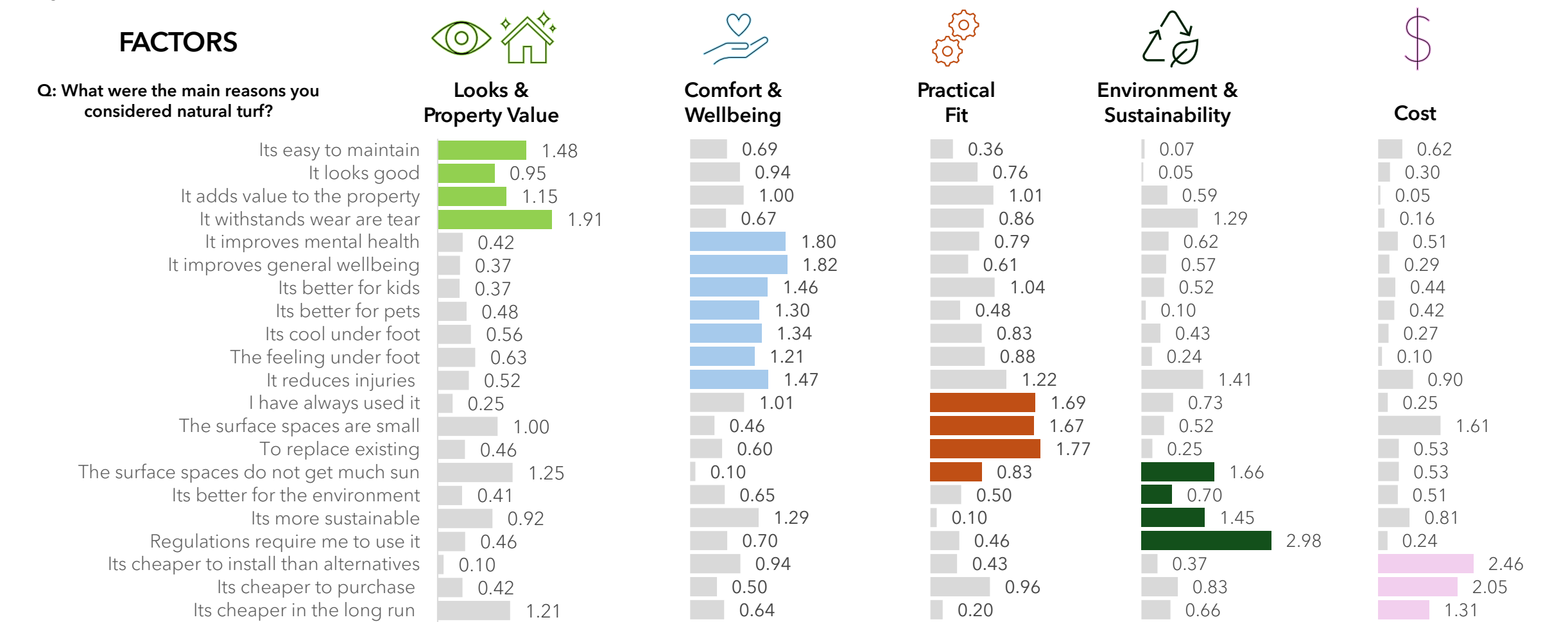
2. Residential

Why natural turf wins early – and where it loses momentum

Natural turf consideration is driven by wellbeing and values, with looks acting as a universal baseline driver



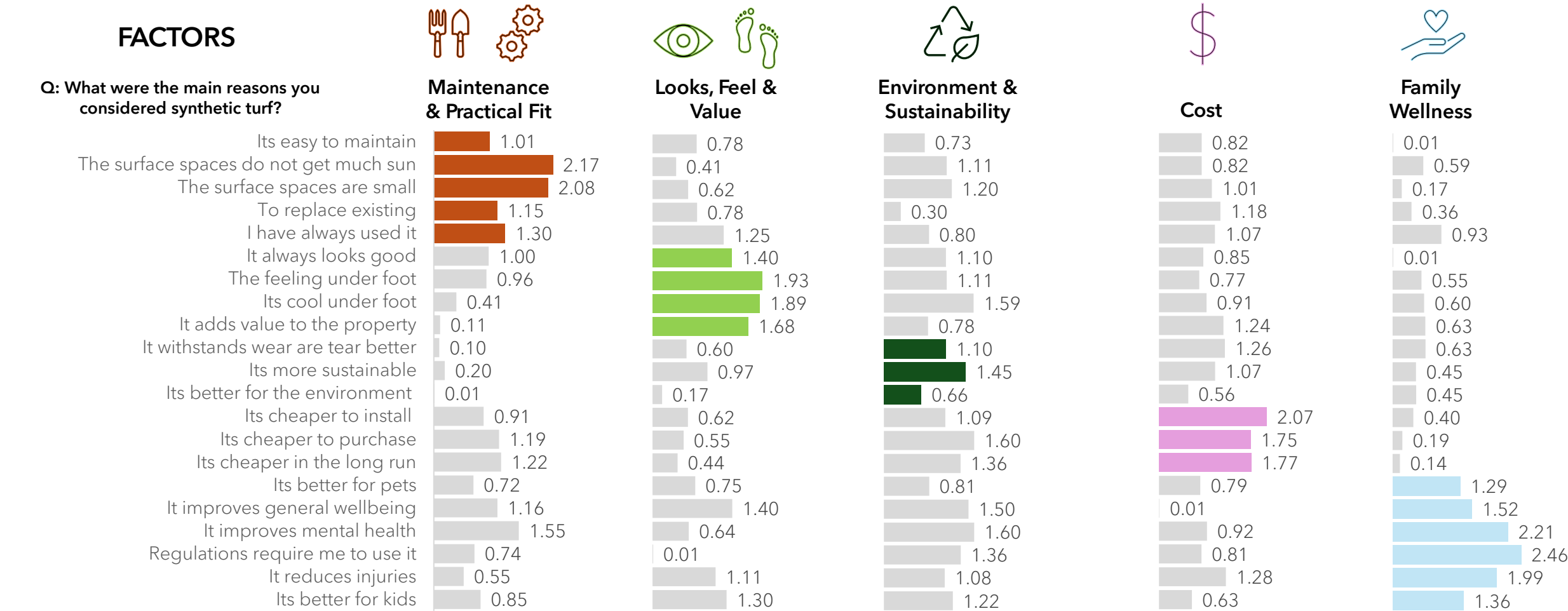
Consideration of natural turf is primarily motivated by **comfort, wellbeing and environmental benefits**, reflecting an emotionally and values-led decision. *"It looks good"* is the most commonly cited reason overall, but it does not anchor a single factor, indicating it acts as a **baseline expectation rather than a differentiating driver**. Practical fit and cost play more situational roles, reinforcing that natural turf is most compelling when framed around **experience, lifestyle and broader benefits**, rather than functional trade-offs.



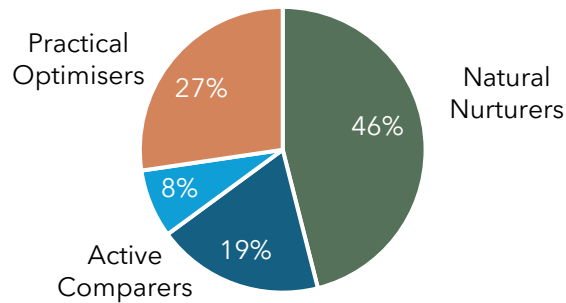
Synthetic turf consideration is driven by maintenance and practicality, with consistent looks and cost reinforcing its appeal



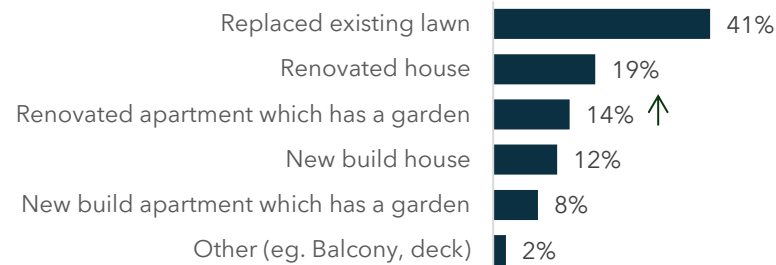
Synthetic turf consideration is led by **maintenance and practical fit**, particularly for small, shaded or replacement spaces where ease of upkeep is critical. While “easy to maintain” is the most commonly selected attribute, it cuts across multiple factors, acting as a **category entry requirement rather than a single motivator**. Consistent looks, cost and environmental considerations play supporting roles, while family wellbeing emerges as a secondary driver, highlighting synthetic turf’s appeal as a **functional, low-effort solution**.



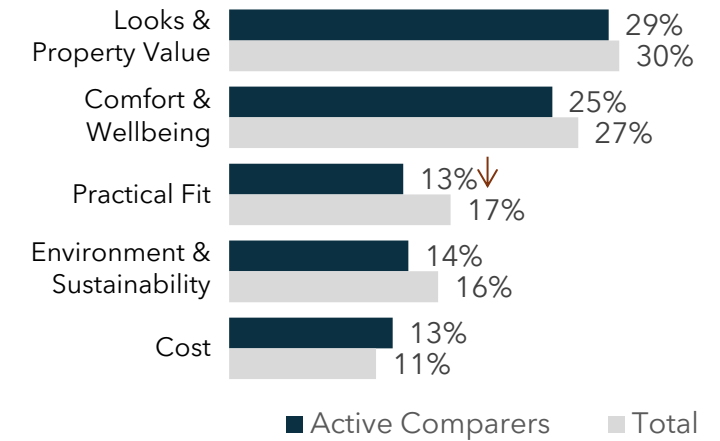
Turf Type Purchase Intent



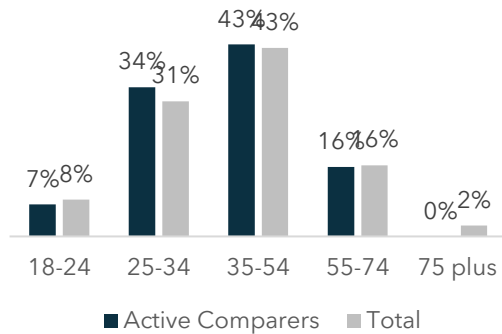
Property Type



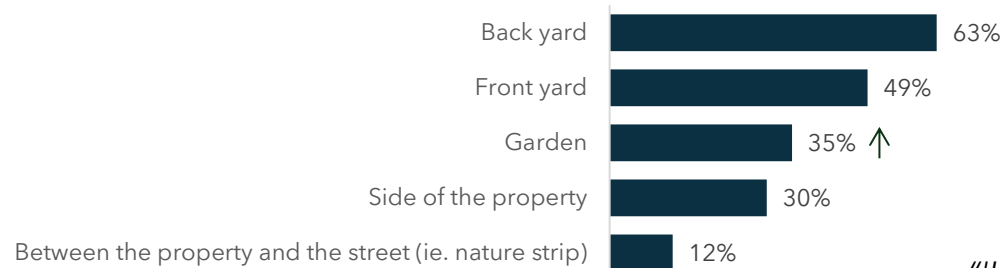
Consideration Drivers (Natural)



Age Bands



Where Intend to Lay

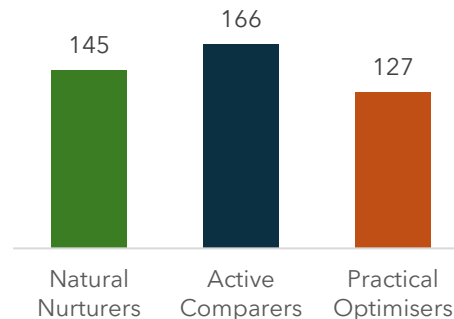


Key Motivations

Highest
"I like nature and the positive impact it has on my life"
 (T2B 86%, Total 86%)

Lowest
"The ongoing maintenance of a garden puts me off"
 (T2B 48%, Total 51%)

Average Size of Area (sqm)



Active Comparers

Over Index
"I'm influenced by what my neighbours or community choose for their landscaping"
 ↑ (T2B 60%, Total 48%)

↑ Significantly greater than total
 ↓ Significantly less than total

Steve, Natural Nurterer

“I want my garden to feel alive – somewhere my family, pets and I can relax, play and enjoy being outdoors.”



Age: Early 40s

Lifestage: Family with school aged kids

Home: Detached home with front and back yard

Outdoor Area: Medium-large lawn area

Pets: Yes

Bio

Steve sees his garden as an extension of his family and lifestyle. It's not just a patch of grass – it's where his kids play, where the dog spends most afternoons, and where the family relaxes together on weekends. Being outdoors makes him feel better, and he genuinely enjoys caring for a living garden.

Steve understands that natural turf takes work, but he doesn't see maintenance as a downside. Watering, mowing and general upkeep are simply part of having a healthy outdoor space. For him, the comfort underfoot, the look of real grass and the wellbeing benefits for his family far outweigh the effort involved.

Motivators

- **Love of nature:** Being outdoors improves his wellbeing
- **Family enjoyment:** Safe, comfortable space for kids and pets
- **Home pride:** Garden reflects his values and lifestyle
- **Authenticity:** Prefers real, living grass over artificial options

Consideration Drivers

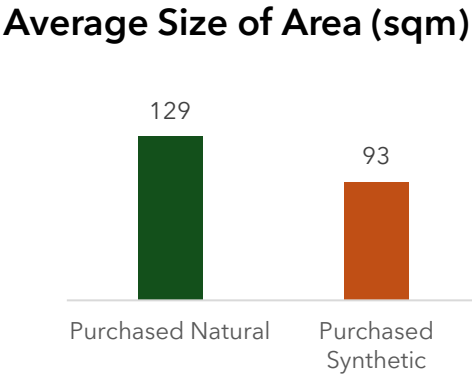
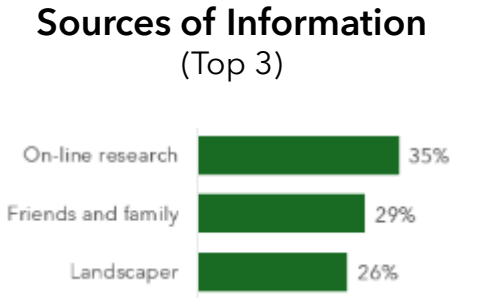
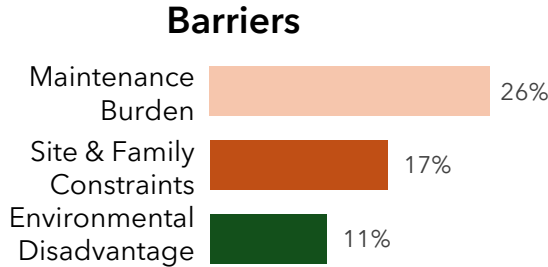
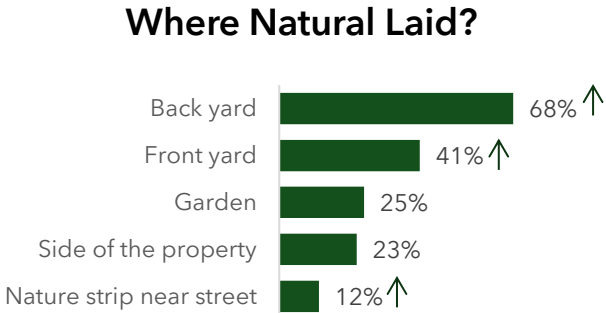
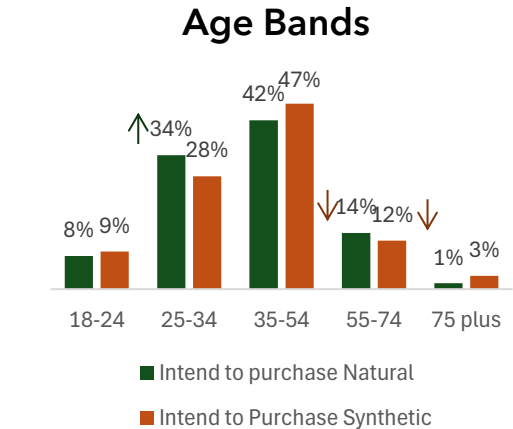
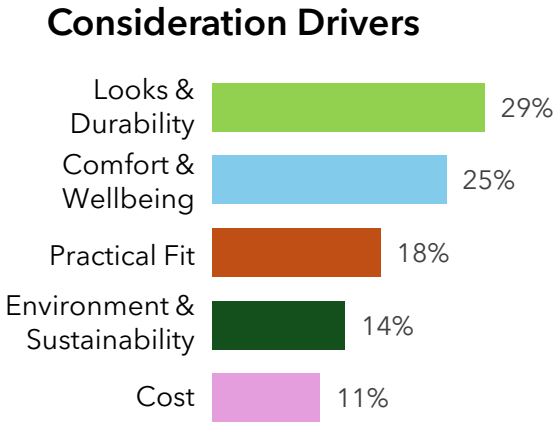
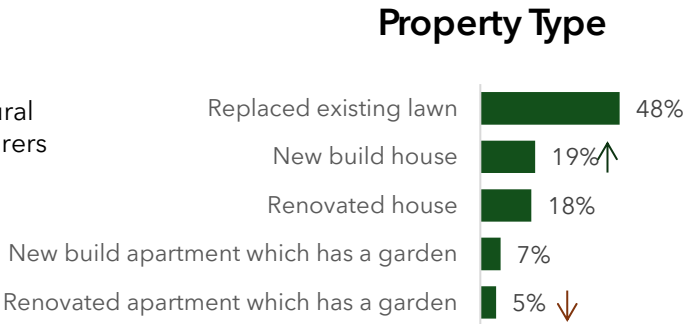
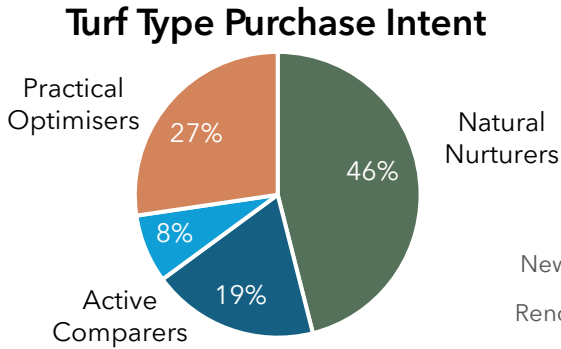
- **Looks & feel:** Natural turf looks better and feels right underfoot
- **Comfort & safety:** Soft, cool and family-friendly
- **Practical fit:** Suits how the space is actually used
- **Environmental reassurance:** More comfortable choosing natural materials

Barriers (but not deal breakers)

- Ongoing maintenance
 - Water use
 - Managing the garden when away
- Steve sees these as practical challenges, not reasons to walk away.

How to Engage with Steve

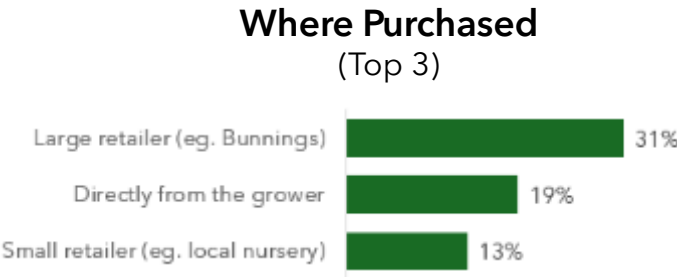
- Show real families enjoying real lawns
- Reinforce the health, comfort and authenticity of natural turf
- Normalise maintenance as manageable and rewarding
- Position natural turf as the safest, most natural choice for kids and pets
- Reach him early, before convenience-led synthetic options take hold



Key Motivations

Highest
"I like nature and the positive impact it has on my life" (T2B 87%)

Lowest
"The ongoing maintenance of a garden parts me off" (T2B 38%)



Alex, Practical Optimiser

"I want my outdoor space to look good year-round without taking up my time."



Age: Early 50s

Lifestage: Family with school aged kids

Home: Detached home or townhouse

Outdoor Area: Small – medium shaded area

Pets: Cat

Bio

Alex sees their garden as a functional extension of the home rather than a hobby. It's a space for kids to play, friends to visit, and everyday life to happen – without adding to an already busy schedule. Alex values order, reliability and predictability, and prefers solutions that "just work" with minimal ongoing effort.

For Alex, synthetic turf solves a practical problem: keeping an outdoor area looking neat, usable and safe without the time, water or maintenance demands of natural grass. Convenience isn't laziness – it's a conscious choice to protect time, reduce stress and simplify life.

Motivators

- **Low maintenance:** Wants a garden that doesn't demand ongoing effort
- **Reliability:** Looks good in all seasons, regardless of weather or use
- **Family practicality:** Safe, durable surface for kids and pets
- **Visual consistency:** Prefers a tidy, predictable appearance year-round

Consideration Drivers

- **Maintenance & practical fit:** Minimal watering, mowing or upkeep
- **Looks & feel:** Clean, uniform appearance that holds up over time
- **Cost certainty:** Clear upfront investment with fewer ongoing costs

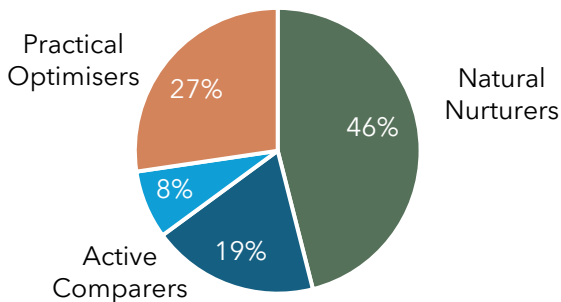
Barriers (but not deal breakers)

- Concerns about artificial look or feel
 - Questions around heat, microplastics and sustainability
 - Higher upfront cost
- Alex weighs these carefully but often concludes the day-to-day convenience outweighs the trade-offs.

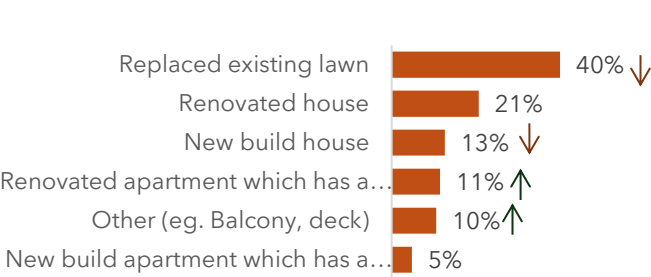
What could shift Alex to Natural

- Clear proof that natural turf can be easy to manage
- Reassurance on durability in high-use family spaces
- Strong evidence of cooler, safer surfaces for kids and pets
- Credible environmental and health advantages over synthetic

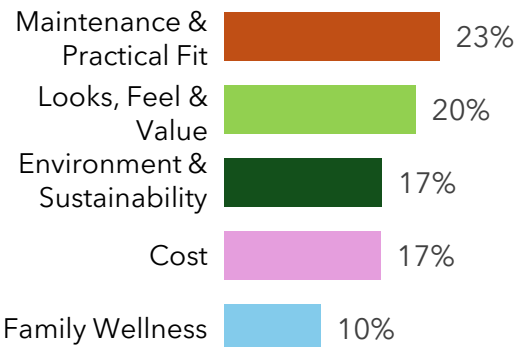
Turf Type Purchase Intent



Property Type



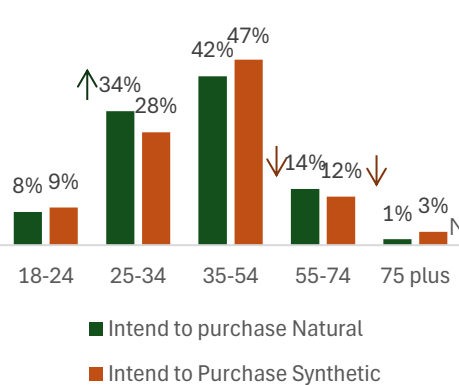
Consideration Drivers



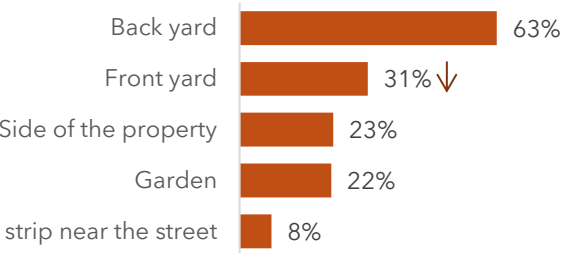
Sources of Inspiration



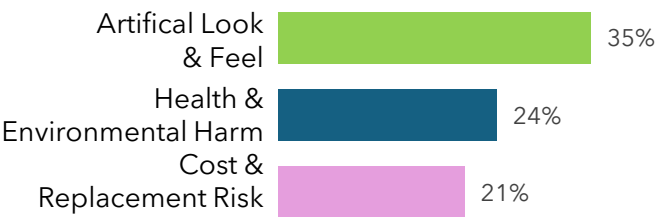
Age Bands



Where Synthetic Laid?



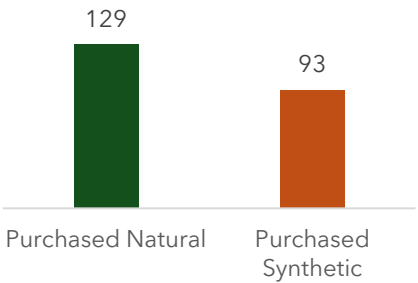
Barriers



Sources of Information (Top 3)



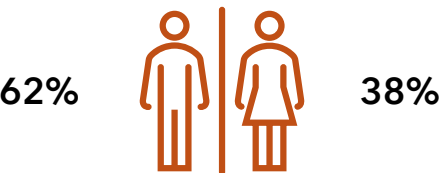
Average Size of Area (sqm)



Key Motivations

Highest
"I value outdoor spaces that are safe and enjoyable for children and pets" (T2B 83%)
Over Index
"The ongoing maintenance of a garden parts me off" (T2B 52%)

Where Purchased (Top 3)



Purchased Synthetic Turf

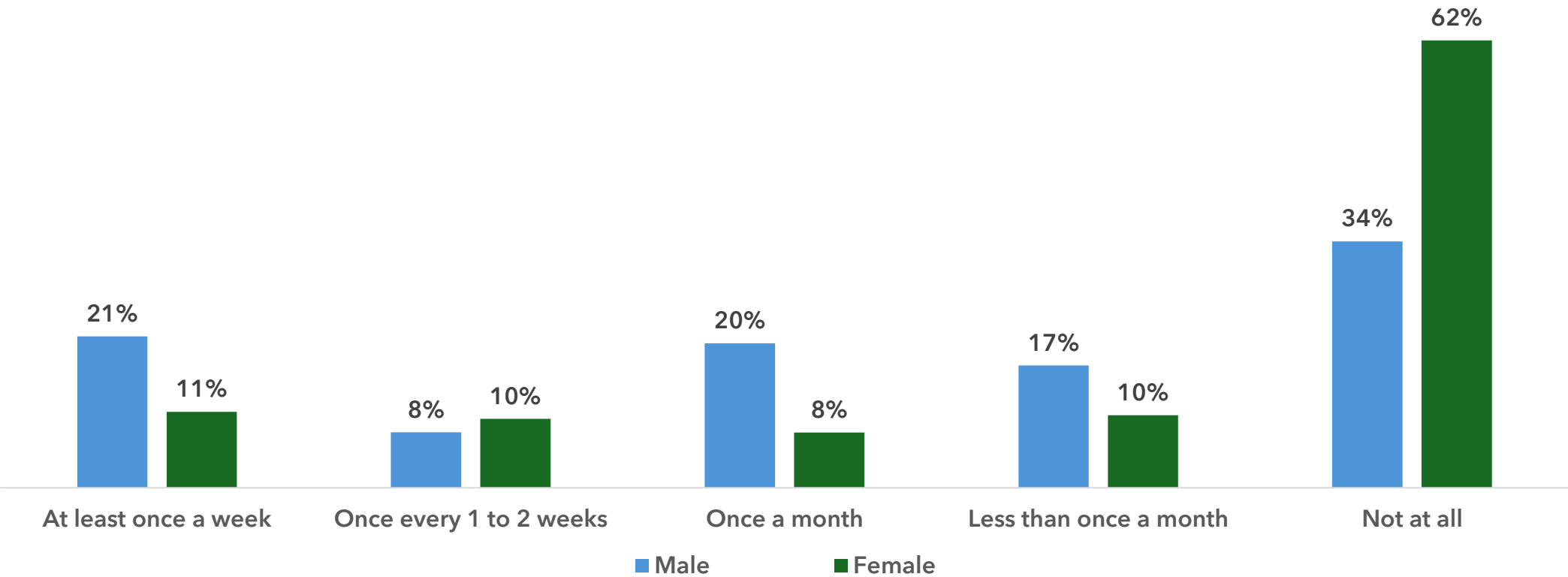
A background image of a soccer field with several players in red and blue jerseys. One player in a red jersey is in the foreground, kicking a soccer ball. Other players are visible in the background, some holding balls. The image is dimmed to allow text to be read.

3. *Commercial*

Where capacity drives decisions – and where value is left on the table

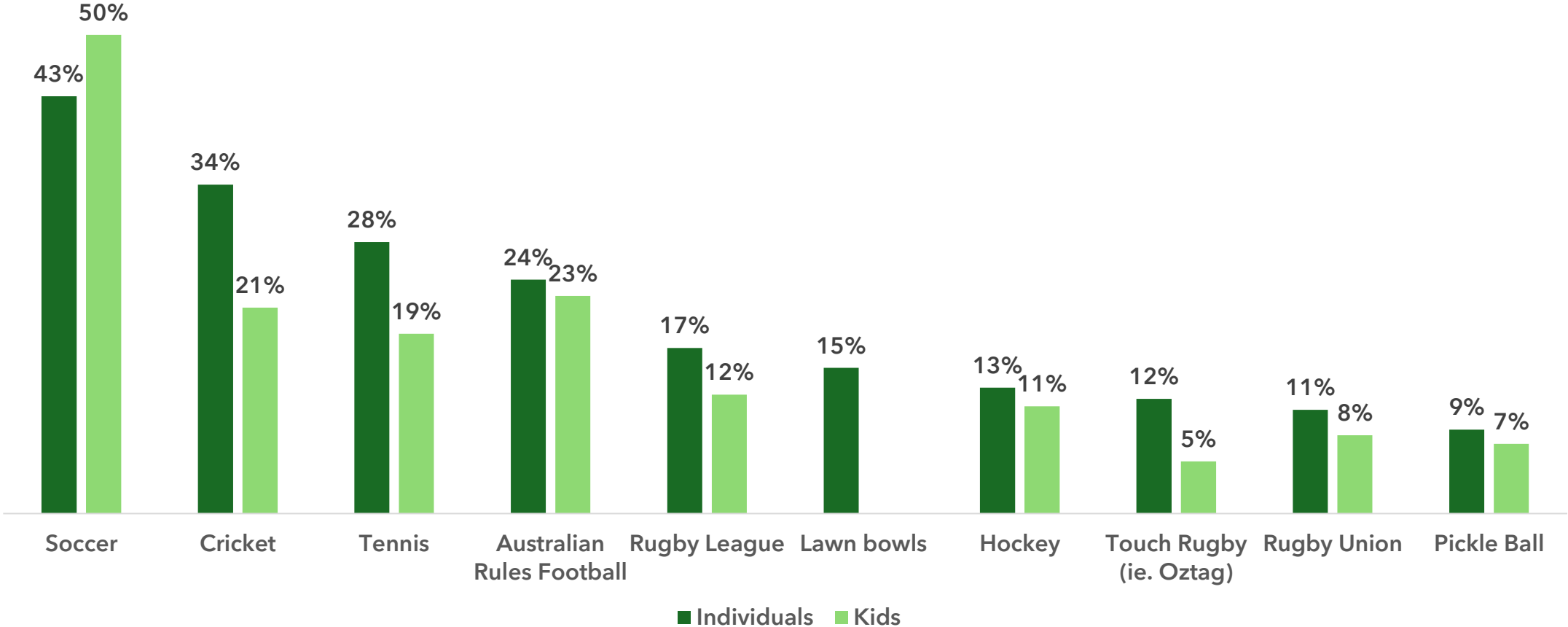
Half of all adult Australian males spend at least once a month playing or training for sport. Females spend far less time and 3 in 5 don't spend any time at all

Frequency of Time Playing or Taining for Sport



Soccer is the most popular participation sport and is played by 50% of kids who play sport. Cricket and Tennis are more popular amongst adults and AFL is also popular

Sports Played - Individuals



A background image showing children playing soccer on a green grassy field. A girl in a white shirt and dark shorts is in the foreground, kicking a soccer ball. Two boys are also visible, one in a striped shirt and another in a blue shirt, both engaged in the game. The background is slightly blurred, showing trees and a clear sky.

3 out of 5

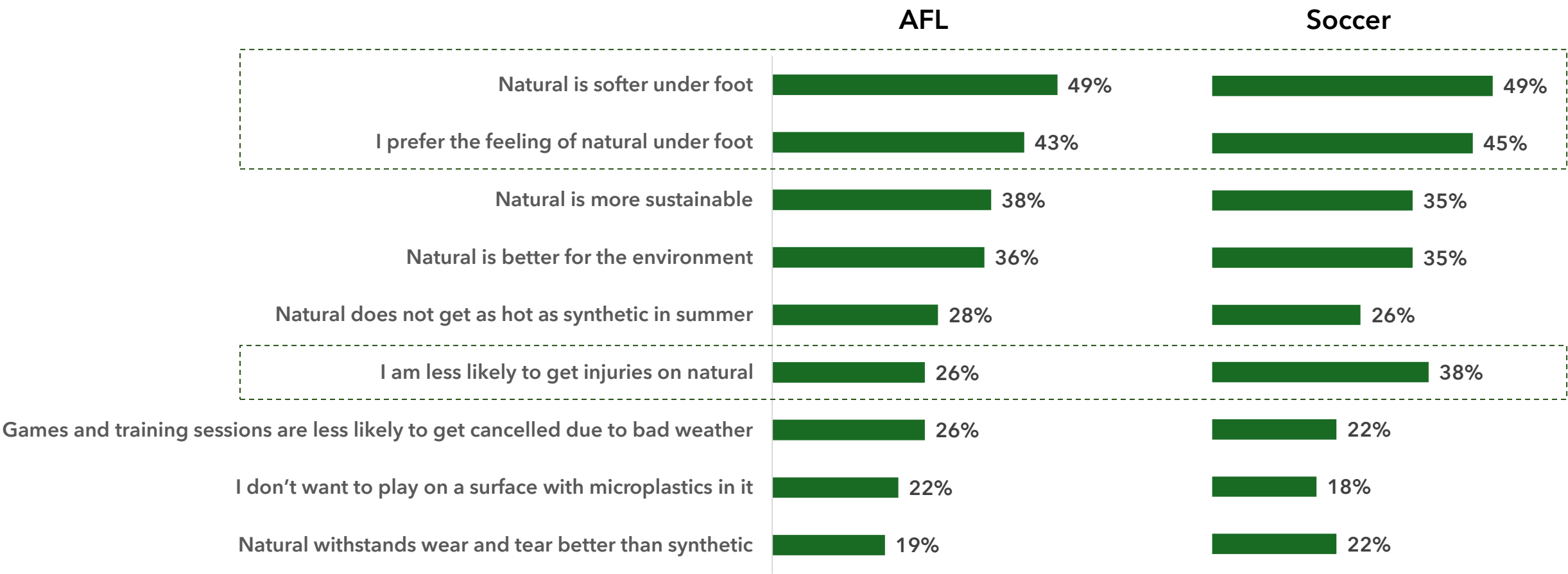
people who play team
sports **PREFER** to play on
NATURAL turf
compared to synthetic

4 out of 5

parents say they **PREFER**
their kids to play AFL or
Soccer on **NATURAL** turf
compared to synthetic

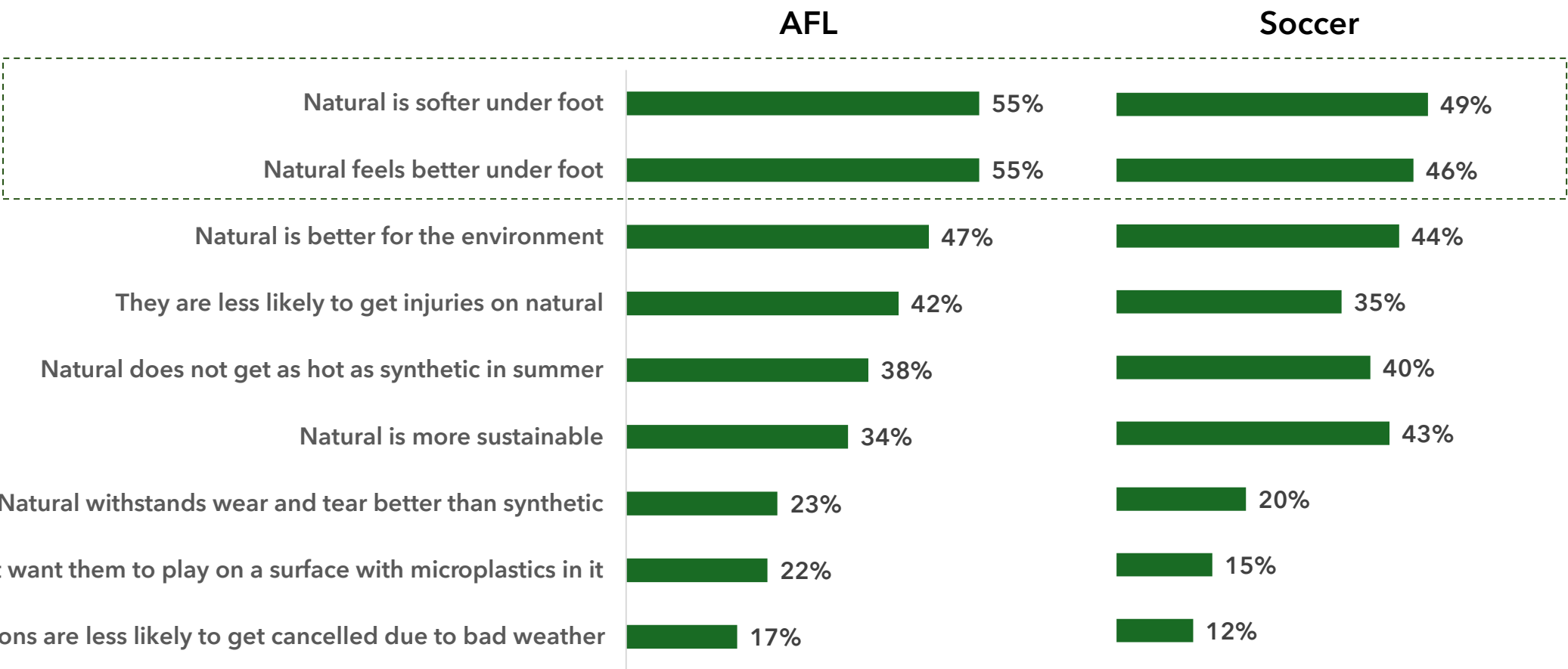
Preference for natural turf is driven by the softness and feeling under foot, and 38% of soccer players say they are less likely to get injured on natural compared to synthetic

Why Preference for Natural for AFL and Soccer - Individuals

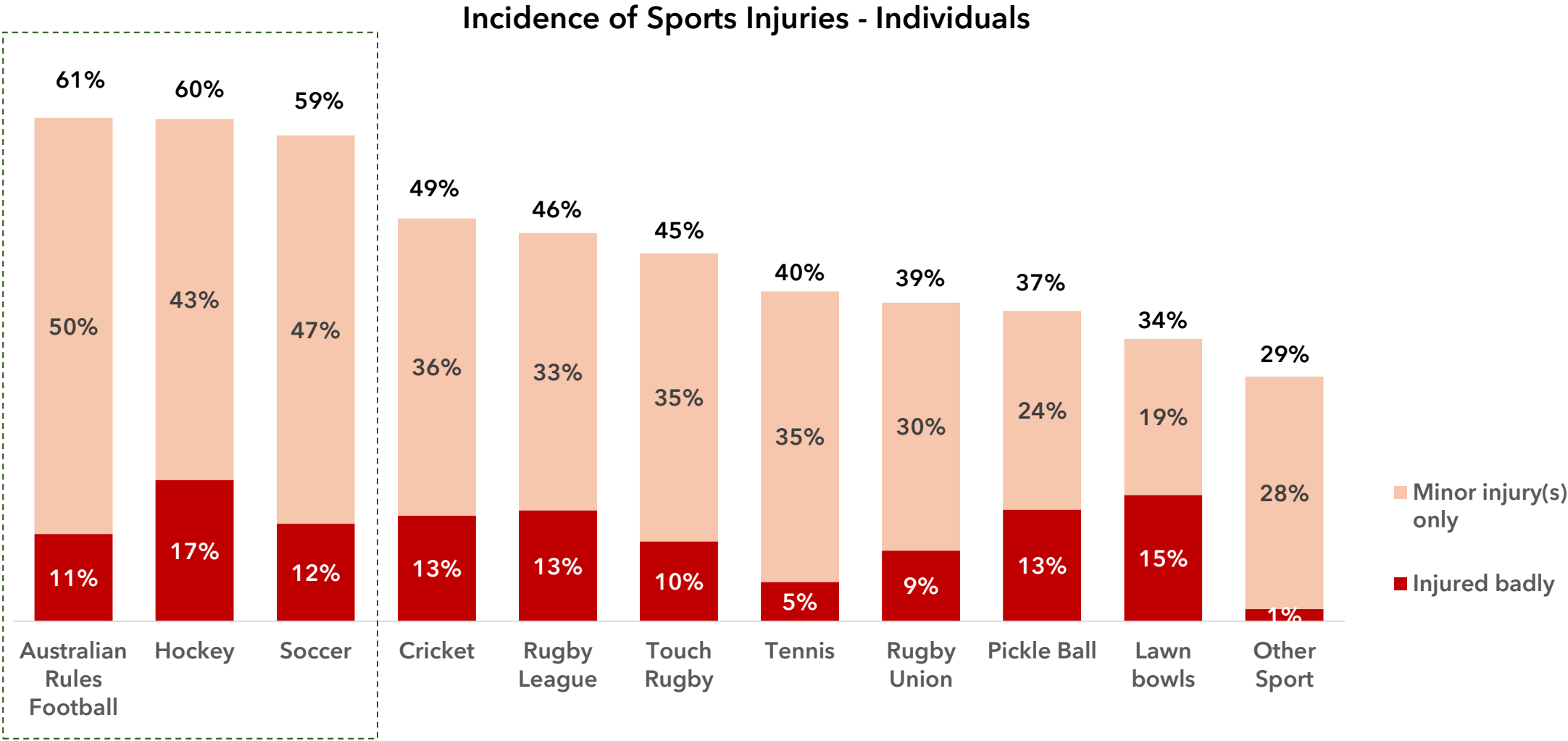


For kids, preference for natural turf is also driven by the softness and feeling under foot. Environmental factors are also important to parents, as well as heat safety and less injuries

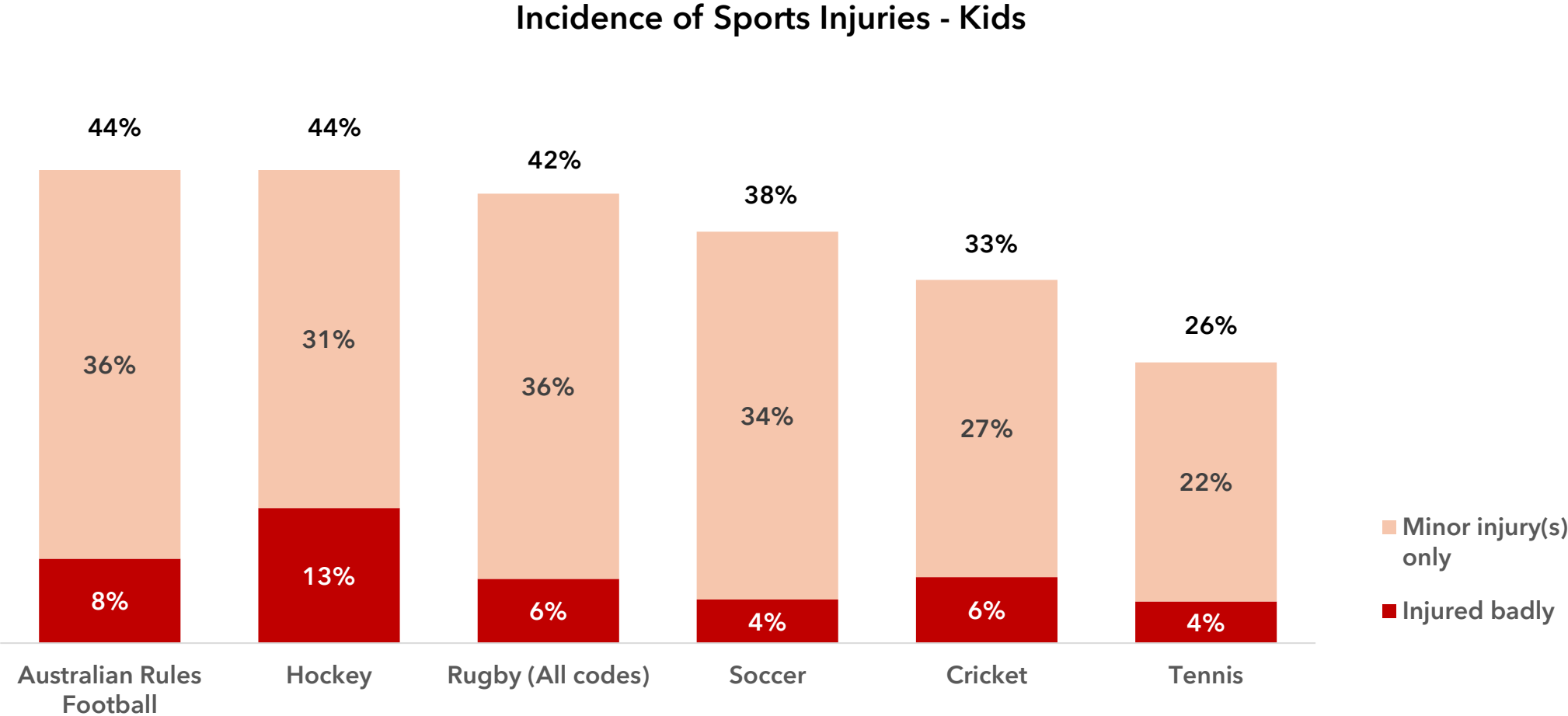
Why Preference for Natural for AFL and Soccer - Individuals



AFL, Hockey and Soccer have the highest incidence of sporting injuries reported by individuals, and Hockey has the highest incidence of serious injuries

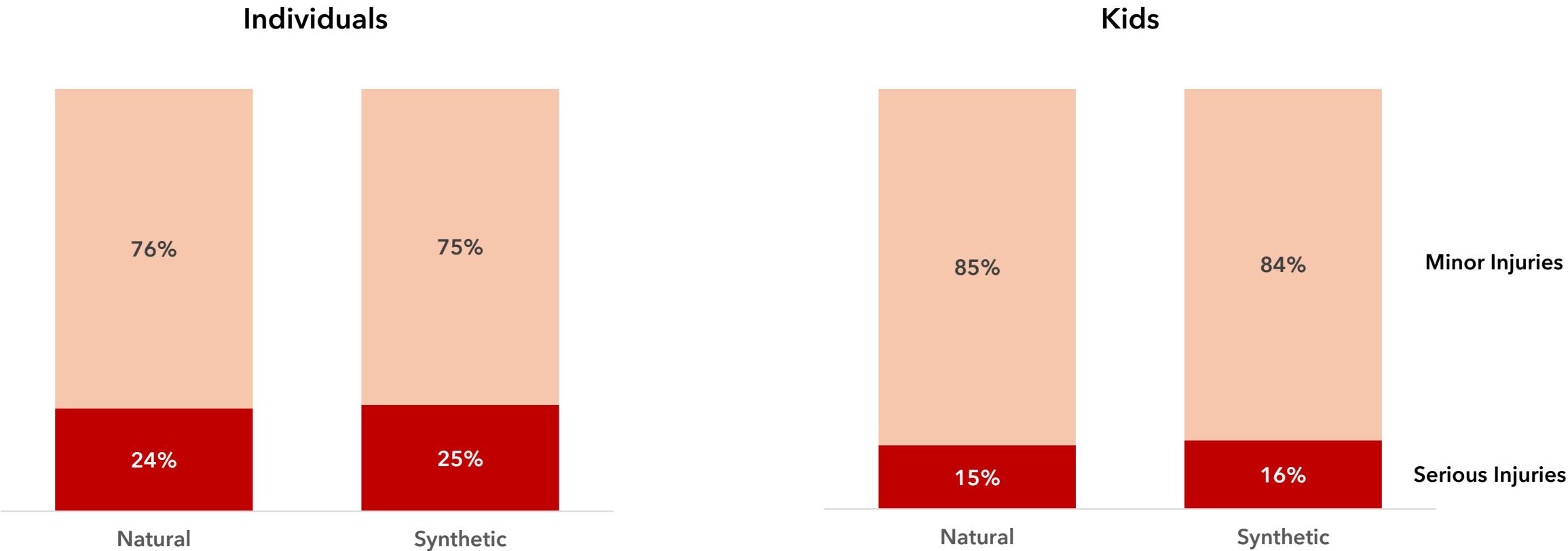


Kids are less likely to get injured than adults and AFL and Hockey have the highest incidence rates of injuries in kids sport. Hockey also has the highest incidence of serious injuries



Overall, kids are 10% less likely to sustain a serious injury than adults, and the relative incidence rates of minor and serious injuries are similar for both natural and synthetic

Incidence of Sports Injuries on Natural and Synthetic



A group of young girls in red soccer uniforms are hugging each other on a grassy field. In the background, there are trees and a city skyline under a clear blue sky.

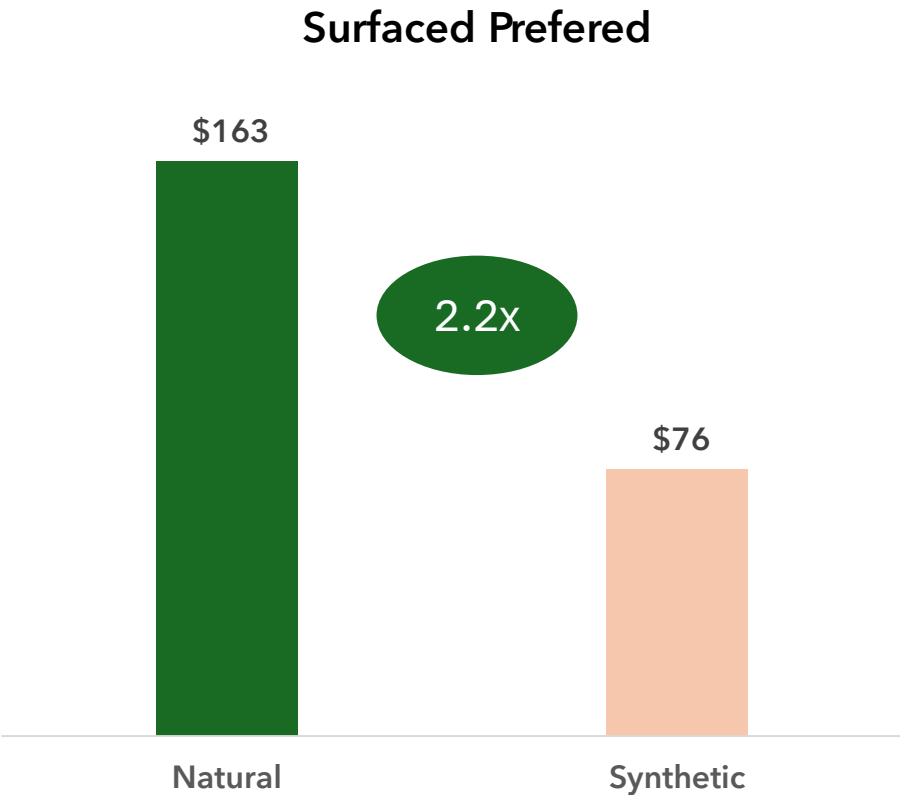
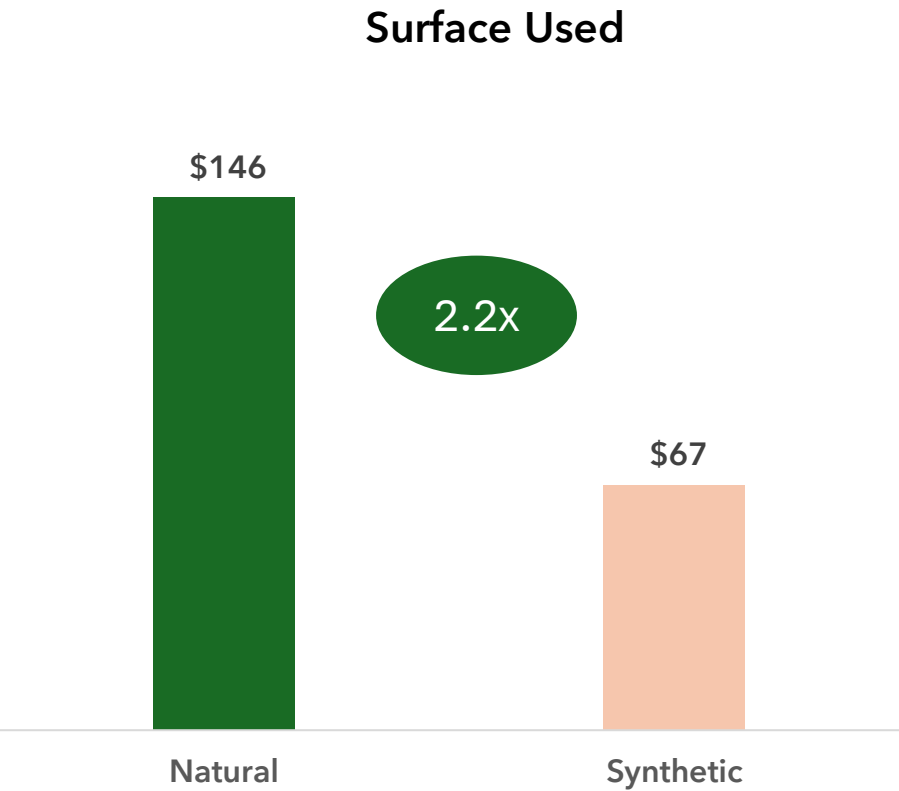
Parents **VALUE** the time their kids
spend on **NATURAL TURF**

2.2x

as much as the time their kids spend
on synthetic turf playing soccer

Parents *VALUE* the time their kids spend on natural turf *TWICE* as much as the time their kids spend on synthetic turf playing soccer

Value of Time Spent on Natural and Synthetic - Soccer



Sports Usage – Key Insights / Findings

Natural turf is the trusted surface for sport, particularly for children and community-level play

- Natural turf is the clear preferred surface for organised sport, particularly for large team sports such as AFL and soccer.
- Preference is even stronger for children, with parents showing a strong bias toward natural turf for junior sport. Preference for natural turf is driven primarily by softness and feel underfoot, alongside perceptions of reduced injury risk and better heat performance, especially for children.
- Injury incidence is highest in high-contact sports such as AFL, hockey and soccer across both natural and synthetic surfaces, suggesting preference is driven more by perceived safety and comfort than differences in actual injury rates.
- Parents place a significantly higher value on time spent playing on natural turf, valuing their children's sporting time on natural surfaces more highly than time spent on synthetic.
- Overall, natural turf holds a strong emotional, experiential and parental trust advantage in sport, particularly for junior participation and community-level sport.

Sports Usage – Opportunities for sporting bodies

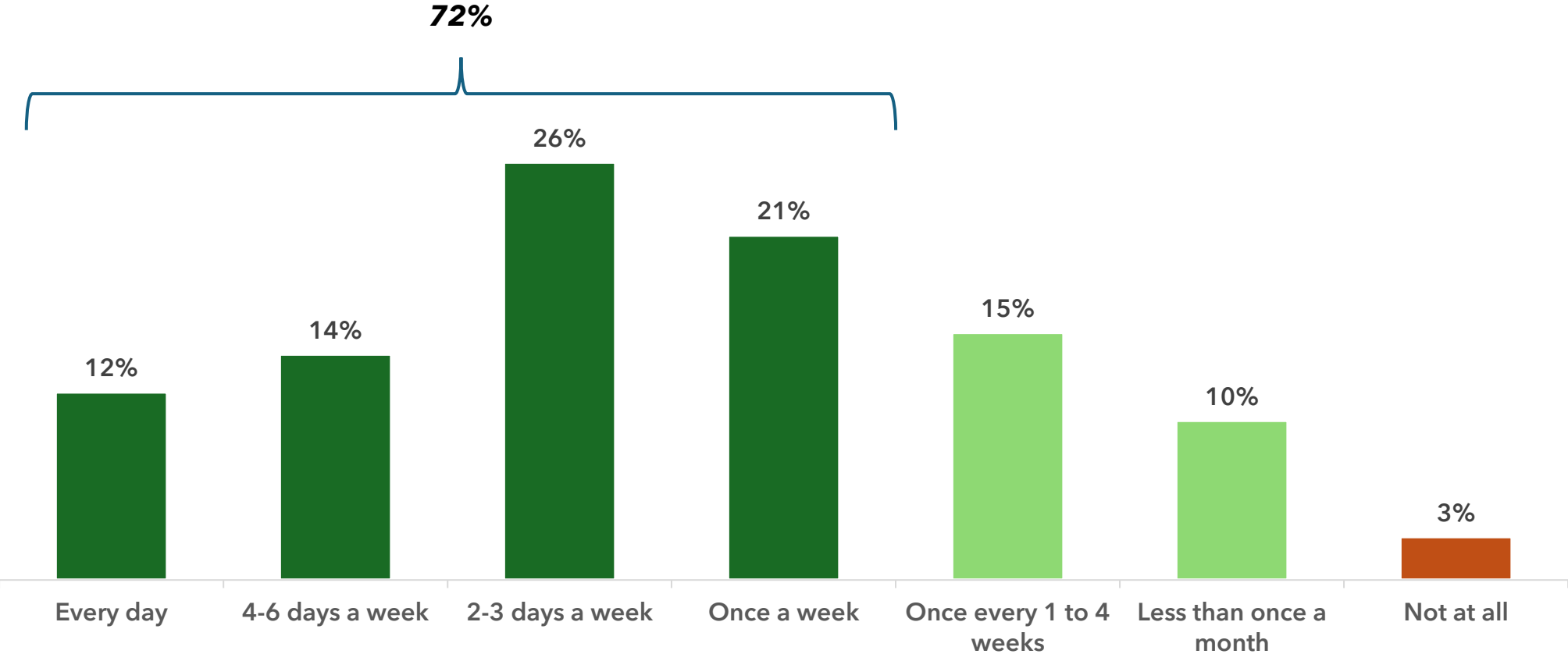
- Prioritise natural turf for junior and community sport, where perceptions of safety, comfort and heat management are most critical for participation and parental trust.
- Acknowledge player and parent preferences explicitly in surface guidelines and facility standards, reinforcing confidence in natural turf as the default playing surface.
- Support investment in turf quality and maintenance, recognising that surface condition – not surface type – is central to safety, performance and experience.
- Use evidence-based communication to clarify injury risk, heat performance and surface suitability, helping clubs and councils make informed, balanced decisions.

A large group of people, including families and children, are gathered on a grassy lawn for an outdoor movie night. They are sitting on blankets and large beanbag chairs, watching a movie on a large screen that is part of a mobile cinema unit. The scene is set in a park-like area with trees and houses in the background.

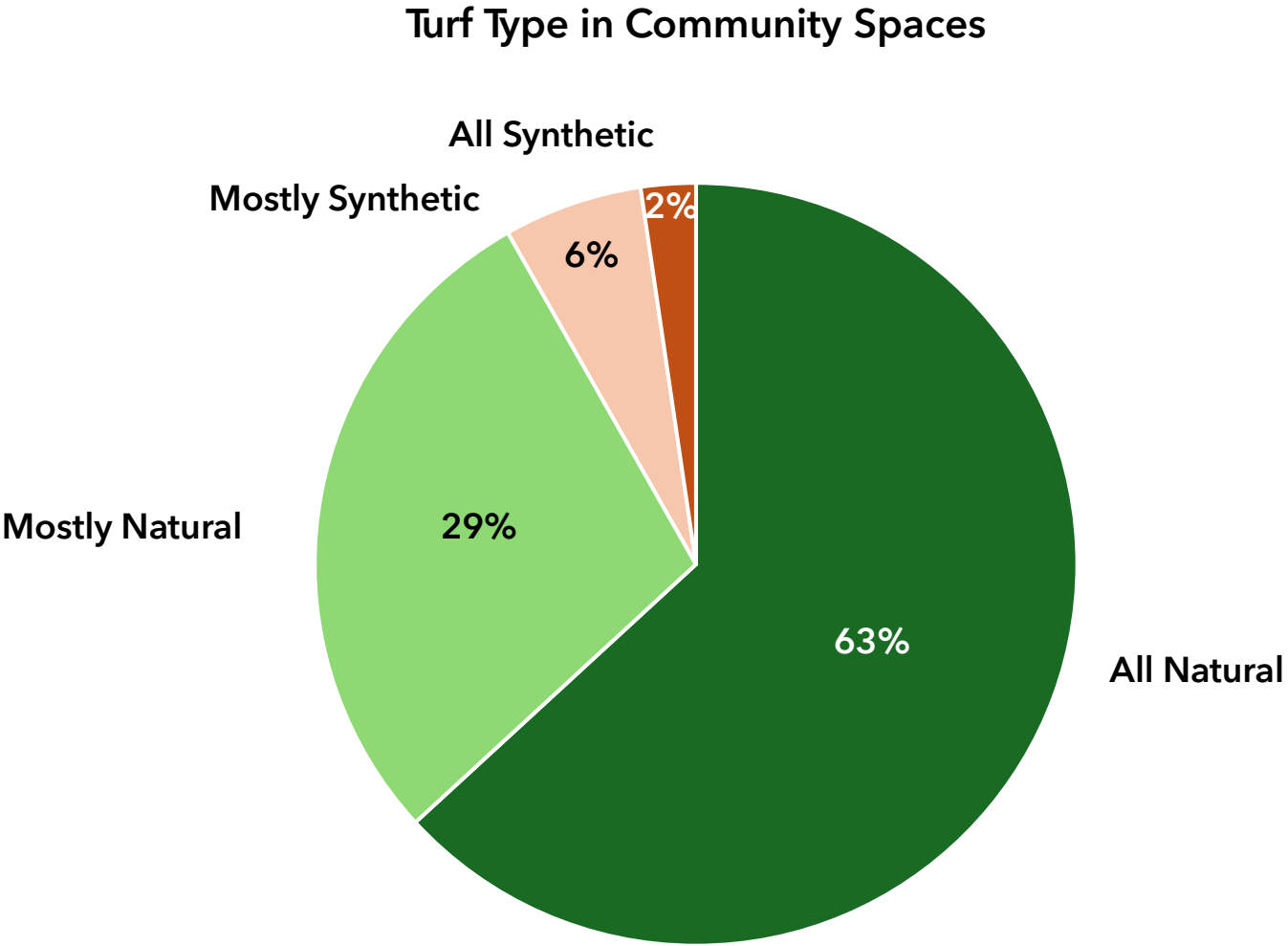
Community Usage

Almost 3 in 4 adult Australians spend at least once a week enjoying time in parks, gardens, sports fields and playgrounds

Frequency of Time Spent in Community Spaces

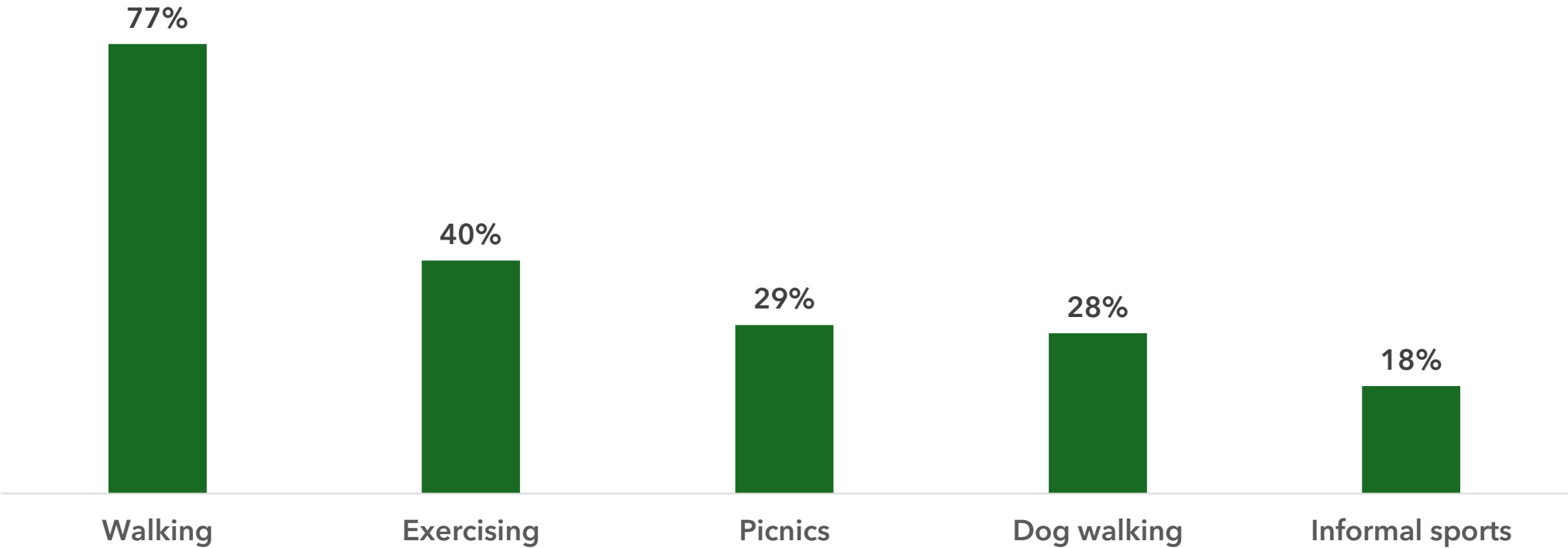


Community spaces are overwhelmingly enjoyed on natural turf with 92% of people saying they spend time in all natural or mostly natural community spaces

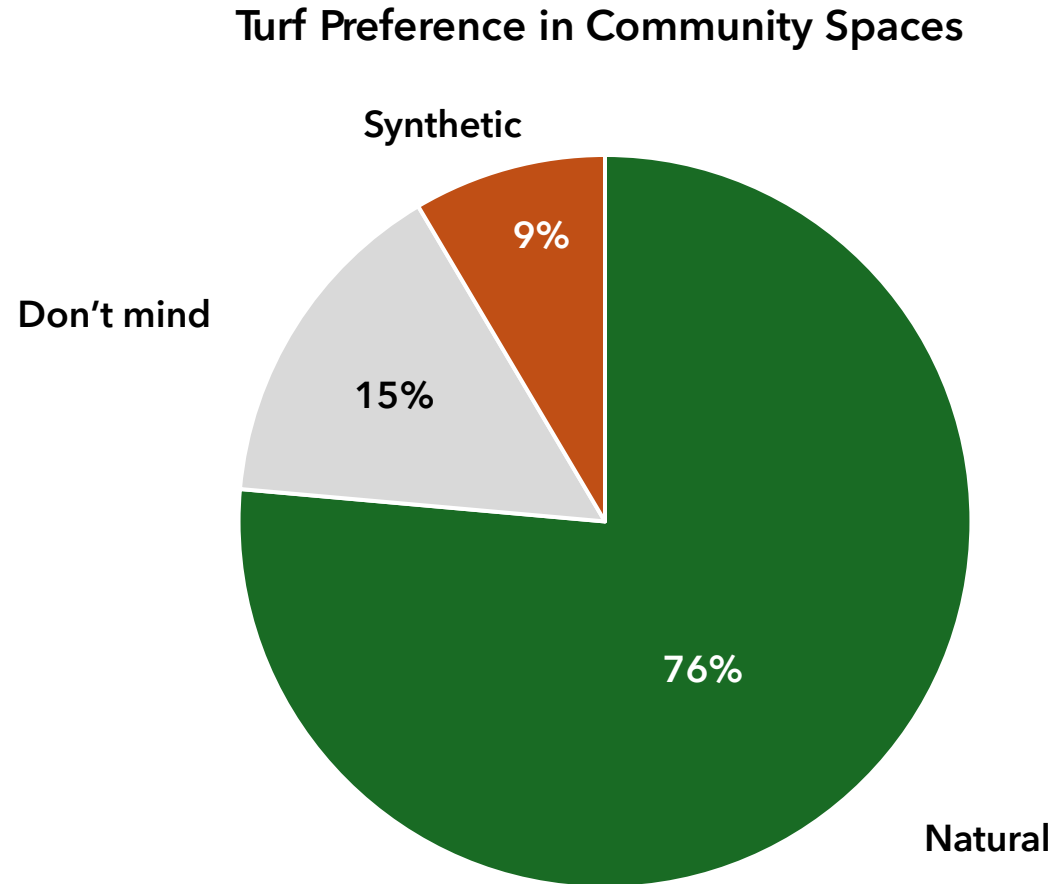


3 in 4 people enjoy walking in Community Spaces. Exercising, picnics and dog walking and also popular

Common Activities in Community Spaces



Natural turf in Community Spaces is overwhelmingly preferred - 76% of people prefer natural. 15% of people don't mind what the surface is and only 9% prefer synthetic

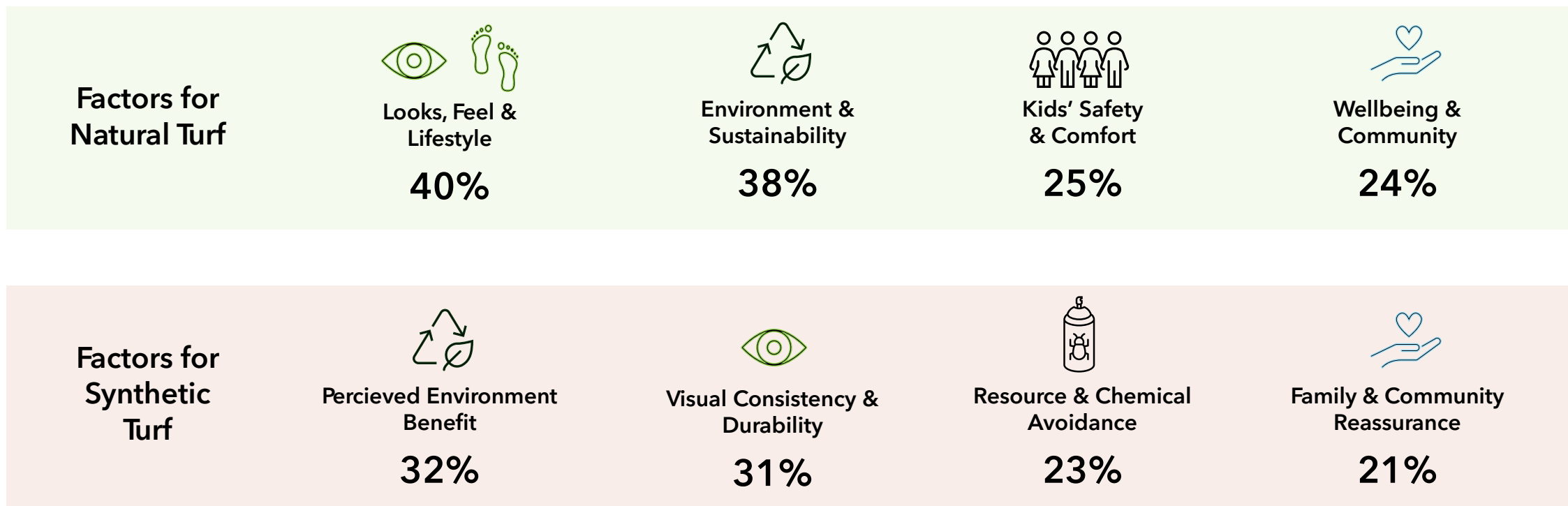


What drives preference?

Factor analysis was used to determine why people prefer natural

Four distinct factors were derived for **natural and synthetic** by grouping together attributes that tended to be chosen for similar reasons.

Factors that Influence Preference for Natural and Synthetic Turf in Community Spaces

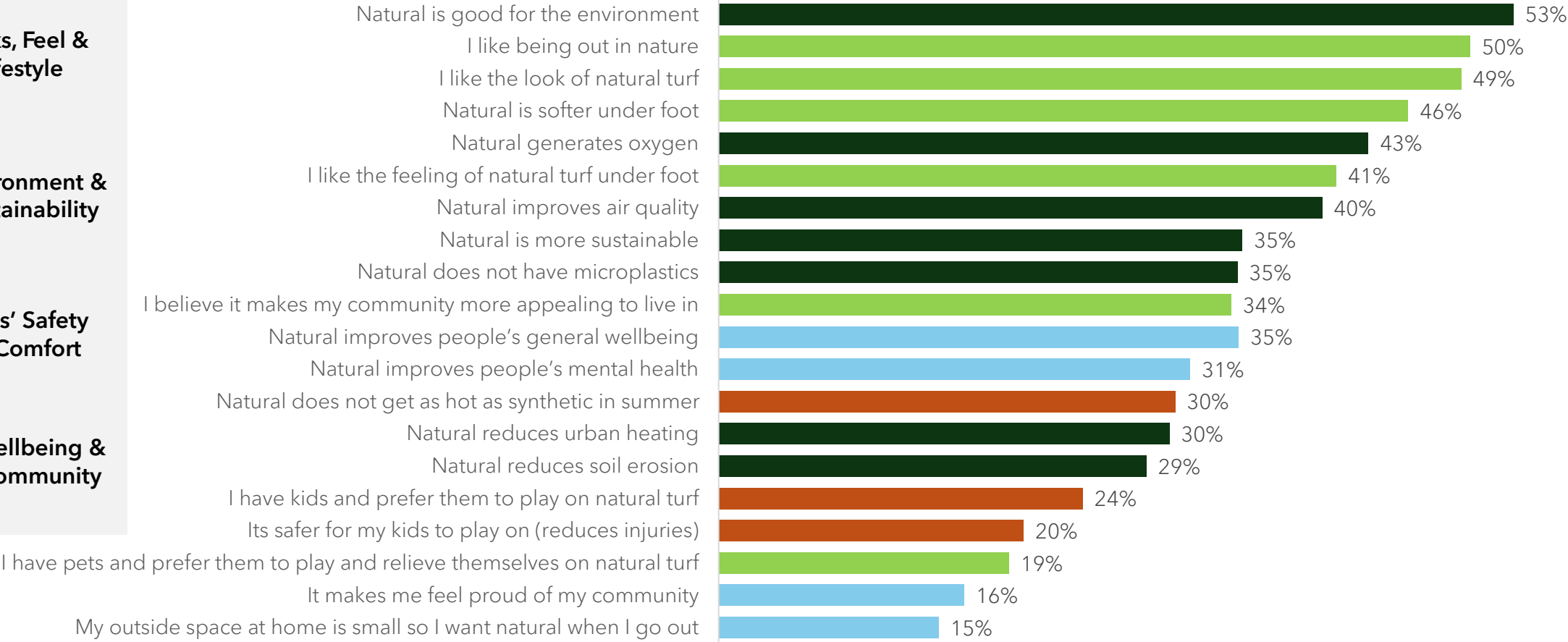


In community spaces, natural turf wins on sensory experience, environmental benefit and everyday enjoyment

Factors



Reasons People Prefer Natural Turf in Community Spaces



The consistent look is the main reason people prefer synthetic in Community Spaces, and they say its better for the environment

Reasons People Prefer Synthetic Turf in Community Spaces

Factors



Percieved Environment Benefit



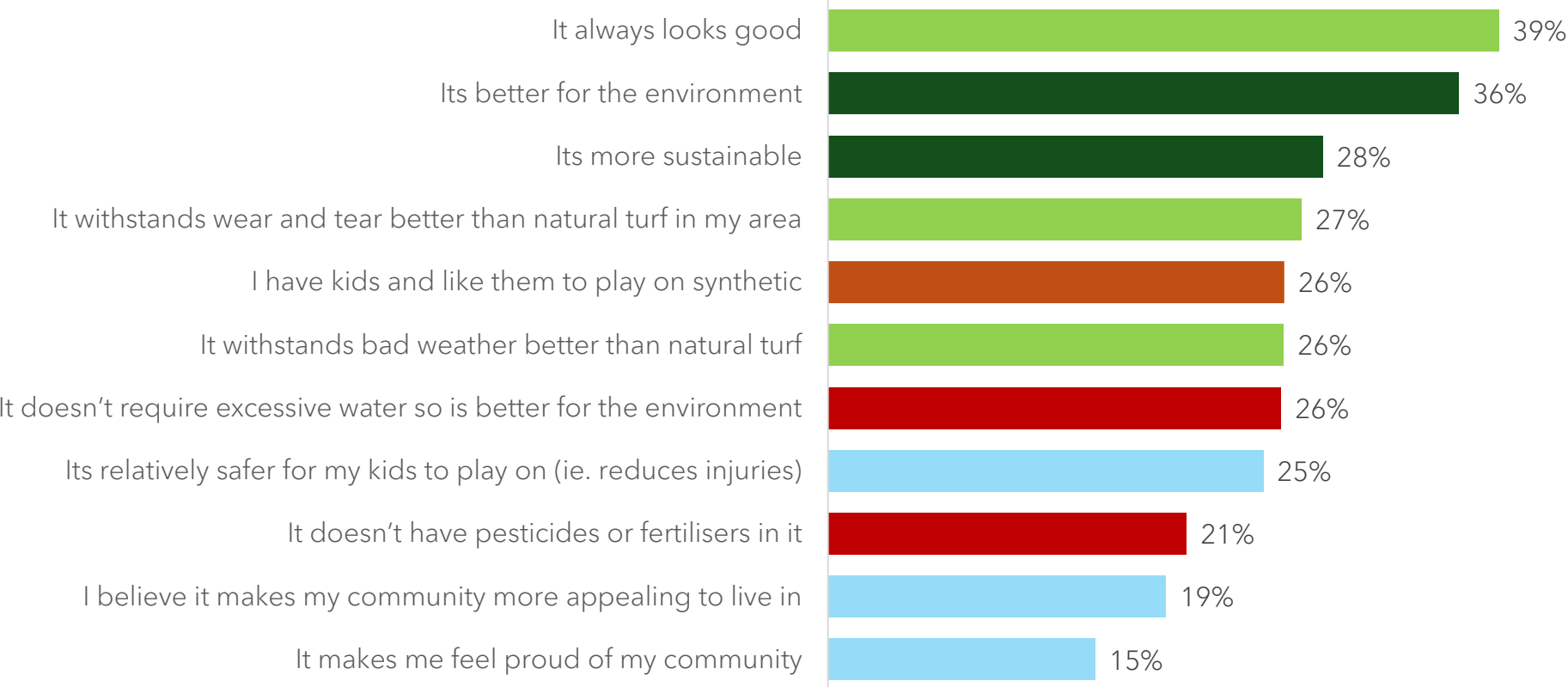
Visual Consistency & Durability



Resource & Chemical Avoidance



Family & Community Reassurance



Community Usage – Key Insights / Findings

Natural turf underpins community wellbeing, shaping how Australians use and value shared spaces

- Community spaces play a central role in everyday life, with most Australians spending time in parks, gardens, sports fields or playgrounds on a regular basis.
- These spaces are overwhelmingly natural environments, reinforcing natural turf as the default and expected surface in shared community settings.
- Natural turf is strongly preferred in community spaces, with only a small minority expressing a preference for synthetic turf. Preference for natural turf is driven by connection to nature, visual appeal, environmental perceptions and comfort underfoot, aligning with how community spaces are used for relaxation, exercise and family activities.
- Where synthetic turf is preferred in community settings, it is primarily due to perceived consistency of appearance and maintenance considerations, rather than experiential benefits.
- Overall, community usage highlights the broader social, wellbeing and environmental value of natural turf beyond purely functional performance.

Community Usage – Opportunities for local councils

- Maintain natural turf as the foundation of community spaces, reflecting strong public preference and its role in wellbeing, liveability and environmental outcomes.
- Balance practicality with experience, using synthetic selectively where site constraints genuinely limit natural turf performance, rather than as a default solution.
- Frame investment decisions around community value, not just maintenance efficiency – recognising the social, health and environmental returns of natural spaces.
- Engage communities early when considering surface changes, ensuring decisions align with how residents actually use and value shared spaces.

An aerial photograph of a coastal area. In the foreground, there's a large, green, somewhat circular field. To the right of this field, there's a cluster of buildings, possibly a school or a small town. The background shows a large body of water, likely a bay or a lake, with some smaller islands or peninsulas visible in the distance. The overall scene is a mix of natural and built environments.

4. Qualitative

Insights from schools, councils, sports clubs, developers, architects and landscapers

Motivations, Preferences and Barriers

Education Institutions



Promote overall health & wellbeing for students

Local Councils



Best meet the needs of all constituents

Sports Clubs



Grow sport participation and commercial viability

Architects/Developers



Deliver projects that satisfy clients

Landscapers



Deliver projects that satisfy clients

Key Motivation

Primarily motivated to satisfy the needs of stakeholders

Primarily motivated by commercial viability

Preference

Natural

- Legacy facilities
- Health & Wellbeing
- Environment & sustainability

Natural/Synthetic

- Legacy facilities
- Constituent preferences

Natural/Synthetic

- Legacy facilities
- Player preferences

Natural

- Client demands
- Aesthetic preference
- Health & wellbeing
- Urban heating mitigation

Natural

- Career being close in nature
- Client preferences
- Cost effective
- Good for kids & pets

Why Natural

Why Synthetic

- Increases capacity
- Heavy wear and tear
- Shade or sites unsuitable for natural

- Meet demands of sport stakeholders
- Installation grants
- Lower ongoing maintenance

- Maximises capacity
- More commercially viable

- Client demands
- Practical & situational limitations
- Low maintenance
- Shady and small areas

- Good for shady and small spaces
- Heavy wear & tear
- Low maintenance

As educational institutions, schools prioritise natural turf for environmental and wellbeing reasons. However, many circumstances allow for synthetic turf and it is widely used

Schools

VIC.GOV.AU



“The *Department of Education’s Building Quality Standards Handbook* sets out the following on natural vs synthetic turf in schools and early learning facilities:

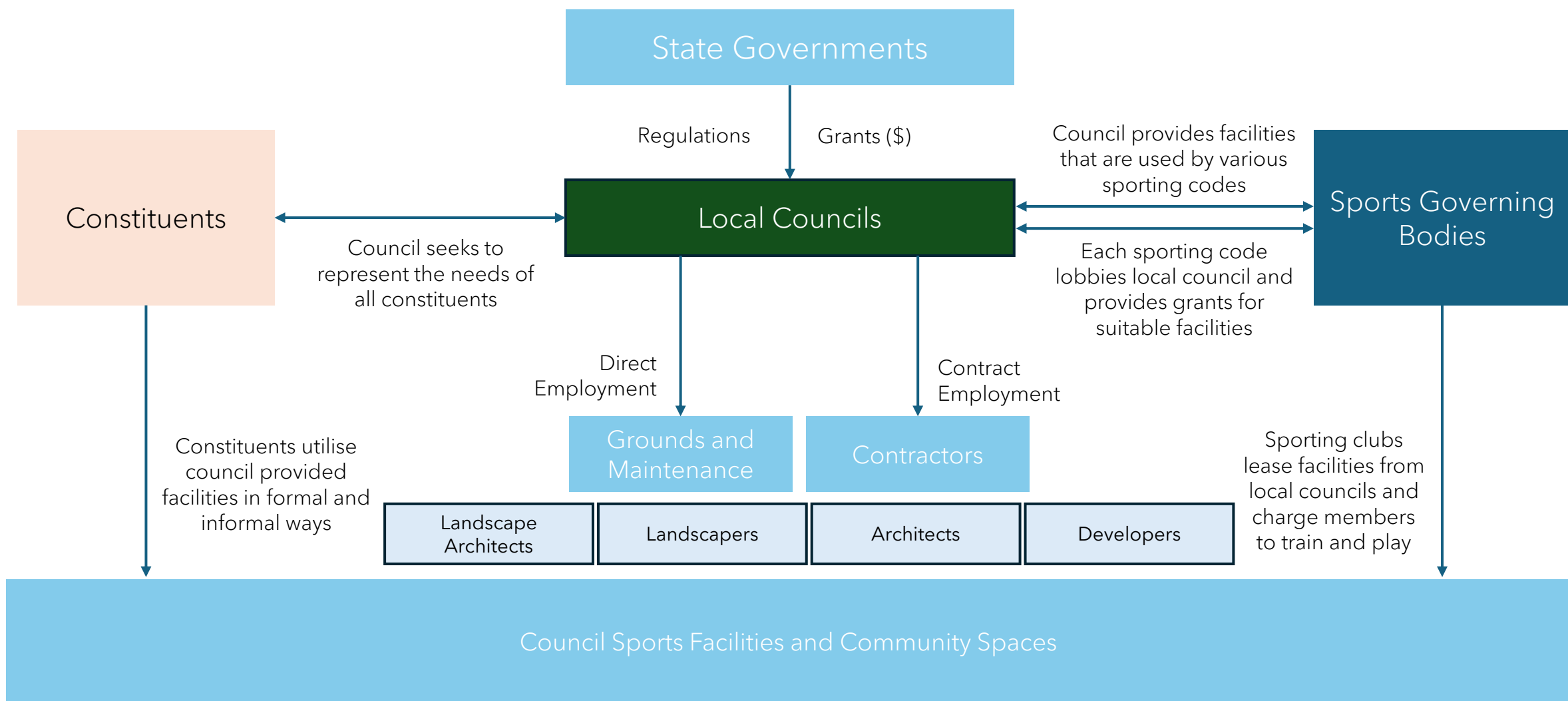
- **Natural grass should be used for large spaces and playing fields** rather than synthetic turf
- In schools, **synthetic grass can only be used in small spaces** where natural grass is difficult to establish and maintain, and
- **Synthetic** turf is **not permitted in early learning facilities.**”

//

The main rationale for this strong stance on natural vs synthetic turf is: **wellbeing and environmental** (i.e. **synthetic turf contributes to the heat island effect** and **children are particularly vulnerable to high temperatures**, and **micro-plastics entering the waterways**); and **cost and maintenance** (noting that **schools rarely plan adequately for the replacement of synthetic turf**)

Senior Policy Officer – Victorian Department of Education

Local councils need to manage many stakeholder groups with different priorities and needs



There is a common misconception across councils and sports clubs about the extent to which the capacity for synthetic is higher than natural

Capacity of Synthetic v Natural Sports Fields

What they say

// Your **average natural field** can handle **20 hours per week**, while a **synthetic field** can get **60 plus hours**

Senior Football Club Executive

*"Synthetic turf fields can sustain significantly higher use than natural turf, **with a synthetic field equivalent to THREE natural turf fields.**"*

*Published in
SYNTHETIC TURF PROGRAM MANUAL 2024
AFL / Cricket Australia*

Reality

While synthetic turf fields can handle more than natural turf fields, **capacity on natural varies wildly**, and **many natural turf fields can handle between 30-50 hours per week**.

In addition, the **typical usage requirements** for the average sports field is less than 60 hours (i.e. 4pm to 8pm M-F, and 8am to 8pm S-S = **44 hours per week**).

When it **rains heavily**, sports clubs scramble to **use local synthetic fields**, since **natural turf** is **less resilient** to severe weather and takes **longer to recover**

Inner City councils face greater pressure than Regional councils to increase capacity, due to higher demand and generally less space

Inner City v Regional Councils

What they say

// Our **synthetic ovals** are **never closed** and they **run even when its wet**. We wanted another synthetic oval but the **dog walkers shut it down**

Maintenance Mgr - Inner City Council

// We have **144 equivalent sized football fields** and we have **never really considered synthetic** as an option

Maintenance Mgr - Regional Council

Reality

Some councils with **limited space** and **increasing demand for sporting facilities**, might **prioritise the sporting needs** of its constituents over other groups, including people who want to use the spaces for general use (i.e. **synthetic sports fields are not really suitable for dog walking or picnicking**).

More broadly, **councils favour natural** if the pressure for capacity is not deemed too high

Sporting codes /clubs want to maintain and grow their membership base and remain commercially viable. Dedicated fields are good for their members but exclude multi-use

Sporting Codes

What they say

// While **everyone would love a good natural field, synthetic** is a **necessary evil** for teenagers and older, since it **withstands wear and tear** better. And if clubs want to be **commercially viable, synthetic is better** for **capacity throughput**

Maintenance Mgr - Regional Football Club

// We really **need a local synthetic** field since the councils are so quick to shut down the fields when it rains. We just **lose too many weekends of footy**

Club Executive - Inner City AFL Club

Reality

All sporting codes are **advocating for more synthetic fields** and see the **advantages in exclusivity**.

While they understand the **conflicting priorities** of **councils** who need to **serve multiple constituency groups**, they are active in representing the interests of their members and the **growth of their own sporting codes**.

Sporting codes are **interested** in **maximising capacity** and **commercial viability**

Environmental factors associated with synthetic surfaces are either not well understood, or not considered adequately enough when making decisions about building synthetic turf fields

Environmental Factors

What they say

// We have **never discussed** the **environmental implications** of **synthetic fields**

Commercial Executive – Inner City Cricket Club

// We are using a new material called **Brockfill** which consists of **wood particles** and **does not use sand or rubber crumb**. We also **sold our previous rubber crumb synthetic turf** instead of it going to land fill **so its not that bad for the environment**

Maintenance Mgr – Regional Football Club

Reality

It is **difficult to ascertain** the extent to which each council and sporting club considers and prioritises the **environmental concerns associated with synthetic turf materials**.

However, it is clear that **some councils have adequately considered environmental factors** when renewing synthetic sports fields while **others have not**.

The synthetic industry is active in **providing solutions** that are **less detrimental to the environment**.

Architects and developers *favour natural* since it is generally *preferred by clients* in *residential, community and commercial environments*

// *We designed a government site which used a biophilic design concept, so we had to use natural.*

// *Landscape architects almost always prefer natural as it improves health and wellness.*

// *The council specifies the amount of greenspace we design to*

// *Natural is more pet friendly for my residential clients*

// *Our clients mostly favour natural because it looks good, and they like that its more environmentally friendly than synthetic*

Biophilic design is a concept used within the building industry to increase occupant connectivity to the natural environment through the use of direct nature, indirect nature, and space and place conditions



Government agencies mostly recognise the *environmental* and *health benefits* of natural over synthetic, so *favour natural*

// *I design a lot of hospitals and natural is always preferred if possible for a healthy environment for patients. Its also to offset the large amount of hard surfaces needed around the hospitals*

// *We did a large State Government 'First Nations Garden' and it was part of the proposal that natural turf be used.*

// *We develop large government projects and as far as I know there is no synthetic turf in any of our developments.*

// *Synthetic gets too hot for kids to play so most councils prefer natural for heat safety.*



Budget constraints often *favour natural* near the end of projects when *developments go over budget* since *natural turf is cheaper*

// One development project ran out of money and we had no choice but to use natural

// Natural turf is sometimes all that our clients can afford.

// In one large development project we needed to cover an underground carpark with turf. It turned out to be cheaper to use synthetic since the cost to build a structure to handle the heavy soil and drainage system was prohibitive. Natural is usually cheaper though.



Synthetic is most often used for more *practical purposes* where *natural might not thrive*, like *high traffic areas* with *limited sunlight*

// The use of synthetic is more common in hospitality for practical purposes where they might want a softer look compared to other hard landscaping, but don't want the maintenance associated with natural

// In education, synthetic is a last resort and a necessary evil

// Day care centres also want low maintenance materials and softfall is preferred where there is playground equipment.

// In a hospital we had to use synthetic in a central courtyard because it didn't get any direct sunlight



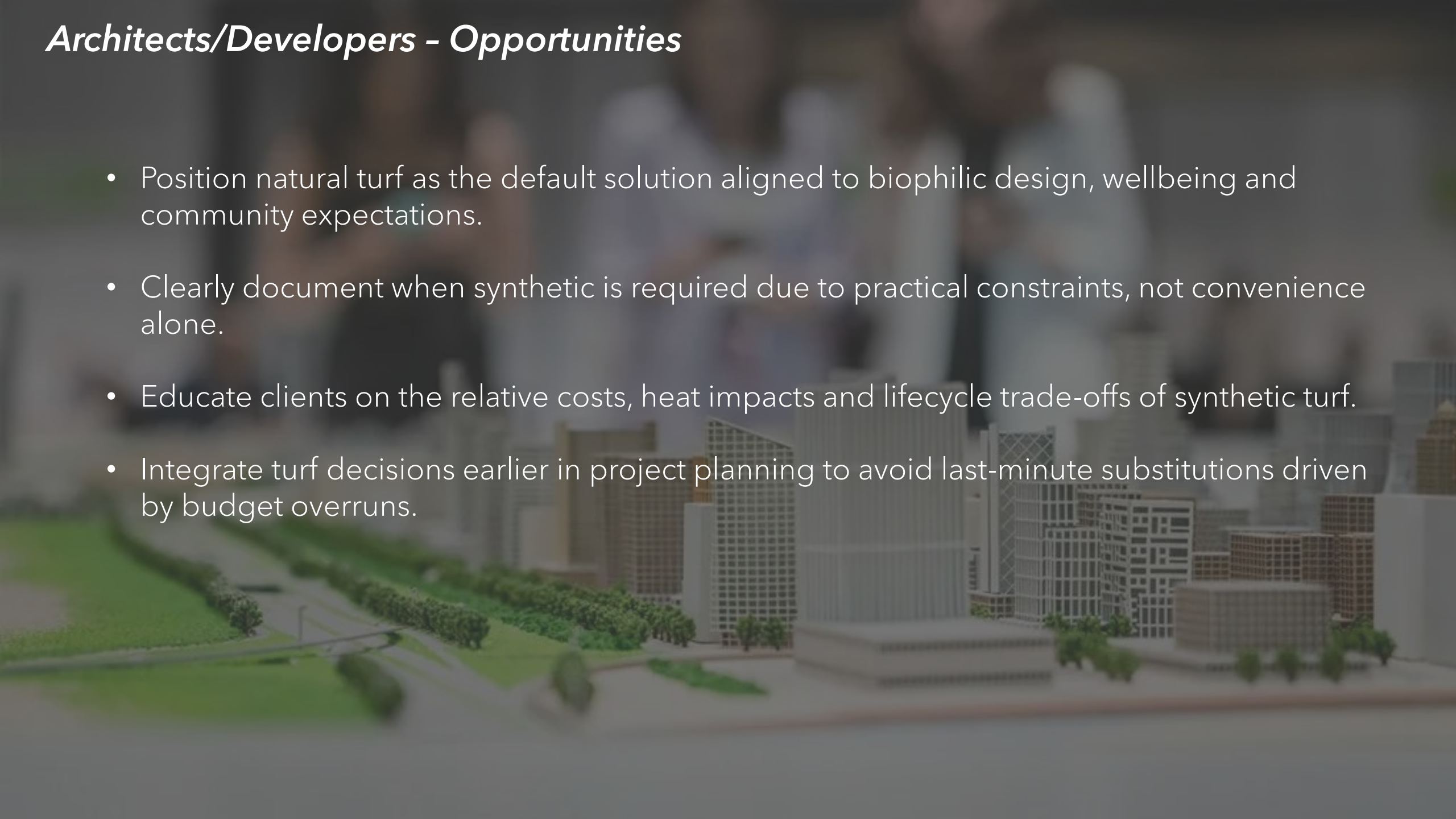
Architects/Developers – Key Insights / Findings

- Natural turf is strongly preferred in residential, community and government projects due to aesthetics, wellbeing and environmental perceptions.
- Government and public sector projects actively favour natural turf for health, heat and sustainability reasons.
- Budget pressures late in projects often result in natural turf being selected over higher-cost alternatives.
- Synthetic turf is typically used only where site constraints (shade, traffic, structural limits) make natural impractical.



Architects/Developers - Opportunities

- Position natural turf as the default solution aligned to biophilic design, wellbeing and community expectations.
- Clearly document when synthetic is required due to practical constraints, not convenience alone.
- Educate clients on the relative costs, heat impacts and lifecycle trade-offs of synthetic turf.
- Integrate turf decisions earlier in project planning to avoid last-minute substitutions driven by budget overruns.



Landscapers have a strong preference for natural appreciating its positive environmental impact, and they like to support local growers

// Natural is better in the long term, and it looks nice. I would only install synthetic if I am asked to.

// Its not well known how bad synthetic is for the environment.

// Natural is the best in most scenarios. Its good for the environment and I like to support local farmers

// Post-COVID, people are enjoying their gardens more and I have noticed natural growing in popularity again

// Synthetic is expensive and it does get really hot so I have noticed people moving away from synthetic to natural in the last 18 months.



However, *situation* and *client preferences* have a big *impact on choice*, and *practical* and *personal circumstances* also play a role

// *The client had a shady terrace and couldn't carry the mower up the steps, so we had to lay synthetic.*

// *A recent client was a single parent household and wanted a convenient, low maintenance option, so I laid synthetic for them*

// *One client had older kids and wanted a putting green so I laid synthetic.*

// *The client needed access from the house to the barn so needed something sturdier than natural*



Natural is best when the spaces get *plenty of sun*, and people want their *kids to play* on natural and generally *prefer it for pets*

// *Natural is great for kids to play in a natural environment. I installed a large natural play area at a childcare centre. They also had a softfall area where the play equipment was.*

// *Natural looks great and is what I use when the household has kids or pets*

// *Some clients with pets actually prefer synthetic so the pets don't dig it up but it can get smelly. Mostly clients with pets want natural.*

// *Natural needs good sun, and is cooler in this areas compared to hard landscaping materials*



Synthetic is most often used in spaces that are *shady*, are *small*, and where there is *high traffic* making it *hard to maintain healthy natural turf*

// *While synthetic is expensive, its good in shady areas and its low maintenance*

// *Synthetic is good when there is low light, poor drainage and in high traffic areas.*

// *I installed a large section of artificial turf at a townhouse development where there was bad light*

// *Gardens are shrinking and synthetic is good when areas are too shady and if there is heavy wear. Synthetic materials have gotten better and they are low maintenance and last a long time*



“Fresher is better” and landscapers favour buying direct from growers. They also like convenience and a fair price to quality trade off

// I generally buy Sir Walter for around \$12.50 from a turf farm in Windsor. Its an LSA business which is well known and they are reliable when it comes to availability of stock.

// Sir Walter is my preferred type as it suits a lot of conditions, its cheap and easy to maintain. Lawn Solutions has a website that enables me to get 3 quotes. Or if I need a couple of rolls I go to Bunnings.

// I buy from 3 regular suppliers. One uses text messages and will deliver reliably. The other is a grower in the Hawkesbury who offers a good price. I also go to a local landscaper in Belrose and can load the turf into my ute.

// Fresher is better so I go direct to the farm which ensures quality. At Bunnings I don't know how long its been sitting there.



Landscapers- Key Insights / Findings

- Landscapers overwhelmingly prefer natural turf due to environmental values, aesthetics and personal connection to working with living materials.
- Client needs, site conditions and lifestyle constraints are the primary drivers of synthetic turf use.
- Natural turf is favoured for sunny spaces, families, children and pets.
- Synthetic turf is used most often in shaded, small or high-traffic areas where natural struggles to thrive.
- Landscapers value freshness, reliability and relationships, favouring direct-from-grower purchase channels.

Landscapers – Opportunities

- Provide clearer guidance on matching turf types to site conditions to maximise natural turf success.
 - Support landscapers with simple education tools addressing heat, pet safety and environmental comparisons.
 - Strengthen direct-to-grower supply models emphasising freshness, reliability and local provenance.
 - Position natural turf as the best long-term solution whenever conditions allow, not just the default choice.
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- A background image showing three landscapers working on a large lawn in front of a white house. One landscaper in the foreground is pushing a wheelbarrow filled with soil or mulch. Another is working further back on the left, and a third is on the right near a red truck. The scene is bright and sunny, with green grass and trees in the background.