

Sustainability Roadmap: Optometry in Australia

FINAL REPORT | JULY 2023

Commissioned by Optometry Australia

edge



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Introduction

INTRODUCTION

Climate change impacts our businesses, supply chains and communities.

Australia's health sector, including optometry, has a role in both climate change mitigation and adaptation, and in reducing its overall environmental impacts. It is within our power to act to avoid and reduce greenhouse gas emissions, to prevent the planet from warming to more extreme temperatures, and to alter our behaviour and systems to ensure we remain able to meet the needs of the communities we serve.

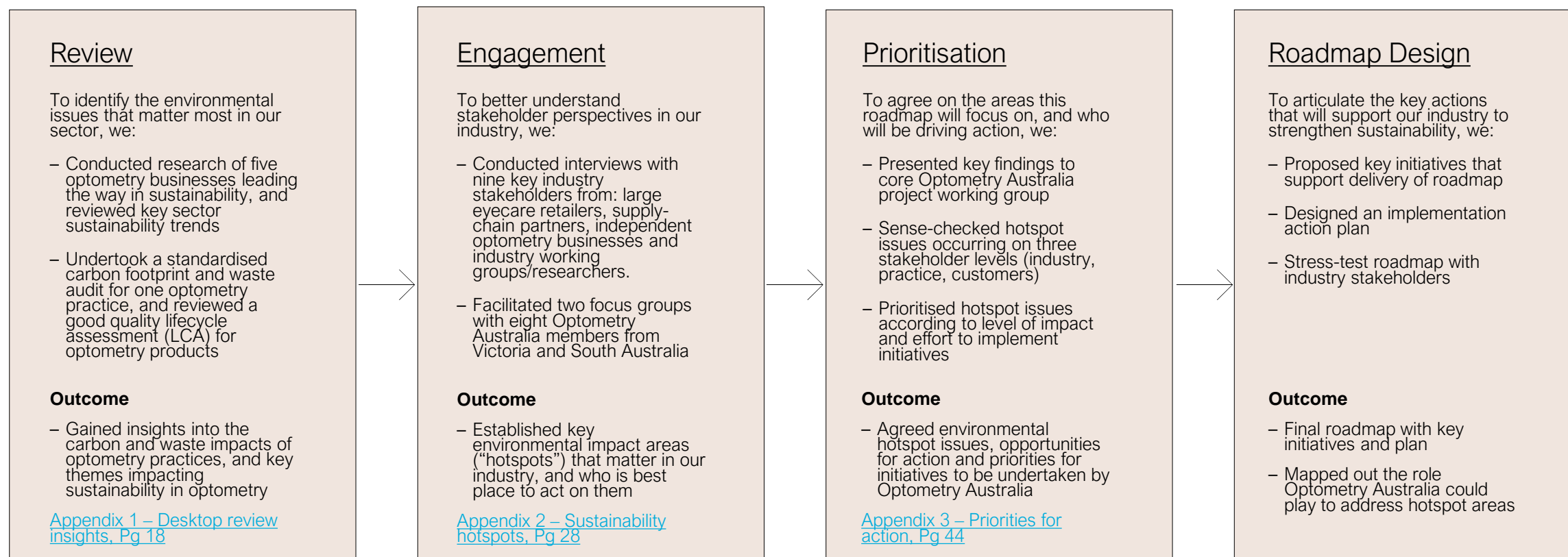
In its 2021-2024 Shared Strategic Plan, Optometry Australia committed to exploring and developing initiatives in response to emerging evidence on the impact of climate change specifically on eye health. We agree that it is time for the healthcare sector, including the optometry profession, to show leadership and accelerate efforts to work towards mitigating the impact of climate change, and reduce its impacts on the environment.

In order to achieve progress, Optometry Australia engaged sustainability consultancy Edge Impact to support identification of the ways in which optometrists and the broader optometry sector can take effective environmental action.

INTRODUCTION

The process




Optometry Australia engaged sustainability consultancy Edge Impact to lead a 4-step strategy design process to develop a Sustainability Roadmap for optometry in Australia. The stages below outline how Edge Impact identified environmental hotspot areas in the optometry sector, what actions/levers can be used to address these, and which level of stakeholders are best-suited to take action.



Plan on a page

HOTSPOTS

What are the key environmental issues?

-  **Waste**
-  **Sustainability knowledge**
-  **Carbon**

STAKEHOLDERS

Who is driving action?

-  **Industry**
-  **Practices**
-  **Individuals**

LEVERS	Year 1	Year 2
Collaboration	<ul style="list-style-type: none"> Establish industry working group Initiate supply-chain engagement regarding decarbonization and materials 	<ul style="list-style-type: none"> Formalise partnerships for waste solutions and product stewardship
Future-fit spaces	<ul style="list-style-type: none"> <i>No specific year one actions</i> 	<ul style="list-style-type: none"> Provide operational waste management plan, store fit-out and packaging reduction guidelines
Pro-active purchases	<ul style="list-style-type: none"> Establish proforma sustainable procurement policy and supplier code of conduct. Map common commodity certification options 	<ul style="list-style-type: none"> Create a common supplier questionnaire and evaluation of responses guide and training pack
Engaged people	<ul style="list-style-type: none"> Launch first round of learning resources, case studies, guidelines and templates 	<ul style="list-style-type: none"> Launch customer-education campaign with members Launch environmental optometry course (CPD aligned)

2025 GOALS

What does success look like?

- Our industry has established formal collaborative approaches to sustainability and product stewardship
- Industry and practitioner knowledge of sustainable practice and choices is increased
- Sustainability considerations become embedded in purchasing decisions
- Circularity is built into product design

Environmental roadmap

Hotspots

Waste



Minimising waste to landfill, improving circular solutions, designing out waste.

Carbon



Understanding and addressing the carbon intensity burden in our sector.

Sustainability knowledge



Knowing how to make better choices, having the right information, communicating with patients and customers.

Summary

HOTSPOTS

What are the key environmental issues?

Waste

Sustainability knowledge

Carbon

STAKEHOLDERS

Who is driving action?

Industry

Practices

Individuals

LEVERS

How are we creating change?

Collaboration

Future-fit spaces

Pro-active purchases

Engaged people

2025 GOALS

What does success look like?

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ENVIRONMENTAL ROADMAP

HOTSPOTS

What are we addressing

Based on the process outlined above we have defined three key environmental “hotspot” areas that your stakeholder groups care about and the optometry sector can directly impact. These three hotspot areas (or material issues) are **waste, carbon, and sustainability knowledge**.

We understand these are the most important issues because of:

- The desktop research, carbon footprint and waste audit we conducted: for example, leading businesses in the optometry sector focus on using alternative and recycled materials, and provide alternative waste solutions.
- Stakeholder interviews and focus groups highlighted the need for providing resources to optometrists to help them make better choices.
- The workshop outcomes confirmed the need to tackle wider industry issues such as alternative end-of-life solutions.

The sustainability roadmap identifies actions that can be taken, and maps them to the hotspot area to the initiative responds too.

WASTE



Practitioners, optometrists and customers face significant waste challenges. The Australian optometry sector is experiencing industry-wide recycling constraints and faces several waste issues within its supply chain as well as at a retail level. Waste issues vary from e-waste, to packaging, manufacturing waste (esp SWARF), a lack of industry-wide circular solutions and end-of-life options. Most significant opportunities will be minimising waste to landfill, improving circular solutions and designing out waste.

CARBON



Carbon is a globally growing concern that touches all sectors. Businesses have an increasing responsibility to reduce their carbon emissions, while consumers are more conscious about how their personal buying decisions influence their carbon footprint. Initiatives addressing our hotspot area “Carbon” will improve the understanding of carbon emissions, outline carbon emission reduction opportunities for practices and address the carbon intensity burden in our sector.

SUSTAINABILITY KNOWLEDGE



A major issue identified during the stakeholder interviews and focus groups is the desire to understand how to make better choices, where to find the right information and how to communicate this information to patients and customers. Under the hotspot area “Sustainability knowledge” we cover initiatives that help optometrists, customers and industry players to choose better materials, and improving energy and waste management.

ENVIRONMENTAL ROADMAP

STAKEHOLDERS

Who will take action

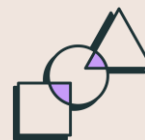
During this process we identified three stakeholder groups that play a role in addressing the hotspot areas and action levers.

The change we want to see will occur on three levels:

- an industry level,
- a practice level and
- an individual level (e.g. optometrists, staff and customers).

Each stakeholder group has a unique role to play in influencing change and reducing its environmental impacts.

INDUSTRY



Complex systemic challenges will require a collaborative approach (as discussed above) and therefore industry roundtables and bodies will play an important role in progressing action. Key initiatives that require this approach will be led by industry groups (formal and informal).

PRACTICE



Some issues are best dealt with in the design and management of the practices our optometrists operate in. Carbon emission and waste reduction initiatives at a practice level will improve the efficiency of our spaces.

INDIVIDUALS (CUSTOMERS/OPTOMETRISTS/STAFF)



Impactful change can occur on an individual level, by educating and engaging optometrists, staff, and customers. Initiatives will cover behaviour change campaigns, providing guidance and templates, case studies and E-learning resources.

ENVIRONMENTAL ROADMAP

LEVERS

How are we creating change

The three hotspot areas can be addressed by actioning four levers to create change:

- **Collaboration**
- Future-fit **spaces**
- Proactive **purchasing**
- Engaged **people**

Carbon, waste and sustainability knowledge gaps can be improved by collaborating to drive wider industry initiatives, designing future-fit optometry practices, driving proactive purchasing decisions by influencing the supply chain and lastly by empowering people to make better decisions by educating and engaging them.

COLLABORATION

Many of the sustainability challenges our industry faces are complex and systemic. Therefore working together with several different stakeholder groups (manufacturers, suppliers, optometrists, etc.) to establish circular design standards, create transparency and provide circular and recycling options will be a key priority to creating sector change.

FUTURE FIT SPACES

Creating future-fit spaces will improve waste, carbon and sustainability knowledge on a practice level, and design spaces for efficiency. Actions under future-fit spaces entail practical solutions such as guidance for improving a practices carbon footprint (LED lights) and reducing packaging.

PROACTIVE PURCHASING









Making proactive and informed purchasing decisions that integrate sustainability criteria will be pivotal to reducing waste and emissions within the supply chain, and choosing better materials. Initiatives focus on providing tools and guidance for members to integrate sustainability into purchasing choices and ensure your industry is providing sustainable options to optometrists.

ENGAGED PEOPLE

A major opportunity to address our hotspot areas is to empower people, particularly our members, to grow their knowledge of environmental sustainability. By providing learning resources and guidelines, we can support them to make better choices.

Taking action

Action lever: collaboration

Priority	Hotspot	Who
Immediate	  	Industry
Immediate	 	Industry
Mid-term		Industry
Long-term	 	Industry

Initiative One: Industry working group (*progress in Yr. 1*)

Establish a working group to identify and drive industry-wide sustainability action.

Lead discussions and influence change by actively engaging tier 1 suppliers, e.g. to collaborate on circular solutions, industry data requirements and design standards.

Initiative Two: Supply chain engagement (*progress in Yr. 1*)

Engage with key suppliers to set decarbonisation expectations for the industry to address emissions from (frame and lens) manufacturing and to have clearly defined sustainability attributes for products.

Initiative Three: Partnerships for waste solutions

Lead partnerships to design end-of-life solutions for problem waste streams (e.g. value add process).

Explore existing options for refurbished equipment (product stewardship // refurbished marketplace options)

Initiative Four: Voluntary benchmarks

Set a voluntary commitment for industry to adopt minimum standards in manufacturing (e.g. frames), retail and design. E.g. Right of repair commitment.

Action lever: future-fit spaces

Initiative One: Operational waste management plan

Provide templates for operational waste management guidelines that can be modified per store.

Initiative Two: Store fit-out guide

Develop industry fit-out criteria for new stores e.g., sustainable materials, energy efficiency etc.

Initiative Three: Packaging reduction initiatives








Switch to 100% paper bags. Use zero plastic for deliveries.

Establish packaging guideline to be included in the supplier questionnaire.













Initiative Four: Emission reduction guidelines

Provide GHG emission reduction tips to practices including e.g. switching to LEDs.

Create partnership list for impactful and verified emission reduction opportunities

Priority	Hotspot	Who
Mid-term		Industry
Mid-term	  	Industry
Long-term		Practice
Mid-term	 	Practice

Action lever: proactive purchasing

Priority	Hotspot	Who
Immediate	 	Industry
Immediate	 	Industry
Mid-term	  	Practice/ OA members
Long-term	  	Practice/ OA members
Long-term	  	Industry/ Practice/ OA members

Initiative One: Establish a common industry approach (*progress in Yr. 1*)

Design a common supplier code of conduct and a sustainable procurement policy template for optometrists.

Initiative Two: Map certifications by key commodities (*progress in Yr. 1*)

Map environmental (social TBC) certifications to key common commodities.

Initiative Three: Common supplier questionnaire

Create a common supplier questionnaire and evaluation of responses guide and training pack, including environmental (social TBC) criteria, that address key hotspot areas, e.g. waste, decarbonisation.

Initiative Four: Supplier database

Develop an approved and scored supplier database for Optometry Australia members based on initiatives 1, 2 & 3 responses.

Initiative Five: Supplier platform

Digitise and automate initiatives 1-4 through the implementation of a supplier platform with supplier sustainability credentials, questionnaire responses and evidence.

Action lever: engaged people

Initiative One: Learning resources (*progress in Yr. 1*)

Create learning resources, e.g. E-learning modules focusing on sustainable procurement, reducing waste and emissions in daily practice etc.

Initiative Two: Case studies (*progress in Yr. 1*)

Write and publish case studies of good practice in the Optometry space

Initiative Three: Guidelines and templates (*progress in Yr. 1*)

Develop sustainability guidelines and templates optometrists can use in their daily business, e.g. outlining preferred packaging and material choices (e.g, recycled content, bio-acetate)

Initiative Four: Customer education







Design customer education campaign promoting conscious environmental behaviours

Initiative Five: Certified environmental optometry course

Create a CPD Certified Sustainable Optometry course

Initiative Six: Behaviour change campaign

Identify behaviour change opportunities targeting individual optometrists

Priority	Hotspot	Who
Immediate		OA members
Immediate		OA members
Immediate		OA members
Mid-term		OA members
Mid-term		OA members
Long-term		OA members

Desktop review insights

Forming insights

Well-informed insights draw on multiple data sources, and incorporate robust data points and practitioner experience. For this research we have collated information from the following sources:

- **Sector desktop research** – a scan of publicly available information regarding industry trends, challenges and opportunities in the sustainability space. This includes looking at innovations in the sector, existing international frameworks, and businesses leading the way.
- **Practice case study** – a comprehensive carbon footprint and visual waste audit of an example optometry business to sense-check trends and stakeholder views with the reality of a practice's key environmental impacts.
- **Stakeholder interviews and focus groups** – to gain an in-depth perspective of what practitioners and industry partners view as the most important sustainability issues and are hearing from their customers, suppliers and staff.



CONTEXT

Key industry trends

There are a number of key macro-trends that have an impact on the issues and opportunities related to sustainability in eyecare and eyewear.

Fast fashion and lower costs – the eyecare and eyewear sector in Australia has undergone a transition in the past decade, with the introduction of lower-cost eyewear wholesale and retail providers. Consumers are taking advantage of ‘multiple frame’ deals and purchasing eyewear as fashion choices. Some eyewear brands, like in broader fashion, now focus on faster, cheaper, rapid-trend turnover products.

More frames and lenses per-person lead to more waste, more packaging, more transport.

Financial incentives – Australia has a high rate of private health insurance. These insurance schemes often provide annually expiring rebates for new frames and lenses, incentivising annual replacement. Medicare scheduled fees for optometry services are less in actual dollar terms than they were in 2012. These systemic drivers create a situation where many optometry business models are increasingly reliant on revenue from the sale of frames, lenses and contacts to remain financially viable.

These financial drivers create discentivises both consumers and optometry businesses to repair rather than replace eyewear products.



Key trends

Conscious consumers – many consumers are seeking greater information about where and how products are manufacture and making decisions based on greater environmental and social awareness – including personal concern about climate change and plastic waste. Optometrists we spoke to throughout this project have reported increasing consumer questions related to materials, country of manufacture and product end-of-life options.

Businesses that want to meet future consumer sentiment will need to keep pace with a demand for sustainable products, and communicate transparently and effectively to customers about the solutions they are creating.

Consolidated value chains – the eyecare and eyewear sector has seen a consolidation of value chains as large brands vertically integrate their manufacturing, lens processing and logistics. This has led to a concentration of manufacturing, wholesale and retail power with a smaller number of core brands.

Action and collaboration between large industry stakeholders will be vital to addressing environmental issues throughout the supply chain.



Key take-outs

1

More people are buying cheaper eyecare products more often. This is increasing the amount of frame, lens and contacts waste generated. End-of-life solutions are going to be a necessary component of any robust, industry-wide strategy.

2

Collaborating with key industry brands that are responsible for a large share of product manufacturing and wholesale will be vital to achieving impact at scale and addressing the areas of most significant waste and emissions generation.

3

The future consumer is going to be more educated, conscious and discerning when it comes to sustainable choices, and greenwashing. Consumers also have a vital role to play in any circular / recycling initiatives. Communicating effectively with consumers is an important aspect of any sustainability action.

CONTEXT

Leading by example

These eyewear brands have integrated environmental improvements to products into the core of their business. Major focus areas are sustainable materials and packaging.

DICK MOBY

“Waste is just a waste!”

- Biodegradable and recycled materials, e.g. recycled stainless steel and recycled acetate
- Disclose environmental data on frames: water use, CO2 footprint and energy used water
- Visit suppliers on regular basis to ensure safe working conditions

MONC EYEWEAR

“We believe in designing products responsibly, for people who believe in true craftsmanship.”

- Focus on sustainable materials. E.g. use glass in their glasses, offer repair services
- Local sourcing where possible (UK suppliers)
- Committed to lowering consumption through small batch production
- Packaging made locally from recycled paper cups
- Collaborate for industry solutions
- Zero waste goal
- 1% for the planet member

MARI AND CLAY

“We want to build a platform that creates positive change for our environment.”

- Using sustainable materials, e.g. bio-acetate
- Logistics/delivery - *Go Green* program for freight
- Sustainable and ethical sourcing – working with suppliers
- Use zero plastic in packaging. Delivery in recycled cardboard boxes and compostable mailers.
- Partnerships to give back, e.g. One Tree Planted
- Take-back scheme to donate or recycle glasses

LUXXOTICA

“To see the beauty of life.”

- Goal to be carbon neutral in operations by 2025
- Shift to bio-based materials and embed eco-design in all product developments by 2025
- Focus on corporate citizenship (e.g. by eliminate poor vision by 2050), and fair and ethical practices within their value chain
- Focus on inclusion and wellbeing of their employees

BIRD

“For us it’s about reframing what really matters; people and planet.”

- First B-Corp certified eyewear brand in the UK
- Use sustainable materials and [recycle](#) old frames
- Partnerships for impact, e.g. with SolarAid
- Recyclable, reusable and biodegradable packaging
- Conduct 3rd party verifications of supply chain
- Goal to be carbon negative by 2025. Part of [B Corp Climate Collective](#)

CONTEXT

Standard carbon footprint

A comprehensive carbon footprint of a typical optometry business was conducted for FY22, to sense-check trends and stakeholder views with the reality of a practice's key environmental impacts.

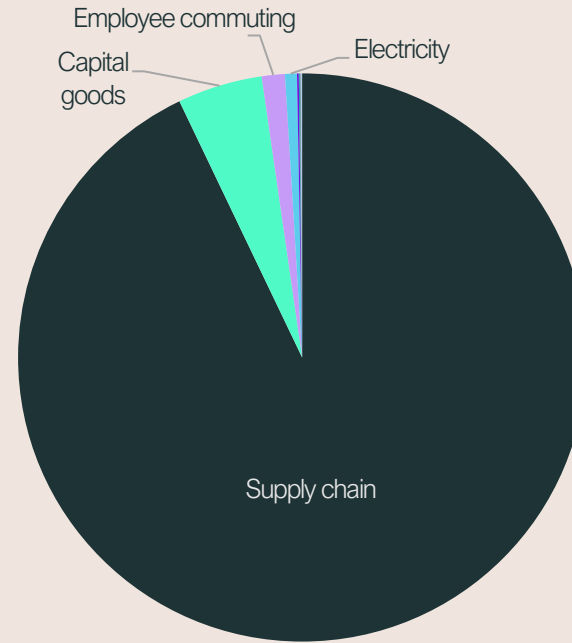
The emissions footprint for a standalone optometry store who buy their electricity from the grid in Victoria was:

880 tonnes CO₂-e emissions total

This is equivariant to the emissions from 48 Victorian households per year, or driving a diesel car from Sydney to Perth 1,320 times.

A total of 98% of emissions are from **supply chain spending** (goods and services) and **capital purchases**. **Employee commuting** and **electricity use** are the next two largest categories representing approximately 2% of emissions.

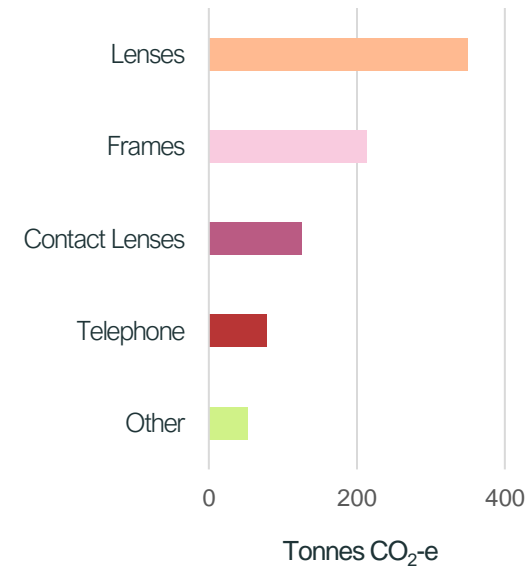
TOTAL EMISSIONS



93%

OF TOTAL EMISSIONS DERIVE FROM SUPPLY CHAIN EMISSIONS

SUPPLY CHAIN EMISSIONS



84%

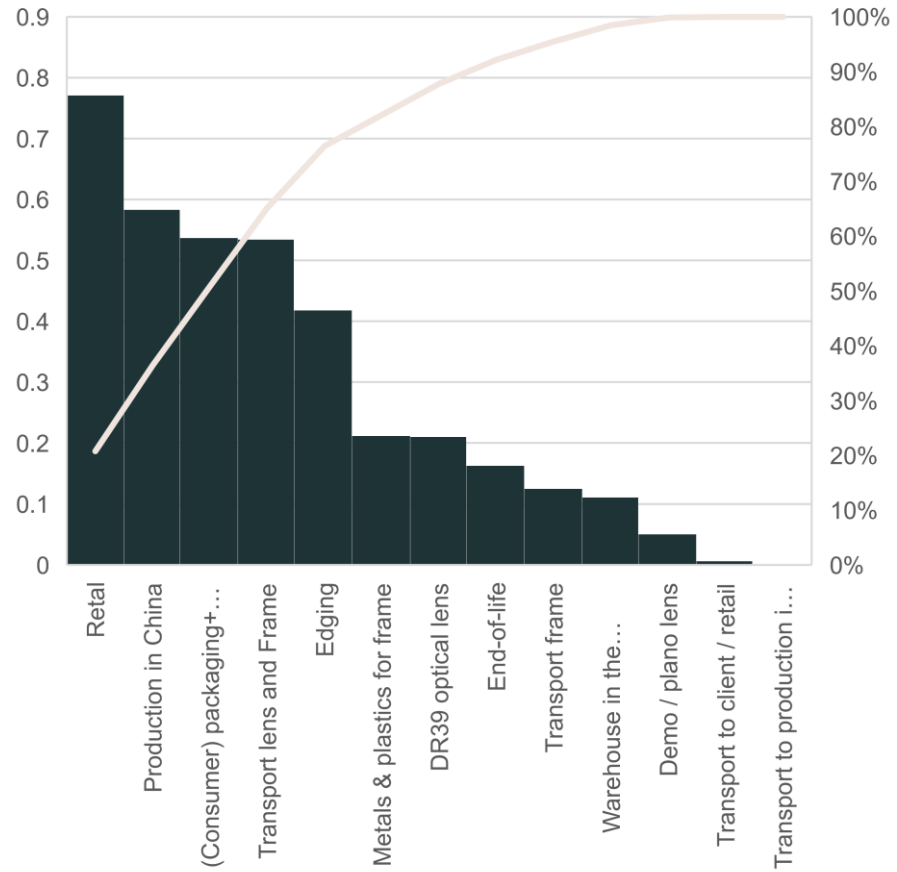
OF SUPPLY CHAIN EMISSIONS DERIVE FROM LENSES AND FRAMES

CONTEXT

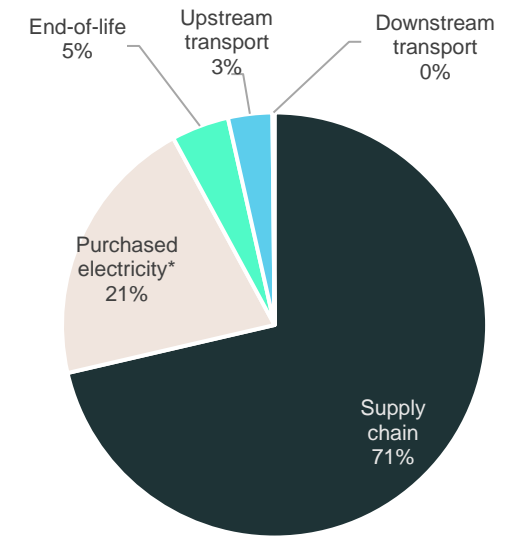
LCA emissions

An LCA describes the environmental impact of a product throughout its life cycle, including raw materials, production, transport, retail and waste treatment. The goal of the analysis is to understand and improve the environmental impact of the glasses and transparently communicate on this process to all the stakeholders.

Relatively the highest impact comes from retail, with 21%. Production of the frame, transport of the lens and frame to the edger, edging & mounting and consumer packaging of the final product contribute another



21%
Retail emissions primarily electricity use



71%
Supply chain emissions (capturing multiple LCA categories)

CONTEXT

Common waste challenges

A visual waste audit was also conducted to understand the main waste generators within the practice, and how waste is currently managed. This practice takes a concerted pro-active approach to minimising waste on-site and with customer choices.

- The main sources of waste generated in store were **packaging waste, cleaning items**, and **staff lunchroom waste**.
- Provision of bags, lens cleaner and promotional material were not provided to customers with purchases, minimising the generation of waste downstream.
- Low quality frames and cases that break easily were identified as a potentially high waste generator. This practice actively educates customers about quality and longevity of products and materials.



CONTACT LENS TAKE BACK SCHEMES HAVE BEEN TRIALED AT THIS PRACTICE. CUSTOMER ENGAGEMENT HAS BEEN LOW.

This practice is apprehensive about frame take back/donation schemes as concerned about transparency of waste stream, and do not want to incentivise regular replacement.

30%

OF CUSTOMERS* REUSE FRAMES FOR 5-6 YEARS AND DON'T REQUIRE NEW CASES DURING THIS TIME

*At this practice.



Key take-outs

1

Data is hard to find when it comes to greenhouse gas emissions and waste. There are few baselines, annual carbon footprints or intensity metrics published by eyewear brands or industry bodies.

Supporting a more transparent and robust approach to environmental data publication will be helpful if the industry is to set environmental targets, track progress and demonstrate meaningful action.

2

The greatest environmental impact leverage point for individual optometry businesses is their purchasing power. Particularly setting sustainable procurement criteria and approaches to how they buy:

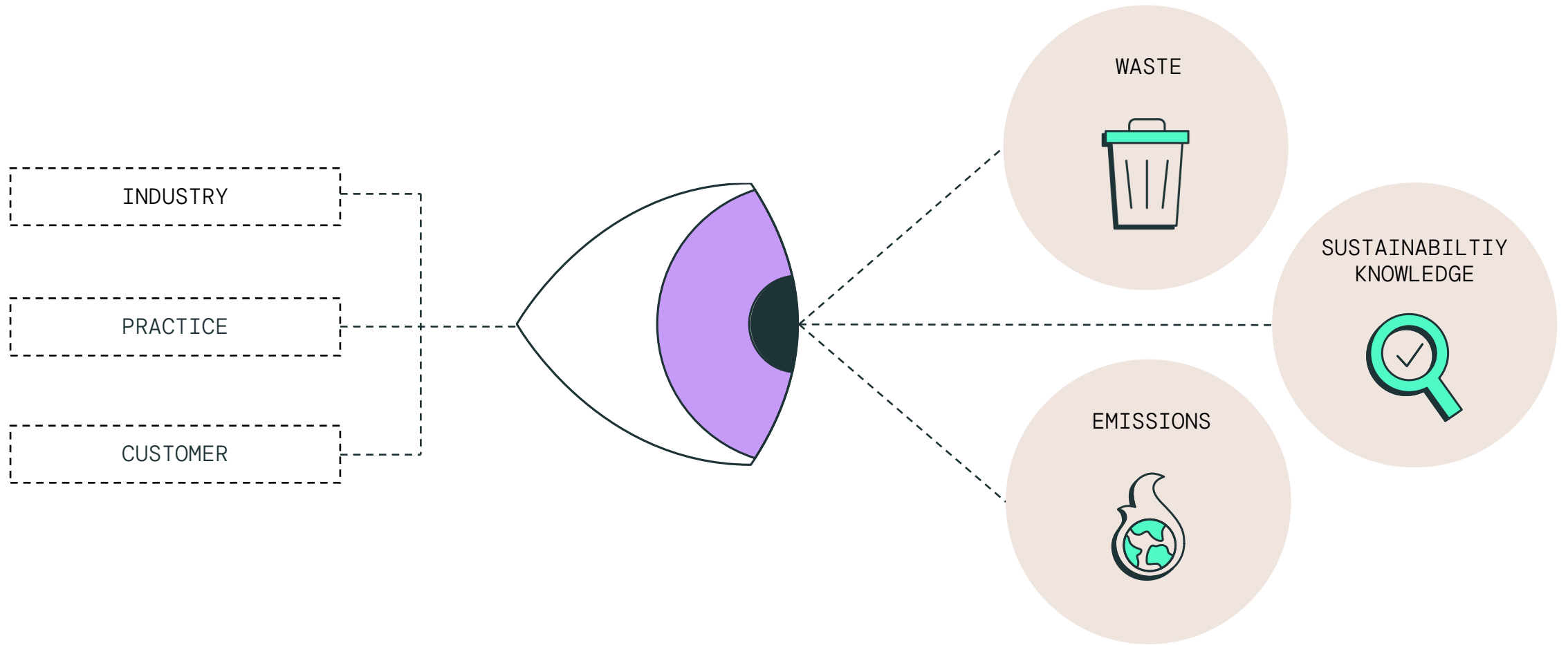
- Electricity
- Packaging
- Clinical equipment
- Lenses, frames, accessories and contact lenses
- Store fit-out
- Logistics

3

Plastic waste is a significant problem – both in manufacturing, retail and end-of-life of products. Governments and consumers are becoming more concerned about the environmental and health impacts of micro-plastics. In optometry plastics are not avoidable, and therefore robust circular and chain-of-custody recycling streams will become increasingly important.

Sustainability hotspots in optometry

Sustainability in optometry



KEY HOTSPOT AREA

Waste



HOTSPOT - WASTE



What matters to customers?

Optometry businesses consistently reported that managing eyecare waste is a top issue raised by customers, and businesses don't feel they have adequate information to respond. Fast fashion approaches to eyewear is causing an increased volume of frame and lens waste, and contact lens customers are increasingly concerned with packaging waste.

"Customers are coming to us because of what we do in terms of sustainability. We receive a lot of emails saying 'thanks for this concept'.... It's not just the materials we use, it's also that we have zero plastic packaging, lens replacement, frame repairs, and we donate to tree planting." – Business owner

"People often bring their glasses back to us and ask if they can be recycled. Both glasses and lenses. They ask about contact lens packaging. What can I do with that?" – Optometrist

WHY THIS MATTERS

Low-cost frames and consumers' purchasing behavior, combined with a lack of recycling information and capability in Australia, is leading to an increasing amount of contacts, lens and frame waste. Although small, eyewear is made of complex mixed-materials that are primarily plastic-based creating long-term environmental impacts, particularly if not disposed of correctly.

BARRIERS TO CHANGE

Customers face uncertainty and limited options to recycle eyewear products correctly (i.e. lenses down the sink). Due to Medicare and private health payment systems, and the expansion of fast-fashion eyewear retailers, there are systemic incentives for customers to increase the frequency of eyewear purchases rather than repair frames or replace lenses.

OPPORTUNITIES IDENTIFIED

A major opportunity for optometrists is educating their customers on sustainable eyewear choices: selecting frames that have clear end-of-life solutions and instructions, and opting for higher quality options that will have greater longevity, repairability and re-lensing options. Establishing ongoing, user-friendly, eyecare waste recycling options (i.e. Terra Cycle system) would be beneficial.

HOTSPOT - WASTE



What matters to practices?

Optometry practices face several waste issues within their supply chain as well as at the retail level. Waste issues vary from e-waste, clinical equipment, packaging, PPE, dummy lenses and damaged/old stock.

“ I don't have enough information about what to do with end-of-life for eyewear. Except for donations to Lions Club.” – **Optometrist**

“*We are part of fast fashion. Most people base their business model on selling products. The money is made in selling more frames, more often*” – **Focus group participant**

“In optics, the circular economy will definitely need to emerge. We are nowhere near there yet. We can't have glasses just going to landfill. Becoming more circular is something we all need to be working towards.” – **Sustainability manager of large optometry business**

WHY THIS MATTERS

Optometry practices have a role to play in reducing waste across the value-chain – they can have influence through their purchasing decisions and interaction with suppliers, they have waste on site to manage, and they can play a role in reducing and educating people about eyewear end-of-life waste.

BARRIERS TO CHANGE

Practices find this challenging to address as the problem starts downstream with the use of non-recyclable materials in lenses and frames. Secondly, end-of-life solutions such as partnerships with TerraCycle have been found too costly for independent retailers to sustain. There is a general lack of existing solutions and information for end-of-life options.

OPPORTUNITIES IDENTIFIED

A number of opportunities being implemented by practices include engaging in secondhand equipment marketplaces, reducing paper waste / increasing digital administration, actively reducing consumer packaging, and in some instances partnering with Terra Cycle to manage practice and consumer waste.

An industry-wide opportunity would be establishing consistent approaches to recycling across the sector, with specialised problem waste stream solutions (and cost recovery mechanisms) in place – for example the sector-wide waste management scheme established by [Sustainable Salons Australia](#).

HOTSPOT - WASTE



What matters to industry?

The Australian optometry sector is experiencing industry-wide recycling constraints. There are currently limited end-of-life options for frames, lenses and contacts, as products are made of non-recyclable or hard-to-recycle materials. A large part of problematic eyewear waste is also produced during the manufacturing process (especially micro-plastic SWARF) – with the offshoring of lens processing primarily to Asia and Europe, supply chain transparency and accountability are increasingly important to addressing waste issues across the value-chain.

“How can we influence the quality of plastic upstream? The distributor here doesn't have influence over the quality of lenses that are manufactured. If you want to get into something meaty, this is it.”

– **Optometry wholesale employee**

WHY THIS MATTERS

This is a problem for the environment because materials used in lenses and demo lenses (such as polycarbonate) can't break down and can cause environmental damage when being disposed of incorrectly. Waste and packaging targets set by the Australian government (e.g. all packaging needs to be recyclable, compostable or reusable by 2025) will impact the industry.

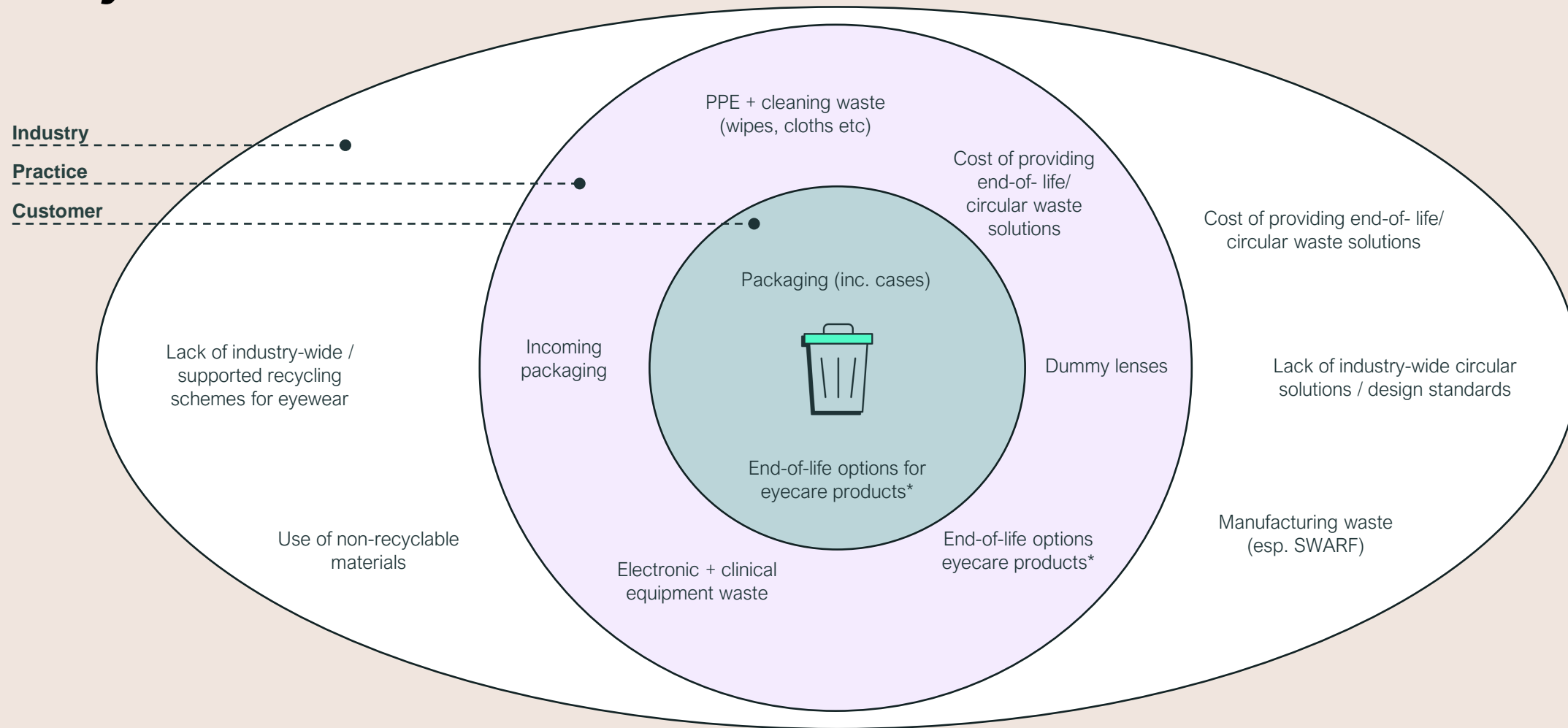
BARRIERS TO CHANGE

This is a challenge for the industry as products are manufactured globally using a mix of materials and standards. Currently, there is no recycling infrastructure and/or waste stream in Australia to prevent these items from going to landfill. This includes waste streams for 'environmentally friendly' options such as ISO 14855 certified biodegradable frames, which only degrade under composting conditions that are unavailable at present in Australia.

OPPORTUNITIES IDENTIFIED

The most significant opportunity for the industry as a whole is to collaborate and advocate for greater recyclability and circular solutions with manufacturing and wholesale stakeholders. To ensure that the materials coming into Australia have end-of-life solutions in this jurisdiction.

Key issues



* Eyecare products = Frames, lenses, contact lenses

KEY HOTSPOT AREA

Sustainability knowledge



What matters to customers?

Consumers are concerned about where and how products are produced, and how to manage their purchases when no longer used. There is a growing demand for eco-friendly products, but consumers are often making decisions regarding these materials without full knowledge of whether there is an end-of-life solution available for them in the Australian context.

“Practices are asking about eco-friendly brands, because the consumer is asking for it. Over 50% would be interested in purchasing from a sustainable partner.” – Optometry wholesale employee

WHY THIS MATTERS

Customers have an increasing interest in eco-friendly products and minimising their waste footprint, but also find it difficult to get clear and accurate information about their choices. Many people make assumptions about the ‘environmentally friendliness’ about products that can be wrong or misled.

BARRIERS TO CHANGE

A major barrier to change is the amount of effort customers have to put in themselves to research the best possible solution, and that information can be conflicting and confusing, which can lead to apathy.

OPPORTUNITIES IDENTIFIED

An opportunity to address this issues is educating consumers on more sustainable options, pre-selecting sustainable materials (e.g. frames made from recycled content, zero-plastic packaging), and actively providing more information on eco-friendly choices. Solutions need to be easily accessible and convenient for consumers.



What matters to practices?

Practices need support on how to make and communicate sustainable choices: choosing sustainable suppliers, materials (e.g. biodegradable - beneficial or not), better knowledge on managing energy and waste, and how to communicate to consumers about sustainability - regarding both their own operations and product choices.

“It would be great to have guidance on products and frames. What to look for. What questions do I need to ask? How do I encourage the big company I work for to be more sustainable?” – **Independent optometrist**

“I was told the aluminum can be taken off and recycled, but I'm not sure if that's correct.” – **Focus group participant**

“I don't think [optometrists] have traditionally thought of ourselves as having a role to play in this stuff. We are about eye health and patient care. Environmental issues seem far away from what we do” – **Focus group participant**

WHY THIS MATTERS

An optometrist's choice of suppliers has environmental and social impacts along the supply chain and is the most important lever available for driving environmental outcomes. These issues go beyond sustainable materials and have an impact on emissions, water consumption, and ethical sourcing within the industry.

BARRIERS TO CHANGE

Barriers to strengthening sustainability knowledge and confidence within optometry practices include a lack of time and resources to research suppliers and materials, limited training in both sustainability and procurement best-practice, limited understanding of the impact and role that optometry has on the environment, and a sense of being 'too far away' from where significant impact and change can occur.

OPPORTUNITIES IDENTIFIED

Things that could support optometrists with this challenge include creating reliable sustainability guidelines and templates they can use in their daily business, running educational sessions that provide practical solutions for their daily work, and setting industry-wide benchmarks or pledges. A number of stakeholders also commented on the need to embed sustainability into formal education for future optometrists.



What matters to industry?

There are currently no industry standards or frameworks on environmental performance or action, data sharing platforms or collaboration on sustainability. Due to the dual retail and healthcare contexts that many optometrists operate in, general sustainability in health frameworks do not meet the unique needs of an industry that includes significant manufacturing, retail and consumer choice engagement.

An accreditation program for suppliers of lenses, frames, contact lenses would be helpful. We trust OA, and if they have accredited a company we would trust that. – **Independent optometrist**

WHY THIS MATTERS

As highlighted above, significant environmental impacts in the optometry industry exist in a complex and global supply chain, and are also influenced by government and private health insurance funding mechanisms. Creating change in this context requires collaborative, industry wide action.

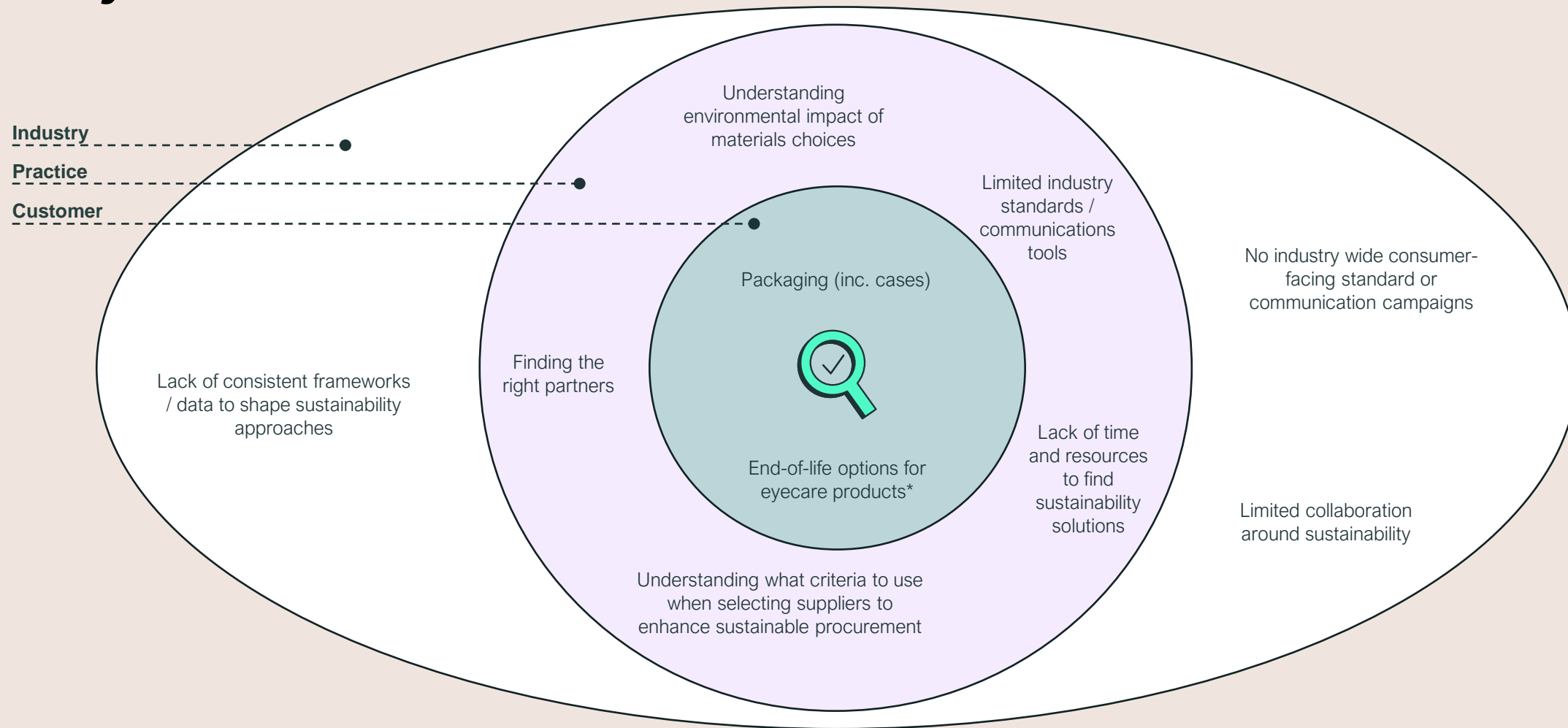
BARRIERS TO CHANGE

One of the largest barriers to collaborative action around sustainability is having a coordinating body that can be a 'backbone' for multi-stakeholder action. Having the resources, relationships and legitimacy to support collective action is crucial. This could be a role for Optometry Australia to step in to. Businesses also find committing resources towards initiatives that are in the broader collective interest, rather than their immediate business priorities, challenging.

OPPORTUNITIES IDENTIFIED

Establishing effective working groups that can drive change around specific industry-wide priorities is an opportunity. This is particularly relevant to addressing funding-related issues, circular solutions and standards of environmental practices and materials innovation and management. Particularly when businesses will see a direct benefit from shared action.

Key issues



* Eyecare products = Frames, lenses, contact lenses

KEY HOTSPOT AREA

Emissions



HOTSPOT - EMISSIONS



What matters to customers?

Consumers are becoming increasingly willing to make purchasing decisions that avoid environmental damage and climate change (GlobeScan 2022). The growth of Climate Active Carbon Neutral certification and customer carbon offsetting programs reinforce the demand for climate-conscious products today.

In a recent study by the Carbon Trust two-thirds (67%) of consumers supported the idea of a recognisable carbon label to demonstrate that products have been made with a commitment to measuring and reducing their carbon footprint (Carbon Trust 2019).

“We have received positive feedback from patients about our mission and the fact that we provide an alternative, or just about the fact that we highlight sustainability as an issue in optometry” – Optometry retail business

WHY THIS MATTERS

Individual action matters in both real teams of reducing individualisation footprint and as a driver to accelerate decarbonisation throughout supply chains. Consumers are increasingly concerned with climate change – and important actors in creating change.

BARRIERS TO CHANGE

There are limited benchmarks and certifications in the optometry industry that help consumers make climate-conscious decisions. When picking up a product on a shelf, consumers do not have clear information about the emission intensity that sits behind that product.

OPPORTUNITIES IDENTIFIED

Consumers want businesses to help them make environmentally aware choices and reduce their personal carbon footprint when they shop (Carbon Trust 2019). By having clear, reputable, and easily understood information about both a practices' operational footprint, and the products being sold, this could help consumers to reduce the emissions profile in the products and services they chose.



What matters to practices?

There are some optometry practices that will want to address their emissions – both within their operational control and supply chain – due to the shifting consumer sentiment mentioned above, and because “*it’s the right thing to do*”. There is also a financial driver as the cost of emissions intensive spend categories (fuel, energy and logistics) rise as global and national decarbonisation efforts increase.

“*Small first steps can be important and motivating. Advice on renewable energy and carbon offset programs, what do they do and are they reputable. That would be helpful.*” – **Independent optometrist**

WHY THIS MATTERS

As with waste, practices have an opportunity to take action on the emissions within their operational control (electricity, air-conditioning refrigerant use, business travel, operational waste, *employee commuting**) and to leverage their purchasing power to seek lower-emissions goods and services within their supply chain.

Because optometry is a highly decentralised service model, small actions from across the whole industry will be needed to achieve significant decarbonisation outcomes.

** Employee commuting is a factor that practices can influence through a range of initiatives and incentives, dependent on location and public infrastructure.*

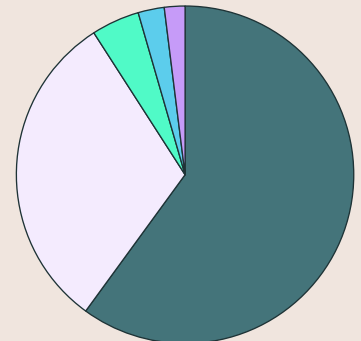
BARRIERS TO CHANGE

Key barriers to decarbonization for optometry practices are a sense of confusion and uncertainty about what their carbon footprint is, clear information about how to take practical action, and having the ability to make changes to energy purchasing and waste stream management in many retail lease settings.

OPPORTUNITIES IDENTIFIED

Taking action on emissions that a practice has a high level of control over is a clear first opportunity. Providing guidance around how to do this, and the tools necessary (basic footprinting + key actions) is a key opportunity.

- Employee commuting
- Electricity
- Fugitive emissions (airconditioning)
- Business travel
- Operational waste



Case Study 'operational control' emissions

HOTSPOT - EMISSIONS



What matters to industry?

International optometry businesses have pledged their commitment to reducing their carbon footprint. This includes the likes of; Essilor, Zeiss, Hoya, Safilo, Zeal, and Luxottica who have set public emissions reduction targets and/or have developed sustainable materials and product alternatives.

“There is an inevitability that governments are going to put policies in place to move businesses to be more climate positive.” - Director of Optometry

“We are working to become carbon positive by 2035 and achieve net zero by 2050” - Director of Optometry

WHY THIS MATTERS

As seen in our Practice Case Study, it is common that 85-95% of business emissions sit within the supply chain. To achieve a meaningful industry decarbonization transition these hard-to-abate emissions will need to be tackled.

BARRIERS TO CHANGE

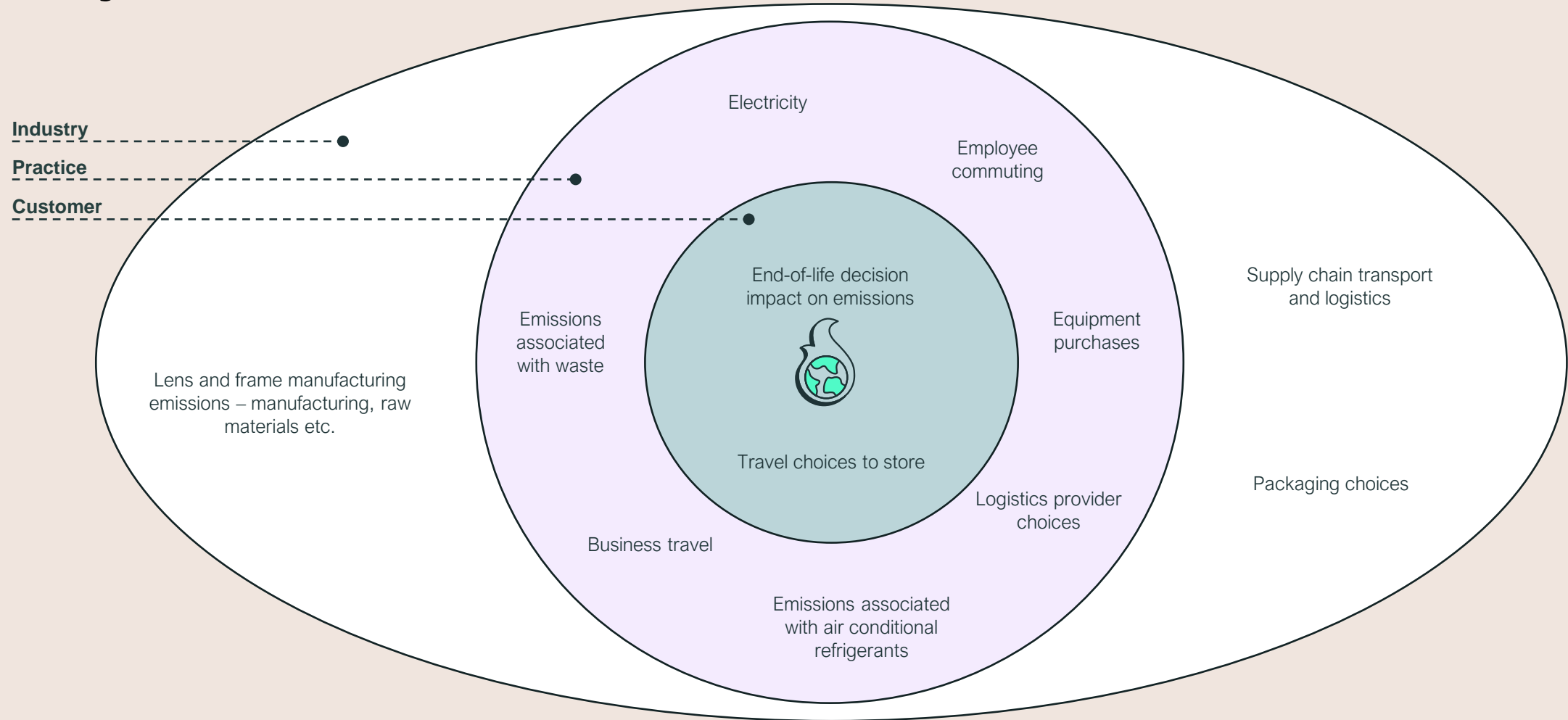
Emissions that sit within global supply chains (known as Scope 3 emissions) are complex and require a different approach to emissions that are within the direct control of a business (known as Scope 1 and 2). These emissions are distributed across countries with a variety of energy sources and regulatory settings. Addressing Scope 3 emissions requires a very different approach to decarbonisation – leveraging procurement processes, supplier engagement and making informed choices about the emissions associated with various materials and products.

OPPORTUNITIES IDENTIFIED

With manufacturers providing sustainable product alternatives, tightening emissions regulations, and customer demand for sustainable products, there is momentum and business opportunity for supporting industry transition.

A key opportunity for the optometry industry is to collaborate to strengthen and standardise decarbonisation expectations within key supply chain sectors, and to ensure that these expectations are articulated throughout the value chain.

Key issues



* Eyecare products = Frames, lenses, contact lenses

Priorities for action

Setting priorities

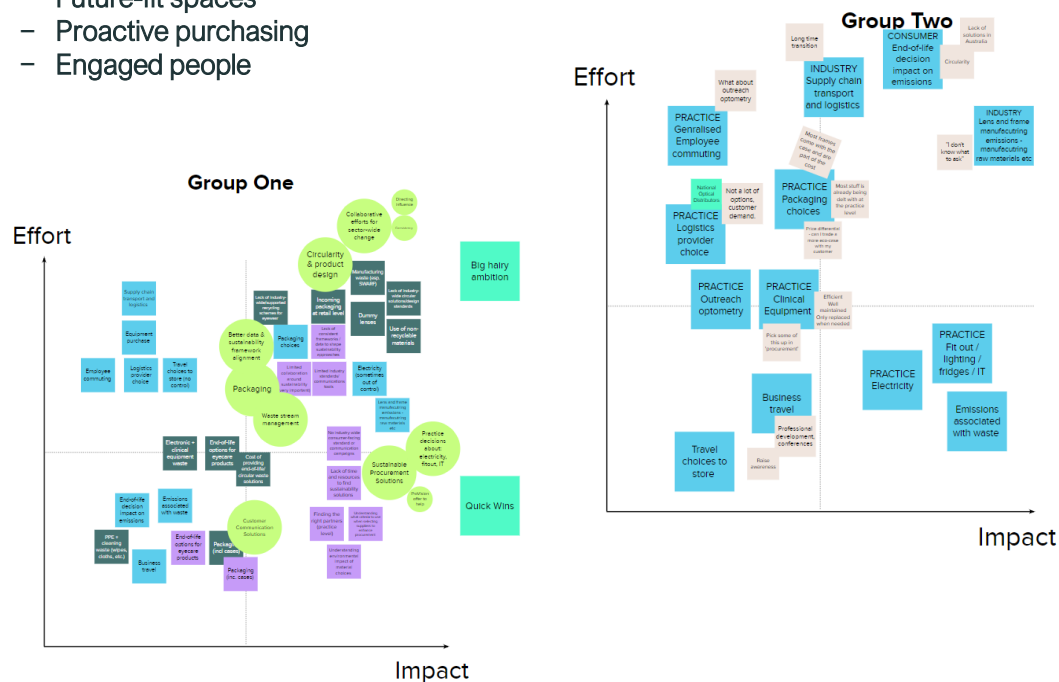
Environmental hotspot and corresponding key areas for action/initiatives were identified through the Review and Engagement phases of this project (see 'Key Issue' figures in Appendix 2). These issues were then discussed and prioritised at a workshop with eight optometry professionals and industry experts. The issues were assessed according to their level of impact and effort.

The high priority issues were identified as:

- Circular solutions and product design
- Collaborative efforts for sector-wide change
- Packaging and waste stream management
- Better data and sustainability framework alignment
- Sustainable procurement solutions
- Customer communication solutions
- Practice decisions about electricity, energy efficiency, fit-outs, etc.

For key 'action levers' were then identified as the way these issues can be addressed in our industry:

- Collaboration
- Future-fit spaces
- Proactive purchasing
- Engaged people



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