THE VISION COUNCIL EXECUTIVE SUMME

21 41 211

January 29–31, 2020 Eau Palm Beach Resort & Spa





Ken Bradley

Eschenbach

Chairman, The Vision Council Board of Directors





EMPOWERING CONSUMERS TO EMBRACE VISION CARE

thinkabout youreyes.com











Reaching Consumers

CONSUMER facing messages







Reaching Consumers









American Heart Association.



Partnerships with brands that create relevance





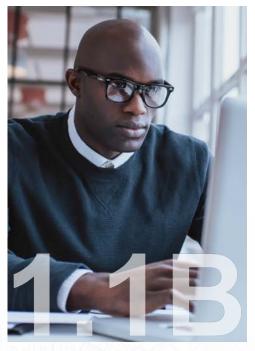
Reaching Consumers

A single call to action: Get an annual eye exam





Why TAYE Works: Inspiring Acti



1.1 Billion

impressions delivered

thinkabout



increase

in campaign awareness 50%

50% increase

in web visitors searching for a doctor







Think About Your Eyes in 2020 Warner Brothers partnership



thinkabout youreves.com



WARNER BROS.



THE VISION COUNCIL EXECUTIVE SUMMIT

Think About Your Eyes in 2020

Wonder Woman 1984









Think About Your Eyes in 2020

- Enlist **new partners**.
- Expand our reach through relevant partnerships
- Embrace a holistic view of the consumer journey.













The Vision Council

- Key Objectives:
 - Continue to drive annual eye exams
 - Educate the public about the options in vision care products & services available
- Evolved Strategy:
 - Targeted, measurable
 approach that aligns with Think
 - About Your Eyes







A targeted approach

to maximize your investment





Website

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PARTNER RESOURCES CONTACT

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UV Eye Protection and Sunglasses

The sun emits three kinds of ultraviolet radiation: UVA, UVB and UVC. While UVC is absorbed by the Earth's atmosphere, UVB radiation is only partially blocked and can burn the skin and eyes. UVA rays are not filtered and cause the most damage to vision health. The Vision Council's most recent VisionWatch survey reveals American adults experience symptoms from prolonged UV exposure like:

Find an Eye Doctor Near You

- Irritation in the eye (15.5%).
- Trouble seeing (13.5%).
- Wrinkles around the eye (8.3%).
- · Red or swollen eyes (5.9%).
- Sunburn on the eyelids (3.7%).
- Sunburn of the eye (2.5%).

Cancer on or around the eye (.6%).

Additionally, the most common time American adults report spending time outdoors is between 2 p.m. and 4 p.m. (39.8%), and the number one thing that concerns them most about UV eye exposure is vision loss (28.2%). However, 27% report they do not typically wear sunglasses when they are outside

Additional findings show that American adults are most likely to wear sunglasses while:

- Driving a vehicle (68.6%).
- Casually relaxing or spending time outdoors (55.2%).
- Near a body of water (49.1%).
- Watching a sporting event (33.7%).
- Playing a sport or exercising outdoors (29.5%).

Sports Sunglasses

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In addition to preventing sports-related eye injuries, protecting your eyes from the sun's damaging UV rays while outdoors is also important. Even golfers and swimmers should find the proper eyewear to ensure that they are keeping their eyes safe while ach





Intermediate magnification

Improves vision involving tasks performed at arm's length, between 20 and 40 inches, such as working on crafts or playing board games.



thinkabout Find an Eye Doctor Near You!

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Low Vision Devices

Patients experiencing low vision can maximize their remaining vision and develop strategies to lead a more independent lifestyle by using low vision aids. People can adopt multiple low vision devices for different purposes to enhance contrast, control glare, and magnify objects. Low vision aids fall into the following categories:





Near-vision magnification

Improves sight of objects close by, within 20 inches, such as newsprint and crossword puzzles.

Social Media

	Linkato	thinkaboutyoureyes • Follow ···	•
	Linkass	thinkaboutyoureyes If you're planning your next big vacation and have your sights set on an outdoor adventure – we've got you covered with the essentials, including sunglasses so your eyes can take in the views safely. Check out picks from our friends at The Vision Council: (link in bio) #vacation #sunglasses #fashion #eyewear	
		first to like this]
VACATION-READY EYEWEAR	Add a d	comment Post	t)





Think About Your Eyes and The Vision Council









Vision Expo Updates





Welcome



Fran Pennella Event Director Reed Exhibitions



Tarrence Lackran Director of Partnerships and Programming The Vision Council







Vision Expo Updates VISION EXPO REIMAGINED







PHASE ONE



a vision 2000 a roadmap

Debut of Neighborhoods



- Themed neighborhoods with curated exhibitors
- Each neighborhood to have its own visual distinction and DNA reflected in enhanced design creativity and interactive appeal of individual exhibit spaces
- The goal is to optimize the connection between sellers and buyers







- Location: The River Pavilion, Level 4
- Opening one day earlier than the general exhibit hall on Thursday, March 26 and showcasing the most innovative designers and retailers in the business
- Featuring daring, design-driven artisanal products, The River is a celebration of an industry steeped in innovation, discovery and deep relationships





The River Exhibitors

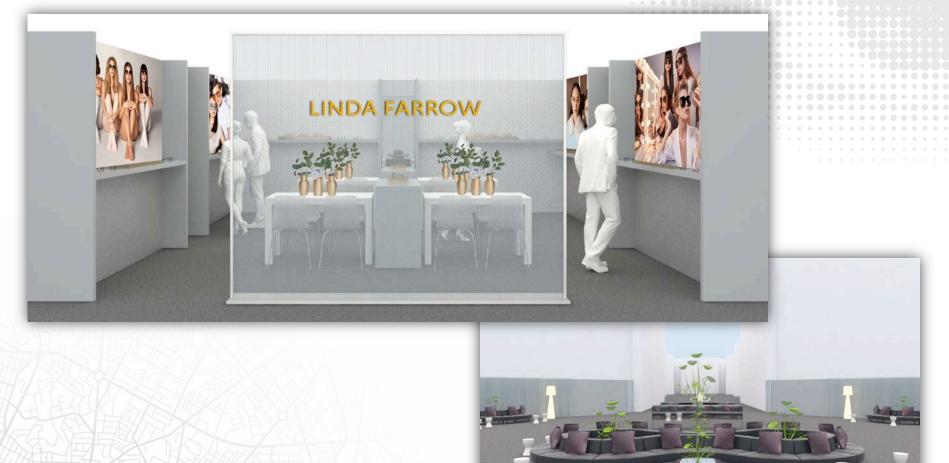
- Anna-Karin Karlsson
- Matsuda
- Maybach
- Rigards
- Emmanuelle Khan
- Mr. Leight / Garrett Leight
- Pugnale
- Eyevan
- Hapter
- I.a.Eyeworks
- Gold and Wood
- DITA / Christian Roth
- Jacques Marie Mage



- Robert Marc
 Theirry Lasry
 Linda Farrow
 Kuboraum
- Kio Yamato
- Tom Davies
- La LOOP
- Sospiri by Ottica Veneta
- Vanessa & Mehdi
- LPLR
- Face a Face / Kilsgaard
- Piero Massaro
- Caroline Abram



The River Booth and Lounge Designs







The River Programming

Thursday, March 26

- Grand Debut Breakfast Reception, 9:30am
- Conversations at The River: The Art of the Collab, 2:30pm
- Vision Expo 2020 Talent Search reception, supported by the edCFDA, 5:00 pm

Friday, March 27

- Conversations at The River: The Next Generation of Retailers Speed Dating, 2:30pm
- OWA Annual Star Award Cocktail Reception, 5:00pm







- Location: Level 3
- An evolution of the Galleria, The Union is the ultimate shopping experience for the newest trend-driven looks and will showcase a discerning edit of wholly independent brands as well as boutique, premium, hip, fashion-forward, pop culture-inspired collaborations
- The Union will be the ultimate exhibition experience for the industry's hottest collections, each with an unforgettable point-of-view





The Union Exhibitors

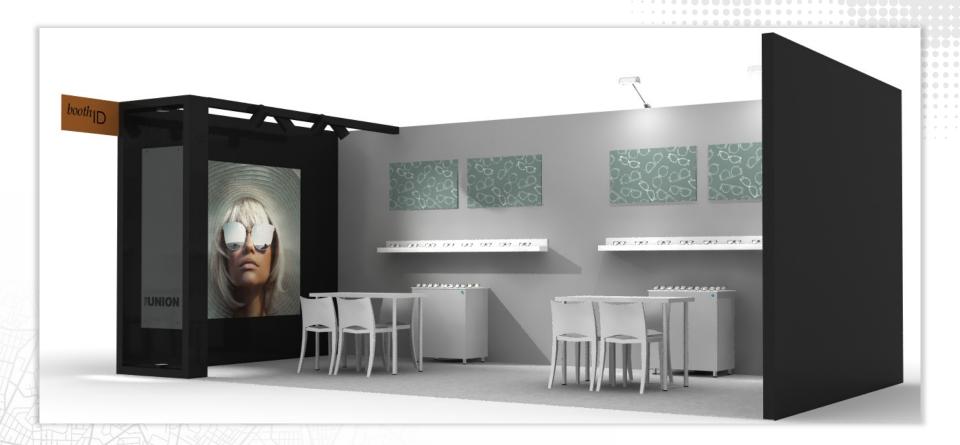
- MODO
- Lafont
- Etnia Barcelona
- Ogi Eyewear
- Studio Optyx
- ic! Berlin
- Eastern States Eyewear
- Jonathan Cate Eyewear
- MOREL Eyewear
- LINDBERG
- TOMS Eyewear

- Design Eyewear Group
- Parasite Design
- Shwood Eyewear
- Article One
- Brooklyn Spectacles / Native Sons
- Orgreen Goldsmith
- Andy Wolf
- Niche Optics
- Fusion Eyewear
- David Spencer Eyewear





The Union Booth Design









- Location: Level 3
- Located in the heart of The Union, The Springs is an incubator zone for emerging talent in eyewear design and vision innovation. Providing a bold platform for the next generation of optical icons, The Springs is a discovery zone where top buyers dive into collections by the industry's ones-to-watch and catch a first glimpse of experimental artistry.





The Springs Exhibitors

- Niloca Eyewear
- Eyewear Holdings
- Cibelle Eyewear
- Coexist Eyewear
- Kazoku
- RE:SIN
- Nouvelle Chicane Eyewear•
- Tony Brown Collection
- Fabbricatorino Fit
- Alexandros Eyewear

- Spectacle for Humans
- Stellis Eyeworks
- Sordelli Franco
- Struktur Eyewear
- Nina Mur
- Jean Philippe Joly
- Komorebi Eyewear
- Turchin Jewelry
- Mondello Roma
- Dzmitry Samal





The Springs Design







Vision Expo 2020 Talent Search supported by the edCFDA

- This competition aims to foster the talent of emerging eyewear designers
- Two final winners will be introduced to the creative eyewear community with complimentary booths in The Springs
- Winners will be recognized during a celebratory event on Thursday, March 26 from 5:00pm – 7:00pm in The River.







The Bridge

- Returning to Vision Expo East for the second year
- Location: Between The Union and the Eyewear + Accessories pavilion









New & Exclusive Continuing Education Programming

- Custom designed for Vision Expo by the Education Advisory Board, the 2020
 Education program includes exclusive, neverbefore-seen clinical presentations staged for the first time ever at Vision Expo East.
- Organized by key content areas including glaucoma, posterior segment/retina, anterior segment/dry eye, surgical/co-management, and systemic disease and diabetes, clinical attendees will discover courses specifically developed to immerse them in the most cutting-edge developments for better patient care.

	SHTS SUPPORTED BY	AN UNRESTRICTED EDUCATIONAL HE VISION COUNCIL
GLAUCOMA	ANTERIOR SEGMENT	PHARMACOLOGY
10C1 March Madness: Case Challenges in Optometry - Optimizing Ocular Imaging, Round 1	11C2 Dry Eye and Contact Lenses 12C2 Biologics in the	11C3 Oral Pharmaceuticals in Anterior Segment Disease
10C2 March Madness: Case Challenges in Optometry - Optimizing Ocular		33C3 Top Ten Drugs: What's in the Cabinet 34C3 Ocular Pain
Imaging, Semifinals and Finals	13C2 Are You Ready for Ocular Allergy	Management
10C3 March Madness: Case Challenges in Optometry - Optimizing Ocular Imaging Workshop	Armageddon? 21C2 Pain Photophobia and Ocular Pathology: What You Should Know to	OPTOMETRIC/SURGICAL PROCEDURES
11C1 Treating Newly	Help Your Patient 22C2 Updates in Corneal	12C3 Laser Procedures in Optometry
12C1 Innovations in Glaucoma Drug Delivery: What the	23C2 The Greatest Anterior Segment Disease	21C5 Cataract 2020: The Optometric Role in the Era of Specialty Lenses
Future Holds 13C1 MIGS in Glaucoma	and Medical	20C4 Injections and Minor Procedures Workshop
21C1 A Roadmap for Making the Diagnosis in Glaucoma	Management of Contact Lens Complications Course Ever 25C2 Advances in Ocular	SURGICAL/ CO-MANAGEMENT
23C1 Treating the Newly Diagnosed Glaucoma Patient	26C2 Diagnosing and	22C4 Aesthetics in Optometry - A Therapeutic Approach: IPL
24C1 Glaucoma and Ocular Surface Disease 25C1 A Roadmap for	Managing Lid Margin Disease 31C2 Uveitis	23C4 Oculoplastic Optometrist: Aesthetics in Eye Care
Identifying and Managing Progression in Glaucoma	32C2 MGD: New Technologies	33C4 20/20 Refractive
26C1 Roadmap for Medical Management of Glaucoma	for Diagnosis and Management 33C2 TBD	Update: Advances in Presbyopic and Corneal Procedures
31C1 The Secondary Glaucoma's	34C2 Red Eyes – It's Just Conjunctivitis or Is It?	HANDS ON WORKSHOP
32C1 New Medications in Glaucoma	42C2 Oral Pharm for Anterior Segment Disease	20C4 Injections and Minor Procedures Workshop
33C1 Glaucoma Grand Rounds 34C1 Surgical Advances In		25L1 Scieral Lens Workshop 30C5 OCT Workshop

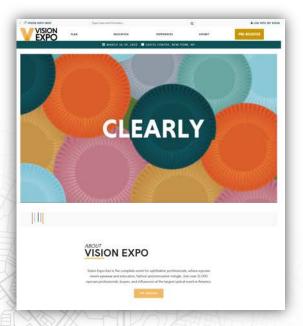




Marketing Update

Website

- New creative implemented
- Specific landing pages for Reimagine Vision project





Registration

- Exhibit Hall opened Dec. 4
- Education opened Jan. 10







PHASE TWO



a vision 2200 a roadmap

Debut of Neighborhoods

2020

Further development of innovations for these neighborhoods

2021

- Debut of themed neighborhoods with curated exhibitors for Eyewear + Accessories, Medical, and Lenses + Processing.
- Debut of new branding for Education Program

2021 - 2022

• Javits expansion opportunities to be determined







Vision Expo Updates VISION EXPO EAST PROGRAMS





Thursday, March 26

- 7:30am OWA Champagne Breakfast: Celebrating Women in Leadership at Gotham Hall
- 9:30am Grand Debut Breakfast at The River
- **2:30pm** Conversations at The River: The Art of the Collab at The Lounge in The River
- 5pm Vision Expo Talent Search Reception supported by the edCFDA at The River
- 6pm Prevent Blindness Person of Vision Dinner at 538 Park Avenue





Friday, March 27

- 9:30am Vision Choice Awards Voting opens at the Product Gallery
- 10am EYE2EYE Series: The Ritz Carlton Leadership Center Presents: Memorable Customer Service at The Bridge
- **12:15pm** Vision Series presented by Novartis
- 12:15pm Vision Series Presented by Regeneron
- 12:30pm EYE2EYE Series: OptiCon @ Vision Expo East 2020 General Session: A discussion with Delilah, sponsored by Essilor and Eyes of Faith at The Bridge
- 2pm Eyecare Business Fashion Trends Presentation at The Bridge





Friday, March 27, cont.

- 2:30pm Conversations at The River: The Next Generation of Retailers Speed Dating at The Lounge in The River
- 3pm AllDocs Presents: Open Your Eyes: A Film by Wayne Chesler at the Innovation Stage
- **5pm EYE2EYE Series**: Headline Speaker at The Bridge
- **5pm** OWA Annual Star Award Cocktail Reception & Networking Event at The Lounge in The River
- 6pm The Vision Council's Sunglass & Reader Division Reception at Ink 48 Hotel
- 6pm SUNY Eyes on New York Gala
- 6:30pm OptiCon @ Vision Expo Welcome Event at the Marquee
- 9pm Vision Expo Opening Night Party at Sony Hall





Saturday, March 28 – Sunday, March 29

Saturday

- **11am** Coffee Talk at The Bridge
- 12:30pm NFOS HOYA Vision Care College Bowl + Reception at The Bridge
- 3:30pm Establishing A Sports Vision Practice Tips from the Pros at the Innovation Stage
- **4pm** Vision Choice Awards Announced at the Product Gallery
- **5pm** Independence @ The Creative Edge Panel at The Bridge
- 6pm OPTImum Retail Award Winner Announced at The Bridge

Sunday

• 1:30pm NOA Panel & Reception at the Innovation Stage





Career Zone

Location: Level 1 in Lenses + Processing

Returning to Vision Expo East for the second year the Career Zone offers students and young professionals a vehicle to meet some of the top companies in the industry.

Turnkey Exhibitor Program Includes:

- Exhibit space and furnishings
- Passport Incentive Program
- Inclusion in dedicated marketing
- Social media promotion
- Inclusion on New Grads + Students
 webpage







See you in New York!



EDUCATION: March 26-29 **NEW RIVER PAVILION**: March 26-29 EXHIBIT HALL: March 27-29







Government & Regulato Affairs Update

Rick Van Arnam, Esq. Regulatory Legal Counsel Barnes, Richardson & Colburn, LLP rvanarnam@barnesrichardson.com 212-725-0200, x126



California Prop 65 SUD Efforts

- Original SUD requested on BpA was submitted December 2, 2016
- Asked OEHHA to issue a completeness determination of our SUD application in early 2017
 - Concerns regarding the "broad" scope of the SUD request was also raised
- Updated SUD application was submitted on 7/17/2018
- Our application was deemed complete on 3/8/2019!!!
 - 30 Day public notice for comments issued
- 4-8-2019 Public notice closed with no comments received
- Still waiting for OEHHA's determination!





California Prop 65 SUD Efforts

Next Steps

Continue to label!!!

 Also, please remember, this application is for BpA and not any other chemicals on the Prop 65 list that may be in your products!



UDI Update

- Class I compliance date now 09/24/2020.
 - Both labeling and GUDID participation.
 - Are you taking steps to be ready for this?

- Last communication with FDA raised issue of guidance document being drafted that would address our concerns.
 - Yet, no response to my request for a proposed timetable
- Lens manufacturers and optical labs exemption granted.
 - Both labeling and GUDID participation.
- Request for frames exemption still pending.
 - Again, this circles back to promised guidance document.
- Reed Tech Chosen as UDI compliance partner



Global Trade Update

- As of 02/14/2020, additional 15% duty China 301 duties on all Chinese origin List 4a products to be reduced to 7.5%.
 - This includes spectacle frames, spectacle lenses, plano sunglasses, OTC readers, and certain low vision products.
 - This <u>does not include</u> eyeglass cases, lens cleaning solutions, certain optical production machinery, ophthalmic instruments, and electro-diagnostic equipment.
 - These remain at 25% additional duty for China origin product.
- Exclusion request portal for List 4a products open until 1/31/2020.
- USMCA (NAFTA 2.0) implemented by US and MX; CA must still implement.





CALIFORNIA Assembly Bill New Law that Changes the Independent Contractor Rules

Jim Anderson General Counsel





Sets forth 3 requirements that must be satisfied to classify a worker as an independent contractor





 The person is free from the control and direction of the hiring entity in connection with the performance of the work, both under the contract for the performance of the work and in fact.

Comment. Similar to the old rule and was the major factor in determining if worker was an IC.





 The person performs work that is outside the usual course of the hiring entity's business.

Comment. This is the biggest change. It means that the services provided by the worker in order to classify the worker as an IC must be incidental to, and not part of, the hiring entity's core business.

AB5 was the codification of CA Supreme Court case that held that the workers who were classified as ICs were delivery drivers, and the company was in the delivery business. Hence, they were part of the company's core business and did not meet the Rule B Test and were not properly classified as ICs.





 The person is customarily engaged in an independently established trade, occupation, or business of the same nature as that involved in the work performed.

Comment. This means that the worker must be independently engaged in an established business doing the kind of work performed for the hiring company.



Exemptions

- AB lists many occupations that are not subject to the ABC rule.
- One exemption is an "independent sales person."
- But the definition of an independent sales person is narrow.
- Under AB it means:



Independent Sales Person definition:

The individual is . . . engaged in the trade or business of primarily inperson demonstration and sales presentation of consumer products , including services or other intangibles, in the home or sales to any buyer on a buy-sell basis, a defined commission basis, or any similar basis, for resale by the buyer or any other person in the home or otherwise than from a retail or wholesale establishment





Federal Affairs Updat

Chris Rorick, MPA

Senior Policy Advisor, Government Relations Health Care Public Policy Practice, Bryan Cave Leighton Paisner



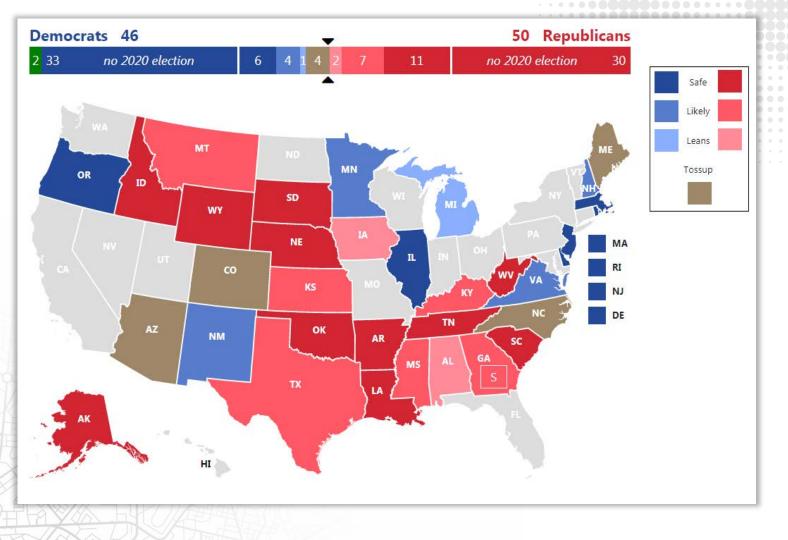
Federal Affairs Update

- 2020 Campaign/Election Report
 - Senate
 - House



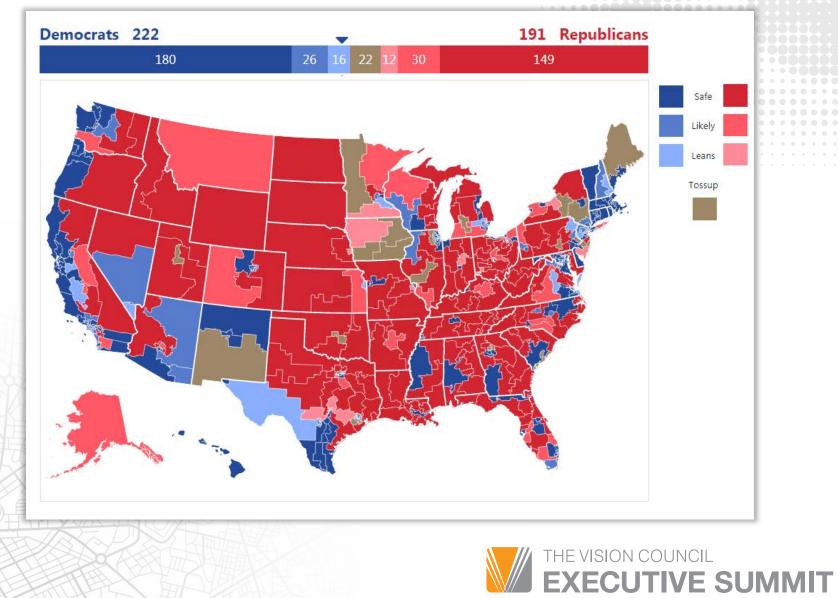


2020 Senate Elections



THE VISION COUNCIL EXECUTIVE SUMMIT

2020 House Elections



2020 Congressional Agenda

- Impeachment
- Legislation to repeal "Surprise Medical Billing"
- Prescription Drug Pricing
- Trade





Medicare Vision Benefit

- House has passed H.R. 3, Elijah E. Cummings Lower Drug Costs Now Act.
- Included provisions to add a Medicare Part B benefit for Dental, Vision, and Hearing.
- Passed 230 to 192 with the support of all Democrats and just two Republicans.
- Won't be taken up in the Senate.



Medicare Vision Benefit

- Title VI would add new benefits for dental, vision, and hearing care to the Medicare program.
- CBO estimates that those provisions would increase direct spending by about \$358 billion over the 2020-2029 period.
- Of that amount, almost \$238 billion would pay for dental care, \$30 billion would pay for vision care, and \$89 billion would pay for hearing services.



Medicare Vision Benefit

- Bill allows beneficiaries to purchase one pair of glasses every two years.
- Medicare would pay \$85 for frames and \$85 for lenses, or:
- Pay \$85 for a two year supply of contacts.
- Beneficiaries would be responsible for any costs above those allotments.
- Would cover 1 routine eye examination and and 1 contact lens fitting service during a 2-year period.



United States-Mexico-Canada Agreement

- USMCA replaces NAFTA
- Compromised reached with House Democrats.
- Senate passed USMCA in January, 89-10 bipartisan vote.
- Canada next in-line to ratify.



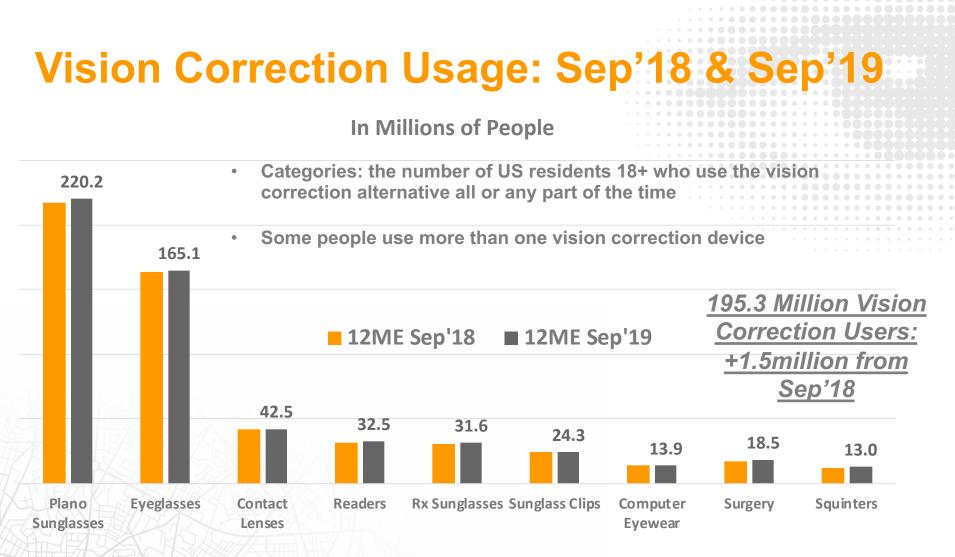




US Optical Market Optical Overview

3rd Quarter 2019





'Squinters': US residents who say that they need vision correction, but do not use any * Surgery is the sum of US residents having ever had refractive surgery; not counted as vision correction users



Net Increase (In Millions) in Adult Vision Correction Usage: Sep'12 to Sep'19

In Millions of People

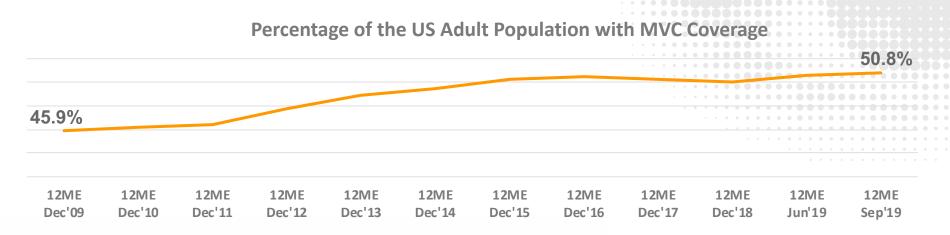
+6.8%		Cated	ories: the	net increas	e in the nun	nber of US	residents '	18+ who
14.0	+8.2%	 Categories: the net increase in the number of US residents 18+ who use specific vision correction alternative all or any part of the time 						
	12.5	• Som	e people us	se more tha	n one visio	n correctio	n device	
	_	<u>US Adı</u>			reased by o'12 to Se		illion	
		+10.4%	+15.7%	+16.2%			+44.5% 5.7	
		4.0	4.4	4.4		+17.8%		
5					+4.3%	2.1		+5.7%
					1.0			0.7
		Constant	Deeders	Du Currele conce		Commenter	Gundanti	Consistent
Plano Sunglasses	Eyeglasses	Contact Lenses	Readers	KX Sunglasses	Sunglass Clips	Computer Eyewear	Surgery	Squinters

'Squinters': US residents who say that they need vision correction, but do not use any

* Surgery is the sum of US residents having ever had refractive surgery; not counted as vision correction users

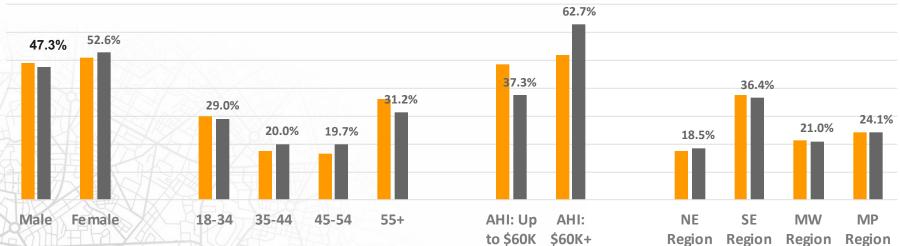


MVC: Trends and Demographics



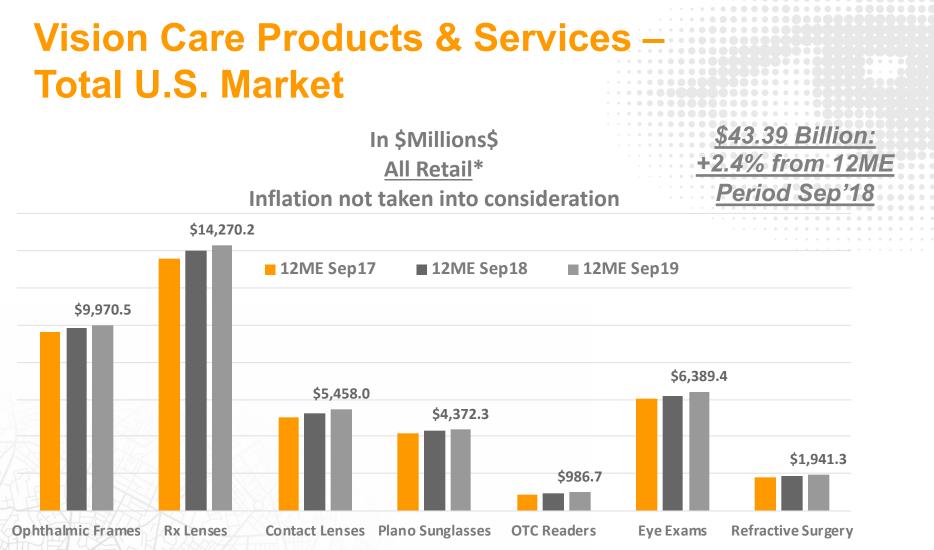
Total US Adult Population





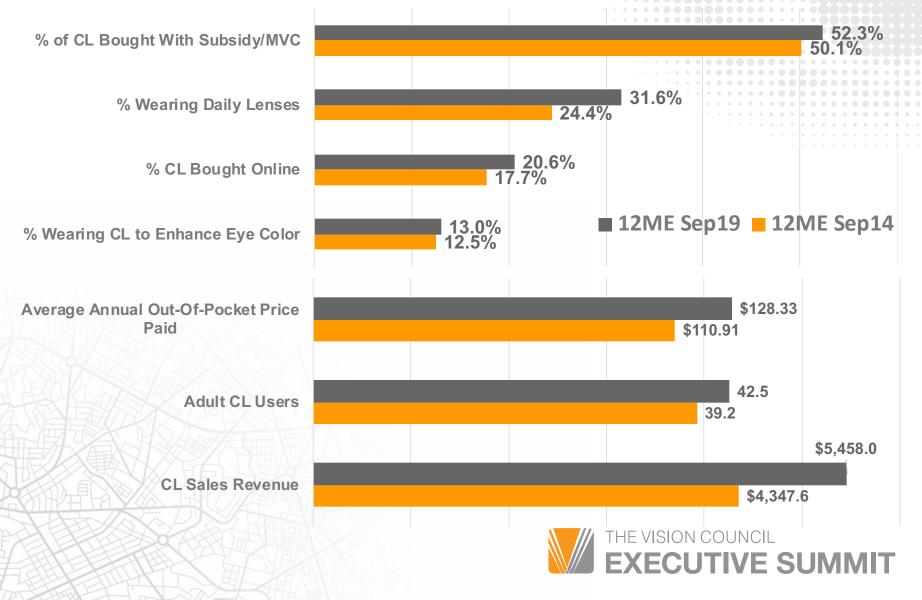
THE VISION COUNCIL

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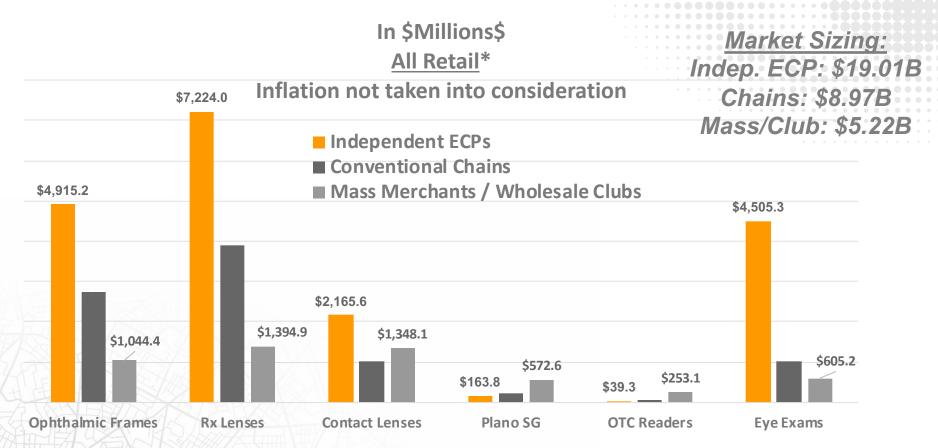


*All retail includes dollars spent at all retail types at any retail location on the sale of either spectacle lenses (including Rx sun), frames, contact lenses, sunglasses (plano), OTC readers, or revenue earned from refractive surgery (LASIK only) or eye examinations. This number does not include sunglass clips and reflects the dollars spent only by those U.S. residents 18 and older. Does not include retail dollars spent by/for contact lenses and exams for those 17 years of age and younger.

US Adult Contact Lens Market Stats: 12ME Sep'14 to 12ME Sep'19

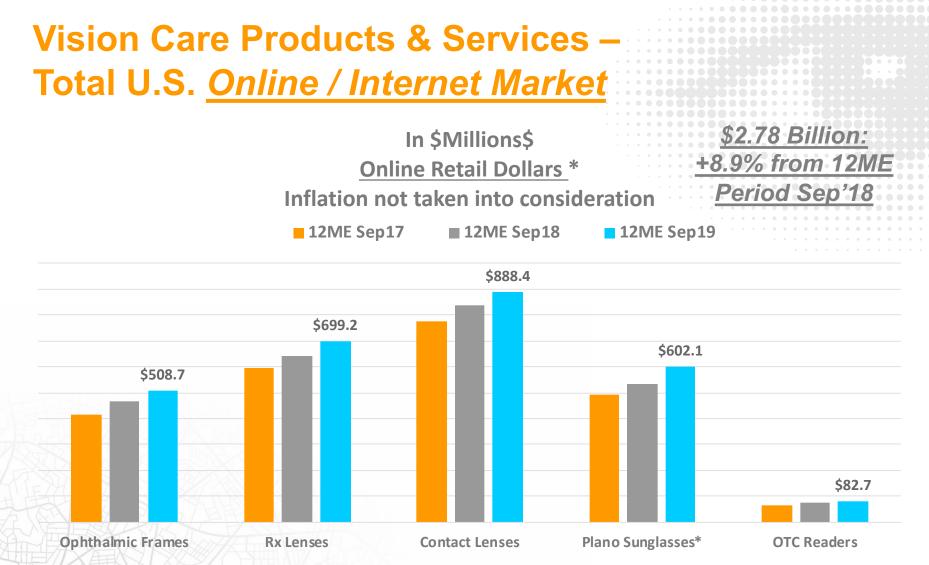


Vision Care Products & Services – Total U.S. Market by Major Distribution Channel



*All retail includes dollars spent at all retail types at any retail location on the sale of either spectacle lenses (including Rx sun), frames, contact lenses, sunglasses (plano), OTC readers, or revenue earned from refractive surgery (LASIK only) or eye examinations. This number does not include sunglass clips and reflects the dollars spent only by those U.S. residents 18 and older. Does not include retail dollars spent by/for contact lenses and exams for those 17 years of age and younger.

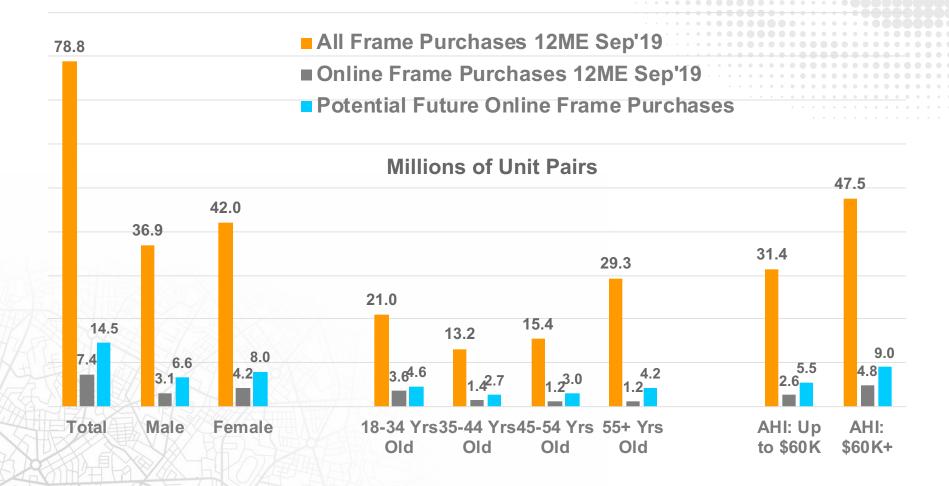
EXECUTIVE SUMMIT



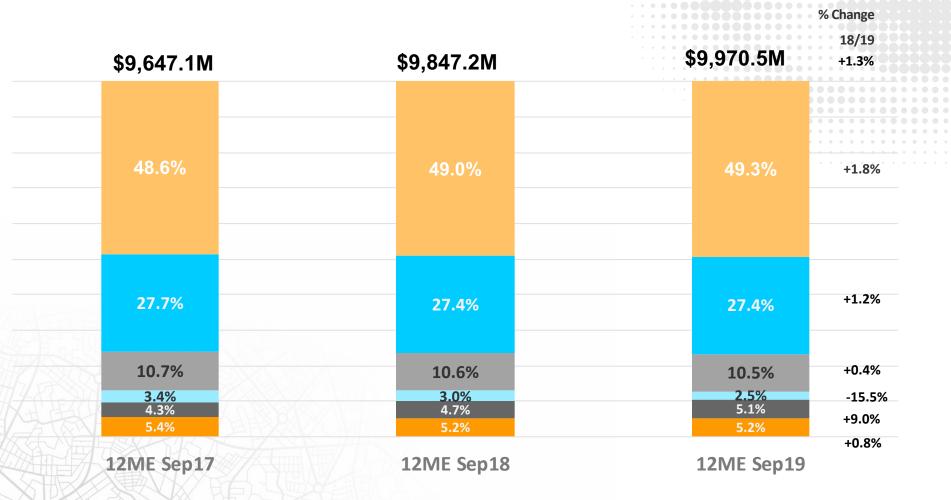
*Online retail includes dollars spent on websites / online retailers for the sale of either spectacle lenses (including Rx sun), frames, contact lenses, sunglasses (plano), and OTC readers. This number does not include sunglass clips and reflects the dollars spent only by those U.S. residents 18 and older. Does not include retail dollars spent by/for contact lenses and exams for those 17 years of age and younger.



12ME September 2019: All Frame Purchase, Online Frame Purchases & Future Potential Online Purchases

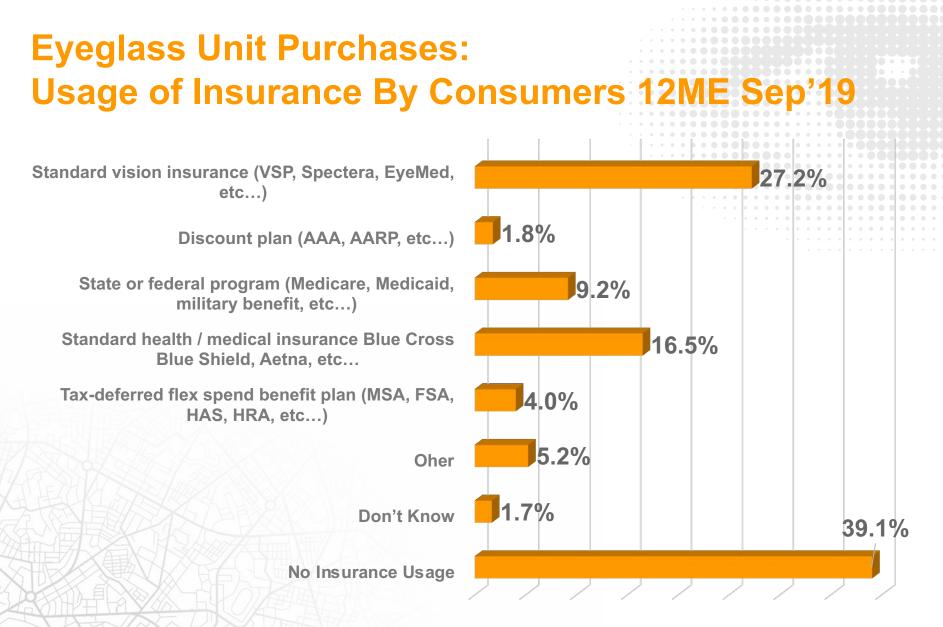


Retail Structure of Frame Market (Dollars)

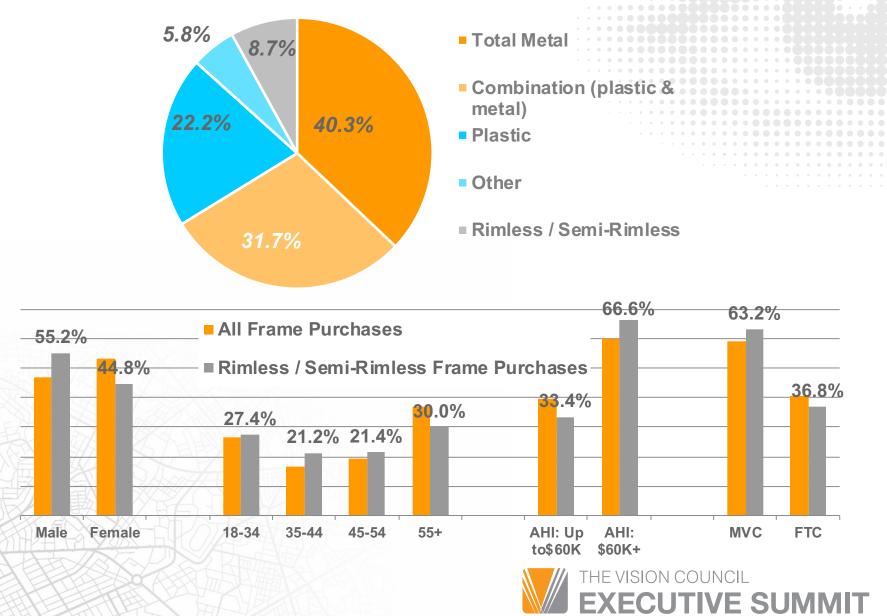


Other Online / Internet Oepartment Stores Mass Merchandisers / Clubs Chains Independents



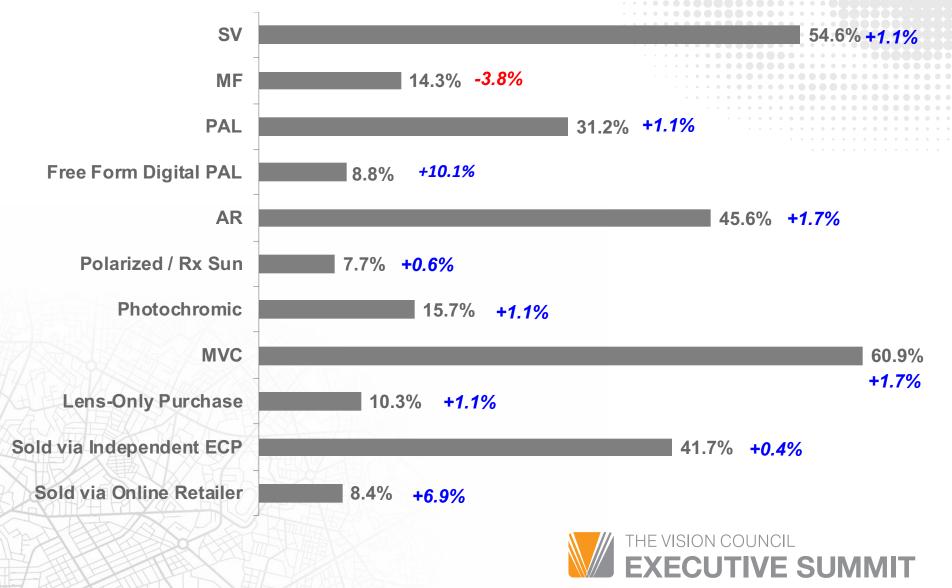


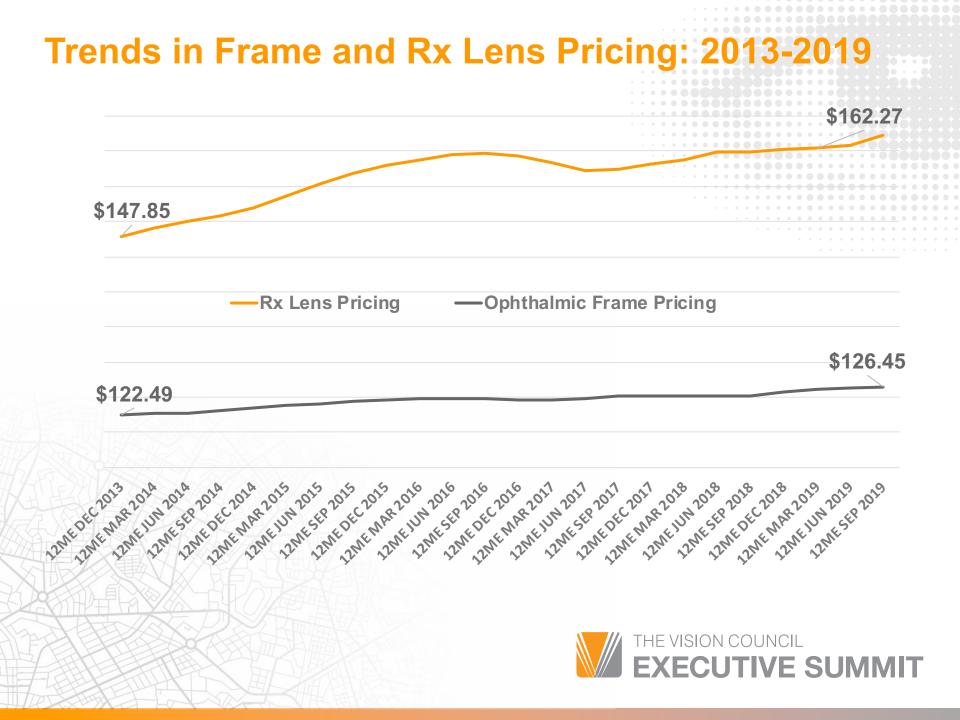
Frame Unit Purchases: By Material—12ME Sep'19

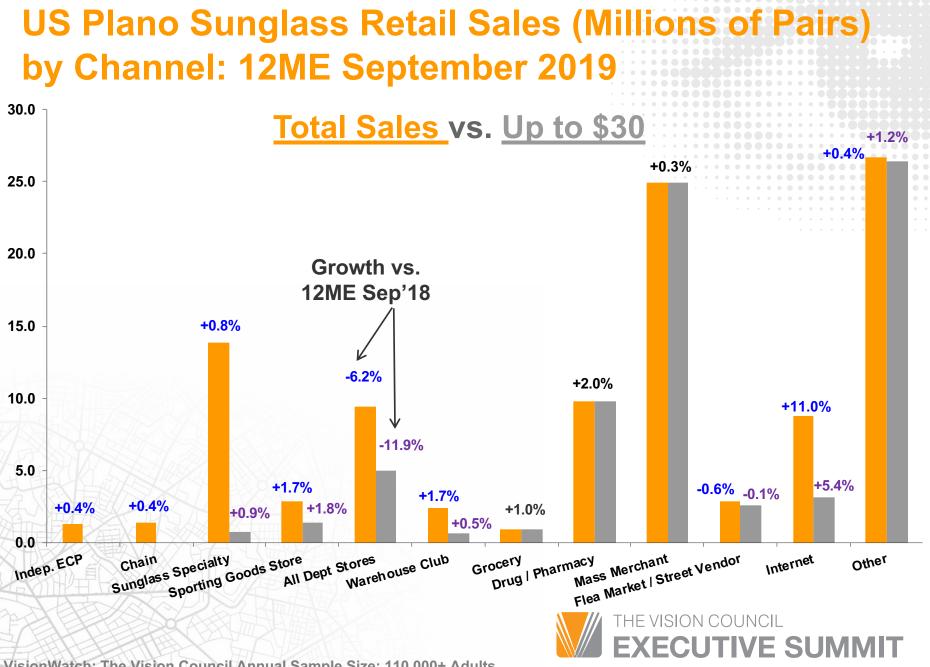


VisionWatch: The Vision Council Annual Sample Size: 110,000+ Adults

Percentage of Lenses (Units) with the Following Attributes: 12ME Sep'18 vs. 12ME Sep'19

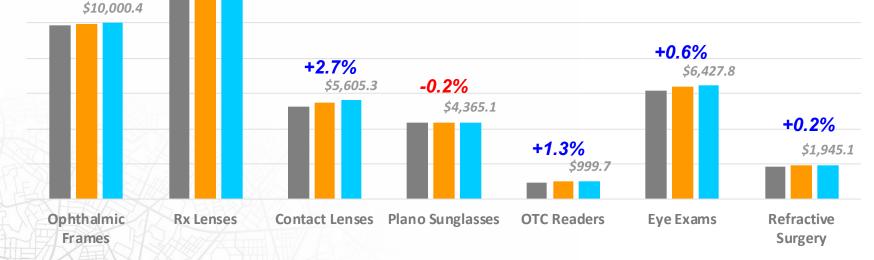






VisionWatch: The Vision Council Annual Sample Size: 110,000+ Adults

Vision Care Products & Services – Total Projected 12ME Sep'20 U.S. Market Forecast In \$Millions\$ Inflation not taken into consideration +0.3% +1.2% \$14,441.5 = 12ME Sep'18 = 12ME Sep'19 = 12ME Sep'20 (Estimated)



*All retail includes dollars spent at all retail types at any retail location on the sale of either spectacle lenses (including Rx sun), frames, contact lenses, sunglasses (plano), OTC readers, or revenue earned from refractive surgery (LASIK only) or eye examinations. This number does not include sunglass clips and reflects the dollars spent only by those U.S. residents 18 and older. Does not include retail dollars spent by/for contact lenses and exams for those 17 years of age and younger.

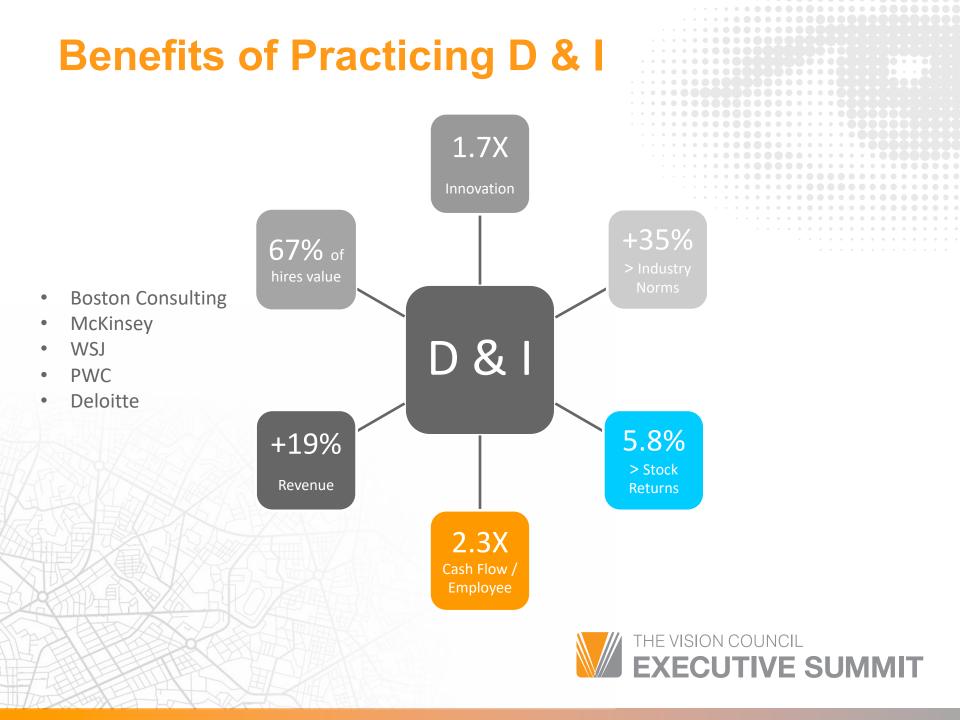




DIVERSITY & INCLUSION IN VISION

Ronald Krefman, OD, FAAO





Study Objectives



Measure diversity, inclusion and career outlook, in vision industry.



Compare D&I in the vision industry to other industries.



Establish a baseline for benchmarking, tracking diversity, inclusion and career opportunities.



Methods

Electronic Survey	Oct. 2019 5	min 6 sec Avg.
SENT	3,840	100%
OPENED	3,802	99%
CLICKED	1,064	28%
RESPONDED	418	11%
COMPLETED	206	5%

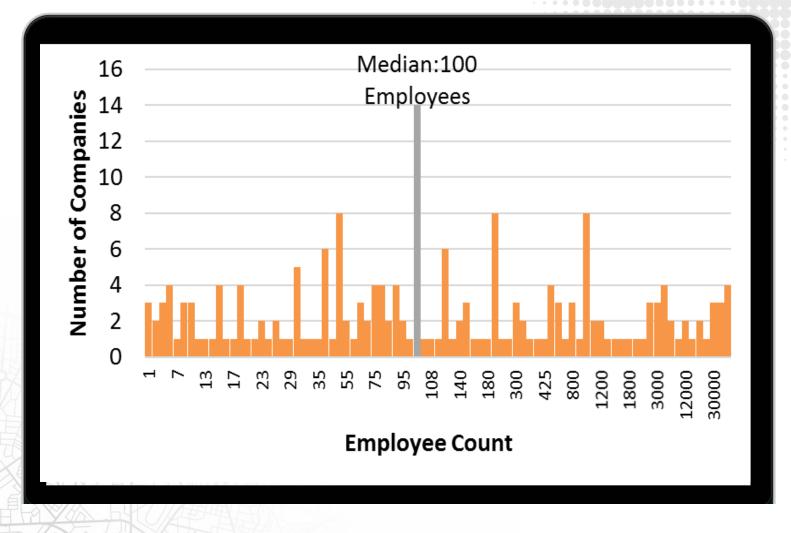


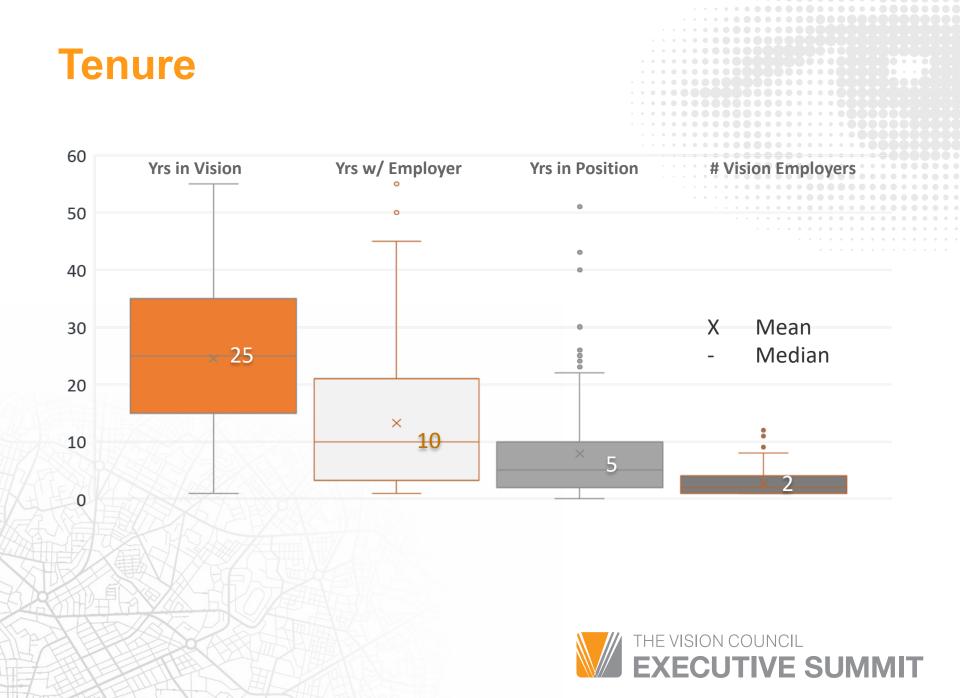
Sample is Representative of Membership

Division	Mailing List	Respondent %	Respondent #
Frames/Accessories	32%	38%	78
Optical Laboratory	22%	23%	47
Lens Manufacturer	12%	11%	23
Other	7%	12%	24
Optical Retailer	7%	6%	12
Sunglass/Reader	10%	4%	8
Lens Processing	9%	4%	8
Low Vision	1%	3%	6
Total	3,840	2	06
Unique Companies	774	Anon	ymous



Employee Count: 1 to 65,000

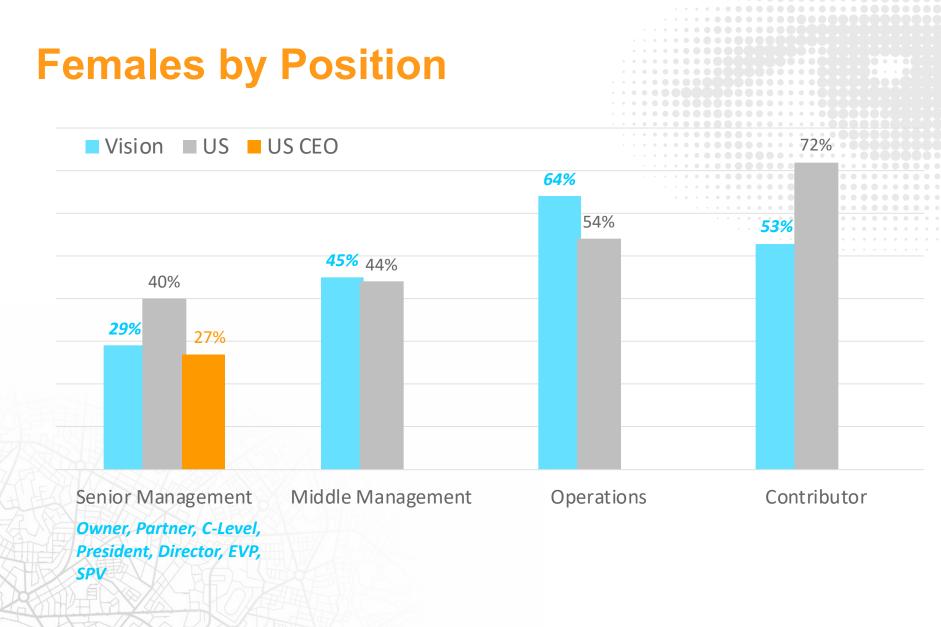




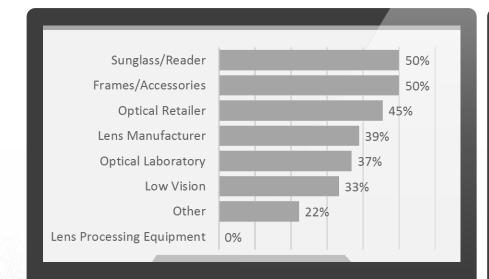
Diversity in Management

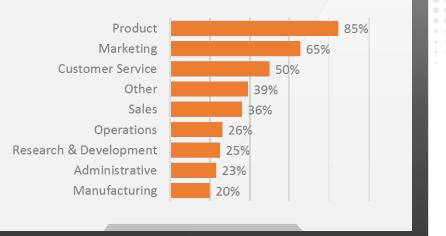
Sample	Management (Share of Workers)	Female (Share of Gender)	Age (mean)	People of Color (Share of Race)
US "Management"	40%	40%	47	16%
Vision Management (all)	84%	43%	52	17%

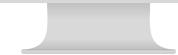




Females by Sector and Role

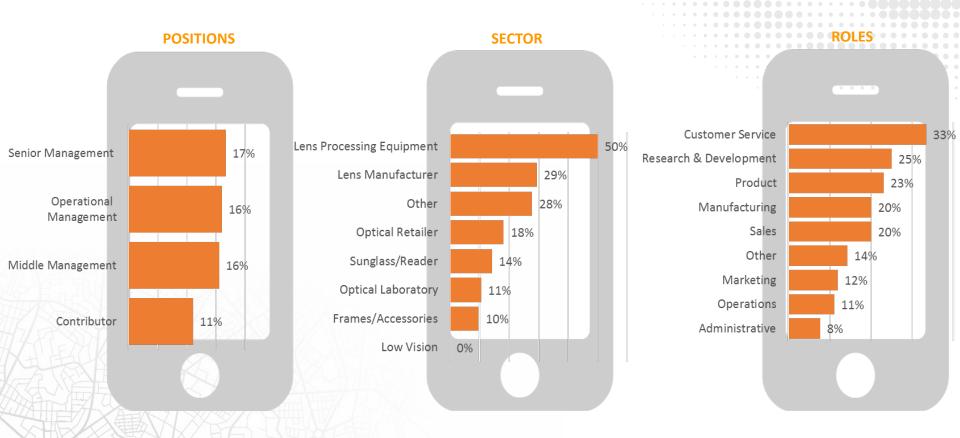


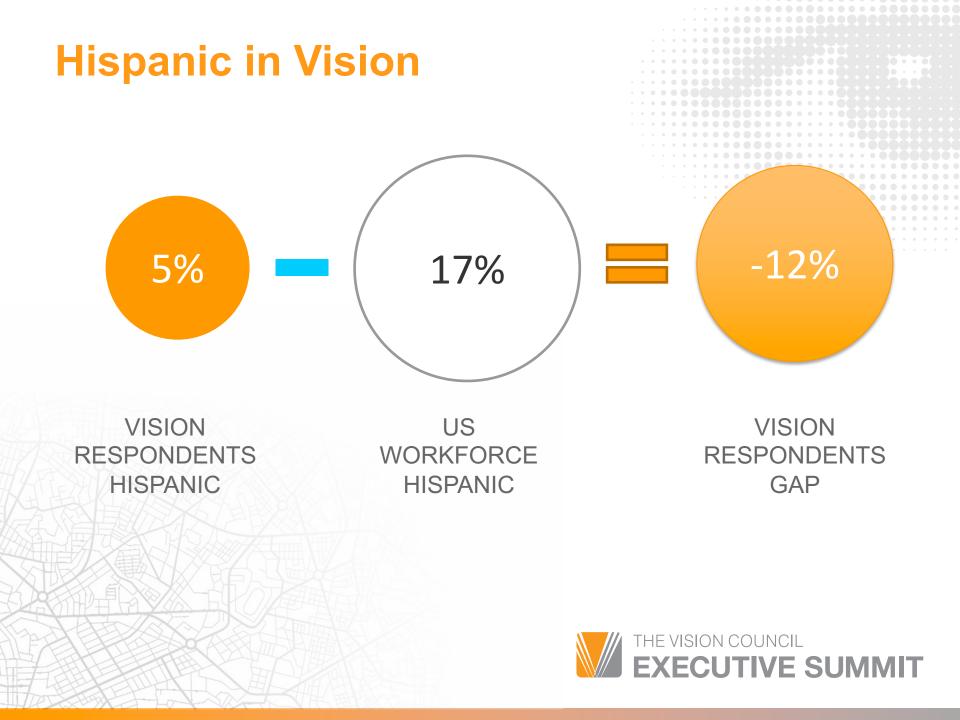




Race in Vision

US Workforce People of Color





LGBTQ+ in Vision

US Avg.

4.5%

Vision 3.6%



Profiles in Vision							
	Vision	US Pop					
Disability?	2.7%	3.8%*					
English Second Language?	8.7%	21.6%#					
Caretaker for Children?	36.7%	29.0%**					
Caretaker for Adult?	13.2%	12.0%**					
Served, or active duty in Armed Forces?	3.3%	0.5%+					
Military spouse or partner?	0.5%	0.3%++					

*Bureau Labor Statistics - % of workers

#US Census

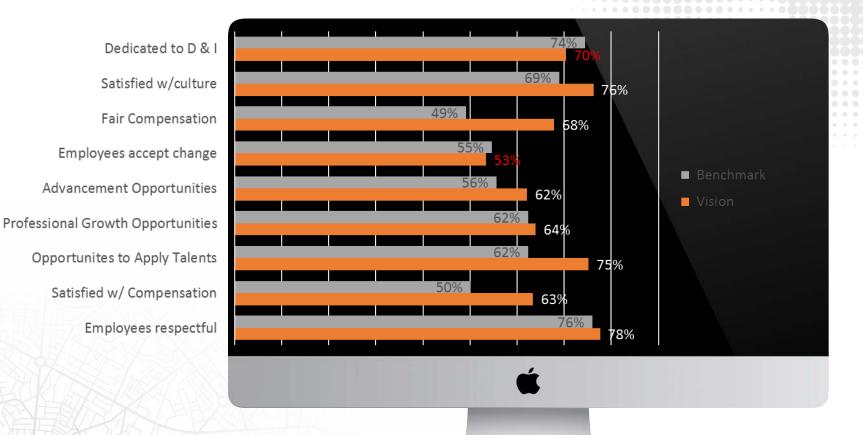
* Pew Research

*Council on Foreign Relations

++Council of Economic Advisors



Employer Ratings: \bigcirc 3X more likely to disagree



Average Vision Responses: 160

Benchmarks: Survey Monkey Data from 3,326 Organizations and 143,145 Responses



Say, "under-represented" in the workforce

	ALL	Men	Women	White	POC	<=53	>53	Hetero sexual	LGBTQ +
Women	18%	11%	28%	16%	38%	25%	11%	19%	19%
People of Color	30%	27%	35%	31%	46%	33%	34%	35%	19%
Elder Adults	18%	14%	22%	15%	30%	17%	22%	16%	40%
LBGTQ	14%	8%	22%	24%	20%	26%	21%	23%	30%



Employer Policy Ratings

Thomson Reuters Benchmarks US Equities

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								Career	Promotion	Management
Industry	Count	Example	D&I Policy	D&I Targets	Flex Hours	Day Care	Skills Training	Develop.	W/In	Training
Pharmacueticals	308	Allergan, J&J	48%	45%	19%	12%	29%	34%	19%	2 <mark>5%</mark>
Medical Equipment	211	Cooper	49%	45%	9%	9%	26%	33%	14%	14%
Specialty Retailers	63	National Vision	47%	44%	24%	0%	24%	29%	29%	18%
Apparel & Accessories Retailer	61	Kering	51%	48%	10%	23%	52%	52%	29%	48%
Apparel & Accessories	79	EssilorLuxottica	52%	51%	15%	0%	38%	46%	31%	38%
VISION	160		66%	39%	82%	8%	72%	64%	87%	57%
VISION GAP (vs Average)			16%	J -7%	1 67%	→ 0%	1 38%	1 25%	62%	1 28%



Outlook for Personal Advancement

Sentiment	%	Count	Male	Female	<=53	>53			Hetero	
8	22%	24	18%	27%	21%	23%	20%	35%	23%	11%
	15%	17	9%	23%	18%	13%	14%	24%	17%	0%
	63%	69	74%	50%	61%	65%	66%	41%	60%	89%





Executive Sumn

Mike Hundert (NVI) Tim Swartz (FGX) Program Committee Co-Chairs





Jamie Shyer, Zyloware



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Val Scott, Vision Expo



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Ashley Mills, CEO



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