

Turf

Residential Market

KEY RESEARCH QUESTION

"How do we motivate residential consumers to choose natural turf?"

MARKET SIZE



plan to buy turf in next 2 years

Intending to buy...

46% NATURAL

27% "UP FOR GRABS"

27% SYNTHETIC

So what? Sizeable conversion opportunity amongst undecided shoppers

DRIVERS



NATURAL DRIVERS

Natural wins on emotional and sensory benefits



SYNTHETIC DRIVERS

Synthetic wins on ease and consistency during comparison

- Looks & Property Value
- Comfort & Wellbeing
- Practical Fit

- Maintenance & Practical Fit
- Looks, Feel & Value
- Environment & Sustainability

BARRIERS



NATURAL BARRIERS

are practical and solvable



SYNTHETIC BARRIERS

are intrinsic objectives

- Maintenance Burden
- Site & Family Constraints
- Environmental Disadvantage

- Artificial Look & Feel
- Health & Environmental Harm
- Cost & Replacement Risk

So what? The job for natural turf is solving practical friction, not creating desire

INFORMATION & INSPIRATION

1.6 = average number of touchpoints



TOP INFO SOURCES (NATURAL BUYERS)

- Online research
- Friends and family
- Landscaper



INSPIRATION: IS SOCIAL/ REAL-WORLD FIRST

- Friends and/or family
- Seeing other people's gardens
- Landscaper/ Gardener

So what? Few touchpoints so be present at key ones to influence

PURCHASING

NATURAL

SYNTHETIC

THERE ARE TWO DIFFERENT PURCHASING PATHWAYS

50% Personal advice channels - trust/expertise led

39% Large Retailers = More "off-the-shelf"

So what? Protect and amplify natural turf expert pathways to improve conversion



KEY FINDING

Preference strongly favours natural turf, but decisions shift to synthetic when practical concerns enter the comparison.



INDUSTRY ACTION

Win the decision moment by addressing practical concerns - simplify maintenance, address misconceptions about water use, and strengthen expert-led pathways.