

Las Vegas Regional Strategic Plan for Health & Wellness Travel

Two-Year Accomplishments Report

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Developed and presented by:



Nevada Governor's Office of
ECONOMIC DEVELOPMENT

Empowering Success

About The Authors



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Since its first classes were held on campus in 1957, UNLV has transformed itself from a small branch college into a thriving urban research institution. Along the way, the urban university has become an indispensable resource in one of the country's fastest-growing and most enterprising cities.

Dr. Stowe Shoemaker (Ph.D., Cornell University) is the Dean of the William F. Harrah College of Hotel Administration and a Lincy Professor at the University of Nevada, Las Vegas, with extensive research and consulting experience in the gaming industry. Dr. Shoemaker has an extensive background in pricing, revenue management, and customer loyalty programs.

Dr. Shoemaker has incorporated his knowledge of hospitality to help health care professionals work on patient satisfaction. He has a joint appointment at MD Anderson Cancer Center in Houston and is currently working with them on other research.



Las Vegas HEALS (Health, Education, Advocacy, and Leadership in Southern Nevada) is a nonprofit entity whose mission is to foster strategic alliances in the health care community, collaborating on workforce issues, and being a proactive force for legislative initiatives to improve access and the delivery of quality healthcare. Las Vegas HEALS was founded in 2002 as the Southern Nevada Medical Industry Coalition. It continues to build relationships amongst all health, wellness, and key community stakeholders to enhance quality outcomes within the industry.

Doug Geinzer is a skilled and successful entrepreneur who was built and sold several businesses throughout his career. Most of his success has been found in the healthcare, technology and employment industries. Today, Doug considers himself more of a social entrepreneur spending a significant amount of his time improving Southern Nevada's health care infrastructure and positioning Las Vegas to become the most globally recognized destination for medical & wellness tourism.



Michael Gordon, Ph.D
Director, Strategic Initiatives and
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Las Vegas Global Economic
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The Las Vegas Global Economic Alliance (LVGEA) brand was established in 2013. The organization's heritage is forged from a rich history of economic development achievements dating back to 1956. Throughout its various iterations, the organization has embodied a mission that whetted diversification and infrastructure planning with the overall goal of facilitating economic growth in Southern Nevada. LVGEA will expand upon its diversification efforts by targeting global opportunities that hold potential to stabilize the region's economic future.

Michael Gordon, Ph.D., came to Las Vegas from Cape Town, South Africa in September 2006 on a Rotary International Ambassadorial scholarship. He received both his LL.B. (Bachelor's degree) and LL.M. (Master's degree) in Private Law from the University of South Africa. During his time as a graduate student at the University of Nevada, Las Vegas, Gordon served three terms as President of the Graduate and Professional Student Association (GPSA) as well as one term as Chair of the Nevada Student Alliance, the overarching student government association for all NSHE student government organizations representing the more than 105,000+ higher education students in Nevada.

As a policy analyst at UNLV he researched and analyzed the academic infrastructure needs of the university while serving on the Faculty Senate, University Policy Committee and the Top Tier Community Engagement subcommittee. He is a graduate of the Leadership Las Vegas Class of 2012 and serves on the boards of The Salvation Army of Southern Nevada as well as the Rotary Club of Las Vegas.

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Vance Farrow
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Vance Farrow is the Industry Specialist for Health Care for the Nevada Governor's Office of Economic Development. He is responsible for supporting the recruitment, retention, and expansion of healthcare professionals and businesses to strengthen the sector's infrastructure within Nevada.

Prior to his position with G.O.E.D., Mr. Farrow served as Chief of the Bureau of Cancer and Chronic Disease with the District of Columbia Department of Health.

As a result of his extraordinary dedication and commitment, Mr. Farrow has been appointed by Nevada Gov. Brian Sandoval to serve as a Commissioner for the Western Interstate Commission for Higher Education, in addition to the Governor's Task Forces addressing Nevada Broadband and Graduate Medical Education.



Cheryl Smith, MA, HMCC
Specialty Markets Manager
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As the official destination marketing organization of Las Vegas, the Las Vegas Convention and Visitors Authority (LVCVA) promotes tourism, conventions, meetings and special events - as well as ongoing advocacy to extend the city's influence as a leader in tourism and hospitality. To drive the tourism engine that powers the Southern Nevada economy, the LVCVA is charged with and committed to building and protecting the Las Vegas brand among its diverse audiences of current and potential visitors.

Cheryl Smith, MA, HMCC is the specialty markets manager for the LVCVA responsible for health and wellness travel development. Through a variety of industry relations activities, sales strategies and strategic opportunities, Smith is responsible for marketing and promoting Las Vegas as a premier health and wellness travel destination. Her 20-year background in the health care industry includes roles as the director of marketing and the system-wide media spokeswoman for HCA Sunrise Health System, the director of public relations for Good Shepherd Hospital, and handling public relations for Good Samaritan Hospital and Advocate Health Care, near Chicago. Smith has marketed numerous medical specialties including neuroscience, neurosurgery, neurology, orthopedic, cardiovascular, oncology, emergency and trauma, diagnostic imaging, ambulatory surgery, ophthalmology, rehabilitation, bariatric, obstetric, pediatric, outpatient and preventative health and wellness services.

She currently serves on the MPI-MD Advisory Board of Meeting Professionals International, the Wellness Travel Advisory Board of the Global Wellness Institute and Las Vegas HEALS. She is also certified in Healthcare Meeting Regulatory Compliance.

Recognizing that this is working and living document, the project partners invite your comments, suggestions and most importantly your participation. Feel free to send those to Doug.Geinzer@LasVegasHEALS.org.

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ZocDoc

In June 2014 the inaugural *Regional Strategic Plan for Health and Wellness Travel* debuted. The plan was developed and written by four authors representing leading organizations within southern Nevada, but it reflected the views and input of more than 100 different organizations engaged in the exploration of this emerging niche industry. Although the document was called a “strategic plan” it was unconventional in that it did not prescribe specific goals, objectives or tactics. Instead, the authors highlighted two core and six specific sector recommendations, which emerged from the collective input of more than 20 focus groups held over four months. The authors believed that presenting recommendations to the community would result in heightened awareness and inspire dialogue around this potential market as an economic development opportunity for the region.

As various organizations in the public and private sectors considered the recommendations, it became evident that a new “movement” was emerging. This movement is best characterized by the idea that in order for health and wellness tourism to flourish in Las Vegas, southern Nevada needed to augment the foundation on which the healthcare sector is built. This augmentation addressed the plan’s two core recommendations of capacity and connections. It subsequently also began to address infrastructure and capacity building, workforce development, patient access and quality of care, innovation and technology, economic development and hospitality in healthcare.

Las Vegas’ travel and tourism industry has a long history of recognizing travel opportunities based on responsible research, deliberate planning, construction, and constant reevaluation of market trends and the assessment of future possibilities. This *Accomplishments Report* highlights the top achievements of a community that is applying this intuitive “know how” to the healthcare industry resulting in the unique development of a responsible and deliberate approach to the development of health and wellness travel for the benefit of the local Las Vegas community as well as its 42 million annual visitors.

Over the past few years, Las Vegas has actively explored the global health and wellness travel market. Health care providers have been recruited from outside of the region and have relocated to Las Vegas, specialties have developed global reputations, and regional facilities for medical training and clinical simulation have been built and are actively utilized. In short, a great deal of thought and energy has been put into developing health and wellness services, and finally, the market is beginning to show early signs of success. This *Two-Year Accomplishments Report* highlights the successes achieved since the original plan debuted and showcases regional efforts to provide a unified vision to guide Las Vegas’ health and wellness travel efforts into the future.

Las Vegas Economic Primer: How did we arrive at this point?

In the mid 2000’s Las Vegas suffered the effects of a national recession. Over the past two decades, no other city in America grew as quickly as Las Vegas. When the recession hit, the region was economically devastated resulting in the one of the highest foreclosure rates, high unemployment, stagnant wage growth for those working, and abandoned commercial development. Southern Nevada’s economy began its rebound between 2010-2012 primarily due to the incremental growth in the city’s travel and tourism sector spurring downstream benefits.

In the Fall of 2010, Brookings Mountain West began planning for a statewide gathering to discuss a statewide recovery. In January, 2011, the University of Nevada Las Vegas (UNLV) hosted an event called “Nevada 2.0” in cooperation with Bookings Mountain West and the Las Vegas Metro Chamber of Commerce, the Secretary of State and the newly elected Governor Brian Sandoval’s economic advisory team. The effort provided Nevada a chance to rethink its economic development approach and chart a new course for future growth and development. In 2011, the Governor’s Office of Economic Development (GOED) was created. One of GOED’s first initiatives was to commission a state-wide economic development study from the Brookings Institution in Washington, DC, Brookings Mountain West at UNLV, and SRI International. By November 2011 the report titled, “Unify, Regionalize, Diversify: An Economic Development Agenda for Nevada” was released. The report categorized Nevada’s core strengths strategically by industry sectors including tourism and health care. The report also designed a new governance structure for “regional development authorities” such as the Las Vegas Global Economic Alliance (LVGEA) in southern Nevada and empowered them to create local economic diversification blueprints around core industry areas ripe for further development.

By July 2013, the LVGEA produced the “Comprehensive Economic Development Strategy” (CEDS) for southern Nevada. The plan focused on local developments in seven key areas including tourism/conventions and health care/life sciences among others. With these two guiding documents completed at both statewide and regional levels, a new approach to economic growth and diversification emerged for Las Vegas including the exploration of synergistic efforts between industry sectors, specifically healthcare and travel/tourism. Simply put, the region began to ask what the potential would be if health care growth were fueled by tourists? By August of 2013 the UNLV Harrah’s Hotel College and Las Vegas HEALS led a community planning effort resulting in the “Regional Strategic Plan for Health and Wellness Travel.” Just a few years ago, the economy of Las Vegas was on life support but all of these efforts combined -- along with the work of the Regional Task Force on Health and Wellness Travel --have helped Las Vegas create a unique, unified vision for its recovery effort and has put the region on track to a more robust and resilient economy.

The Global Market

The medical tourism industry remains relatively unchanged since the original plan was written. It is still a nascent industry globally. It continues to be blurred by poorly developed expectations by providers, governments and patients based on incomplete, misleading or misinterpreted data produced by too many organizations around the world. What began as a few providers offering cheaper or higher quality services across political or economic borders has blossomed into a global industry, complete with trade organizations, certified practitioners, and academic research that is intended to help the industry respond. While growth seems rapid due to optimistic headlines and news media reports, the reality is that few countries have realized the success they expected. This is mostly due to hyped expectations by enterprising organizations and a lack of understanding about consumers of medical travel services by providers. Early analysis estimated medical tourism to be a \$50-60 billion industry annually. However, more recent reports, which have been publically criticized, suggest the industry is expected to grow to \$170 billion in the next decade. The reality is no one really knows exactly how much this industry generates in revenue, nor how many people actually travel for medical care either domestically or internationally. There is no reliable source or body of research to suggest that any of the estimations about medical travel are accurate. What is known about medical travelers is that the majority of people who travel for medical care seem to do so within geographic regions. While some do cross oceanic borders, most travel occurs within regions and continents.

Wellness travel is also nascent in development but much more varied and prevalent throughout the world than medical travel. What's more, wellness travelers are not sick – they are healthy and seeking new modalities to stay well. It is rapidly becoming recognized as a niche travel market ranging in services from traditional spa services to geothermal hot springs, from fitness to yoga, from healthy dining to nutraceuticals, from outdoor adventure experiences to workplace wellness. The most significant body of global research for the wellness industry is compiled by the Global Wellness Institute (GWI). The most recent research estimates the global wellness industry at over \$500 billion annually, based on GWI's 2015 research study by SRI International.

Las Vegas hoteliers operate more than 45 resort-model spas in the destination offering consumers a variety of spa treatments and wellness services that reflect diverse cultures from around the world including Turkish Hammams, Moroccan Rhassoul and a variety of massage therapies such as Shitasu, Lomi Lomi and others. Las Vegas spas attracted more than 2.5 million consumers in 2014, according to the LVCVA's 2015 Visitor Profile Study. Additionally, some medical and dental providers in Las Vegas are building relationships with Las Vegas hoteliers in order to offer their patients the benefit of spa services either pre- or post- procedure (depending upon the nature of the medical/dental procedure).

The travel industry has also recognized wellness travel as a niche market and has developed a Wellness Travel Certification through The Travel Institute for travel professionals. This certification is aimed at educating travel professionals on the difference between medical travel and wellness travel and their respective liabilities and opportunities. It also highlights that many other areas of travel including outdoor and adventure tourism and cultural tourism when combined with spa treatments and other relaxation or mindfulness experiences in a destination can be packaged as a wellness travel experience. Las Vegas will continue to explore synergies between its spa and wellness providers and medical providers. This is a complement to the work being done to develop traditional medical tourism services. This is also the reason why the regional task force prefers to call this effort "Health and Wellness Travel" rather than "medical travel."

Where We Are: The Groundwork Exists

Some say that various levels of medical tourism have been occurring in Las Vegas for decades. Historical research dating back to the early 1900's documents Las Vegas' first physician and hospital, which marked the beginning of the city's medical community. Since that time, medical providers have supported local health needs and also provided medical care to travelers visiting Las Vegas. As the city has grown so, too, has the medical community. Many practitioners today credit the growth of their practices to the domestic and international medical traveler.

In the past ten years, Las Vegas, whether it realized it or not, has laid the groundwork to take advantage of the global health and wellness tourism industry:

- The opening of Terminal 3 at McCarran International Airport has dramatically improved our accessibility to the rest of the world.
- Las Vegas has become one of the most prominent medical meeting destinations, hosting and attracting a significant concentration of health care industry leaders to our region multiple times per year. Our concentration of public and private bio-skills (cadaver, surgical, dental and nurse training) labs has made us a destination for all levels of continuing medical education.

- The Patient Protection and Affordable Care Act (ACA) has put an increased emphasis on prevention and wellness, and our more than 45 world class resort spas, both on and off of the Las Vegas Strip, are well-positioned to capture a fast growing wellness tourism market.
- The ACA has changed the nature of health care industry incentives and put an increased emphasis on patient satisfaction; Las Vegas' hospitality expertise well positions the destination to take advantage of these new incentives.
- The ACA has put a heavy emphasis on electronic medical records, and our high concentration of ultra-secure cloud and data storage facilities has attracted new firms and talent to the region.
- Las Vegas already has dozens of world-class physicians and surgeons who have built their business by attracting the healthiest and wealthiest patients to Las Vegas.
- Las Vegas has raised the bar in specialty health care, attracting world-class centers of excellence and globally recognized brands, like the Cleveland Clinic, Stanford University, and UCLA.
- Las Vegas has identified niche disciplines within the health care industry, such as fertility, plastic surgery, age management, bariatric and orthopedic surgery, diagnostic imaging, and dental, which attract both domestic and international travelers to our destination.
- Las Vegas's medical and wellness industries are more organized and more cooperative than they have been in years past, and our economic development and travel and tourism infrastructures are working like never before to foster a more robust and diverse regional economy.

Right now, our region relies on what is essentially a three-pronged strategy:

1. Attract the wellness traveler through high quality facilities, services, and experiences through innovative sales and marketing campaigns.
2. Attract the medical meeting traveler through the recruitment of high-level medical conferences and high quality bio-skills facilities.
3. Attract the specialty medical traveler through the recruitment of new industry players and the promotion of innovative and cutting edge health care facilities and services.

Although we have made significant progress, the health and wellness tourism market remains slow to develop in Las Vegas. Once the original strategy debuted, the medical community realized it needed to strengthen several foundational elements on which sustainable health and wellness services must be built. Only then, will Las Vegas capture a healthy slice of this niche market. Over the past two years, local industry and economic development partners have come together to address the systemic issues holding the health and wellness tourism economy from realizing its full potential. This report highlights accomplishments and also identifies several new areas of foundational achievement.

The Original Strategy

The strategy was developed after dozens of meetings with medical, wellness and spa, tourism, academic, business and economic development leaders from early 2013 to early 2014. This *Accomplishments Report* documents achievements made between 2014-2016. Led by the four regional partners, Las Vegas Health Education Advocacy and Leadership of Southern Nevada (Las Vegas HEALS), the University of Nevada Las Vegas (UNLV), the Las Vegas Convention and Visitors Authority (LVCVA), and the Las Vegas Global Economic Alliance (LVGEA), the strategy breaks down the medical and wellness tourism sector into its constituent parts and analyzes assets and opportunities in each one of those areas. The Governors Office of Economic Development (GOED) has joined the core team to contribute to this *Accomplishments Report*.

From the onset, the regional partners sought to broaden the definition of medical and wellness tourism. In the past, our region has thought about medical tourism exclusively through the lens of medical procedures. We sought to recruit innovative medical practitioners or well-respected health care providers in the hopes of driving new visitors to our region for high quality medical services. Though that strategy is an important part of the overall plan, a broader definition of medical tourism necessitates a broader strategy.

Our Region's Limitations

Las Vegas is not competing in the same manner that other health and wellness travel destinations in the global market are competing. Instead, we are defining a unique strategy based on the intrinsic assets of our destination. The global medical tourism industry is focused on two primary growth strategies:

- Creating pipelines for patients to obtain low-cost treatments in foreign countries such as Costa Rica and Malaysia.
- Creating pipelines for patients to seek the highest possible quality of care at a premium cost at domestic medical providers like the Texas Medical Center and the Mayo Clinic.

Las Vegas, as innovative as it is, is not going to be able to compete on cost (compared to some foreign countries), and does not have the capacity to see tens of thousands of new patients or offer services on par with the Mayo Clinic or the Texas Medical Center. Though efforts are underway to build some of this infrastructure, we must recognize our current limitations.

In addition, Las Vegas must carefully consider the types of medical capabilities that it wants to attract for health and wellness tourism purposes. Would we want to attract thousands of visitors recovering from major surgery to our hotels in the resort corridor? Would it make more sense for us to focus on elective procedures or non-invasive procedures so that medical and wellness travelers could also take advantage of all of the other amenities that our destination has to offer? These are questions that have been explored by the project partners and are now beginning to be answered by the community-at-large.

Ultimately, Las Vegas has some unique resources and advantages that make us competitive in the health and wellness travel space, but in order to make us competitive globally, we need to focus on two things: capacity and connections.

Core Recommendation #1: Capacity Building

Our region has successfully attracted medical and wellness travelers for more than a decade, but it has been doing so on a small scale. In order to catalyze the market, we need to focus on growing our capacity. Attraction of high quality medical professionals is one piece of this puzzle, but ultimately, our region must grow its own high quality talent to compete in the competitive medical and wellness tourism industry. To that end, our region has proactively addressed the following areas in response to recommendations made by the project partners in the original plan.

- *Support the growth of medical education and research related to health and wellness tourism.*
 - o Medical Schools: The University of Nevada Las Vegas (UNLV) and Roseman University of Health Sciences (RUHS) are presently building two new medical schools in Las Vegas. These schools will complement the work of the two existing medical education centers in our region, Touro University Nevada (TUN) and the University of Nevada School of Medicine (UNSOM). The construction of these schools will help to address the documented shortage of physicians in Las Vegas and is imperative to the growth of the medical and wellness tourism economy. More doctors will not only address the needs of the local population but will also increase Las Vegas' capacity to treat more medical travelers.

Roseman University College of Medicine hosted a site visit of the Liaison Committee on Medical Education (LCME) in February 2016, which was a major step towards accreditation and achieving their target goal of 60 medical students beginning in the summer of 2017. UNLV School of Medicine will host a LCME site visit by end of Summer 2016.

The UNLV School of Medicine "60 by 2016" scholarship drive to cover tuition costs for its entire 2017 charter class was a tremendous success. Wrapping up months ahead of schedule and raising twice as much as originally expected, scholarships will cover 135 full four-year scholarships; 60 for the school's 2017 charter class and 25 for each of the next three entering classes.

- o Graduate Medical Education: Las Vegas expanded the number of graduate medical education (GME) slots in the region. Many of our existing hospitals previously had limited or no GME taking place, so the project partners proposed in the original plan working with the medical community to expand GMEs, not only at our independent hospitals, but also at places like the VA Hospital in North Las Vegas and the Mike O'Callaghan Memorial Hospital on Nellis Air Force Base. Increased GME is critical so that graduating doctors can continue their residency education in Las Vegas. Without more GME positions, most doctors have to look outside Nevada for their continued educational needs and mostly likely never return to practice in our state. Las Vegas HEALS' GME Council explored the expansion of GMEs in Las Vegas by hosting a "Community Conversation" event and ultimately proposed an innovative model for developing interdisciplinary relationships that never existed in our region previously. With the leadership of Las Vegas HEALS and GOED, Las Vegas successfully acquired the necessary federal and private sector funding to expand GME's in Las Vegas making way for more medical school graduates to stay in Las Vegas and practice medicine.

- The Governor’s GME Task Force has submitted recommendations to the Governor following the completion of Phase 1 of the Request for Applications (RFA) process for the expansion of medical residencies throughout Nevada. Awards totaling \$5M were recently disseminated among area medical schools and hospital training sites in order to increase medical resident training in primary care and behavior health fields. A second RFA will be released early Summer 2016 for Phase 2 of the GME expansion process. Phase 2 awards will total an additional \$5M for a complete investment of \$10M in graduate medical education expansion.
 - Clinical Trials and Biomedical Research: UNLV, in partnership with the Cleveland Clinic Lou Ruvo Center for Brain Health, has successfully applied to a number of grants, including GOED for Knowledge Fund dollars and more than \$11 million from the National Institutes of Health (NIH), to fund a new Center of Biomedical Research Excellence (COBRE) in Las Vegas. COBRE will be supported by UNLV’s new Medical School, opening in 2017, and will be modeled after the Center for Biomedical Research Excellence at the University of Nevada, Reno’s School of Medicine. Clinical trials and innovative treatments are at the heart of any good health and wellness tourism strategy. Although still in its nascent phase, there are high hopes for COBRE and its faculty to conduct innovative research in key fields in medicine. The research faculty at COBRE will conduct research in the areas of pharmaceuticals, human infectious disease, and have a particular emphasis on neuroscience and neuropsychology. The new partnership between the University and the Cleveland Clinic, along with collaboration between private and academic partners, will serve as a catalyst for positive change in Las Vegas’ research scene. COBRE will provide a space for students and professional researchers to build their capacity for clinical trials and innovative medical research, which will in turn drive visitation to Las Vegas by biomedical experts, trial participants and their families, and students.
- *Develop a human capital recruitment campaign to build up our capacity of medical tourism practitioners*
- Medical Meeting Recruitment: Las Vegas attracts a significant number of medical meetings and some of the best medical minds to our region every year to attend health care and continuing medical education meetings. Las Vegas HEALS is working with the LVCVA to develop relationships (where possible) with meeting planners interested in exposing their attendees to the potential medical tourism industry and business opportunities in Las Vegas. In exchange, Las Vegas HEALS helps promote local attendance at the meeting/convention and potential new membership for the healthcare association. This relationship also helps create awareness among local healthcare professionals of the numerous continuing medical education opportunities that pass through our city.

Recruitment Based on our State’s High Standards: GOED successfully introduced a bill in the past Nevada Legislative Session that allows for expediting the licensure process for credentialing physicians from other states who wish to practice medicine in the state of Nevada. The new Expedited Licensure process reduces the time from application submission to credentialing to 60 days. Historically the process had taken 6-9 months for approval/denial. Expedited licensure also opens the gateway for Las Vegas providers to develop strategies to attract “top-grade” talent and leverage Nevada’s extensive qualifications to become a licensed physician. Government’s ability to ease the licensure process will attract highly skilled physicians & surgeons and simultaneously allow for recruiting of visiting physician faculty members who can staff our medical schools.

Two bills were passed with unanimous support addressing expedited licensure within sixty days among a number of health professional licensing boards. This legislation (AB89 & SB68) will assist with timely licensure of veterans (and their spouses) and other healthcare professionals in good standing in other states that are looking to relocate to Nevada and help address our shortages of qualified healthcare professionals. Licensing boards under this effort include the Boards of Medical Examiners, Dental, Podiatrists, Nursing, Optometry, Osteopathic Medicine, Audiology and Speech Pathology, Pharmacy, Physical Therapy, Occupational Therapy, Massage Therapists, Psychology, Marriage and Family Therapists and Clinical Professional Counselors, Social Workers, Alcohol, Drug and Gambling Counselors.

- Medical and Wellness Concierge Services: One of the core recommendations focused on Las Vegas' lack of a cadre of professionals critical to the growth of the health and wellness tourism market: the medical tourism concierge. These professionals provide concierge services for patients seeking medical or wellness tourism procedures or services, and have been critical to the success of the industry in other North American regions. Given the fact that Las Vegas attracted more than 42 million visitors in 2015, what Las Vegas also needs instead is a medical concierge that could service visitors already staying in Las Vegas resorts. In early 2016, ResortCiergeMD was created to provide on-site health services by licensed physicians to guests requiring non-life threatening medical care in Las Vegas hotels. ResortCiergeMD's physicians are able to write and fill prescriptions, provide physical exams and well checks, and offer transportation/referral services to guests who need to go to a healthcare facility for more specialized care. Hygeia is one of the healthcare companies that provide support to ResortCiergeMD. Hygeia's primary care facility is one of the first facilities in Las Vegas to offer both internal medicine and pediatric care and offers private and sensitive care to high-level executives in Las Vegas.

These core recommendations to address capacity building will help support the foundation and growth of health and wellness tourism in Las Vegas. While building capacity is a critically important aspect of this plan, just as important are building the connections that will make health and wellness tourism work on a regional scale.

Core Recommendation #2: Connection Building

The global economy is built upon connections, and in order to facilitate the growth of the health and wellness tourism industry, our region must leverage some of its unique connection points and create new ways for the industry to work in Las Vegas. There are many ways in which we can leverage our connection points in Las Vegas, but in the next few years, our region should focus on building three specific programs that could spark growth in the sector:

- *Connect and centralize regional health and wellness tourism marketing and concierge services*
 - Not only do we need to develop a workforce of medical concierges, we also need to develop an integrated regional capacity to market and facilitate our region's health care and wellness amenities. Currently, medical and wellness providers are doing a lot of this on their own, and their efforts do not necessarily take into account all that Las Vegas has to offer. If we create a regional center for medical and wellness marketing and facilitation services, we can offer an innovative and balanced service that few other regions currently offer. Las Vegas HEALS is addressing this connection point with digital solutions by enhancing its website with integrated communications about health care developments and providers in Las Vegas, publishing a weekly eNewsletter (INSIDE MEDCINE Weekly), and launching a weekly video podcast series, interviewing physicians, educators and innovators.

- *Connect the medical and wellness industries through a pilot program with a wellness services provider to offer expanded preventative medical services in their facility*
 - o Las Vegas is unique in that it already has a plethora of high quality spa and wellness facilities throughout the region. These facilities see thousands of clients each day, and they might very well be the best way to capture existing visitors that could be interested in elective, non-invasive, or preventative medical services. Many barriers exist, however, in mixing medical services with wellness spa services, so the regional partners propose a pilot program with one spa that would attempt to work through some of these issues with an eye toward showcasing our region's medical assets to our existing wellness travelers. Dialogue has begun between several medical providers and several resort spas, but at present no pilot program exists. This is a connection point that deserves further attention and exploration.
- *Connect the medical, wellness, tourism, academic, and economic development industries through a government advocacy agenda for medical and wellness tourism in Las Vegas*
 - o Regulatory and legal barriers will no doubt come up as the regional partners work together to catalyze the health and wellness tourism industry. The regional partners recommend that they work together to identify these barriers and advocate for legislative and regulatory changes when needed to facilitate the growth of this industry. This connection point has demonstrated successful results related to GME and Expedited Physician Licensure and should continue collaborative efforts to ensure any future barriers are successfully resolved.

Conclusions

Over the past decade, much has been made of the region's efforts to build its health and wellness industry. Much has also been made about the region's deficits and disparities as it relates to health care in Las Vegas. Health and wellness tourism provides a possible market solution to address some of our regional health care disparities. In just the past two years since the original *Regional Strategic Plan for Health and Wellness Travel* debuted, more has been accomplished to address missing foundational elements that have prevented the healthcare sector's growth and/or inhibited its ability to address fundamental barriers than in the preceding decade.

Our regional health and wellness industries see the potential of health and wellness tourism in Las Vegas, and they recognize that the industry's growth will be constrained by issues related to capacity and access to care. The development of new medical schools, GME, and expedited physician licensure will do much to improve the region's shortage of medical providers in the long-term. However, new realizations have emerged and while the region is still addressing seemingly old barriers, there are new ones quickly emerging. Among them are continued infrastructure and capacity building, workforce development, patient access and quality of care, innovation and technology, economic development and hospitality in healthcare.

If Las Vegas can take steps to address these six emerging areas in addition to simultaneously continuing work on the original recommendations, then the region will be successful in developing a segment of our economy that has a high potential for growth, and we can truly make Las Vegas a global player in the medical and wellness tourism industry. All agree this is a long-term strategy and short-term successes, while helpful, are not an indicator of completion. They are just a beginning.

Licensed medical and clinical professionals, regardless of their specialty, are required to attend continuing education courses in order to maintain their professional licenses. They can do this by completing Continuing Medical Education (CME) credits for medical doctors and Continuing Education Units (CEU's) for nurses and other health professionals. Often CME's and CEU's are offered as part of health and medical education conferences like the hundreds that are held in Las Vegas hotels, convention centers as well as in medical laboratory/bio-skills facilities annually.

Las Vegas hosts meetings better than any other destination city. In 2015, Las Vegas attracted a record in excess of 42 million visitors for business and leisure, according to the Las Vegas Convention and Visitors Authority (LVCVA). As part of its efforts to attract more visitors for business, the LVCVA has turned its sights on becoming a top medical meeting destination.

In addition to traditional hotel and convention meeting space, Las Vegas also offers unique medical laboratory meeting facilities for hands-on bio-skills labs and surgical training; a clinical simulation center; and specialized continuing medical and dental education training. These venues offer everything that scientific medical meeting planners need including dedicated lab managers and lab technicians; complete diagnostic and pathology equipment; surgical lighting; c-arms and endoscopy towers; general instrumentation; autoclaves; high-definition video equipment; auditoriums; on-site catering; and trained staff to assist with the unique needs of bio-skills meetings, including anatomical procurement services.

STRATEGY

Goal: The goal for this strategy is to position Las Vegas as the global destination for continuing (post-degree) medical and health care education, by leveraging the medical meetings that are conducted in Las Vegas and the continuing medical education that is available and accessible within the medical meetings industry.

Lead Agency: LVCVA

Support: Las Vegas HEALS

RECOMMENDATIONS:

- Leverage the existing surgical training centers to expand Las Vegas's presence in the global market.
- Market and promote Las Vegas as a place to go for continuing medical education.
- Develop a comprehensive communication strategy to reach medical societies, academies, colleges, and organizations to bring awareness of the continuing medical education opportunities that are offered in Las Vegas.
- Partner with organizers of medical meetings and conferences to offer access to local medical professionals and practitioners. Negotiate discounted rates "for locals," allowing Las Vegas practitioners access to the largest library of training opportunities and access to innovative training offered at specialty conferences. This also could become a value-added benefit to medical meeting planners.
- Implement a cohesive physician/surgeon/practitioner recruitment campaign that aligns with the targeted conferences.

- Partnering with media to report on the innovative medicine and research that is released at medical meetings in Las Vegas. *Med City News* (Philadelphia) does a good job of this allowing them to position the region as the hub for Pharma, DME, and Health IT.
- Creating a “Speaker’s Bureau” of world-class physicians who reside in Las Vegas and market this to the incoming medical meetings and continuing education clientele. This can be achieved by identifying and developing a speaker’s bureau list of local experts and providing it to the LVCVA.
- Marketing our bio-skills/cadaver training centers to medical practitioners from countries that do not provide this level of post-degree training.
- Developing a database of where all Las Vegas physicians were trained and develop alumni networks in order to showcase pedigree, develop credibility, and generate new meeting leads.
- Growing medical and hospitality research opportunities.
- Developing an Educational Consortium to share resources and attract nationally “renowned” organizations to establish a presence in Las Vegas.
- Promoting Las Vegas as a premier destination with the amenities such as our concentration of surgical, medical, dental, and nursing training labs required for those travelers seeking to enhance their medical education.
- Expand Las Vegas’ medical and wellness community services designed for the medical and business executive traveler, as well as the leisure traveler, and their guests. These services could include executive physicals and preventative health screenings, dental treatments and corporate wellness services.
- The destination boasts more than 45 of the finest spas and thousands of treatments for relaxing experiences after the conference or meeting, or for spouse programs. Some of these spas may also be available to offer on-site services at meetings to enhance the attendees’ experience.

ACCOMPLISHMENTS:

1. Las Vegas HEALS began listing all healthcare events (local and visiting) on its website and publishing a newsletter that lists upcoming medical meetings that match our goals.
2. Strategically aligned with several medical meetings including The American Academy of Anti-Aging Medicine, the Institute for Healthcare Consumerism, MD Expo, OR Today, and the Society for Laproscopic Surgeons.
3. LVCVA has opened communications with medical meetings that meet our needs and priorities: Self-insured conferences, Mental Health conferences.
4. Oquendo Center – Introduce the center to local professionals, which has led to expanded training and attraction of new conferences, including the training of over 7,000 surgeons over the past two years. A recent \$8 million expansion to the surgical training center is underway.
5. UNLV hosted the first “Hospitality in Healthcare Conference” in 2015 and is scheduled to host the second conference on November 14, 2016.
6. Expanded GME - \$10 Million
7. UNLV School of Medicine fully funded
8. Roseman University – New building acquisition and LCME Application
9. Touro University – Recipient of new Kosher Kitchen by the Consumer Technology Association
10. New conference relationships were made with Culinary Medicine, Cardio Metabolic Institute, OR Today and others
11. LVCVA hosted a small roundtable event in Washington, DC with Las Vegas HEALS and a select few medical meeting organizers to create awareness.

12. Las Vegas HEALS Legislative Task Force worked to pass the Expedited Licensure Bill in the Nevada Legislature
13. MGM Grand expanded its Stay Well concept beyond guest rooms to its meeting space and introduce Stay Well Meetings
14. Created a UNLV Healthcare Administration – Executive Masters (MHA) degree. Targeting healthcare professionals who have been in the field 5+ years with an online degree program. Students are required to come to Las Vegas two weeks per year for in-person education.
15. Hosted the National Council for Behavioral Health (NATCON) 2016 Conference at Caesar’s Palace. This was the nation’s premier conference for topics in medicine, health care, psychiatry, mental health, and behavioral medicine. A southern Nevada panel hosted a session on, “101 Reasons Why Nevada is a Great Place to Work and Live”
16. GOED led a Nevada delegation to the 2015 BIO International Conference in Philadelphia, PA. GOED, UNLV and the City of Henderson hosted forty-one partnering meetings with representatives from several companies/institutions ranging from pharmaceutical, biotechnical, medical device, and university technology transfer. The primary objectives for GOED attending these meetings were to promote technology transfer and economic development capabilities with key licensing, research and commercialization organizations, and, (ii) to promote Nevada as a growing region of healthcare innovation.

OPPORTUNITIES:

1. Explore worker’s compensation conferences and events for the self-insured marketplace taking place in Las Vegas for opportunities.
2. Explore possibility of building/creating a “demonstration hospital” to help fuel the creation of a “Medical Mart” concept that could support medical association and corporate meetings
3. Brainstorm ways to become a national and international hub for “Hospitality in Healthcare”. How could this be integrated into a medical meeting strategy?
4. Work with private educational institutions providing nursing and allied health education to bring hospitality into the curriculum to improve upon service deliver levels in healthcare organizations.
5. Develop a “carve-out” on-line program for certificate-level training for front-line healthcare staff. Students would be required to come to Las Vegas to be awarded the certificate and for the final leg of training.
6. Explore relationships with national healthcare associations, societies, etc. to build specialty-based MHA programs.
7. Explore the possibilities of brining national known clinics and providers to Las Vegas not so much to treat patients, but to leverage upon their experience and deliver training to others.
8. GOED will be leading additional Nevada delegations to the 2016 BIO International Conference in San Francisco, CA in June 2016 as well as the 2017 BIO International Conference in San Diego, CA.

MEDICAL TOURISM

Medical travel is spawned by a growing number of educated and empowered people searching for health and wellness quality, affordability, availability and accessibility to services that may or may not be offered near their place of residence. According to Patients Beyond Borders, an international source of consumer information about health and medical travel, in 2016 more than 1,400,000 Americans will travel overseas for medical and surgical treatment. Currently, it is estimated that more than 30 countries on four continents market their medical services to the international health traveler. Worldwide, Patients Beyond Borders estimates that more than eight million patients visit international hospitals and clinics annually in countries other than their own.

As more medical providers in Las Vegas become aware of the concept of health and wellness travel, we recognize the need to create professional education programs to create awareness and understanding of the needs of medical travelers for physicians and hospitals. While these medical providers are accustomed to treating medical conditions, they may not be fully aware of the unique needs of medical travelers (both domestic and international) such as providing language translation services and assisting in the coordination of the patient's entire travel experience.

Initial research discovered that several Las Vegas medical providers are (and have been) engaged in promoting their services to travelers.

STRATEGY

Goal: To create awareness and introduce Las Vegas as a medical tourism destination with the intention of positioning Las Vegas as the premier medical tourism destination in the United States and the world by 2020.

Lead Agency: Las Vegas HEALS

Support: UNLV, LVCVA, LVGEA

Recommendations:

- Create the "middleman". The city offers medical and wellness providers, but lacks coordination of these services with hotels, spas, attractions and entertainment. Developing an organization or facility to assist in connecting patients with providers and working with Medical Facilitators and travel agents who book wellness travel in assisting the patient/client with their complete travel experience coordination while in Las Vegas.
- Partner with Medical Facilitators and travel agents (who book wellness travel) to be included in their list of preferred providers.
- Market to the potential medical traveler through medical tourism marketing education seminars, programs, and on-line information.
- Capitalize on Las Vegas' brand image and advertising as a destination that respects and protects individual privacy and adult freedom of choice.

- Develop Las Vegas as a destination for preventative health services and potentially combining medical screenings and spa wellness services. This could be an area targeted for further research and development. Specifically, diagnostic imaging, executive physicals, age management services, alternative medicine, and corporate wellness.
- Develop Las Vegas as a destination for recovery and recuperation. Regardless of where medical travelers go for their medical/surgical care, Las Vegas has an opportunity to become a “through put” connection either on the front-end or back-end of a medical tourist’s travel experience. This stopover could be a good opportunity for follow-up care and/or for a spa/wellness experience.
- Develop Las Vegas as a destination for minimally invasive procedures including bariatric surgery, orthopedics, spine surgery, and cosmetic/plastic surgery.
- Develop Las Vegas as a regional Center of Excellence for specialty services such as fertility and dental services.
- Create consistent messaging for all health and wellness providers to utilize.
- Facilitate contracting relationships with self-insured employers and third-party insurance payers interested in adding medical or wellness travel services to their employee benefits programs.
- Develop “bundled” package prices to make it easier for the employer and their employees to understand and accept the idea of traveling outside of their home area for medical care.
- Explore Las Vegas as a destination for corporate wellness experiences for the business traveler.
- Market Las Vegas to both domestic and international medical and wellness travel consumers.

ACCOMPLISHMENTS:

1. Successful partnerships were developed between some medical providers and hotels resulting in special “hotel packages” and hotel accommodations for medical travelers.
2. Las Vegas HEALS attended the Medical Tourism Association’s Annual Conference representing the destination in Washington, D.C.
3. Las Vegas HEALS established a “destination” booth at the Institute of Healthcare Consumerism’s annual conference in Las Vegas. This is a conference for the self-Insured marketplace interested in medical tourism direct contracting. The destination a conducted Medical Tourism Familiarization Tour during IHC Conference
4. Identified multiple providers that have entered into Medical Tourism and engaged them in Las Vegas HEALS
5. Hosted a Lunch & Learn featuring nationally recognized experts in Third Party Administration(TPAs), domestic medical tourism and direct contracting.)
6. Began research and exploration of bundling rates and how they apply to Medical Tourism.
7. Attended “Destination Health – A Canadian Medical Tourism Show”. Exhibited as a destination.
8. Opening up several new outpatient surgery centers in the region.
9. Remodeling of existing surgery centers including Parkway Surgery Center in Green Valley, the Parkway Medical Office Building and the new Bonati Spine Institute.
10. Progress was made on new medical developments including the Las Vegas Medical District, Union Village, Henderson Healthcare Corridor, and the Summerlin healthcare district. These efforts clearly identify four main medical zones within the region, which are now exploring how medical tourism can fit into their models.
11. New Dignity St. Rose Siena tower opened with an expanded emergency department and six new surgical suites. This expansion further increases hospital capacity for more patients.

12. Kindred Hospital recently opened a new post-acute care hospital in Spring Valley with extensive rehabilitation services and skilled nursing capabilities.
13. Spring Valley Hospital continued constructions of a new expanded patient tower, which will increase capacity specifically in orthopedics and spine.
14. New high-tech surgical equipment was introduced into the marketplace by local hospitals, including the DiVinci Surgical Robot at University Medical Center and Sunrise hospitals.
15. Steinberg Diagnostic Medical Imaging opened a new facility in the Las Vegas Medical District
16. Roseman University acquired the Nevada Cancer Institute assets in Summerlin so it can develop a medical school and expand health care education programs.
17. The new Henderson Hospital will open in October 2016, closely integrated with Union Village and able to support medical tourism as Union Village is the first fully integrated healthcare campus.
18. Las Vegas HEALS hosted a “Reimbursements Conversation” which included a key staff member from the Senate Finance Committee who authored much of the MACRA language and educated attendees on the shift to bundled payment models including the recently implemented CCJR.

OPPORTUNITIES:

1. Publishing of a Medical Tourism Directory online to assist potential medical travelers with identifying Las Vegas providers.
2. Create educational programs for physicians and physician office staff and hospital providers on how to accommodate the medical traveler. Medical travelers have different needs than local patients and services must be available and designed for the traveler in mind.
3. Expand Hospitality in Healthcare through additional conferences and other educational opportunities to share best practices from the hospitality industry with healthcare providers in order to improve the patient experience and eventually reimbursement rates, which are increasingly dependent upon patient service ratings.
4. Continue research and exploration of bundling rates and how they apply to medical tourism and how it may impact traditional reimbursement.
5. Can we establish a Dialysis Center in a hotel? This is a topic to explore with the local hospitality industry. Las Vegas has multiple centers ‘close’ to the Strip, but none on-site to cater to the patient looking to travel.
6. The new Henderson Hospital presents future opportunities for medical tourism given its proximity to Union Village
7. Development of a comprehensive medical evaluation executive physical program presents opportunities to combine business travel with medical and/or dental tourism.
8. Cancer/Oncology is the #1 reason for worldwide medical travel. More emphasis should be spent exploring this.
19. Further expansion and relationship development between medical providers and hotels to accommodate medical travelers.

SPA AND WELLNESS TOURISM

In 2013, the Stanford Research Institute (SRI) estimated that the wellness industry segment represented a market of more than \$2 trillion dollars worldwide. The most recent research estimates the global wellness market is a \$3.4 trillion market. There are several types of spas each having distinct business models (Las Vegas hotels are considered resort-model spas) all of which contribute to the growth of the spa industry. The majority of these spas provide services including massage, facial, hydrotherapy, fitness, and nutrition. These services contribute to the proactive wellness industry, which encourages rest, relaxation, and rejuvenation. They also contribute to the prevention of illnesses, health maintenance, age management, and enhanced feelings of well-being and overall mindfulness.

Las Vegas is well-positioned to be a leisure and corporate wellness destination. The city boasts more than 45 Resort Spas, that's more per capita than any other destination, with a capacity to see thousands of spa guests per day across the destination. Las Vegas is home to several Forbes five-star spas, which include Encore, Wynn Las Vegas; Four Seasons, and Mandarin Oriental spas. There are also Forbes four-star spas, including Canyon Ranch Spa Club, Bellagio, Spa Mio at M Resort, the Spa Salon at Aria, the Spa at Trump International Hotel, ESPA at Vdara and Sahra & Hammam at the Cosmopolitan.

Las Vegas resort spas have indicated that the spa industry definition of wellness is inclusive of mind, body and soul experiences. Often wellness includes activities not traditionally offered in a spa environment. Some of these wellness activities include hiking, biking, or participating in marathons. With that said, it is important to note that wellness is defined as any activity that contributes to the overall improvement of one's well-being. One person's definition of wellness may be dramatically different than another's. While spa treatments are considered wellness, many also consider outdoor soft adventure experiences, cultural activities, and adrenaline-boosting activities to also fit the wellness definition. Our destination offers an abundance of outdoor activities that can easily be added or packaged with existing wellness spa services. There is an opportunity for Las Vegas to explore the wellness traveler's needs and expectations and then further define how Las Vegas can appeal to the growing demand for wellness travel experiences.

Las Vegas is also a leader in the concept of healthy hotels / healthy hospitality. MGM introduced the Stay Well Room including in-room wellness amenities and technologies. Trump International offers Trump Wellness throughout the hotel. Westin Lake Las Vegas offers the "Westin Workout" and a new Adventure Boutique where guests can rent bicycles, hiking gear and paddle boards. M Resort now offers M Experience Rooms offering aromatherapy and other wellness amenities for guests. And Hilton Grand Vacations now offers a special "Medical and Wellness Travel" discount.

Wellness travel is taking hold worldwide as the world's population ages and is living longer than previous generations. More and more people are discovering the benefits of traveling for a wellness experience. In fact, the Global Coalition on Aging issued a 2013 report citing the benefits of travel to healthy aging. This concept should be explored for further opportunity and market development, especially since Las Vegas offers numerous facilities, activities, attractions, spas and resort hotels that are already positioned to meet the needs of this market.

STRATEGY

Goal: The goal of this strategy is to attract more visitors to Las Vegas to participate in health and wellness services and activities, specifically spa and wellness services and outdoor recreational activities.

Lead Agency: LVCVA

Support: Las Vegas Hotel Spas, Las Vegas HEALS, Cultural Tourism & Outdoor Community

RECOMMENDATIONS:

Reactive Wellness Opportunities:

- Partnering with the medical industry to encourage and conduct evidence-based research, and explore ways for individual spas to support specific research studies. This research could include consumer preference research, treatment efficacy research, and/or guest satisfaction research.
- Partnering with the wellness tourism industry to offer non-invasive spa services for medical tourists in the pre-op, post-op, and recovery phases.
- Creating integrated spa, beauty, and wellness packages for medical patients and their companions.
- Encouraging spas to partner with conventional medical establishments to deliver complementary and integrated wellness services to medical patients (such as massage, facial, hydrotherapy, etc.).
- Encouraging spas to develop specialized treatment packages tailored for specific patient profiles (such as cancer, diabetes patients, etc.) or package beauty and confidence-enhancing spa, salon or grooming services/products for patients with pre-existing medical conditions to boost their mood, self-image, and positivity.

Proactive Wellness Opportunities:

- Repackaging existing offerings and developing new offerings to define and market spas as a wellness necessity, especially by drawing upon traditional/culturally-based healing therapies.
- Educating consumers on the therapeutic benefits of these treatments and placing greater emphasis on partnering services with products that have therapeutic value, that promote healthy aging and self-image, and that can help a guest continue to look good and feel well after leaving the spa.
- Creating incentives to merge corporate wellness initiatives with meetings and conferences held in Las Vegas.
- Bring awareness of the Spa & Wellness Industry and their offerings to meeting planners, medical facilitators and travel professionals.
- Taking the spa out of its usual niche and bringing spa services into new physical locations.
- Making spa and wellness services accessible to different consumer segments and developing specialized services that target specific consumer markets such as baby boomers.
- Providing continuity of care to customers by building long-term relationships through wellness membership programs or wellness/life coaching services. Perhaps this could be combined with hotel guest loyalty programs.
- Incorporating outdoor spaces, National Parks, State Parks, County recreation facilities, and attractions in wellness packages.

Corporate Wellness Opportunities:

- Delivering executive health services, such as executive health assessments or executive retreats, and package wellness services and lifestyle counseling with these programs.
- Marketing Las Vegas spas as an extension of corporate wellness programs.
- Developing corporate membership wellness programs.
- Defining and packaging executive wellness services to market to the executive business traveler and convention delegates who visit Las Vegas annually for business.

Opportunities Relating to Social Trends:

- Offering a robust selection of services for men, as the market for men's beauty has increased 18 percent since 2006.
- Target marketing age management services to Baby Boomers interested in maintaining personal well-being and appearance.
- Marketing "green" initiatives and organic or vegan spa products and services to GenX, Y, and Millennials seeking products and services that have an element of perceived social responsibility.

ACCOMPLISHMENTS:

1. Strengthened communications with Spa Industry and identification of leading entities.
2. In 2014, 2.5 million visitors experienced a Las Vegas resort spa.
3. Conversations around future partnership opportunities were conducted with Canyon Ranch Spa Club, the largest resort-spa in Las Vegas that's based on a medical model.
4. Identified those hotels that have Spa and Wellness packages.
5. Some hotels have self-identified and developed Medical Tourism Packages including: Hilton Grand Vacation Club, and Hilton Lake Las Vegas.
6. MGM Grand expanded the number of Stay Well Suites and also expanded the Stay Well concept into their meeting space by introducing "Stay Well Meetings."
7. Restaurants offering vegan and vegetarian menus were identified by the LVCVA and added to LasVegas.com.
8. LVCVA engaged in further communications with travel agents and travel professional associations to help understand the difference between medical tourism and wellness tourism.

OPPORTUNITIES:

1. Expand dialog with hotels and resort spas interested in medical and wellness travelers. Make introductions between medical providers and hotel personnel to move relationships forward.
2. Research outdoor assets and experiential opportunities that can be integrated into "wellness packages" for travel professionals.
3. Explore how local medical and wellness providers can participate in Las Vegas marathons, 5K Runs, etc.
4. Expansion of vegan and vegetarian restaurant listings.
5. Expand relationship and partnership with Delos Living and their Stay Well developments in Las Vegas.

There are two professions assisting the movement of guests to a destination for medical and wellness services: The Wellness Travel Agent focuses on booking wellness travel experiences for their guests and the Medical Facilitator focuses on medical travel for their clients. The travel agent's role is clear; they book travel and accommodations but with a focus on wellness experiences, spas and destinations that offer their clients activities to improve overall well-being. Sometimes they work in cooperation with medical facilitators assisting with the coordination of travel services only.

Medical Facilitators take on the responsibility of connecting their client with a doctor and hospital who will perform a surgical procedure. Medical facilitators are often not physicians or other medical professionals but do have established relationships with in-country treatment centers, hospitals and clinics. They generally do not provide medical advice, or make specific recommendations of medical or wellness providers. However, most do provide a list of preferred hospitals, clinics, physicians and surgeons that they have personally researched. They also provide lists of choices based on a patient's specific needs and requirements. Additional benefits of a medical facilitator include pre-negotiated and discounted rates with medical providers, referrals to travel arrangements and accommodations, and tour companies for destination sightseeing. This is an emerging business role, and Las Vegas may have the opportunity to influence its development.

The main function of the medical facilitator, however, is to assist the patient with communications between parties working through language barriers, time zones between destinations, technology differences as well as religious and cultural barriers. Medical facilitators can also assist in the convenient transfer of medical records and information internationally including documents and electronic medical records. These are typically not responsibilities of a travel agent. Most medical facilitators are compensated for their services by the foreign medical provider and/or their client.

STRATEGY

Goal: Identify the role of wellness travel agent and medical facilitators and further identify resources for finding them and introducing Las Vegas in their list of client offerings.

Lead Agency: LVCVA, Las Vegas HEALS

Support: Medical Facilitators and Existing Travel Partners

Recommendations:

- Develop a Medical Services Directory including a comprehensive inventory of existing health care companies and medical and wellness tourism services in Las Vegas.
- A comprehensive inventory of wellness travel agents and medical facilitators should be developed for Las Vegas health and wellness providers
- Partner with or recruit an aggressive, competent and ethical medical concierge service.

- Develop a regional (and central) website portal for medical facilitators, wellness travel agents and individual travelers. Create a sub-domain or set of webpages specific to medical tourism. This could utilize the technology of LasVegas.com to bundle the package.
- This area could become an education opportunity for UNLV to fuse hospitality and health care together and offer new professional training opportunities.
- Medical providers could consider reaching out to medical facilitators to build relationships and become part of their established referral networks.
- The region could consider the development of a regional international patient center with shared resources such as translators, transportation, currency exchange, etc.
- The area could attract and/or develop a global call center to facilitate the patient traffic/flow that results from these initiatives.
- Education of local Destination Management Companies (DMCs).
- Provide continuing education opportunities to existing travel agents and medical facilitators to introduce them to the opportunities of facilitating medical and wellness travel to Las Vegas.

ACCOMPLISHMENTS:

1. LVCVA Supported The Travel Institute's "Wellness Certification Course" for travel agents
2. Integrated wellness services and experiences into newsletter updates for travel agents in the LVCVA database.
3. Hosted travel agents for familiarization tours.
4. Review of survey results from travel agents across US and identification of 2,500 agents booking spa and wellness travel revealed specific areas for concentration.

OPPORTUNITIES:

1. Continue to work with The Travel Institute to support and update travel agent education
2. Continue to integrate wellness services and experiences into LVCVA newsletters for travel agents.
3. Host travel agents for familiarization tours.
4. LVCVA - Update travel agent collateral
5. LVCVA to explore integration of wellness into other travel markets including executive business travel, leisure luxury travel, LGBT travel, cultural tourism and wedding and romance travel.

Health and wellness travelers in search of alternative treatment or preventative health care options are willing to explore the world in order to find their preferred services at a lower cost and/or sometimes higher quality than what they can buy at home. It has become increasingly imperative for medical practitioners to easily and clearly communicate the price of their services to medical travelers. The concept of “bundling” the cost of medical procedures and the experience of travel, hotel accommodations, attractions, and sometimes entertainment is becoming the norm for this emerging industry.

Bundling of medical services into a total “episode of care or experience” helps consumers clearly understand what they will receive and how much it will cost them in total so they can budget and plan accordingly. It also allows them to compare destinations and shop for providers. Whether or not the travel arrangements are included in the bundle is secondary (and potentially unnecessary) to the consumer’s primary need to first understand what the cost of the treatment will be for them. Travel arrangements can be packaged separately and purchased separately once the consumer has made their medical treatment arrangement with a hospital or doctor.

The tourism industry has mastered bundled packages for business and leisure travelers: hotel accommodations, airport transfers, transportation, concierge services, entertainment and attractions, etc. It is assumed that bundling will make the marketing and promotion of medical travel services in Las Vegas easier for consumers and travel agents, wellness travel agents, medical facilitators and self-insured employers to understand and promote Las Vegas services to their clients.

STRATEGY

Goal: To explore if bundling and package pricing of health and wellness services is important; what can and cannot be bundled; the limitations on bundling; how to package price medical services; and the desire of the consumer to these services bundled.

Lead Agency: Las Vegas HEALS & LVCVA

Support: UNLV

RECOMMENDATIONS

- Further research the Oklahoma City Surgery Center and conduct external SWOT analysis.
- Research bundling/package pricing from countries such as Costa Rica, Thailand, India and Malaysia to extract best practices.
- Work with the hospitality/travel industry to share existing and proven best practices.
- Inventory existing surgery centers to assess and accommodate medical traveler capacity.
- Need for additional research to understand the best methods for package pricing medical travel services for cash-paying medical travelers.
- Need to research the needs of medical facilitators to better understand exactly what the expectations are of bundled services.
- The Las Vegas hotel sector may be able to share some best practices with Las Vegas hospitals and medical practitioners on how hotels manage revenue and growth across fluctuating variables and package multiple services with success.
- Explore the possibility of holding an educational program or seminar conducted by a medical tourism expert for Las Vegas medical providers to address the specific details of how to bundle and package price their services.

ACCOMPLISHMENTS:

1. Hosted a lunch and learn program for medical providers with nationally recognized experts in the area of Third Party Payer/Consultant viewpoint with experience in direct contracting for Wal-mart, Lowes, and JetBlue, among others.
2. Exploration of Dr. Mike Crovetti's "all inclusive" model and ability to scale (best practice)
3. Bariatric surgery bundling: ASC, Hospitals (Desert Springs, Blossom Bariatrics)
4. Expanded conversations with executive from the Institute of Healthcare Consumerism to better understand the needs of the self-insured market.
5. Began research to better understand how international providers/destinations are bundling services.
6. Engaged the author of the recent MACRA legislation to better understand bundled payment models, episode of care reimbursements and analyze the CCJR (Joint Replacement) model that CMS deployed April 1, 2016.

OPPORTUNITY: Packaging and Bundling of Services

1. Expansion of Medical Travel Concierge Services to Las Vegas hotels.
2. Need to further understand the risk tolerance of providers and the barriers to creating bundled packages.
3. Need to explore best practices for pricing structures within hospitals. This might be accomplished by attendance at conferences focused on packaging and bundled pricing.

When a patient is given a serious diagnosis, and existing treatments for their condition are either not available in their home area, or are seen as inadequate for their desired outcome, the patient will look elsewhere for treatments. Thus, medical tourism goes hand-in-hand with clinical trials, as patients will be drawn to visit destinations with the resources to help their situation. For this reason, large and famous medical providers, such as the Texas Medical Center and the Mayo Clinic, often trumpet their involvement in a large range of clinical trials.

An opportunity exists to harness our existing tourism industry to bring more clinical research to Southern Nevada. Much emerging clinical research, especially as it relates to prevention treatment, relies on large amounts of quantitative bioinformatics data. The large ingress and egress of tourists to Southern Nevada provides an opportunity to gather data on a broad swath, not just of the American population, but of the global population. In addition, an opportunity exists to develop capacity for clinical trial design and development through UNLV and clinical trial providers and big data firms in the community. Finally, there is an opportunity to catalyze on the successes of clinical trials taking place in Southern Nevada through the broad range of medical meetings that take place in Las Vegas.

Perhaps the biggest opportunity to grow clinical trials in Southern Nevada is the advent of two new allopathic medical schools, one in Henderson and Summerlin at Roseman University of Health Sciences, and the other at UNLV. Indeed, while the nature of clinical trials is changing all over the world, many trials are still linked to academic medical institutions. The two new schools, complementing the existing services of Touro University Nevada and the University of Nevada School of Medicine, will have a catalytic effect on the quality and level of treatments in Southern Nevada.

Though anecdotal evidence suggests that there is already a broad range of clinical trials conducted in Southern Nevada, there is no centralized infrastructure that organizes this type of information. Several medical institutions, such as the Cleveland Clinic Lou Ruvo Center for Brain Health and Comprehensive Cancer Centers of Nevada are already participating in a broad range of clinical trials. The Cleveland Clinic, for example, recently announced that they would be participating in a large and ambitious trial related Alzheimer's prevention. In addition, Comprehensive Cancer Centers of Nevada participates in approximately 170 clinical trials each year and has played a key role in developing and testing 44 of the 49 FDA approved cancer therapies. The Cleveland Clinic Lou Ruvo Center for Brain Health, in a joint effort with UNLV, was recently awarded the title of Center of Biomedical Research Excellence (COBRE), which comes with \$11.1 million, 5-year grant from the National Institute of Health and the National Institute of General Medical Sciences. COBRE's faculty will conduct innovative research on Parkinson's and Alzheimer's disease and will potentially conduct research on other life-threatening diseases. Several other research labs, including the UNLV's Nevada Institute of Personalized Medicine (NIPM), have applied for the COBRE grant, but the proposals are still under review. NIPM is developing a research infrastructure that will provide education, workforce training, technology commercialization, and personalized solutions for individual and community health. NIPM is on the cutting edge of genome mapping research in Nevada to create personalized diagnosis and treatment programs. Soon, the UNLV School of Medicine will have a research division of its own to continue building a centralized infrastructure for clinical research in Southern Nevada. COBRE labs and NIPM provide a space for students and professional researchers alike to build their capacity for clinical trials and innovative medical research, which will in turn drive visitation to Las Vegas by biomedical experts, trial participants and their families, and students.

STRATEGY

Goal: To position Southern Nevada as a global destination for clinical trial research and to grow the existing clinical trial industry in the region with an eye toward driving medical tourism through innovative and emerging treatments.

Lead Agency: UNLV; All Medical Schools

Support: LVGEA, GOED

RECOMMENDATIONS:

- Identify those organizations currently conducting clinical trials
- Work with local Universities to develop new programs and curriculum that would support the growth of Clinical Trials
- More efficient statistical testing and simulation procedures have been proposed to improve the success rate of clinical studies. These methods, however, are computationally intensive and require high performance computers. Fortunately for Southern Nevada, we already have a great deal of capacity when it comes to high performance computing. The University could use resources like the National Supercomputer Center for Energy and the Environment at UNLV, Switch SUPERNAP, the world's largest private data center, and the recently approved DRI Applied Innovation Center for Advanced Analytics, to assist in these efforts.
- The role of data and information in the health care sector has increasingly been highlighted as a way to improve health services and health outcomes. The Affordable Care Act has led to a myriad of changes that will affect the health care delivery system, and new reimbursement mechanisms from CMS are making data central to the way that the health care industry operates. UNLV is already working with organizations such as Sunrise Health and Health Care Partners on assessing health care delivery and outcomes, and these efforts will grow with the advent of the new center.
- Expand Clinical Trials and the research and education that accompany those trials.
- Develop a database of clinical trials available (including contact information) for the use of consumers/travelers.
- Leverage current investigators as speakers at conferences coming to the Las Vegas Speakers Bureau.
- Support the growth and success of the newly formed "Quantitative Health Sciences Department" of UNLV.

ACCOMPLISHMENTS:

1. UNLV launched the Institute of Personalized Medicine. The institute has access to a super computer that provides computational and statistical support to research and clinical trials on the development of more specific treatment of chronic diseases.
2. UNLV, in collaboration with the Cleveland Clinic Lou Ruvo Center for Brain Health, launched the Center for Biomedical Research Excellence (COBRE)
3. UNLV hires internationally renowned radiation oncologist, Dr. Parvesh Kumar, to oversee clinical research efforts in the UNLV School of Medicine Cancer Program.
4. Expansion of Switch Communications and medical records storage for previous clinical trial data.
5. Expansion of Comprehensive Cancer Centers of Nevada Clinical Trials
6. Cleveland Clinic - Lou Ruvo Center for Brain Health expanded new trials and also launched the new Retired Athletes Clinic and research study focused on the impact of repetitive brain trauma on long-term brain health.

7. The launch of the “Healthy Brains” initiative – a partnership between Cleveland Clinic and Caesars Foundation was a big step to align hospitality & healthcare.
8. Lazarex Cancer Foundation, now based in Las Vegas, is committed to connecting Nevadans to clinical trials that otherwise would not have access to them. They provide financial assistance to defray costs associated with patient participation in FDA clinical trials. Additionally, they help patients navigate their clinical trial options and provide community education and outreach services.
9. Aurora National Pathology – Will be contracted with Medical Schools and building out a national library and tumor bank. This effort is attracting national pharmaceutical companies to Las Vegas for clinical drug trials.

OPPORTUNITY: Clinical Trials

1. Continue to explore and expand clinical research opportunities. This will enhance Las Vegas’ medical quality reputation.
2. Continue to identify providers engaged in clinical research studies.
3. Continue to enhance relationships between Las Vega HEALS and clinical research providers to promote the benefits of medical research taking place in Las Vegas.
4. Enhance media awareness of the clinical studies taking place in Las Vegas to create awareness.

As the authors collected the achievements featured in this report, there were several new areas of accomplishment that were also identified by contributors. These new areas were not included in the original strategic plan but are nonetheless noteworthy and so they are included in this report. Further development of these areas should be a primary focus moving forward.

INFRASTRUCTURE BUILDING:

As implementation of the strategic plan progressed, several providers discovered gaps in infrastructure that needed to be addressed to successfully execute upon the *Regional Strategic Plan for Health and Wellness Tourism*. A considerable amount of time and effort was put forth to these areas:

1. Las Vegas HEALS' organizational development and growth as a professional association. This included expansion of medical networking mixers, a new office location, addition of a video studio, and INSIDE MEDICINE online newsletter for promotion of health care achievements.
2. Las Vegas HEALS' video production and development of new web technology resulting in a weekly podcast and greater online presence of Las Vegas healthcare developments.
3. Advancement of Las Vegas Medical District Master Plan
4. Nevada Medical Center feasibility study was completed
5. Henderson Healthcare Corridor (Broadening beyond Union Village to include Dignity St. Rose Hospitals
6. Groundbreaking of new Henderson Hospital – anchor facility for Union Village in Henderson.
7. Dignity St. Rose De Lima Campus and focus on Inpatient Spinal Cord Injury and Physical Rehabilitation
8. Introduction of Turntable Health, created by Dr. Zubin Damania, offers a new primary care membership model.
9. Launch of Minimally Invasive Surgery Institute
10. Proposed expansion of the Oquendo Center
11. Proposed expansion of the Las Vegas Convention Center District
12. Parkway Surgery was remodeled to introduce 'rehabilitation suites' in the same office building as surgery suites.
13. The newest VA Hospital in the United States has been deepening its collaboration with Mike O'Callaghan Medical Center to offer specialty and sub-specialty services to servicemen from the region.
14. Cleveland Clinic Expansion of Urology Services at Sunrise Hospital and Medical Center
15. Expansion of Mental Health Funding and its attraction of Addiction Services. Several national players have acquired practices and expansions are underway or have occurred at Seven Hills Hospital, Desert Parkway Behavioral and Valley Hospital.
16. Expansion of Fertility Services include a nationally recognized fertility group acquiring the Sher Fertility Institute, the expansion (new integrated building with surgery center) of Red Rock Fertility and three new board certified fertility specialists relocating to the area.
17. ResortCiergeMD – Hotel House Calls
18. Medical School alignment with specialty practices.
19. Expansion of specialty pharmacy centers (Catamaran and ProCareRx)
20. Flying ICU and expanded air ambulance services.

21. The Nevada Western Interstate Commission (WICHE), Nevada Department of Health and Human Services (DHHS), and Southern Nevada Adult Mental Health Services (SNAMS) increased the number of post-doctoral clinical psychology interns from two to five. Two of the psychologists are available to treat patients in Southern Nevada.
22. A recent \$350K grant will allow the Simulation Center of Las Vegas (largest on West Coast) to update technology and prepare for utilization by the UNLV School of Medicine.
23. Several new skilled nursing facilities including Spanish Hills Wellness Center and Advanced Skilled Nursing expanded in Southern Nevada, allowing for expanded services to the baby boomer population.
24. The completion of Nevada's Broadband Network allow for not only rapid transmission of digital electronic medical records throughout the state, but laid the groundwork for a sophisticated telemedicine delivery system. Build out of the telemedicine and broadband network.

HOSPITALITY IN HEALTHCARE:

1. Local Hospitals are engaging UNLV for HCAPHS survey research and improvement.
2. Las Vegas' core competency around hospitality and visitor experience offers enormous opportunity for providers to learn hospitality best practices and utilize them to enhance the patient experience and ultimately HCAPHS scores and reimbursement rates.

AGING SERVICES:

1. Retirement and snowbird growth in the Las Vegas Valley is beginning to influence the type of medical services being developed and/or under consideration, i.e.: Union Village, Lou Ruvo Center for Brain Health, Geriatric Psych Services.
2. The need for quality Aging Services will continue to increase in demand as more "snowbirds" are attracted to the destination and/or find themselves traveling to Las Vegas to access outdoor activities and the resort corridor.
3. Home Health Service expansion in the region also developed potential capacity building for the delivery of post-surgical services in hotels.

WORKFORCE DEVELOPMENT:

1. There is a renewed interest in collaborate healthcare recruitment on behalf of providers in Las Vegas. Efforts to revisit strategies from the last decade are being re-evaluated and updated to achieve new objectives and goals. Additional workforce is necessary to meet demand for local resident care but also to accommodate growth in medical travelers.

COMMUNITY ENGAGEMENT & EDUCATION:

Our preliminary strategic planning process included 147 organizations and individuals. Upon introducing it to the community, the project planners discovered we had greater interest than anticipated increasing the need to engage more organizations and to offer additional education. Below are some random accomplishments to do just that:

1. Nevada Healthcare Forum – addition of a session specific to medical tourism
2. Henderson Healthcare Forum – addition of a session specific to medical tourism.
3. Media Recognition and Partnerships (Press)
 - a. Business Press – Business of Medicine
 - b. Nevada Business Magazine
 - c. LV Sun/Vegas INC.

- d. KNPR – Desert Companion
- 4. Inspired Excellence in Healthcare event sponsored by Las Vegas HEALS
- 5. Medical School’s Dean’s Dinners held regularly to align regional efforts around medical education.

OTHER NEW AREAS OF OPPORTUNITY:

- 1. Quality of care improvement. More needs to be done to address quality improvement scores. The project authors recommend the exploration of a regional task force of providers to share best practices and address specific tactics that all providers can implement to make incremental improvement in patient quality of care scores.
- 2. Health and wellness tourism research must be developed to accurately establish a baseline against which future accomplishments can be measured. With a lack of accurate national and global research available, Las Vegas must begin to rely upon its own measures of success/failure in order to move this emerging industry forward.
- 3. Patient access continues to be an issue for local residents. While the project partners recognize that this plan is focused on services for health and wellness travelers, they also believe that access to care for locals must be addressed first to prevent future access problems from occurring as a result of an unintended consequences of increased medical travelers.
- 4. Innovation and Technology needs continuous documentation, promotion, and collaboration. This idea could perhaps be explored in the context of medical meetings and/or community engagement.
- 5. Economic Development must continue in order to support the overall growth of the healthcare industry. Relationships between providers and the LVGEA and GOED are imperative to enhancing the intellectual knowledge of the city and utilize that knowledge to attract supporting businesses and services that fuel the development of health and wellness services in the community.
- 6. Research and expansion into Destination Dental and identification of providers and inventory of services.
- 7. Greater exploration of Executive Health, Sleep Labs, Stress/Depression, and Nutrition requires research and services inventory.

Las Vegas has the assets and is well-positioned to become a dominant player in the health and wellness travel market globally. The inaugural strategic plan identified numerous opportunities for exploration and development. It also called out several other areas that require continued research, support and development. Those recommendations remain critical to our success. They include:

- **Take steps to correct the perception of health care in Las Vegas**
 - a. Conduct a community survey to determine current local perception
 - b. Gather data on Las Vegas provider quality
 - c. Align with health care industry & select publishing partner
 - d. Curate content accentuating quality and innovation in market
 - e. Partner with Las Vegas Metro Chamber of Commerce and LVCVA on “Customer Service Excellence Awards” and bring the program heavily into health care to recognize the exceptional care delivered to patients.
- **Develop a methodology or system to properly track medical travel** (heads in beds)
- **Partner with State and Regional Economic Development Authorities to execute a strategic physician and surgeon recruitment campaign:**
 - Partner with Medical Meetings
 - Highlight favorable tax climate and IP protection
 - Gain support from local business (Chamber) including Legal, Accounting, Real Estate and Licensure.
 - Develop a campaign to ‘top grade’ incoming talent to further align Nevada’s tight qualifications process
- **Geo-clone a “Medical Mart” in Las Vegas.**
 - Look to existing Medical Marts such as those in Cleveland and Nashville
 - Partner with existing space such as the future World Trade Center, World Market Center (or equivalent) to develop a permanent medical equipment retail center.
 - Market Las Vegas as the largest shopping hub for medical equipment and technology.
 - Partner with a ‘used equipment’ show promoter to accelerate commerce for medical equipment providers ensuring that Las Vegas providers always maintain a competitive advantage.
- **Work with local providers to increase capacity of Executive Physicals**
 - Easy to tie corporate health (whether clinical or holistic) to industry and association annual meetings.
 - This will assist in retention of non-medical meetings and accelerate recruitment/retention of medical meetings.
 - Executive Physicals lead to better health management. Will help accelerate the attraction of more specialists.
- **Position Las Vegas to become a “Center of Excellence” for the Research of Medical & Wellness Tourism**
 - Support the formation of a new Institute of Healthcare Hospitality
 - Begin to bring the I.P. of Hospitality into the delivery of health care. UNLV has prepared and developed the talent that runs hotels such as MGM Resorts International, Wynn, Caesar’s, Mandarin Oriental, Hilton, etc. That transfer of knowledge will be impactful.
 - Develop ‘best practices’ around patient satisfaction surveys, perception surveys, etc.
- **Research and develop new “Opportunities” around:**
 - Substance Abuse and addiction services
 - Destination dental care
 - Urology & Men’s Health