Creating Opportunity

America's population landscape has undergone dramatic changes in recent years, and with those changes come some huge opportunities, as well as challenges, for the healthcare industry. Pharmaceutical companies and their advertising agencies are determining how to bring messages about their products to diverse groups in a way that is culturally sensitive, that will garner long-term goodwill of the communities, and that address the most pressing health concerns facing various racial and ethnic groups. Developing diverse marketing promotions and programs where each group is recognized as an integral part of the overall effort is crucial, according to industry experts. Diversity marketing can never be just an afterthought or general market publicity with different color faces.



America's population landscape has undergone dramatic changes in recent years, and with

By addressing all of a market's ethnic, cultural, and racial components, companies will be able to successfully integrate diversity marketing elements and present healthcare options more clearly. Through a thorough comprehension of the diverse and cultural market behavior of these consumer groups and how they respond, multicultural professionals with expertise in the area of diverse marketing and public relations can increase compliance, raise awareness, and generate brand loyalty.

The findings of the 2000 census, together

with population projections, are an important guide for determining the best course of action for marketers. Census data show that Hispanics or Latinos constitute more than 35 million people, or 12.5% of the U.S. population, while Black or African-Americans alone or in combination with one or more other races represent 12.9% of the population.

Each year between now and 2050, the Hispanic population is projected to add more people to the U.S. than any other single race/ethnic group. By 2005, it is projected that Hispanics

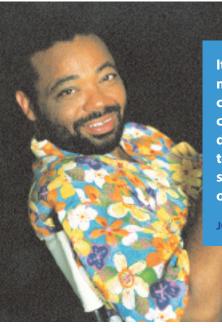
With a thorough comprehension of cultural market behavior of diverse consumer groups, pharmaceutical companies can increase compliance, raise awareness, and cultivate loyalty for their brands. will surpass non-Hispanic African-Americans as the nation's second-largest race/ethnic group, behind only non-Hispanic Whites, according to a report from the U.S. Census Bureau. And by the middle of the century, Hispanics are expected to represent about 25% of the population, says a Census Bureau report.

"From a demographic perspective, the Hispanic market is extremely attractive because it is growing rapidly," says Laura Cruz, president of Adelante Marketing. "The mean age among Hispanics is more than 10 years younger than the main market. The mean family size is larger than the main market's family size. It's an attractive market segment if it meets a company's business-plan needs and if a company has the appropriate product to offer."

Furthermore, the buying power of minority groups is growing faster than that of the general market. Based on a 2000 report from the Selig Center for Economic Growth, a pub-



that come some huge opportunities, as well as challenges, for the healthcare industry.



It's safe to say the marketing methods of pharmaceutical companies must change. Those changes relate directly to the direct-to-patient business and to products that help solve some of the issues that people of color tend to be plagued by.

JO MUSE

lic service unit of the Terry College of Business, minority buying power (African-

American, Native American, and Asian) is now estimated to be about \$860.6 billion, 95.6% above the 1990 level. The study suggests that the Hispanic population has disposable income of \$452.4 billion, estimating total buying power among racial and ethnic groups to be \$1.3 trillion.

These markets are attracting more and more attention from businesses, and there has been an explosion in the number of Black and Hispanic media, reflecting an increase in advertising dollars. Nevertheless, the marketing dollars dedicated to those groups remains small, between 1% and 2% depending on reports. And, according to multicultural marketing experts, pharmaceutical companies have been particularly slow to jump on board.

"Even though Hispanics represent about 13% of this nation's population, Hispanics represent only 2% of all marketing dollars spent in the U.S.," says Ingrid Otero-Smart, president and chief operating officer at Mendoza Dillon & Asociados. "The pharmaceutical industry is one of the slowest categories to address this market, next to financial and insurance companies."

Doing the Research

To get the return on their marketing dollars, pharmaceutical companies need to invest in studying and understanding the various ethnic and racial markets, experts say.

"Pharmaceutical companies can't run a one-size-fits-all campaign," says Stephen Chavez, VP of business development at FWI. "They have to begin with good marketing research. They need to understand the ethnic market's behavior patterns and that within the minority marketplace, each ethnicity will be affected by healthcare differently and will view healthcare differently."

In addition, when addressing Hispanic and

Asian markets in particular, companies or their marketing agencies need to know what percentage of their audience are immigrants versus those who were born in the U.S.

"The critical aspect of success with targeting Hispanics is understanding the acculturation process," Ms. Cruz says. "The cognitive, attitudinal, and behavioral norms of

immigrant populations are formed as they interface with the host society. The Hispanic acculturation process has been interesting due to several factors such as geographic proximity to the country of origin, which makes it easier to exist in both worlds, and the fundamental importance of the family unit, which can both hinder and enhance the acculturation process. The family unit is seen as one of the basic reasons why Hispanics tend to keep their native language. So companies need to consider these issues when they are marketing their products. How a Hispanic consumer/patient will respond to ads, what type of ads will be appealing, whether those ads are in English or Spanish and have Anglo or Hispanic people in them is dependent on where that consumer/patient is in the acculturation process."

Understanding these intricacies is important if a campaign is to have credibility, and reach the appropriate target market.

"It makes good business and marketing sense for the pharmaceutical companies to keep pace with the rapidly changing face of America, to see where the growth has come from, what the new urban constituent is in terms of percentage of Hispanics and their country of origin, percentage of new immigrants, or percentage of second- and third-generation immigrants," says Rupa Ranganathan, ethnic strategist and senior VP at Strategic Research Institute.

And with the census data offering localized information on the ethnic population of a neighborhood, companies can save themselves resources by honing their message to the most appropriate geographic areas.

Given the expertise available, companies are turning to multicultural marketers for advice.

"We have an agency that focuses on African-American as well as Hispanic populations, and another agency for Asian Americans and Pacific Islanders," says Sylvina Frutos, product manager in charge of direct-to-consumer and direct-topatient for GlaxoSmithKline's Avandia for Type II diabetes. "We have resources here to double check everything, but we're letting the experts tell us what needs to happen, what material is relevant, what communication is impactful, and how these groups need and want to receive the information."

Using a mix of internal and external resources to understand the specific needs of multicultural groups also is the approach Abbott Laboratories' Ross Products Division has taken.

"We have an internal group that works with outside agencies to develop broader strategies for multicultural marketing," says Mary Beth Arensberg, Ph.D., R.D., director of public affairs at Ross Products Division. "We sponsor employee sessions with outside groups on marketing to various ethnic populations as well as looking at other people of diverse needs, such as those with disabilities."

Building Goodwill

Evidence suggests companies that invest in understanding and building goodwill with ethnic markets benefit by having their investments rewarded with brand loyalty.

"We've found that sustained interest within minority communities helps build better opportunities, not only loyalty and understanding of a brand, but better extension of the brand's reach and distribution," says Jo Muse, chairman and executive creative director, at Muse Cordero Chen & Partners.

"Pharmaceutical companies should learn a lesson from consumer companies and telecom companies, which are much more attuned to ethnic marketing," says Rajesh Singh, VP and general manager at Formedic Communications. "These are companies that participate at





By displaying sensitivity in understanding cultural nuances that go deeper than mere language translations, companies and brands can signal that they are respectful of their consumers and their cultures, which is in itself a great first step in establishing relationships with an emerging and evolving segment.

RUPA RANGANATHAN

the local fairs, they advertise in the ethnic media, and use outlets that reach the local populace."

Those with experience in the multicultural market say forming a relationship with opinion or community leaders is an important step to building trust, since this shows respect for that community. Of equal importance is ensuring that whoever delivers the message has credibility.

Whether it makes sense for a company to have a Hispanic campaign depends on their business plan, strategic objectives, the product or therapeutic class offering, and of course, the forecasted return on investment for the incremental promotional spend.

LAURA CRUZ

"The key to producing effective messages to segmented populations is identifying a culturally appropriate messenger," says Sheila Thorne, president of Torre Lazur McCann's Multicultural Healthcare Marketing business unit. "Culturally relevant information is not getting to these communities. One reason for the disconnect is that the wrong person or vehicle has been delivering the message. Messages have to be delivered by someone who understands the dis-

ease area and who has credibility in the community."

Additionally, companies need to reach out to the caregivers in those communities. "Pharmaceutical companies should develop programs to help educate the physicians in ethnic areas," Ms. Otero-Smart says.

CenterWatch reported in its February 2002 issue that investigators often become prescribers of the products they have previously studied.

"Marketers of pharmaceutical products can certainly drive their market share by expanding the use of physician/investigators who are a part of these communities," says James H. Powell, M.D., director of biomedical education and research at the National Medical Association. "As they gain early experience, such physicians are likely to become prescribers and advocates for technology that benefits the community."

Recognizing the importance of the messenger, Novo Nordisk Pharmaceuticals Inc., with a prominent presence in diabetes care, has been reaching out to caregivers and educators in diverse populations.

"Novo Nordisk launched a targeted multicultural initiative last year, initially focusing on the Hispanic community," says Andrew Purcell, VP of diabetes marketing at Novo Nordisk Pharmaceuticals. "This program primarily focuses on providing educational and resource support to primary-care physicians, who are responsible for 80% of patients with diabetes in the U.S. We also work with diabetes educators, another key healthcare professional group important to patients. In addition, we sponsor select local diabetes awareness programs throughout the country."

The Language of Trust

Building credibility with the African-American market requires sustained education and outreach programs, together with credible marketing campaigns, experts say. Within the Hispanic and Asian-American markets, companies must add the component of language.

"Language needs are really important when a company speaks to Hispanic and Asian communities, since more than 80% prefer in-language information," Ms. Frutos says.

Dr. Arensberg adds, "Spanish-language ads have 57% more effective product awareness, 5 times more persuasiveness, and much greater recall among Hispanics who have Spanish-language preferences than English-language messages."

But a straight translation from English to Spanish doesn't help companies reach out to these communities or address their culturally unique needs.

"The process of translation involves interpreting the message and then adapting the message to the culture," says Jaime Carlo-Casellas, Ph.D., president and CEO of CC Scientific. "We take into account the socioeconomic needs of the market that's being addressed so that we incorporate that into the message. The translation division comprises a multinational team of experts — attorneys, physicians, and healthcare providers. After there has been a rudimentary translation, con-



The process of translation also involves interpreting the message and then adapting the message to the culture. We take into account the socioeconomic needs of the market that's being addressed so that we incorporate that into the message.

DR. JAIME CARLO-CASELLAS



SHEILA THORNE

tent is analyzed. We then will generate a Spanish translation that is modified and adapted to the audience. We translate that ad back into English so the client can read what the ad

says. We take that piece to a focus group to test, and get feedback."

While the language complexities with regard to the Asian market are

obvious, given the huge variety of linguistic variations specific to distinct regions of origin, there also are huge variations within the Hispanic/Latino market. "This year, we'll start with a pilot program to the Hispanic population in general," Ms. Frutos says. "But at some point, ideally, we'd like to be very specific to particular countries or origin — Mexico, versus Puerto Rico, versus Cuba."

In addition to translation complexities, imprecise or overly complex instructions that fail to meet the linguistic needs of various population groups often will result in poor compliance.

"There are many factors that impact the

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understanding of instructions and the decision to be compliant with a diabetes treatment regimen, for example," Mr. Purcell says. "Within a Hispanic

Developing Clinical Diversity

s important as it is for the pharmaceutical industry to create diverse marketing campaigns that understand the particular healthcare needs and cultural dynamics of various racial and ethnic groups, it is vital that healthcare providers pay close heed to drug responses among the various groups. Several studies indicate that race and ethnicity play a role in the way a patient responds to a pharmaceutical, which may require having a broader group of participants in certain clinical trials.

"A very few companies have efforts in place to assure adequate involvement of culturally competent investigators and appropriately diverse patient populations in clinical trials," says James H. Powell, M.D., director of biomedical education and research at the National Medical Association. "We must seek diversity at every level, diversity of the designers and participants in the marketing campaign as well as diversity in the designers of the trials and the participants who provide the data supporting the safe and effective use of the product."

A monograph into racial and ethnic differences in response to medicine currently is in draft form and is being collated by the National Pharmaceutical Council under the guidance of Richard Levy, Ph.D., VP of scientific affairs at the National Pharmaceutical Council. The report reviews the genetic, environmental, and cultural factors that underlie variations in drug response among different racial and ethnic groups, particularly African-Americans, Asians, and

Caucasians. Available information suggests that racial and ethnic minority patients may be subject to greater risks if they are prescribed or switched to an "equivalent" drug either because the agent may not be as effective, or because substantial dosage adjustments may be necessary to avoid overdosing or under dosing.

The study of genetically determined variations in drug response resulting from inherited differences in drug metabolism or drug targets is called pharmacogenetics or pharmacogenomics. Pharmacogenetic research in the past few decades has uncovered significant differences among racial and ethnic groups in the metabolism, clinical effectiveness, and side-effect profiles of therapeutically important drugs.

"In the future, as genomics advance, we'll be able to look for individual differences across patients," Dr. Levy says.

The report notes that the pharmacokinetics of specific agents in most drug classes have not yet been studied in different racial and ethnic



Pharmaceutical companies are sensitive to these differences, they want to do the right thing, and they see the potential competitive advantage of developing medications that might work well for a given ethnic and racial group.

DR. RICHARD LEVY

minority groups. It is therefore important that therapeutic substitution programs for minority groups be undertaken with extreme caution.

"It becomes prohibitively expensive and difficult to recruit an adequate number of patients into the study, so some judgments have to be made," Dr. Levy says. "Pharmaceutical companies are sensitive to these differences, they want to do the right thing, and they see the potential competitive advantage of developing medications that might work well for a given ethnic and racial group."

community, the many variations of the Spanish language may increase the potential for miscommunication. As a result, it is essential that written materials are simple and contain culturally relevant information and styles, and that an open dialog is encouraged among all members of the healthcare team."

Also of importance are the words and images used in the communication.

"Socio-linguistics and the use of semiotics or non-verbal signs and symbology, including color is vital," Ms. Ranganathan says. "Even simple visual stimuli such as background color can be powerful communicators and mean different things in different cultures. Particularly, in terms of health messages anything inauspicious in terms of a number, a color, or a symbol can be a costly mistake, and one that is difficult to revoke. By displaying sensitivity in understanding cultural nuances that go deeper than mere language translations, companies and brands can signal that they are respectful of their consumers and their cultures, which is in itself a great first step in establishing relationships with an emerging and evolving segment."

The Bottom Line

In addition to language and cultural barriers, pharmaceutical companies and their marketing partners face other challenges in communicating to diverse racial and ethnic groups. Financial concerns with regard to investing in a market which is not well-understood and where the outcome is perceived to



be uncertain often make pharmaceutical companies uneasy about multicultural marketing.

"Many of the pharma companies I talk to are not necessarily resistant in terms of embracing multiculturalism, but reluctant," Ms. Thorne says. "Given finite dollars and finite time to achieve a business objective, the average product manager or director is not going to delve into the unknown."

But, say experts in the field, assumptions that these communities don't have the resources to pay for pharmaceuticals are inaccurate.

"It's still a very much misunderstood marketplace because of a lack of knowledge and lack of true perception of its value," says John Racik, general manager at Sentrix Global Health Communications. "Many clients who we've talked to in the past couple of years say multicultural marketing comes down to budget, it comes down to these markets not being able to afford the products, and there isn't enough return on invest-

> We did an evaluation of the use of ARBs for hypertension in these markets. By capturing as little as 1% of the target patients, revenue can be driven by as much as \$400 million. And, the census data show this is a growing marketplace.

JOHN J. RACIK



ANDREW PURCELL

ment. However, we did an evaluation of the use of ARBs for hypertension in these markets. By capturing as little as 1% of the target patients, revenue can be driven by as much as \$400 million. Census data show this is a growing market. Reports on insurance coverage or ability to pay show there's not much disparity between non-Hispanic Whites (87%), Hispanics (63%), African-Americans (73%), and Asians (78%)."

Poor access to healthcare and to health information remains one of the most complicated issues, particularly given that several diseases such as hypertension, diabetes, HIV/AIDS, and even cancer disproportionately affect these groups.

"Medical and pharmaceutical industry information as it relates to the under serving of people of color doesn't seem to be getting into the

marketing departments as an opportunity to extend their reach in terms of their marketing programs," Mr. Muse says. "There often is a lack of involvement or lack of treatment of ethnic minorities who have a higher propensity for certain diseases and therefore certain treatments, and one of the biggest issues is how marketing firms really deal with this. It's safe to say the marketing methods of pharmaceutical companies must change. Those changes relate directly to the direct-to-patient business and to products that help solve some of the issues that people of color tend to

be plagued by."

Lessons in Health

Education, conducted in culture and in language, is one of the keys to improved health standards and greater compliance.

"An educational component has to be part of any successful marketing program targeting Hispanics," Ms. Otero-Smart states. "This

group has an informational void when it comes to healthcare and is actively seeking information in this area."

Several programs have been initiated aimed at addressing issues of compliance and health disparities.

Formedic Communications has a patient-registration program available for the Hispanic market that provides information aimed at educating the patient

about their own health. "The primary focus of the patient-registration forms is to make the patient aware of what steps they need to take to keep themselves in good health," Mr. Singh says. "The forms also enable patients to provide information to physicians, giving the doctor a more complete picture of that patient and their health habits. There is a whole page for pharmaceutical companies to communicate to the patient by making that person more aware of different aspects of their own health and enhance their aware-

Addressing Diversity in DTC

he National Medical Association in April 2002 released the first survey of African-American doctors' views on direct-to-consumer advertising, or DTC, of prescription drugs. Physicians reported that the ads positively impact consumers and help them become more actively involved in their healthcare. To ensure that African-Americans receive the full benefits of drug advertising, the NMA is calling on the pharmaceutical industry to place more ads in traditionally African-American media outlets and to create more drug advertising initiatives that are culturally diverse.

"The NMA study acknowledges the important role drug ads play in raising awareness of medical conditions and treatments and improving patient-doctor communication," says Sharon Allison-Ottey, NMA study author. "We're concerned that African-Americans aren't getting the full benefit of these ads because the majority do not represent that population. Hopefully, pharmaceutical companies will address these disparities and work with African-American physicians and patients to improve drug ads and help



ness about cholesterol management, arthritis, diabetes management, and other health-related topics.

"The goal with the Hispanic-focused program is to help patients become more empowered to their health needs in those communities in a language they understand, feel comfortable with, and converse with their physician in," Mr. Singh continues. "We know that an empowered patient is a good patient because he or she will follow therapy better."

FWI is working with the National Medical

African-Americans get early diagnoses for life-threatening diseases."

The survey's findings are especially important in light of a two recent reports on the healthcare of minority Americans. The Commonwealth Fund report found that minority Americans lag in relation to healthcare quality measures and are more likely to have communication problems with their doctors than Whites.

In addition, a study released by the Institute of Medicine shows that racial and ethnic minorities receive lower quality healthcare even when their insurance and income are the same.

The NMA's survey of about 900 African-American physicians represents the largest and most comprehensive survey of African-American physicians on the issue of DTC advertisements to date. In addition to increased cultural diversity of ads and more ads placed in publications that target minorities, the NMA would like to see more input from African-American physicians and patients in the development and promotion of DTC ads.

Pharmaceutical companies need to understand the ethnic market's behavior patterns and that within the minority marketplace, each ethnicity will be affected by healthcare differently and will view healthcare differently.

STEPHEN CHAVEZ

Association to provide bi-weekly information to 500 physicians about research relating to treating Black patients, as well as content for the NMA Website.

"The uniqueness of the program FWI offers is that there isn't another publication with that frequency that includes

that specific story selection," Mr. Chavez says. "There isn't another healthcare publication covering the latest developments for African-American physicians and the communities in which they practice."

Dr. Powell says, "The National Medical Association piloted this program as a means to get the latest information about the needs of Black patients to the physicians caring for them in a timely manner. We sought to bypass some of the routine barriers that thwart the incorporation of the latest observations on Black health needs into the actual delivery of care to patients."

Those companies that have initiated targeted outreach programs understand the importance education plays in compliance.



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INGRID OTERO-SMART

"It is essential to reach out to these communities with effective communications that make patients more aware of their treatment options," Dr. Arensberg says.

Novo Nordisk describes education as the hallmark of its approach to business.

"Physicians and patients alike require educational 'solutions' and support materials along with products to facilitate diabetes management on a day-to-day basis," Mr. Purcell says.

A Multiplicity of Venues

As important as the message is, the mediums used to talk about disease states and treatment options are equally as vital in reaching ethnic communities.

"If companies are not working with minority publications as well as radio stations and other minority media outlets, they are missing the opportunity to connect with those communities — to add an educational component to the medical information," Mr. Muse adds.

The opportunities to be creative with outreach programs are immense - from media outlets, to church groups, to community centers, or popular social venues.

With regard to media outlets, multicultural marketing specialists point to ethnic publications, cable television and, specifically, radio as prime venues for their messages.

"Cable is a much better way to reach people of color than network television," Ms. Thorne says. "Radio is a particularly important element because music is such an integral part of all of these communities - Black, Hispanic, and Asian."

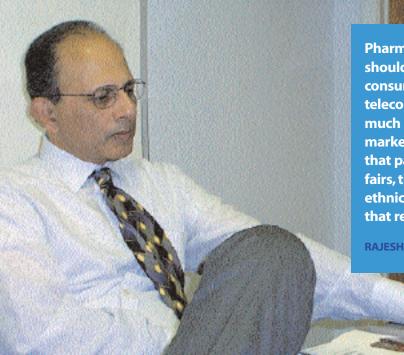
Dr. Casellas notes that the major Spanish networks, Univision and Telemundo, capture between 95% and 98% of the Hispanic audience.

Almost all ethnic marketers highlight the importance of reaching out to community centers and churches.

"Community-based centers, retirement communities, and churches are vitally important," Mr. Muse says. "As churches have an older age group they can be a real component for helping and teaching patients about issues of high-blood pressure, fitness, and exercise."

In fact, investigators from Johns Hopkins Medical Institutions have reported that nutrition and exercise programs based in the church may help Black women follow healthier lifestyles.

"We're doing programs with churches in



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RAJESH SINGH

African-American neighborhoods, and we're doing other programs connected with minority-based events, for instance, the Sweet Auburn Festival in Atlanta," Ms. Frutos says.

Imaginative outreach programs that are part of community-based social venues are encouraged by marketing specialists.

"It is important for companies to commutheir message where the nicate consumer/patient feels most comfortable receiving information," Mr. Racik says. "For example, market research shows that African-American women are more likely to be receptive to healthcare messages in their community beauty parlors. What we have found in market research in the Northeast, at least, is that for women who go to beauty parlors this often is their social outing. Research also shows that in both the African-American and Hispanic household, the female is the matriarch, sometimes a single parent, definitely the gatekeeper to healthcare for her immediate and extended family. '

A Booming Market

As the census data show, the ethnic market is booming, as too are the needs for sustainable healthcare programs. For a small or mid-tier drug company battling to make headway in the general market in terms of product placement, capturing a large portion of the multicultural market may be the path to improved profitability.

"For companies whose products are third, fourth, fifth, or 10th on the marketplace, why compete against all of those competitors in the general marketplace?" Mr. Racik asks. "A company can, dollar for dollar, get a better return on its investment by going to audiences that are very concentrated and then owning those audiences."

"Adding the numbers, the ethnic market is almost as big as the baby-boomer market," Ms. Ranganathan says. "If pharmaceutical companies paid even half as much attention to the ethnic market as they have to the boomer market, they would reap great returns."

There are inequities in health standards, and many organizations such as the NMA, the



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DR. MARY BETH ARENSBERG



We're letting the experts tell us what needs to happen, what material is relevant, what communication is impactful, and how these groups need to receive the information.

SYLVINA FRUTOS

National Hispanic Medical Association and others, as well as some pharmaceutical companies are looking at ways to address these unmet needs. However, for the pharmaceutical industry as with every other industry, the

bottom line is financial growth.

"Given the rapidly shifting demographics and increasingly competitive marketplace, pharmaceutical companies no longer have the option of ignoring multicultural segments of the population," Ms. Thorne says. "It has become a business imperative." Therefore companies need to assess how valuable these ethnic markets are to them in terms of growth, and analyze the long-term returns they stand to enjoy.

"To me, Hispanic marketing is nothing more than market segmentation," Ms Cruz says. "Whether it makes sense for a company to have a Hispanic campaign depends on their business plan, strategic objectives, the therapeutic class offering, and of course, the forecasted return on investment for the incremental promotional spend."

PharmaVoice welcomes comments about this article. E-mail us at feedback@pharmalinx.com.

Experts on this topic

MARY BETH ARENSBERG, PH.D., R.D.

Director of public affairs, Ross Products Division, Columbus, Ohio; Ross Products, a division of Abbott Laboratories, is a U.S. market leader in pediatric nutritionals and a world leader in adult nutritionals **STEPHEN CHAVEZ.** VP of business development, FWI (formerly FaxWatch Inc.), Scottsdale, Ariz.; FWI provides timely, unbiased medical information to physicians, healthcare executives, and patients JAIME CARLO-CASELLAS, PH.D. President and CEO, CC Scientific, Rancho Mirage, Calif.; CC Scientific provides financial services and healthcare industries with guidance, support, and ancillary services to respond to the Hispanic consumer

LAURA CRUZ. President, Adelante Marketing, Phoenix, Ariz.; Adelante Marketing provides qualitative market research and strategic planning for clients who wish to target the Hispanic community

SYLVINA FRUTOS. Product manager, Avandia, direct-to-consumer, direct-topatient, GlaxoSmithKline, Philadelphia; GlaxoSmithKline is one of the world's leading research-based pharmaceutical and healthcare companies

RICHARD LEVY, PH.D. VP scientific affairs, National Pharmaceutical Council, Reston, Va.; NPC sponsors and conducts scientific, evidence-based analyses of the appropriate use of pharmaceuticals and the clinical and economic value of pharmaceutical innovation **JO MUSE.** Chairman and executive creative director, Muse Cordero Chen & Partners, Los Angeles; Muse Cordero Chen & Partners is a full-service multicultural advertising agency

INGRID OTERO-SMART. President and chief operating officer, Mendoza Dillon & Asociados, Newport Beach, Calif., and managing partner of MD&A/Salud; Mendoza Dillon & Asociados, part of WPP Group Plc., provides integrated marketing services to reach the growing and high-potential Hispanic market in the U.S.; MD&A Salud is a joint venture with CommonHealth that develops programs for DTC advertisers in the Hispanic market, CommonHealth is a member company of the WPP Group

JAMES H. POWELL, M.D. Director of biomedical education and research, the National Medical Association, Washington, D.C.; the NMA is the nation's oldest and largest African-American medical association, representing the interests of more than 25,000 African-American physicians, dedicated to promoting quality healthcare for African-Americans and under-served populations ANDREW PURCELL. VP of diabetes marketing, Novo Nordisk Pharmaceuticals Inc., Princeton, N.J.; Novo Nordisk is a focused healthcare company and a world leader in diabetes care

JOHN J. RACIK. General manager, Sentrix Global Health Communications, Short Hills, N.J.; Sentrix is a Young & Rubicam global healthcare agency network

RUPA RANGANATHAN. Ethnic strategist and senior VP, Strategic Research Institute, New York; Strategic Research Institute researches, creates, produces, and manages executive conferences covering industry specific business-to-business topics **RAJESH SINGH.** VP and general manager, Formedic Communications, Somerset, N.J.; Formedic supplies patient record and registration forms and other promotional selling tools, free of charge upon request, to more than 158,000 physicians; programs are designed to streamline practice management, increase efficiency, and decrease office overhead; the company's Hispanic program reaches more than 15,000 physicians in markets throughout the U.S.

SHEILA THORNE. President, Torre Lazur McCann's Multicultural Healthcare Marketing business unit, Parsippany, N.J.; the division focuses on the specific needs and values of multicultural and multiethnic communities