

BE PART OF  
THE VISION



2025  
ANNUAL REPORT

## FROM THE CEO



Dear Members,

This past year reminded us just how much this industry can accomplish when it moves with purpose and unity. Backed by an engaged Board of Directors, a staff that brings genuine passion to this work every day, and members like you who make it all worthwhile, our organization stepped up at every turn, advocating boldly, innovating thoughtfully, and building the kind of community that keeps this industry strong. As we look to 2026, I have never felt more confident in where we are headed.

In January, industry leaders converged in Santa Barbara for the Executive Summit, and the energy in the room set the tone for everything that followed. Thought-provoking keynotes, candid peer conversations, and the unveiling of the Market inSights report made it one of our most memorable gatherings yet. Throughout the year, we launched the Member Community platform and strengthened our webinar offerings, giving members a more personal way to stay informed on the issues that matter most to their businesses.

When tariffs rose to the top of the national agenda, our team stood ready. We brought member voices directly to senior trade officials, made dozens of visits to Capitol Hill, and developed exclusive tools to keep members informed and prepared in real time. Advocacy is only as strong as the relationships behind it, and in 2025, we built some of our most meaningful ones yet.

Vision Expo wrote a new chapter this year. East made a debut in Orlando with an unforgettable keynote from Venus Williams, while West brought thousands of professionals back to Las Vegas for another week of connection, education, and discovery. After careful consideration of feedback from industry stakeholders, exhibitors and attendees, we announced that beginning in 2026, Vision Expo will become one unified annual event rotating through major U.S. cities – a bold step forward for our entire community.

The Vision Council Foundation's "Better Vision for Better Lives" campaign anchored our consumer outreach efforts throughout the year, with initiatives including free vision screenings in underserved communities and a record-breaking National Sunglasses Day. The Opening Your Eyes Scholarship continued to grow, supporting students pursuing careers in ophthalmic dispensing and sending the next generation of optical professionals into the workforce.

This industry continues to inspire me, and so do each of you. Thank you for your trust, your partnership, and your continued investment in everything we are building together.

Ashley Mills  
Chief Executive Officer  
The Vision Council

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## ADVOCACY

The Vision Council's advocacy efforts rose to new levels as evolving trade policies dominated headlines in 2025. The team championed the interests of members and the vision industry at large by continuously monitoring the legislative landscape and advocating for policies that enable accessible and affordable eyecare for people everywhere.

### TARIFFS

The Government and Regulatory Affairs team worked diligently to increase efforts in Washington, D.C., meeting with lawmakers to elevate industry concerns around tariffs, domestic manufacturing, and access to affordable vision care. The Vision Council continued to underscore the messaging that vision care is healthcare, and trade policy decisions have direct impacts on American businesses and patients.

### OFFICE OF THE UNITED STATES TRADE REPRESENTATIVE (USTR) VISIT



In the fall, members and staff of The Vision Council met with senior USTR officials to discuss the broader impact of tariffs on American eyewear manufacturers. This meeting detailed how duties on raw materials, parts, and finished goods constrain hiring, investment, and research and development, while driving up consumer costs and putting pressure on small, family-owned manufacturers across the country. At the same time, the team highlighted companies investing in domestic production and discussed how tariff relief could accelerate onshoring and supply-chain resilience. The organization requested USTR guidance on federal tools that could support U.S. eyewear manufacturing and workforce growth.

### MEMBER RESOURCES

The Vision Council played a critical role in keeping members informed and prepared during this period of uncertainty. The organization created and delivered practical resources, including an exclusive Tariff Dashboard, a real-time tariff developments webpage, and hosted six informational webinars.

### IMPROVING MEDICARE & MEDICAID AFFORDABILITY AND ACCESS

A key advocacy focus of 2025 centered around making eyewear more affordable for children and seniors, while also ensuring that it is financially viable for domestic suppliers to partner with Medicaid programs. Staff made strides engaging lawmakers when they met with Congressman Jeff Hurd (R-CO), who agreed to champion a letter asking the Centers for Medicare and Medicaid Services to prioritize lowering the cost of prescription eyewear and ensuring access to essential vision care for all families.

## MADE IN USA

Another advocacy focus surrounded labeling policies related to the Federal Trade Commission's (FTC) definition of "Made in USA," which continues to impact eyewear and vision care manufacturers. This year, team members met with Senate Commerce Committee staff to discuss challenges that the FTC's Made in USA ruling will have on members and identify opportunities to better align federal labeling standards with consumer expectations.

## ADDITIONAL INDUSTRY INTERESTS



Over the course of the year, The Vision Council visited lawmakers on Capitol Hill over three dozen times, meeting with members of the Senate Commerce Committee, the House Ways and Means Committee, and the Energy and Commerce Committee. These visits covered a variety of topics, including efforts to seek regulatory parity with the USTR and the Food and Drug Administration, supporting members through the Small Business Administration, and working with the Department of Veterans Affairs (VA) to address the financial losses associated with providing prescription eyewear through VA partnerships.



Support of VisionPAC enabled The Vision Council to expand its impact and engage with lawmakers on a deeper level. Because of VisionPAC, The Vision Council secured an audience with Senator Ted Cruz (R-TX) at an in-person event, and attended a dinner with Senator Roger Marshall (R-KS) in 2025. Donations to this non-partisan political action committee help fuel work to inform policymakers and champion industry interests.

## REGULATORY GUIDANCE AND COMPLIANCE

The Vision Council continued to be a reliable resource in other regulatory areas, publishing guidance and compliance resources on several state and federal regulatory issues, including California & Prop 65, ADA Compliance, PFAS and PBTS, and the Department of Justice Data Security Program.

## CONGRESSIONAL CONNECTIONS

The Vision Council remained committed to providing members with a platform to bring their concerns directly to lawmakers through the Congressional Connections initiative, facilitating three meetings in 2025.

Members interested in participating can fill out the form linked at the QR code here.



# TECHNICAL AFFAIRS

The Vision Council continues to manage multiple open and active technical programs, working on behalf of its member companies across the U.S. and globally. Serving as the secretariat for ANSI ASC Z80, The Vision Council oversees 25 national standards for ophthalmic optics and serves as the U.S. Technology Advisory Group (TAG) to ISO Technical Committee (TC)172/Subcommittee (SC)7 – Ophthalmic Optics. The Vision Council's experts provide leadership and industry knowledge to ANSI ISEA Z87 – Eye and Face Protection, ASTM F08.57 – Eye Safety for Sports and ISO TC94 SC6 – Eye and Face Protection.

## ASC Z80 MEETING DEVELOPMENTS

The Vision Council facilitated the spring and fall meetings for the ASC Z80 standards committee, where the various subcommittees reviewed and discussed updates and revisions of U.S. and International standards.

## DATA COMMUNICATION STANDARD

In July, The Vision Council released Version 3.14 of the Data Communication Standard, developed by the Data Communications Standard Committee under The Vision Council's Lens, Lab & Lens Processing Technology Division (LLLPT). The Data Communication Standard establishes a method by which machines and computer software systems used in the fabrication of ophthalmic lenses can exchange information. The newly released version introduced essential updates to keep pace with evolving technologies and featured a reorganized structure for defining data points, ensuring greater consistency in the delivery and interpretation of inspection data.

## ISO EYE AND FACE PROTECTION STANDARDS MEETING

In June, Michael Vitale, Vice President of Membership, Government Relations & Technical Affairs, represented The Vision Council at the ISO TC94 SC6 Eye and Face Protection interim meetings in Stockholm, Sweden. Serving on behalf of ASTM and ANSI, Vitale contributed to discussions shaping international standards for sunglasses, safety and sports eyewear.

## ISO WORKING GROUPS

Several ISO working groups addressed key updates and new developments across several industry standards in 2025, including:

- **ISO/AWI 4007** – Vocabulary for personal protective eye and face equipment.
- **ISO 12312-1:2022/Amd 1** – Sunglasses for general use.
- **ISO/CD 12312-2** – Filters for direct solar observation.
- **ISO 16321-3:2021/Amd 1** – Occupational mesh protectors.
- **ISO/FDIS 16321-4** – Protection against biological hazards.
- **ISO 18527-3:2020/Amd 1** – Surface swimming eyewear.
- **ISO/AWI 18527-4** – Motorcycling and motorized sports eyewear.
- **ISO/AWI 18527-5** – Snowmobile goggles.
- **ISO/CD TS 19818-2** – Guidance for laser eye and face protection.

# TRADE SHOWS

## VISION EXPO EAST 2025

Thousands of eyecare professionals, designers, manufacturers, distributors, buyers, and students traveled to Orlando, Florida, for Vision Expo East 2025 in February. This show marked a transition to a new host city, attracting visitors from 105 countries, over 400 exhibitors, and an overwhelming number of first-time attendees. The Vision Council hosted several committee and division meetings ahead of the show, as well as an All-Member Meeting that took place right on the Show floor.

Vision Expo's debut in Florida was marked with an inspiring keynote from tennis icon and entrepreneur, Venus Williams. In conversation with sports broadcaster Kelly Tilghman, Williams shared her experience finding success as a business owner and spoke about living with Sjogren's Syndrome, providing a unique perspective on the importance of eye health and perseverance in the face of challenges. Additional highlights included the debut of the Indie Lab Speakeasy, a dedicated space for independent labs, the OTC (Over the Counter) Showcase, and the Launch Pad, an area that platformed the latest in up-and-coming technology.

## VISION EXPO WEST 2025

The optical industry convened in Las Vegas for Vision Expo West in the fall. Nearly 10,000 optical industry professionals met for a week of networking, continuing education, and exploring the latest technologies and trends. The redesigned Show floor aimed to make exploration and discovery a breeze. Highlights of Vision Expo West included the debut of VSP Vision Innovation Challenge on the Main Stage and the NOW Design Showcase, which offered a sneak peek at creative eyewear designs to be seen in 2026.

Member committee and division meetings were held onsite in advance of Vision Expo, and the All-Member Meeting returned to the Main Stage. The Vision Council had a reimagined presence on the floor with the introduction of the TVC Bar that hosted several happy hours, coffee chats, and expert meetups.



## A UNIFIED SHOW

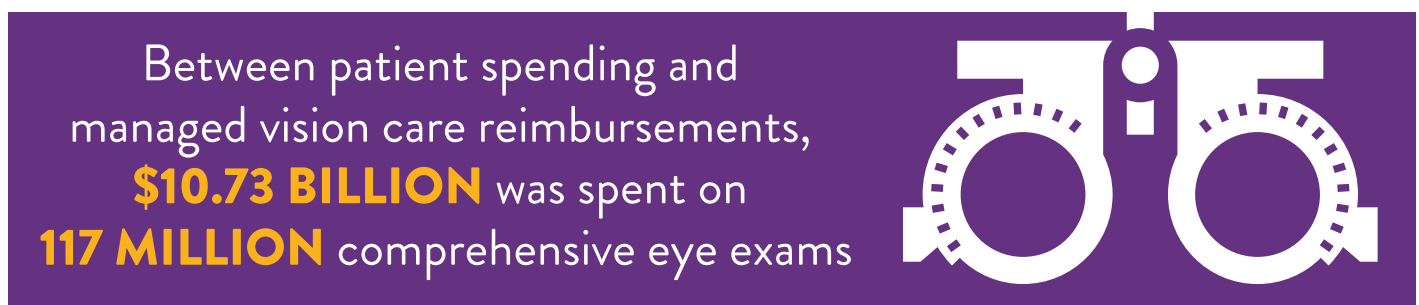
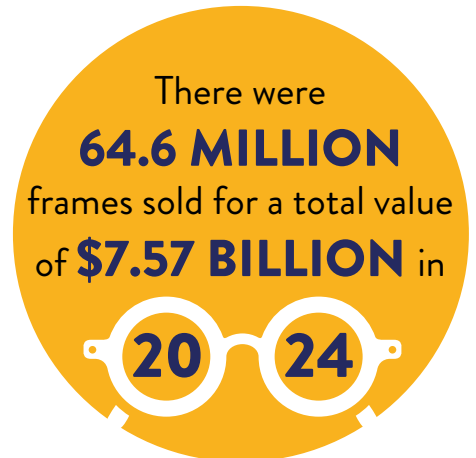
After meaningful conversations and careful consideration of feedback from attendees, exhibitors, and industry stakeholders, The Vision Council and RX announced that Vision Expo would become one unified annual event beginning in 2026. The event will rotate through major U.S. cities, beginning with Orlando in 2026, followed by Las Vegas in 2027 and New York City in 2028. This development aims to strengthen the impact of Vision Expo, underscoring its importance as a platform for innovation, connection, and growth. By channeling energy into one powerful annual moment, The Vision Council show team is equipped to unlock new potential, bigger ideas, deeper relationships, smarter investments, and a stronger community.

## INSIGHTS RESEARCH PROGRAM

The Vision Council's inSights Research program expanded its impact in 2025, providing members with timely, accessible, and actionable intelligence to better understand consumer behavior and market dynamics. Reports and supplements included insights into survey results, specialized pieces, cross tabulated demographic data, and optical retail location lists, reinforcing inSights as a trusted resource for strategic decision-making.

In 2025, members of The Vision Council downloaded a total of \$17M in free research. The inSights team issued 54 unique reports and expanded its scope to complete a variety of custom projects and analysis. The team also solidified its reputation as trusted industry data source, lending their expertise to nearly 40 interviews, speaking engagements, and requests from the media. The Vision Council remains committed to sourcing reliable data and translating it into digestible reports to support members and their business needs.

# The total market value for 2024 is **\$68.3 BILLION**



## MARKET INSIGHTS

The highly anticipated Market inSights 2024 with 2025 Forecast was released in January, providing a complete picture of the overall health, performance, and trends of the optical industry for the year prior and a projected outlook for the one ahead. Supplemental data tables for specific categories were also made available in the Market inSights+ series.

In 2025, the inSights team introduced Market inSights Quarterly Reports. The team issued three quarterly reports to better inform businesses with insights into consumer activity and market performance, and provided updated forecasts, when available.

## FOCUSED INSIGHTS

Focused inSights are in-depth special interest reports on timely topics or areas of interest to members and the industry at large. The specialized 2025 reports included Smart Eyewear; Myopia Management; Managed Vision Care; Frame Buyers; and Artificial Intelligence: Case Studies from the Optical Industry.

## CONSUMER INSIGHTS

In 2025, the inSights program continued issuing quarterly snapshot reports of surveyed consumer sentiments regarding vision correction, eye exams, eyeglasses, contact lenses, readers, and plano sunglasses in the U.S. These Consumer inSights reports were accompanied by supplemental product-specific data tables in Consumer inSights+ reports. This year, The Vision Council also released data representing the Canadian market through bi-annual reports in the Consumer inSights Canada series.

## PROVIDER INSIGHTS

Provider inSights is a bi-annual report that looks at eyecare providers' perceptions on practice performance, economic sentiment, staffing, telehealth, tariffs and other key topics impacting operations. The Vision Council released two Provider inSights reports in 2025: one examining Q3 and Q4 2024, and another for the first half of 2025.

## CUSTOM INSIGHTS



In 2025, The Vision Council renewed its commitment to providing members with the research they want to see. Custom research opportunities are available to help meet members' unique business needs. Projects vary in methodology, scope, format, and pricing, ensuring flexibility based on specific goals. Scan the QR code to contact a team member and learn more.





The Vision Council Foundation, the 501(c)3 charitable nonprofit arm of The Vision Council, experienced a successful year fueled by several impactful partnerships, activations, and initiatives. The 2025 campaign, “Better

Vision for Better Lives,” drove the team’s efforts throughout the year. The campaign aimed to bring vision care resources to underserved communities, empower future industry professionals, and amplify the mission of making clear vision achievable for all through industry collaboration.

## CONSUMER OUTREACH AND EDUCATIONAL CAMPAIGNS

### Vision Curriculum Kits

In their first full year of partnership, The Vision Council Foundation and EyeMed Vision Care took strides toward advancing their shared mission of driving public awareness of the importance of eye health and supporting industry careers. Together, the organizations produced co-branded vision curriculum kits for grade-school students to learn more about their eyes. In addition to producing this series of free resources, the Foundation and EyeMed developed “Fueling the Future: The Next Generation of Eye Care Professionals,” an educational webinar that explores workforce trends and pathways to support the next generation of optical professionals.

### National Sunglasses Day

The 2025 National Sunglasses Day campaign centered around both science and style. The Vision Council Foundation released an updated promotional toolkit, which saw a nearly 200% increase in downloads compared to 2024. The Foundation also welcomed AccuWeather as a supporter of National Sunglasses Day. AccuWeather promoted National Sunglasses Day across their channels via website ads, videos, and interviews, which resulted in 117K total impressions. The Vision Council Foundation showcased AccuWeather’s UV index on its website homepage to educate consumers about the importance of protecting your eyes from harmful UV rays.

The Vision Council Foundation also hosted consumer activations in celebration of National Sunglasses Day, including an event in New York City on the eve of National Sunglasses Day for media, influencers, and local eyecare professionals. Guests attended a panel session featuring insights from a local OD, an AccuWeather storm chaser, and a photographer, who spoke about the impacts of UV at the intersection of health, weather, and art. Attendees explored sunglasses displays and participated in curated try-ons from a variety of Foundation supporters. On June 27, the Foundation partnered with the Boston Red Sox to distribute free sunglasses, accessories, and educational materials during an evening game at Fenway Park, spreading the message of UV eye safety to approximately 30,000 consumers in attendance.





## Vision Screenings and Comprehensive Eye Exams

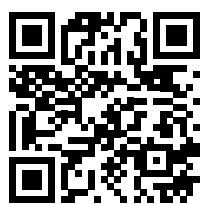
In 2025, the Foundation engaged 20/20 Onsite to bring free eyecare to communities in need. A spring pop-up was held at a Boston Public Library branch where visitors were encouraged to get their eyes screened via 20/20 Onsite's mobile vision clinic. In the fall, the mobile vision clinic and Foundation staff visited a Title I Orlando school to provide comprehensive eye exams for nearly thirty students, fit children for glasses, and refer those in need of additional care to local eyecare providers.

## RESOURCES

The Vision Council's Marketing and Communications department created and refreshed a wide array of marketing and educational materials throughout 2025. The Marketing and Communications newsletter continued to relay timely updates, upcoming events, and exclusive resources that hit members' inboxes at the beginning of each month.

The Foundation's website hosted new free resources for members, eyecare professionals, schoolteachers, and caregivers to utilize via their own marketing or education efforts. Included in these free resources are sample social media calendars, printable marketing materials offered through the VistaPrint Proshop, and toolkits focused on industry topics like back-to-school eye exams, UV safety, and general vision health.

## OPENING YOUR EYES SCHOLARSHIP



The Vision Council Foundation's Opening Your Eyes (OYES) scholarship supports the future industry by providing financial assistance to students in need pursuing an associate degree in ophthalmic dispensing. In 2025, OYES funded program tuition and covered exam fees for graduating students at partner schools across the United States. The scholarship is supported by generous donations from members of industry. This year, fundraising for OYES flourished through a fun, interactive Plinko game at The Vision Council's Executive Summit and Vision Expo East.

Donations can be made to support future opticianry students through the QR code.

## HOW TO GET INVOLVED

To learn more about campaign and event sponsorship opportunities, contact Abigail Crosby, Partnerships and Business Development Manager, at [acrosby@thevisioncouncil.org](mailto:acrosby@thevisioncouncil.org).

The Vision Council periodically reaches out to members to request submissions for consumer media pitches and to gauge interest in participating in media events. For more information and to get involved, contact [media@thevisioncouncil.org](mailto:media@thevisioncouncil.org).

# COMMUNITY BUILDING

## MEMBERSHIP, EVENTS & ENGAGEMENT

The Vision Council welcomed a total of 34 new members in 2025 and provided members with a myriad of opportunities to network and deepen involvement with the organization and the industry. The Vision Council launched the Member Community platform as a new member benefit, offering a virtual place to connect with peers and access resources from The Vision Council. The team also communicated timely and relevant information via member webinars, hosting a total of 14 in 2025. The webinar format allowed The Vision Council's team of experts to convey updates in a more personal setting, with members given the opportunity to ask questions and gain a better understanding of member offerings.

The Vision Council's committees and divisions continued to thrive, with participating members lending time, knowledge, and expertise to support organization goals and future planning. In June 2025, upon John Marvin's retirement, The Vision Council welcomed Kent Iglehart, General Manager of City Optical, as Retail Division Chair. Kent was elected unanimously by his peers. The voting process also began for Technology Division Chair, with a candidate to be selected in early 2026.

### Executive Summit 2025

Nearly 300 industry leaders convened in Santa Barbara, California, for The Vision Council's 2025 Executive Summit in January. The highly anticipated event packed three days with networking, leadership development, and collaborative discussions that set the stage for the upcoming year. Programming highlights included keynotes from speakers Eugene Shatsman; Alison Canavan; Eric O'Neill; Kim Lear; and Brian Beaulieu, who made his final speaking appearance at the Summit before retirement. The Government and Regulatory Affairs team also spoke to the audience about impending tariffs and policy changes, while the inSights Research team unveiled the 2024 Market inSights report, providing a detailed overview and analysis to attendees.





## Annual Business Meeting

The Vision Council's Annual Business Meeting took place in Santa Barbara in conjunction with the Executive Summit. The meeting included an outline of The Vision Council's 2024 achievements and priorities for 2025. The 2025 Board of Directors was approved, with the following officers beginning an initial term: Jamie Rosin (Chair); Jim McGrann (Vice Chair); Scott Shapiro (Immediate Past Chair); and John Lakey (Secretary/Treasurer).

## Lab Leadership Forum & Emerging Optical Leaders Retreat

The Vision Council hosted two springtime events in Addison, Texas, this past year. The annual Lab Leadership Forum offered education geared toward lab members in a setting that encouraged connection building and provided a platform for forward-looking conversations. In conjunction with the two-day forum, The Vision Council also hosted the Emerging Optical Leaders Retreat. Hosted for members of the Emerging Optical Leaders Committee, The Vision Council's professional development initiative for rising stars, the retreat offered leadership workshops, a local optical lab tour, and exclusive networking events.



# FINANCIALS

Financial Information shown represents The Vision Council's 2025 financial status as of March 31, 2026.  
As such, it is preliminary and unaudited.

| PROJECTED 2025 BALANCE SHEET            |                   |
|-----------------------------------------|-------------------|
| Assets                                  |                   |
| Current Assets                          | 5,494,225         |
| Long Term Assets                        |                   |
| Right of Use Asset                      | 1,803,825         |
| Net Fixed Assets                        | 493,334           |
| Investments                             | 12,804,801        |
| <b>Total Assets</b>                     | <b>20,596,185</b> |
|                                         |                   |
| Liabilities                             |                   |
| Short Term                              | 2,734,669         |
| Long Term Lease Liability               | 1,781,073         |
| Net Assets                              |                   |
| Beginning Net Assets                    | 14,538,832        |
| Year-to-Date Net Income                 | <b>1,541,611</b>  |
| <b>Total Net Assets</b>                 | <b>16,080,443</b> |
|                                         |                   |
| <b>Total Liabilities and Net Assets</b> | <b>20,596,185</b> |

| PROJECTED 2025 INCOME STATEMENT   |                  |
|-----------------------------------|------------------|
| Revenues                          |                  |
| Shows                             | 6,159,955        |
| Dues and Fees                     | 2,741,831        |
| Research                          | 490,965          |
| All Other Income                  | 593,326          |
| <b>Total Revenue</b>              | <b>9,986,077</b> |
|                                   |                  |
| Expenses                          |                  |
| Personnel                         | 4,568,308        |
| General & Administration          | 1,669,694        |
| Program                           |                  |
| Marketing & Communications        | 493,105          |
| Shows/Expositions                 | 611,245          |
| Member Services                   | 469,424          |
| Research                          | 577,832          |
| Meetings & Events                 | 791,809          |
| Government Relations              | 341,978          |
| Executive Initiatives             | 152,696          |
|                                   | 3,438,089        |
| One-Time Events                   | 277,198          |
| <b>Total Expenses</b>             | <b>9,953,289</b> |
|                                   |                  |
| <b>Net Income from Operations</b> | <b>32,788</b>    |
| Investment Gains/Losses           | 1,508,823        |
| <b>Total Net Income</b>           | <b>1,541,611</b> |