



**WELCOME**

# All-Member Meeting

September 14, 2022



# Vision Expo West Highlights

Mitch Barkley,  
Vice President, Trade Shows and Events





**VISION | 2022**  
**EXPO | VEGAS**

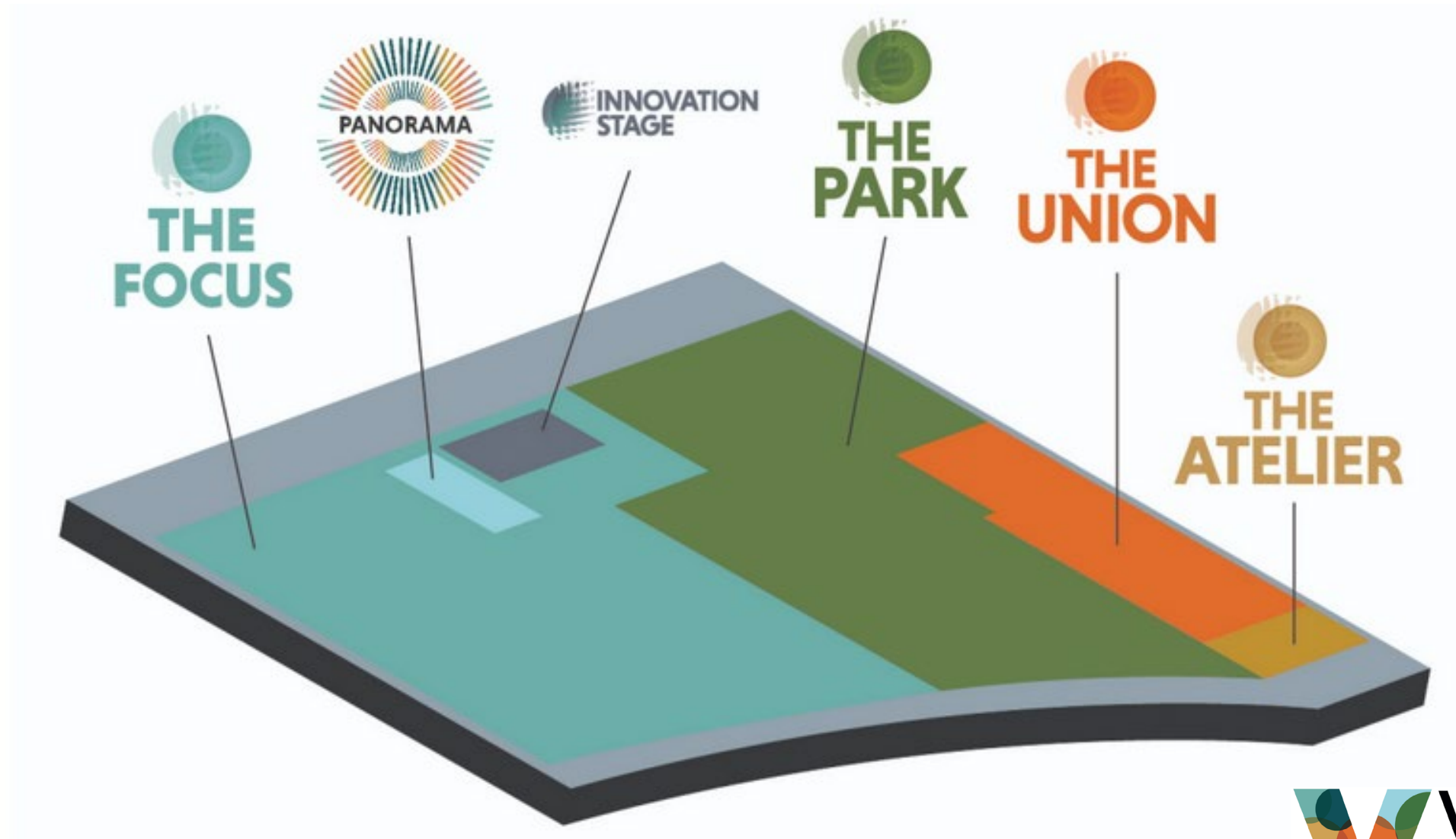
EDUCATION: SEPT 14-17

EXHIBIT HALL: SEPT 15-17

VENETIAN EXPO | LAS VEGAS



# Floorplan Snapshot – Vision Expo West 2022



# Highlights and New Additions @ West '22

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- The Suites program has been consolidated to one floor as recommended by the Show Committee
- The launch of The Atelier at West
- The launch of new Panorama neighborhood
- Education:
  - 100% fresh educational program: over 200 sessions/320 hours
  - New education planning committee – 30% turnover addressing DI&E initiative
- Introduction of an interactive activation – Vision Board Mural
- Innovation Stage
  - New: Keynote speaker. Disruption & Innovation Strategist Shawn Kanungo will present “The Future of Eyecare is Human,” followed by reception
  - Panels (incl. Sustainability; Metaverse; YODA; latest in Research; & more)
  - Sponsored Sessions (Bausch + Lomb, Macuhealth, Hoya)



# Special Events Snapshot: Highlights @ West '22

## Wed. September 14

- *Swing Fore Sight* Golf Tournament, presented by Prevent Blindness at Bali Hai Golf Club, 6:00 AM - 6:00 PM
- BusinessOutside® Connection Hike hosted by The Vision Council at Red Rocks State Park, 6:15 AM - 11:00 AM
- Global Contact Lens Forum and Symposia, throughout the day
- Marketing4ECPs sessions throughout the day
- Opti-Port Spark Conference, Level 1 Room 403, 9:00 AM - 5:00 PM
- TVC All-Member Meeting, Venetian Rooms 302/303/304/305, 12:00 PM - 2:30 PM
- TVC Show Committee Meeting, Venetian Rooms 309/310, 3:30 PM - 5:00 PM
- TVC Member Welcome Reception, Sugarcane at the Venetian, 5:30 PM - 7:30 PM
- IDOC Dinner & Discussion, Mercato della Pescheria, 5:30 PM - 8:30 PM
- Optometry Giving Sight *Beacon of Light* Dinner, Mercato della Pescheria, 6:00 PM - 9:00 PM

## Thurs. September 15

- Optical Women's Association (OWA) Connection Series Luncheon, 12:00 PM - 1:30 PM, Level 3 Murano Ballroom
- OptiCon and Eyes of Faith present a Conversation With Delilah, EyeMax Theater, 12:30 PM - 1:30 PM
- Innovation Stage Keynote Presentation feat. Shawn Kanungo + reception to follow, Innovation Stage on the Show Floor, 4:00 PM - 6:00 PM
- Vision Expo West Opening Night Party: Bad Habits "The EyeDocs of Rock" at Brooklyn Bowl, 9:00 PM - 12:00 AM



# Special Events Snapshot: Highlights @ West '22

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## Fri. September 16

- Vision Monday's Most Influential Women Luncheon at the Venetian (Lido Ballroom) from 12:30 PM - 2:00 PM
- Optical Women's Association (OWA) Annual Networking & Raffle Event at the Venetian (Murano 3304), 5:30 PM - 7:00 PM
- PECAA Member Cocktail Reception, Canonita, 5:30 PM – 7:30 PM
- ODs on Facebook - Fluorescence Party at Drai's Beachclub, 7:30 PM – 9:30PM

## Sat. September 17

- *Career Zone* morning & afternoon sessions; Champagne Toast at 3:15 PM





# Market Research Update

Alysse Henkel,  
Senior Director of Market Research &  
Analytics



# MEET THE TEAM

**Alysse Henkel**

Senior Director, Market Research and Analytics



**Kris Stevens**

Data Analytics Manager



**Ella Maalem**

Research Manager





**Ugh, data**



**Data  
tolerant**



**Data  
curious**



**Data  
interested**



**Yay, data!**

# Agenda



## **inSights Program Overview**



## **Consumer inSights Q2 2022 Report Highlights**



## **Focused inSights – Digital Habits**



## **Questions**

# inSights Program Overview





# Member Research Taskforce



Regular meetings



Provided feedback on  
Consumer inSights and  
Provider inSights survey and  
reports



Provided input into future  
topics for ad-hoc, in-depth  
research reports



Planning to review updated  
market modeling methodology

## Member

## Company

Jennifer Wright

Marcolin

Elias Soussou

FGX

Nick LaManna

Hoya

Melanie Mills

Essilor

José Alonso

Essilor

Jeremy Hawk

Cooper Vision

Taryn Prince

VSP

Frannie Fickling

Warby Parker

Christie Smiley

Eyemart Express

Jacqui Pugsley

Zeiss

Carrie Soderstrom

Maui Jim

Amanda Shapiro

Europa Eyewear



**Consumer**  
inSights

**Provider**  
inSights

**Focused**  
inSights

**Industry  
Data**  
inSights

**Market**  
inSights

SUPPORTED BY A METHODOLOGY REDESIGN &  
MODERN TECHNOLOGY UPGRADE



# Consumer inSights

Quarterly summary of revised monthly consumer survey about vision correction, eye exams, frames and lens purchases, contact lenses, plano sunglasses, and over-the-counter readers.

Data is representative of the US adult population, with 15,000 respondents per quarter.

These reports do not contain market size estimates.



# Consumer inSights+

## *Topic area reports:*

- Vision correction
- Managed vision care
- Eye exams
- Eyeglasses, lenses, and frames
- Contact lenses
- Plano sunglasses
- Readers

## *Demographic crosstabs:*

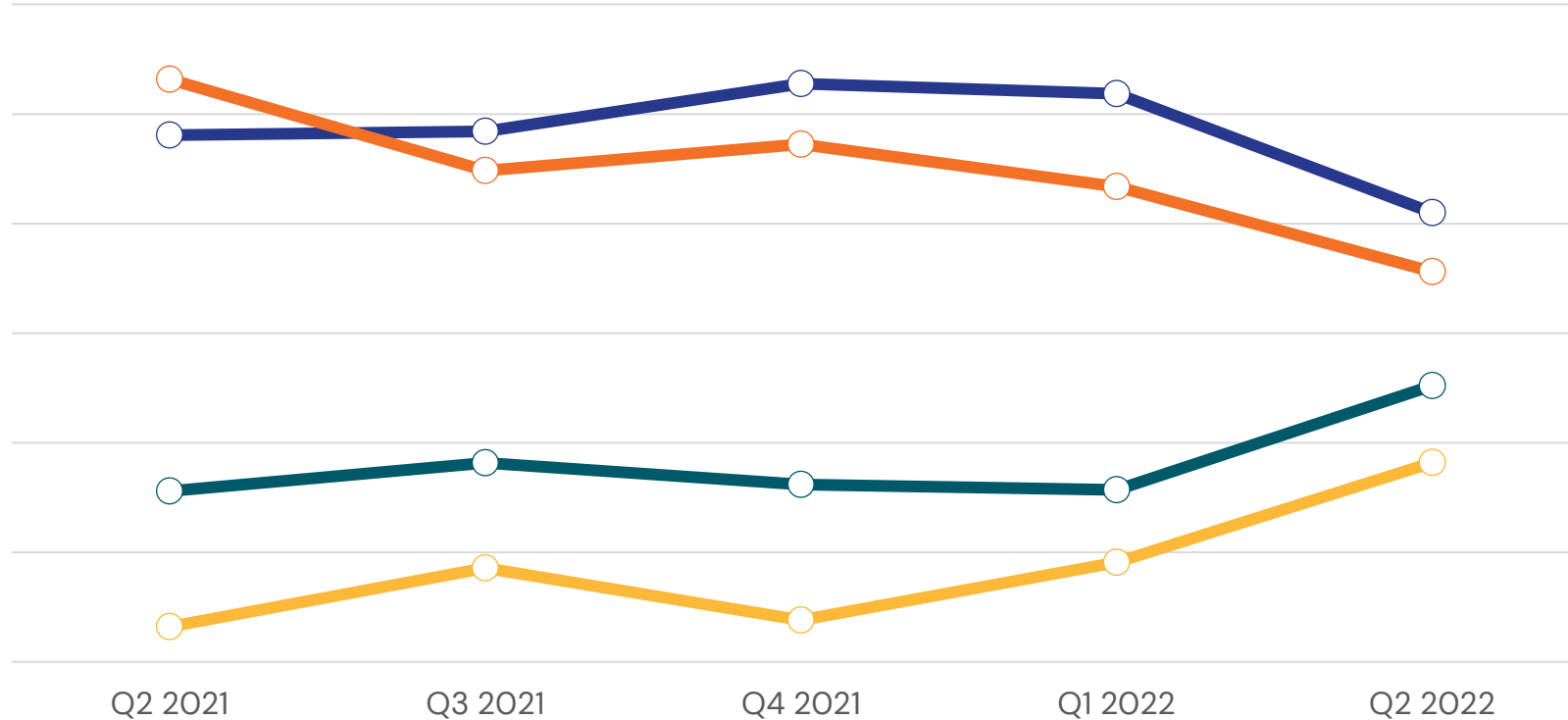
- Age
- Gender
- Race
- Ethnicity
- Region (9 US Census regions)
- Household income
- Education level

## *Other crosstabs:*

- Net promoter score detail (by provider, channel, purchase detail)
- By managed vision care status
- By lens type
- By contact lens supply and modality

# Trending data over time

When trending consumer survey data, **we will be using raw counts from prior VisionWatch surveys, not the published modeled market estimates** from prior VisionWatch reports, so the data used in the trending will differ from the data published in prior VisionWatch reports



# Focused inSights

New, in-depth new special interest reports on topics important to members. Data sources for these reports include ad-hoc consumer surveys and transaction data (when applicable).

## 2022 Reports

- Consumer choices
- Sunglasses snapshot
- Digital habits / online shopping
- Frames
- Lenses



# Provider inSights

Quarterly summary of monthly eyecare provider survey about their practice, economic sentiment, telehealth offerings, staffing, and other rotating topics.

Substantial detail about practices: revenue, number of employees, services provided, MVC accepted, etc.





# RESEARCH DOWNLOAD CENTER

Welcome to the all-new Research Download Center!

If you are interested in purchasing multiple reports, custom research or annual subscriptions, or have trouble accessing the research center, please contact Nathan Troxell at [ntroxell@thevisioncouncil.org](mailto:ntroxell@thevisioncouncil.org).

Title Contains

Filter by Interest

- ANY -



Items per page

20



Find

	Title	Date Published	Member Price	Non-member Price
Download	Provider inSights Q1 2022 Report	05/17/2022	\$0.00	\$250.00
Download	Consumer inSights Q1 2022 Report	05/10/2022	\$0.00	\$3,000.00

<https://thevisioncouncil.org/research-reports>

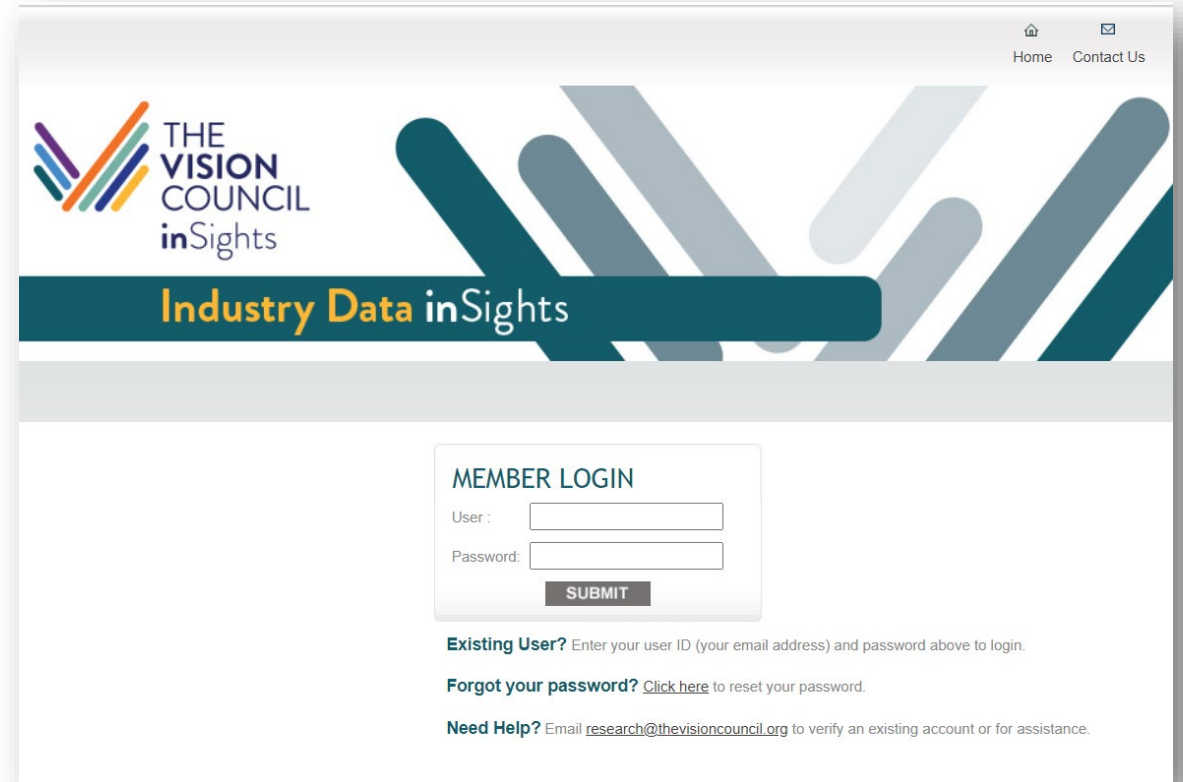
# Industry Data inSights

New research program that will replace previous member data collection programs, like the lens shipment report and the lab stats report.

**Members contributing to the reports will be able to benchmark their data against anonymized, aggregated data in an online portal, allowing contributing members to easily download reports with benchmarked data.**

In 2022, The Vision Council plans to begin data collection and reporting for the following content areas:

- Lens
- Lab
- Plano sunglasses
- Over-the-counter readers



The screenshot shows the 'Industry Data inSights' member login page. At the top left is the logo for 'THE VISION COUNCIL inSights'. To the right are links for 'Home' and 'Contact Us'. A large teal banner with the text 'Industry Data inSights' is positioned below the logo. The main content area features a 'MEMBER LOGIN' section with two input fields for 'User' and 'Password', and a 'SUBMIT' button. Below the login fields, there are three lines of text: 'Existing User? Enter your user ID (your email address) and password above to login.', 'Forgot your password? [Click here](#) to reset your password.', and 'Need Help? Email [research@thevisioncouncil.org](mailto:research@thevisioncouncil.org) to verify an existing account or for assistance.'

# Market inSights

These reports will include annual market estimates of market size and forecasts for the coming year using predictive analytics.

These reports will rely consumer survey data, provider survey data, transaction data, and member-reported data to create the market size estimates and forecast.





# 2022 inSights Report Roadmap

	Q1	Q2	Q3	Q4
Consumer inSights	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Provider inSights	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Focused inSights		Consumer choices Sunglasses snapshot	Digital habits Frames	Lenses
Industry Data inSights*			Lens Lab	Sunglasses Readers
Market inSights				<input checked="" type="checkbox"/>

*\*Industry Data inSights report topics and timing contingent upon member participation*

# Consumer inSights

Q2 2022



[Download the Report here.](#)



# Focused inSights

## Digital Habits



[Download the Report here.](#)



# Focused inSights

## Consumer Choices



[Download the Report here.](#)



# Thank you!



Alysse Henkel  
Director of Research Data and Analytics  
[ahenkel@thevisioncouncil.org](mailto:ahenkel@thevisioncouncil.org)



# Government & Regulatory Affairs Update

Omar Elkhatib,  
Government Relations Manager



# The GR Team

- **Venable**

- Josh Finestone
- Yardly M. Pollas
- Jodie Curtis
- Sheridan O'Kelly
- John Drzewicki

- **Counsel**

- Rick Van Arnam
- Jim Anderson

- **The Vision Council**

- Omar Elkhatib (Government Relations Manager)
- Michael Vitale (Vice President, Membership & Technical Affairs)



# Regulatory Updates



# FDA Updates on Reporting and Labeling

## Guidance Document Results – Sunglasses and OTC Readers

1. **Plano sunglasses and OTC readers must fully comply with UDI labeling and GUDID reporting**
2. The FDA extended the compliance date for GUDID reporting of all Class I devices by 75 days, moving the compliance deadline from September 24 to December 8, 2022. **However, the requirement that all Class I devices have a UDI (which can be a UPC) is still scheduled for September 24, 2022**



# FDA Updates on Reporting and Labeling

## Exclusion Request Results

- **The FDA did not exempt spectacle frames from UDI labeling requirements.**
- The FDA considers spectacle frame manufacturers or re-packagers to be “labelers” that must comply with the UDI labeling regulations. The FDA, however, confirmed that because spectacle frames are Class I regulated medical devices, **the use of a Universal Product Code (UPC) on the labels and device packages will meet all UDI labeling requirements**
- The FDA confirmed that frame manufacturers do not need to populate any UDI information into the FDA’s online UDI database, called the GUDID
- FDA reconfirmed that they **do NOT** consider either optical laboratories or eyecare professionals to be UDI labelers. Thus, no responsibility exists for those entities to generate UDIs when they process or dispense finished eyeglasses, as they do not cause labels to be affixed to the finished eyeglasses.

# Ocean Shipping Reform

The Vision Council's government and regulatory affairs (GR) team sent a letter to the Senate Committee on Commerce, Science, and Transportation supporting the Ocean Shipping Reform Act (S. 3580)

In June, **President Biden signed into law the Ocean Shipping Reform Act of 2022 (OSRA 2022)**

**The new changes include, but are not limited to, the following:**

- New provisions for a National Shipping Exchange Registry, which would require shipping exchanges to register with the FMC and meet other new requirements.
- New provisions for data collection, which will require the FMC to publish new reports on regulated ocean common carriers.
- New provisions for charge complaints, which allows individuals to submit complaints to the FMC regarding charges assessed by a common carrier.
- Expanded prohibited common carrier activities, to include unreasonable refusal of otherwise available cargo space, improperly assessed charges, and inaccurate/incomplete detention and demurrage invoicing.

# GR Moving Forward



# Hill Activity and Advocacy

## Hill Meetings

- Senator Steve Daines (R-MT)
- Senator John Cornyn (R-TX)
- Senator Michael Bennett (D-CO)
- Senator Ben Cardin (D-MD)
- Senator Chuck Grassley (R-IA)
- Rep Jackie Walorski (R-IN)
- Rep Drew Ferguson (R-GA)
- Rep Kevin Brady (R-TX)
- Rep Darin LaHood (R-IL)
- Rep Linda Sanchez (D-CA)
- Rep Brian Higgins (D-NY)
- Frankl Pallone (D-NJ)
- Mike Burgess (R-TX)
- Buddy Carter (R-GA)
- John Curtis (R-UT)
- Richard Hudson (R-NC)
- John Patrick Joyce (R-PA)
- Ben Ray Lujan (D-NM)
- Jacky Rosen (D-NV)
- Angie Craig (D-MN)
- Doris Matsui (D-CA)
- Suzanne DelBene (D-WA)
- Ron Kind (D-WI)

## Hill Action Items

- ✓ National Economic Council
- ✓ International Trade Commission
- ✓ United States Trade Representative
- ✓ Healthy Vision Month Resolution





# State Laws Monitoring



## STATE MANAGED VISION CARE LAWS TRACKING SHEET- July 2022

The following document details pending vision care legislation by state. To locate a bill number, scroll to the desired state.

### ACTIVE LEGISLATION 2021-22

#### Illinois

Vision Care Regulation Act ([HB4844/SB2086](#))

A vision care organization (incl. subcontractors) cannot:

- issue a contract that requires an eye care provider to provide services or materials to an enrollee at a fee set by the vision care plan unless the services or materials are covered under the vision care plan
  - fees for covered services or materials must be reasonable and clearly listed on a fee schedule provided to the eye care provider
- misrepresent the benefits of a vision care plan as a means of selling coverage or communicating the benefit coverage to enrollees
- restrict an eye care provider's freedom to choose suppliers, materials, or labs or require an eye care provider to purchase materials from a source owned by the entity that issued the vision care plan

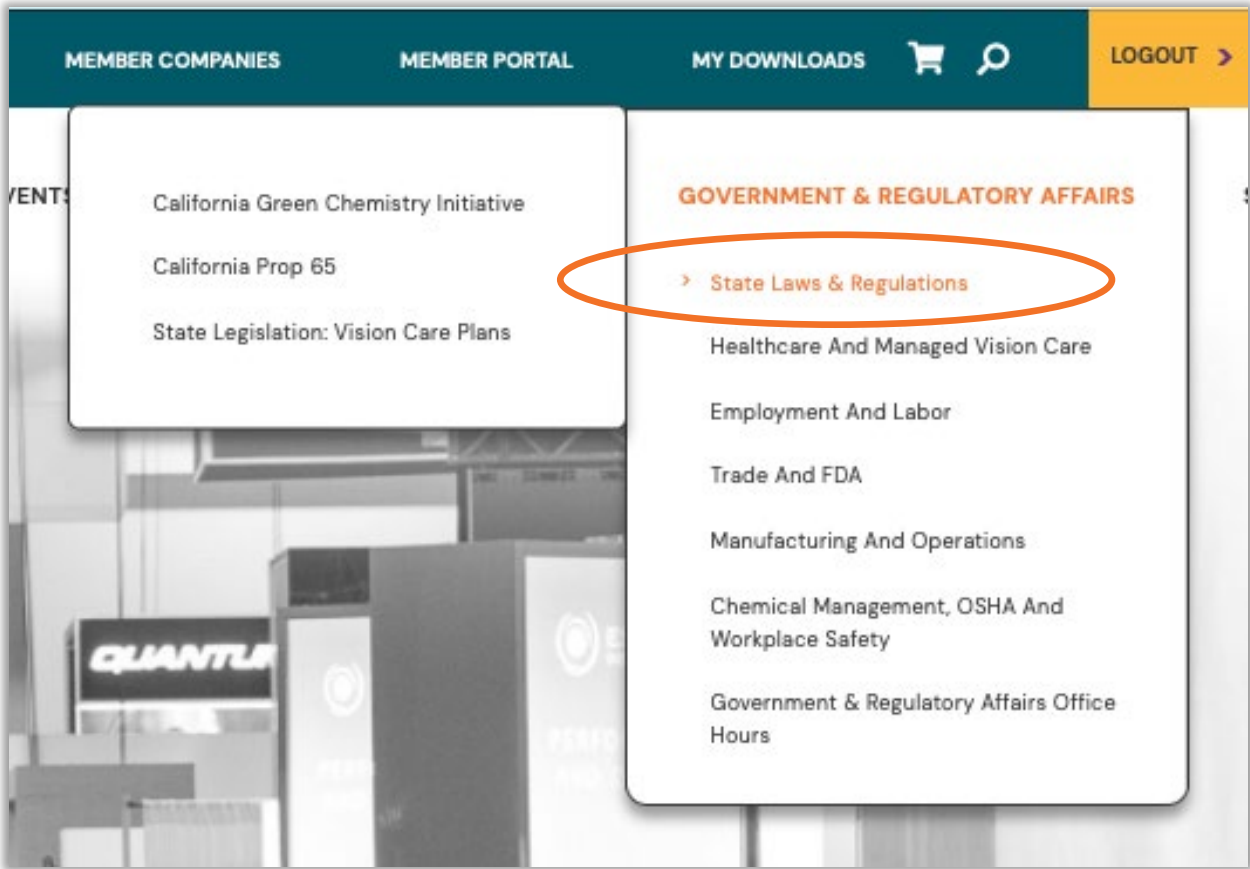
In addition:

- terms, fees, discounts, or reimbursement rates in a vision care plan may not be changed unless mutually agreed to in writing by the eye care provider and the vision care organization

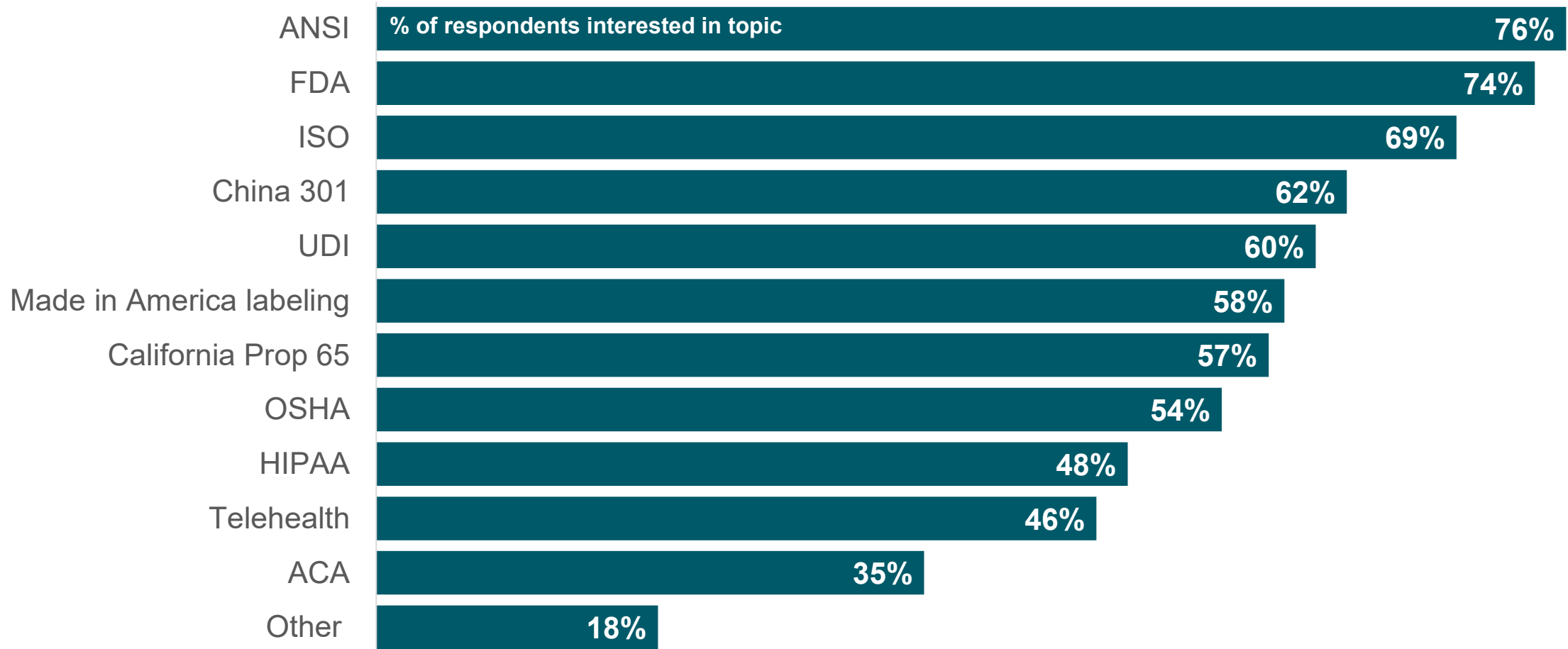
#### Michigan

##### [SB0543](#)

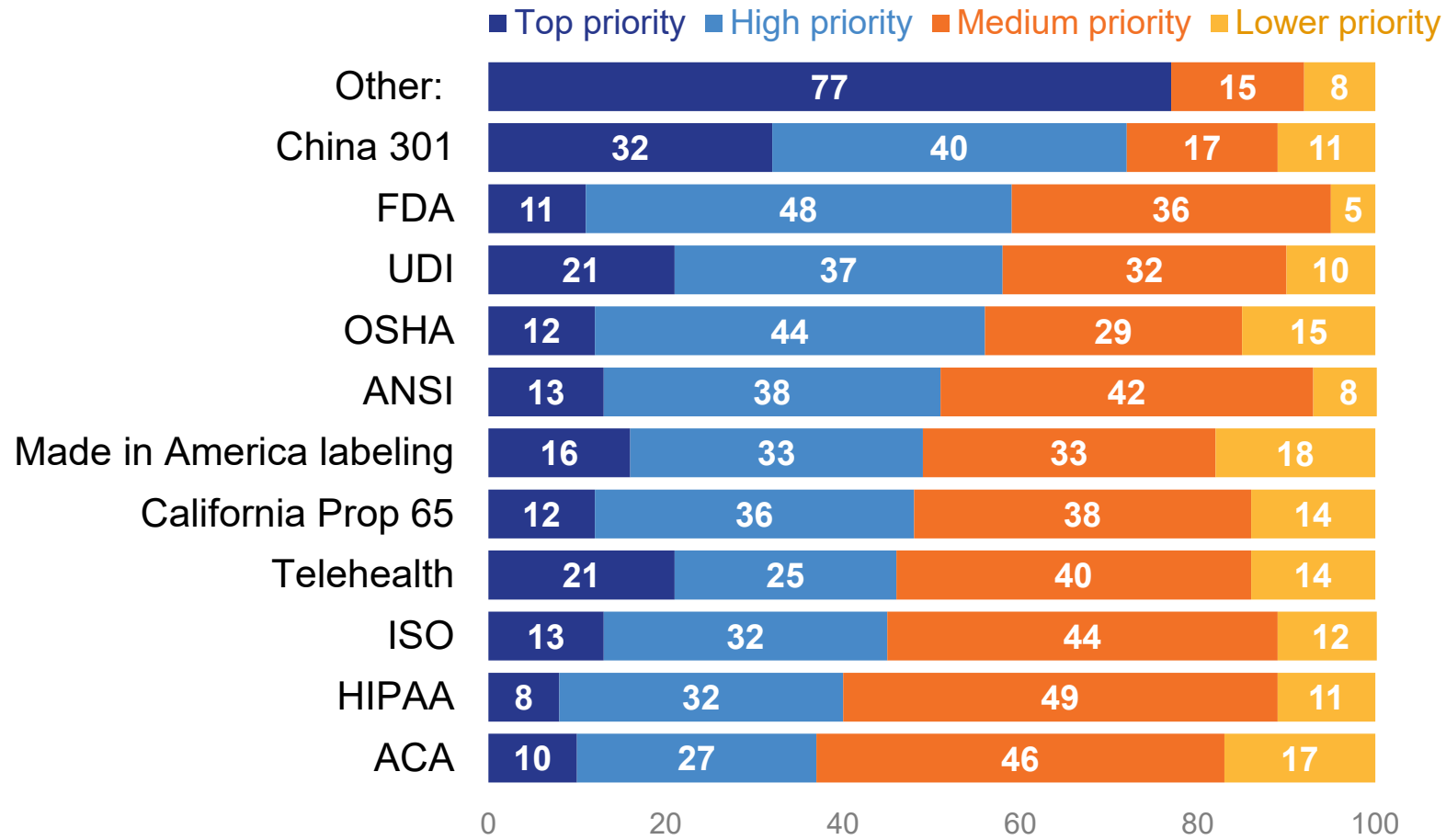
A non-profit corporation that operates dental care plans for dental services in or outside of Michigan can also operate supplemental vision care plans. A supplemental vision care plan may be a fee for service plan, administrative service contract, cost plus arrangement, or a capitation plan.



## Issues your company is concerned about or would like to follow closely



## Members ranked the priority of each policy topic they were interested in – China tariffs ranked as a very high priority overall



# Consumer Outreach

Hayley Rakus,  
Senior Communications Manager



# Objectives

- Elevate consumer interest in the importance of eye health and the breadth of vision products and services available
- Generate positive consumer media exposure for The Vision Council's member products and services
- Expand portfolio of consumer-facing resources for members





# Tactics

- **Conduct targeted media pitching** to health and wellness, lifestyle, parenting, fashion and consumer media outlets, leveraging The Vision Council's network of experts and medical advisors; member products and services; and The Vision Council's research
- Host National Sunglasses Day **media and influencer event** in New York City
- Engage in **strategic influencer partnerships**
- **Develop regional spokesperson network** for media opportunities
- Distribute press releases over **PR Newswire**
- **Curate consumer-facing resources/collateral** for members

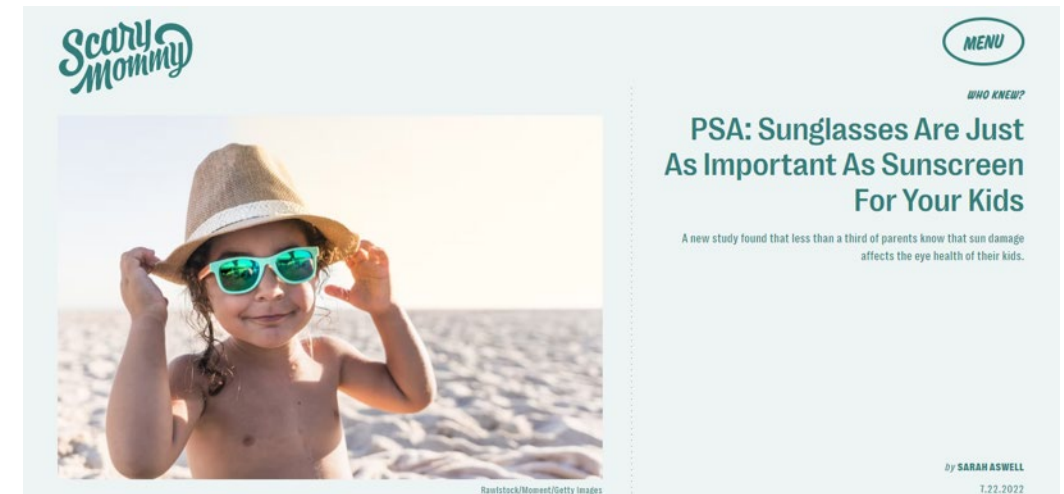
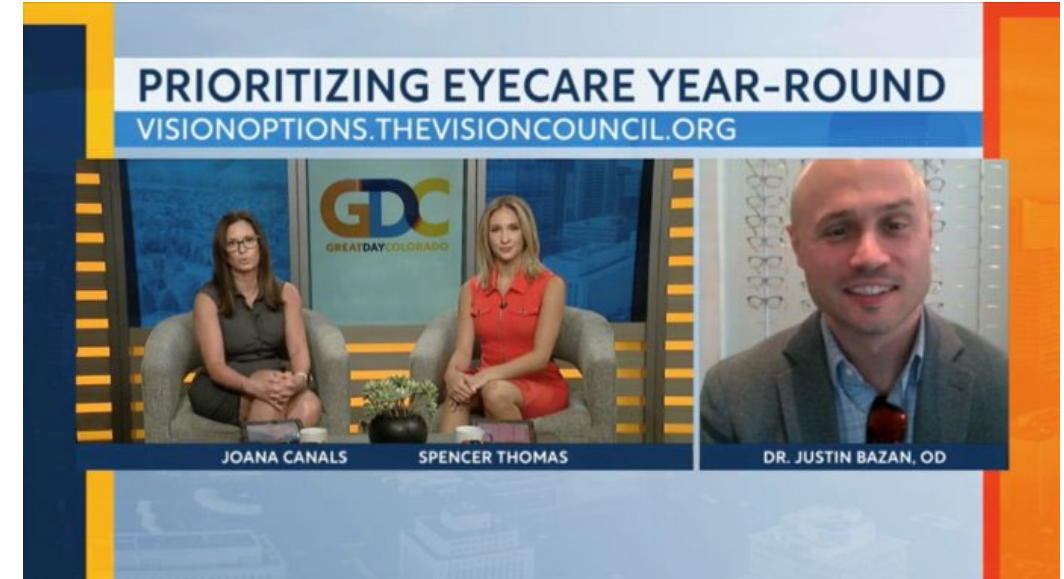
# Key Consumer Messages + Media Moments

## Consumer Messages:

- Explosion of consumer choice
- Vision care trends and technology
- Advice from eyecare experts
- Importance of an annual comprehensive eye exam
- Digital Eye Strain
- UV Eye Health

## Newsycle Moments:

- Healthy Vision Month (May)
- National Sunglasses Day (June 27)
- Back to School/Work (July-September)



# Member Resources

- Printable marketing assets available in Vistaprint ProShop
- Monthly social media calendars
- Downloadable marketing assets at [nationalsunglassesday.com](https://nationalsunglassesday.com)



## National Sunglasses Day



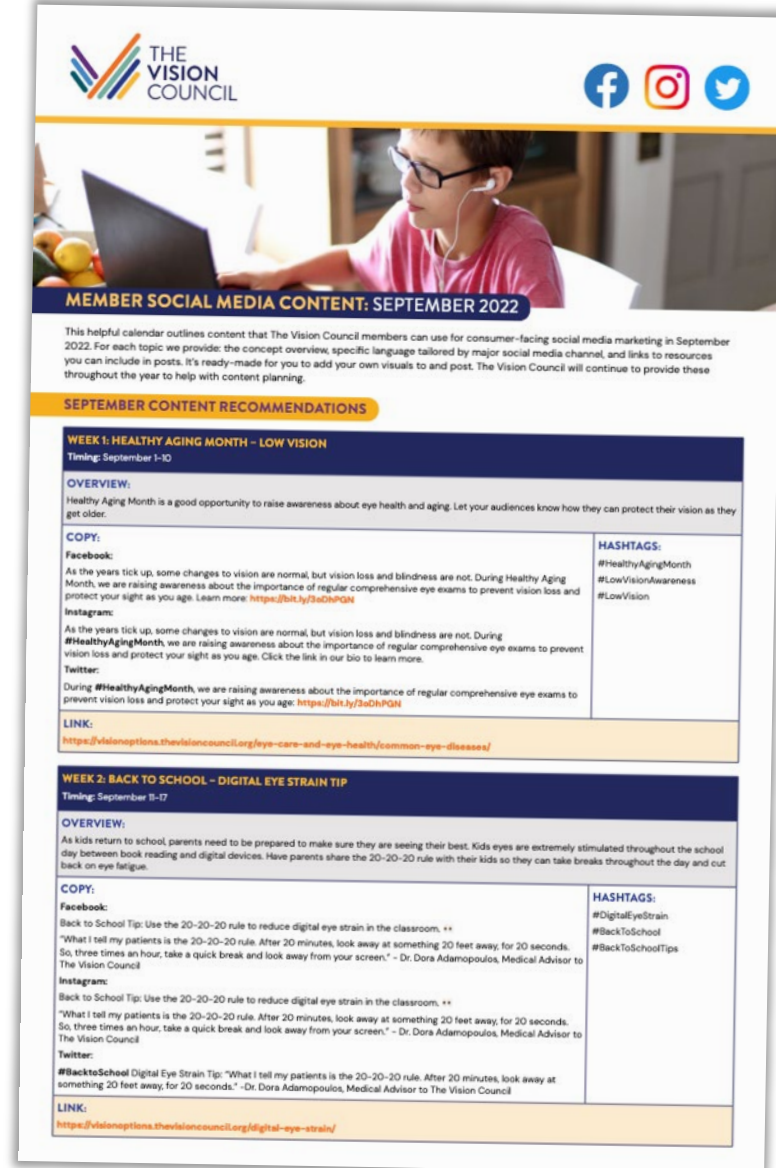
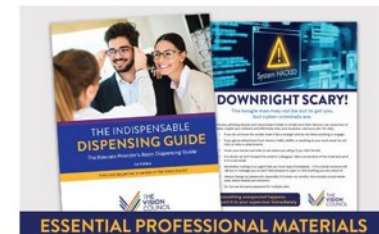
## Low Vision Resources



## Lenses and Frames Collateral



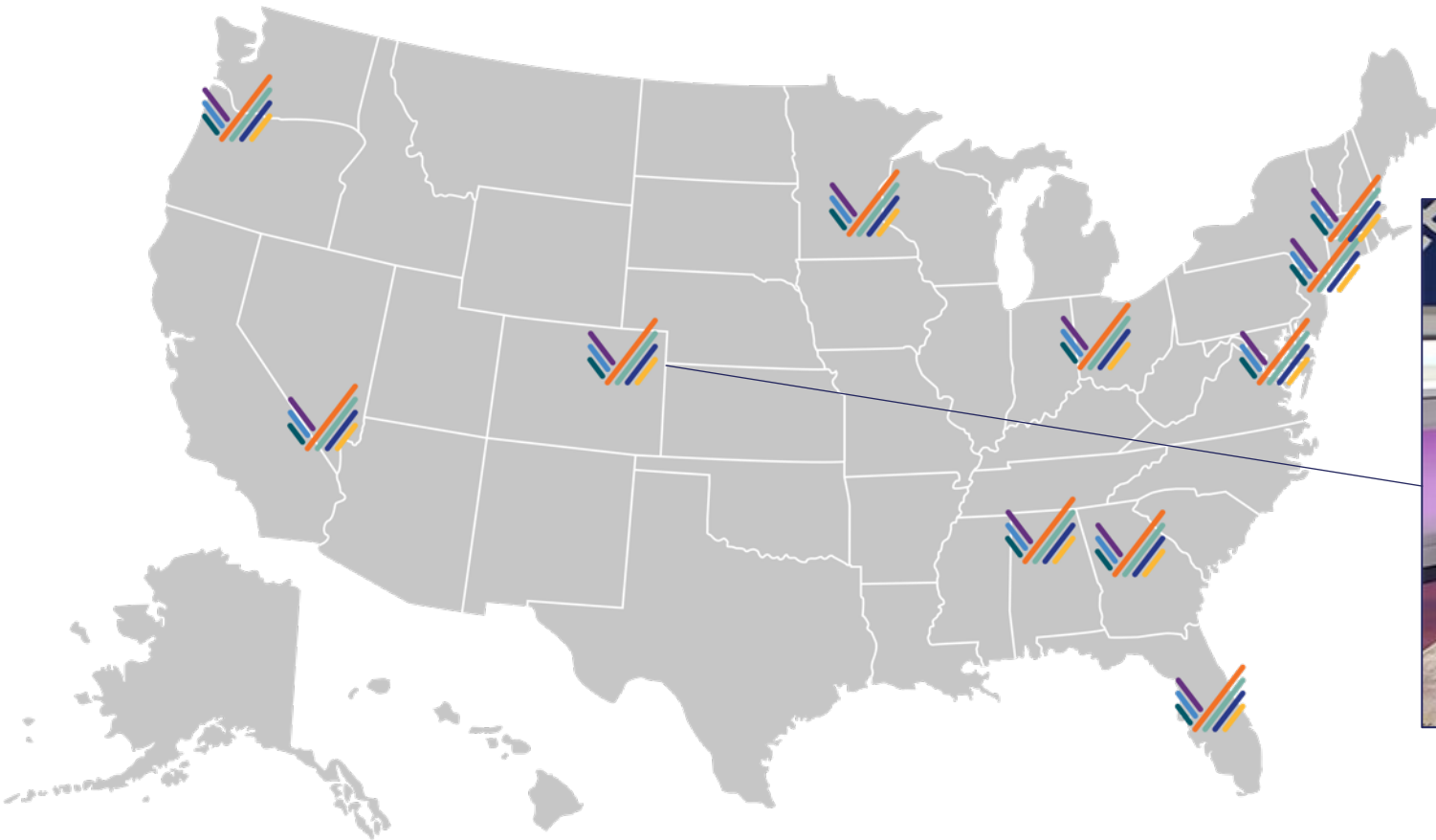
## Professional and Office Resources





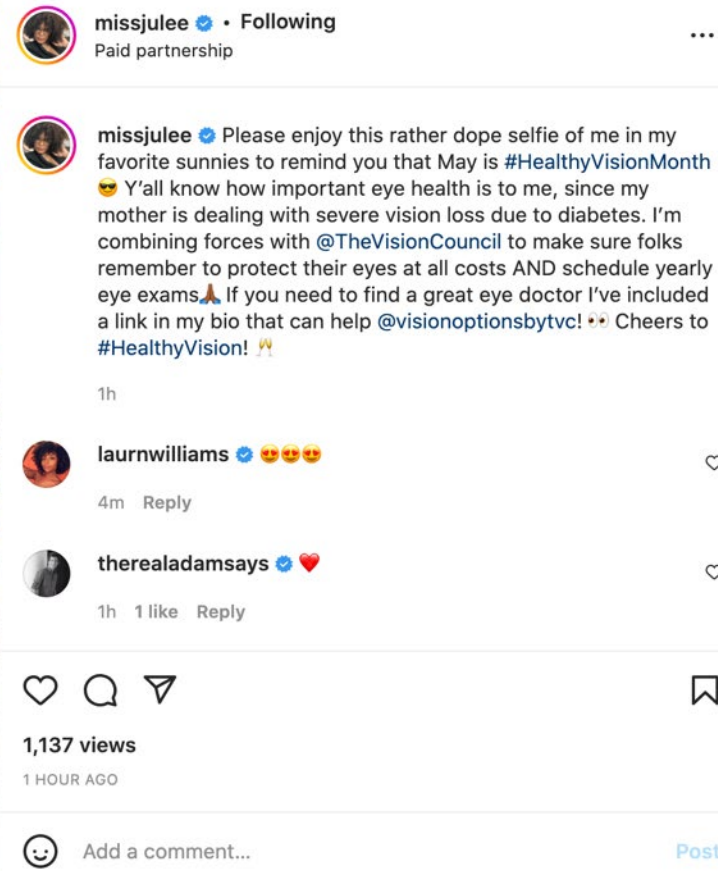
# Regional Spokesperson Network

- **Developing regional spokesperson network for media opportunities**
- **To-date, secured 15+ regional broadcast interviews** in top media markets including Atlanta, Birmingham, Denver, Las Vegas, Minneapolis, New York, Tampa and Washington D.C.



# Strategic Partnerships

- Engaged with Julee Wilson, Beauty Editor At-Large for *Cosmopolitan* and eyecare health advocate

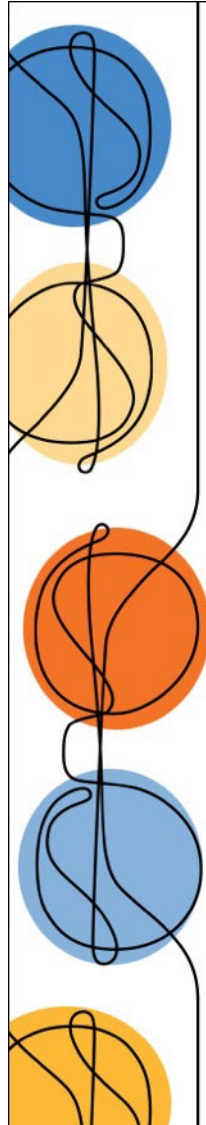




# National Sunglasses Day Media Event

- 38 media and influencers attended
- 30+ member companies contributed 140+ sunglasses and product options for a 'Sunglass Suite'





*get your*  
**SHADES  
READY**

Join Optometrists Dr. Justin Bazan and Dr. Jennifer Tsai for a fireside chat hosted by Cosmopolitan's Beauty Editor-at-Large, Julee Wilson, along with cocktails, hors d'oeuvres and stylish shades from some of your favorite sunglass brands.

Hosted by The Vision Council  
**TUESDAY, JUNE 21**  
6:00pm – 8:00pm  
The Cabana at CATCH Steak  
88 9th Avenue  
New York, NY 10011  
(entrance on 16th and 9th)

Please RSVP to Rachel at [r.vodofsky@bellapr.com](mailto:r.vodofsky@bellapr.com)  
by June 15th.

**NATIONAL  
SUNGLASSES  
DAY**  
THE VISION COUNCIL



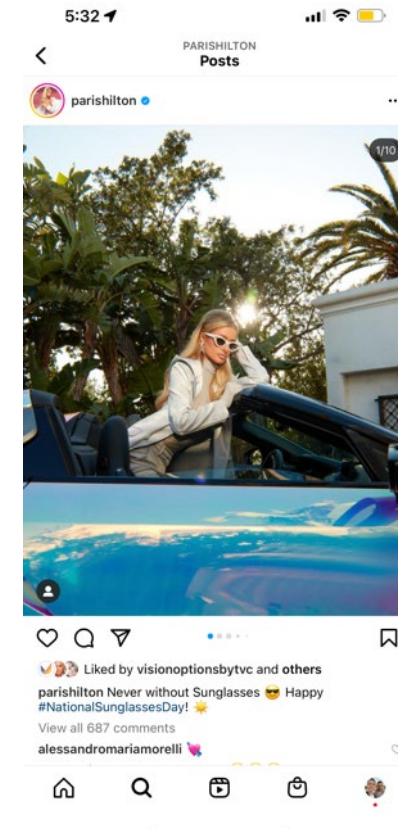
# Press Placements + Results





# National Sunglasses Day Campaign Results

The social media campaign, including the #NationalSunglassesDay hashtag, garnered more than **137 million impressions** and more than **146,900 engagements**



# National Sunglasses Day and UV Eye Health



## OK! SHOPPING

Happy National Sunglasses Day! Spruce Up Your Summer Style With Trendy Shades — Shop Now



SOURCE: SZADE, AMAZON



## ESSENCE

HOME • FASHION

### The Shades You Should Buy In Honor Of National Sunglasses Day

ON NATIONAL SUNGLASS DAY, THESE SUNGLASSES HELP US GET READY FOR THE WEATHER.



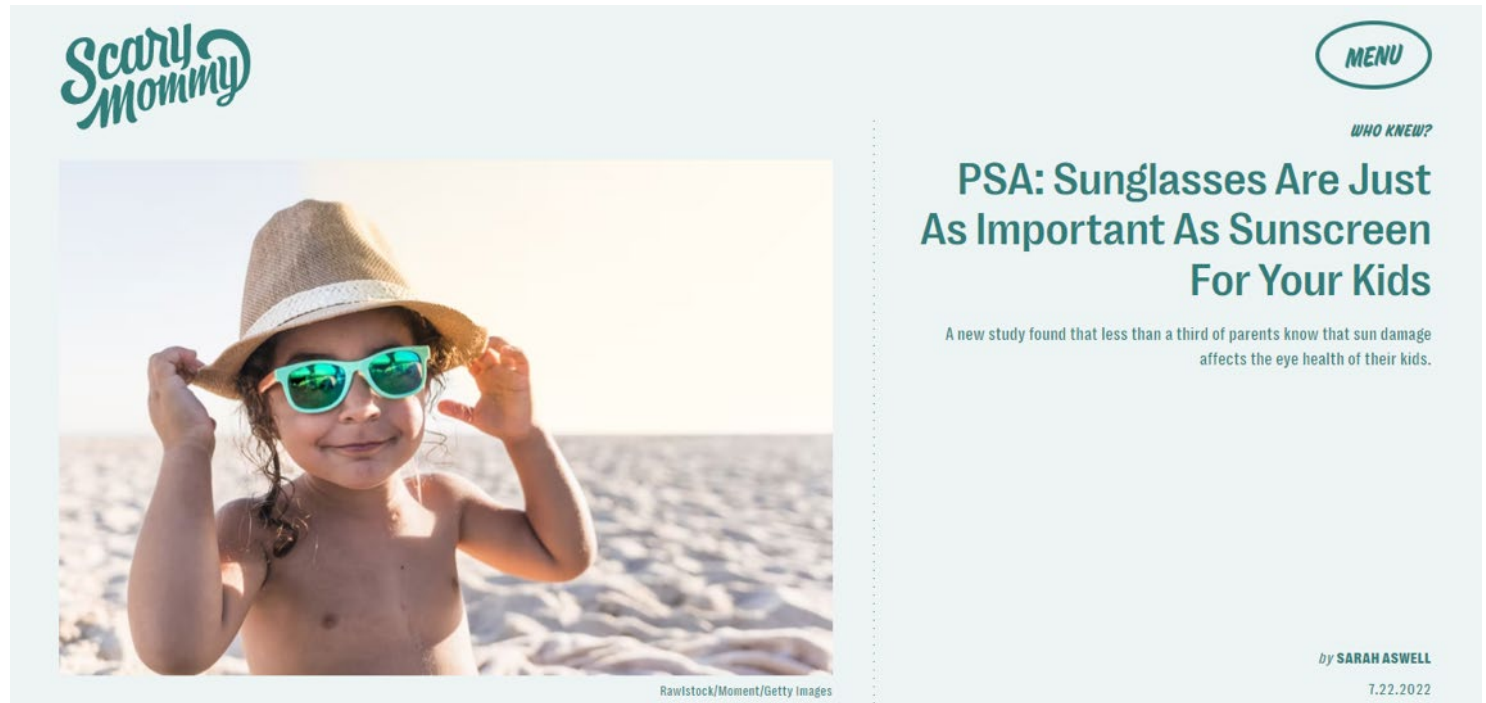
*"Whether blocking out the haters or actually protecting your eyes from the sun, sunglasses are a must-have — and today is National Sunglasses Day, so let's show some appreciation to the oh-so-aesthetic accessory! Originally brought to life by The Vision Council, Monday, June 27, marks the annual commemoration of sunglasses to celebrate them in all of their glory."*



# UV Eye Health

**“It’s so important to wear sunglasses any time you’re outside, regardless of the weather or the season,” Dr. Dora Adamopoulos, a medical advisor to The Vision Council, a non-profit vision health organization, tells Scary Mommy.**

**“Sunglasses are a daily health necessity to protect your eyes from long and short-term damage from the sun’s UV rays.”**



# Lens Types and Treatments

"Some lenses provide different types of vision and different type of protection. For example, polarized lenses are great for those that are spending time on the water. They cut down on glare and reflections."

- Dr. Artis Beatty, Chief Medical Officer at MyEyeDr.



"Redder tints enhance contrast. Gray tints help keep colors stable. Depending on the activities that you're doing, you want to pick a sunglass that reflects that activity, much like you pick your outfits or your shoes."



## Lens Types and Treatments

### 8 great polarized, UV-protected sunglasses under \$60, according to experts

We spoke to two optometrists and the vice president of membership at The Vision Council to identify a handful of great polarized, UV-protected sunglasses for a reasonable price.



— We highlighted sunglasses across four different style categories — round, square, cat-eye and aviator — all with polarization and UV protection.  
Sunki ; Goodr ; Blenders Eye

"Polarization is important because polarized lenses block out glare, therefore increasing contrast sensitivity, Michael Vitale, the Vice President of Membership and Technical Affairs at The Vision Council, told me."

# Eye Health and Consumer Product Choices



## If You're Straining to Read This, It Might Be Time for Reading Glasses

Millennials, welcome to your 40s

"Another perk of buying a custom pair of readers from an optician is the high-index lens material that makes the lenses thinner and lighter, says Michael Vitale, vice president of membership and technical affairs at The Vision Council."  
- ConsumerReports.org

"According to The Vision Council, 166 million adults in the United States wear prescription eyeglasses, with 34.5 million wearing over-the-counter glasses for reading."  
- HealthDigest.com

## Signs You May Need Glasses



**Health**Digest

# Back to School Eyewear and Eyecare



"It's important to make them fun. They're an accessory, right? The first day of school is coming up. Everyone gets their outfit ready and take pictures – check out what I'm wearing: new clothes, new backpack. Why not get somebody excited about a new pair of glasses?"

"I can't stress how important eye exams are – honestly for the whole family."



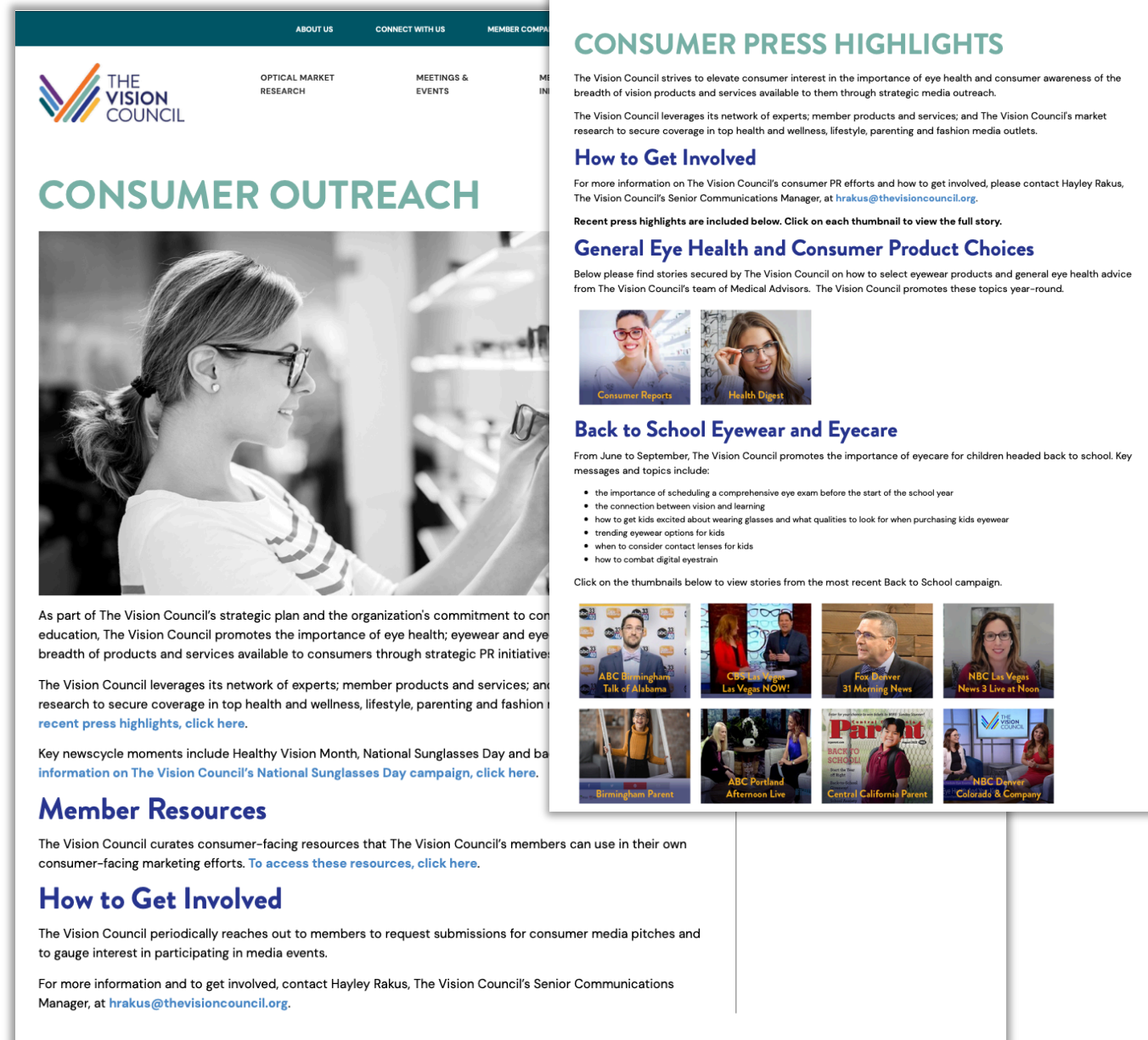
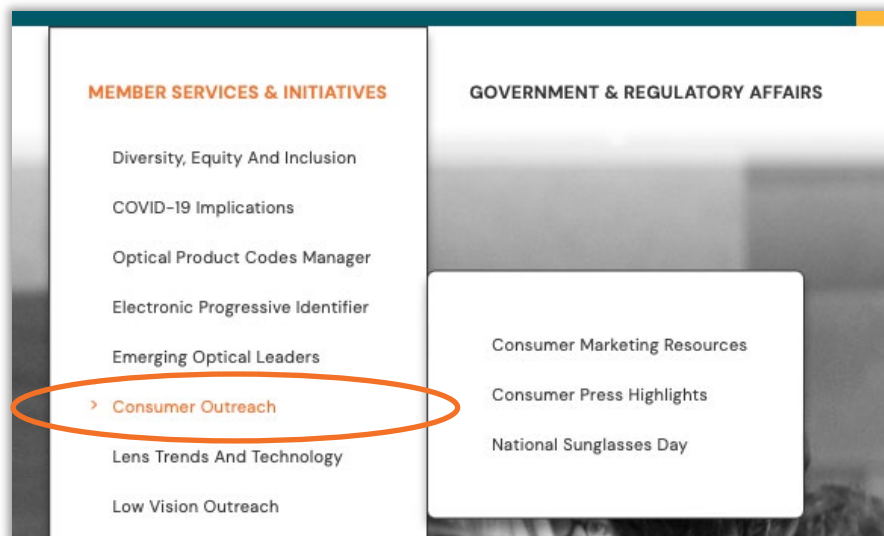
LAS VEGAS NOW

**See Better, Feel Better**



# How to Get Involved

- Take advantage of member resources and benefits
- Watch out for member calls for participation in media pitches and events
- Email Hayley at [Hrakis@thevisioncouncil.org](mailto:Hrakis@thevisioncouncil.org)



# Division & Committee Meetings & Welcome Reception

Time	Event	Location
3–4:30pm	Optical Retail Division Meeting	307
2:45–4:15pm	Sunglass & Reader Division Meeting	306
2:45–3:15pm	Eyewear & Accessories Division Meeting	405
2:45–3:45pm	Lens, Lab, Lens Processing & Technology Combined Division Meeting	302/303/304/305
4–5pm	Lab Division Program	302/303/304/305
4:15–5:15pm	Emerging Optical Leaders Committee Meeting	405
5:30–7:30pm	Welcome Reception	Sugarcane at The Venetian

The background is a dark blue field filled with various geometric shapes. There are several thick, rounded diagonal stripes in shades of yellow, orange, light blue, and purple. Additionally, there are several chevron shapes (V-shapes) pointing downwards, rendered in light teal, dark teal, and orange. The text 'THANK YOU' is centered in a bold, white, sans-serif font.

**THANK YOU**