

Residential Decision Dynamics for Natural Turf - Summary

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

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

This report examines how Australian households choose between natural and synthetic turf, highlighting where natural turf leads, where it loses momentum, and the key opportunity to improve conversion. While **natural turf has a clear preference and intent advantage**, final outcomes are determined during a **short comparison phase** where practical considerations dominate and **synthetic captures a disproportionate share** during comparison.

1. Market Dynamics: Intent vs Conversion

More than **1 million Australians are actively in-market** for turf in the next two years, with a further **1 million forming future intent**, highlighting the scale of residential demand.

Among active buyers:

- **46% intend to purchase natural turf** (47% purchased; +1)
- **27% are undecided or open to both** (14% purchased both)
- **27% intend to purchase synthetic turf** (38% purchased; +11%)

Natural turf enters the decision journey with a **clear preference advantage** and converts broadly in line with intent (+1%), while synthetic materially over-converts (+11%), particularly among **undecided buyers** ("Active Comparers"). This creates a clear **conversion gap**, with share shifting during the comparison phase rather than at initial consideration.

As a result, growth depends on **targeting high-intent undecided buyers and converting preference into purchase**, not on creating demand.

2. Drivers of Choice

Preferences shift materially as buyers move from emotional intent into practical comparison.

Natural Turf is Chosen For

- Looks & property value (29%)
- Comfort & wellbeing (25%)
- Practical fit (18%)
- Environment & sustainability (14%)

Synthetic Turf is Chosen For

- Maintenance & practical fit (23%)
- Looks, feel & value (20%)
- Environment & sustainability (17%)
- Cost (17%)

This creates a clear dynamic:

- **Emotion drives intent (natural turf leads)**
- **Practicality drives purchase (synthetic gains ground)**

The key challenge is therefore not creating desire for natural turf but **reducing practical friction during comparison**.

3. Motivations and Barriers

Natural turf buyers are motivated by **lifestyle, wellbeing and connection to nature**, rather than **convenience** (which is valued more highly by **synthetic turf buyers**).

Barriers to natural turf are **practical and manageable**, including maintenance, water use and site constraints.

In contrast, **synthetic turf** faces **intrinsic objections**, including **artificial look and feel, heat and environmental concerns**, and **replacement and lifecycle costs**.

This creates an asymmetry:

- Natural turf loses on **perceived effort**
- Synthetic turf is constrained by **trust and acceptability concerns**

4. Decision Journey and Purchase Pathways

Final decisions are made quickly and through highly compressed journeys, typically involving only **1-2 touchpoints**. This means that the **first credible touchpoints disproportionately shape the final decision**.

Top Information Sources - Natural buyers

- On-line research (35%)
- Friends & family (29%)
- Landscapers (26%)

Top Inspiration Sources - Natural buyers

- Friends and/or family (29%)
- Seeing other people's gardens (26%)
- Gardener/landscaper recommendation (20%)

Purchase pathways differ between natural and synthetic.

Trust-led purchase pathways (Natural)

- Large Retailer (31%)
- Direct-from-grower (19%)
- Small retailer - local nursery (13%)

Retail-led purchase pathways (Synthetic)

- Large Retailer (39%)
- Hardware store (12%)
- Small retailer - local nursery (10%)

This highlights the importance of **credibility, early visibility** and **protecting expert-led pathways**, where:

- **Natural turf is trust-led**, often purchased through growers or professionals
- **Synthetic turf is retail-led**, reflecting its standardised nature

Conclusion

Natural turf holds a strong position in the residential market, driven by **emotional and sensory benefits**, but **loses share during comparison**, where **convenience and perceived practicality reshape decisions**.

The growth opportunity lies in **reducing practical friction** and **reinforcing confidence at the point of evaluation**, converting early preference into final purchase and strengthening natural turf's position at the moment decisions are made.