

# SECTION 4: SCARBOROUGH RESEARCH™

## Background

Scarborough Research™ is a joint venture between the Nielsen Company and Arbitron, Inc. Scarborough captures detailed insights on the lifestyles, demographics, media behaviors and shopping patterns of more than 210,000 American consumers ages 18+ across the country. The dataset is locally rooted (i.e., community based) and allows a look nationally and in most states and communities at consumer food choices, where people shop, restaurants frequented, roads traveled, health care choices, media habits, and digital, internet, and telecom usage among others. Scarborough employs a two-phase methodology beginning with a randomly dialed telephone interview, followed by a mailed, self-administered consumer survey booklet and seven-day television diary. The consumer data profiles were developed by FHI 360 using the Scarborough data to provide support to CDC Community Transformation Grant recipients.

# SCARBOROUGH DEMOGRAPHICS

Scarborough Research™ is a joint venture between the Nielsen Company and Arbitron, Inc. Scarborough captures detailed insights on the lifestyles, demographics, media behaviors and shopping patterns of more than 210,000 American consumers ages 18+ across the country. The dataset is locally rooted (i.e., community based) and allows a look nationally and in most states and communities at consumer food choices, where people shop, restaurants frequented, roads traveled, health care choices, media habits, and digital, internet, and telecom usage among others. Scarborough employs a two-phase methodology beginning with a randomly dialed telephone interview, followed by a mailed, self-administered consumer survey booklet and seven-day television diary. The consumer data profiles were developed by FHI 360 using the Scarborough data to provide support to CDC Community Transformation Grant recipients.

Table 11: Number of Scarborough Research™ Respondents by Release Date

	Media Market	Number of Respondents		
		2012 Release 2	2013 Release 1	2013 Release 2
Atlantic	Philadelphia	132	133	138
Burlington	Philadelphia	223	228	221
Cape May	Philadelphia	47	43	43
Cumberland	Philadelphia	106	N/A	109
Gloucester	Philadelphia	138	141	140
Hunterdon	New York	57	57	N/A
Mercer	Philadelphia	172	N/A	175
Morris	New York	198	193	N/A
Passaic	New York	364	388	N/A
Somerset	New York	126	120	N/A
Sussex	New York	65	63	N/A
Warren	New York	51	55	N/A
Multi-Market	NJ/PA/NY	N/A	5,106	N/A

# KEY FINDINGS

## Food and Food Purchasing Behaviors

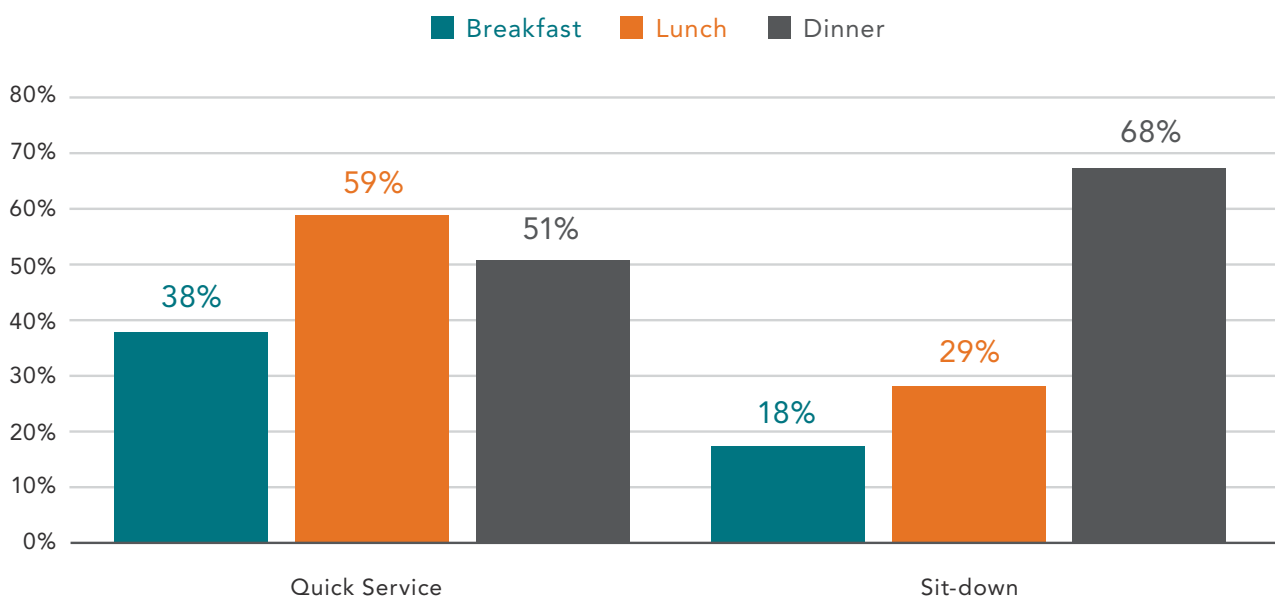
First we will look at some of the more telling statistics on New Jersey's food consumption patterns, especially when viewed through a socio-economic lens.

In a state renowned for its diners, it is not wholly unexpected that 6% of New Jerseyans reported that they ate at a sit-down restaurant 10 or more times in the past 30 days, which is about 3 times per week. However, that is less than half the number of residents who said they consumed 10 or more meals in the past 30 days at quick service establishments (13%). When eating out, Garden Staters also tend to eat dinner most frequently at sit-down restaurants (68%), while lunch was the most popular meal to get from quick service establishments (59%).

On the beverage front, New Jerseyans are big fans of sugar-sweetened beverages: 71% report they've had at least one in the past week. That includes any regular soft drink, fruit drink, energy drink, specialty coffee, sports drink or any bottled, or canned tea drink.

71% of New Jersey residents report that they've had at least one sugar sweetened beverage in the past week.

Figure 35: New Jersey Food Purchases by Restaurant Type Past 30 Days



DATA SOURCE: FHI360 using Scarborough Research Data: Multi-Market 2013 Release 1 Total (Feb 2012 - Mar 2013).

Table 12: County Food Purchases (Any quick service restaurant past 30 days) by Race/Ethnicity

Overall	N/A	84%	82%	77%	86%	81%	87%	87%	80%	80%	92%	85%	78%
White Non-Hispanic	N/A	78%	80%	74%	88%	84%	88%	88%	77%	78%	90%	84%	77%
Black Non-Hispanic	N/A	87%	78%	100%	100%	79%	N/A	80%	41%	78%	88%	N/A	N/A
Hispanic	N/A	100%	97%	100%	82%	75%	76%	86%	100%	83%	100%	100%	100%
Asian or Other Non-Hispanic	N/A	100%	100%	N/A	46%	16%	100%	100%	96%	81%	97%	N/A	N/A
	New Jersey	Atlantic	Burlington	Cape May	Cumberland and Salem	Gloucester	Hunterdon	Mercer	Morris	Passaic	Somerset	Sussex	Warren

Overall quick service restaurant purchases in the past 30 days

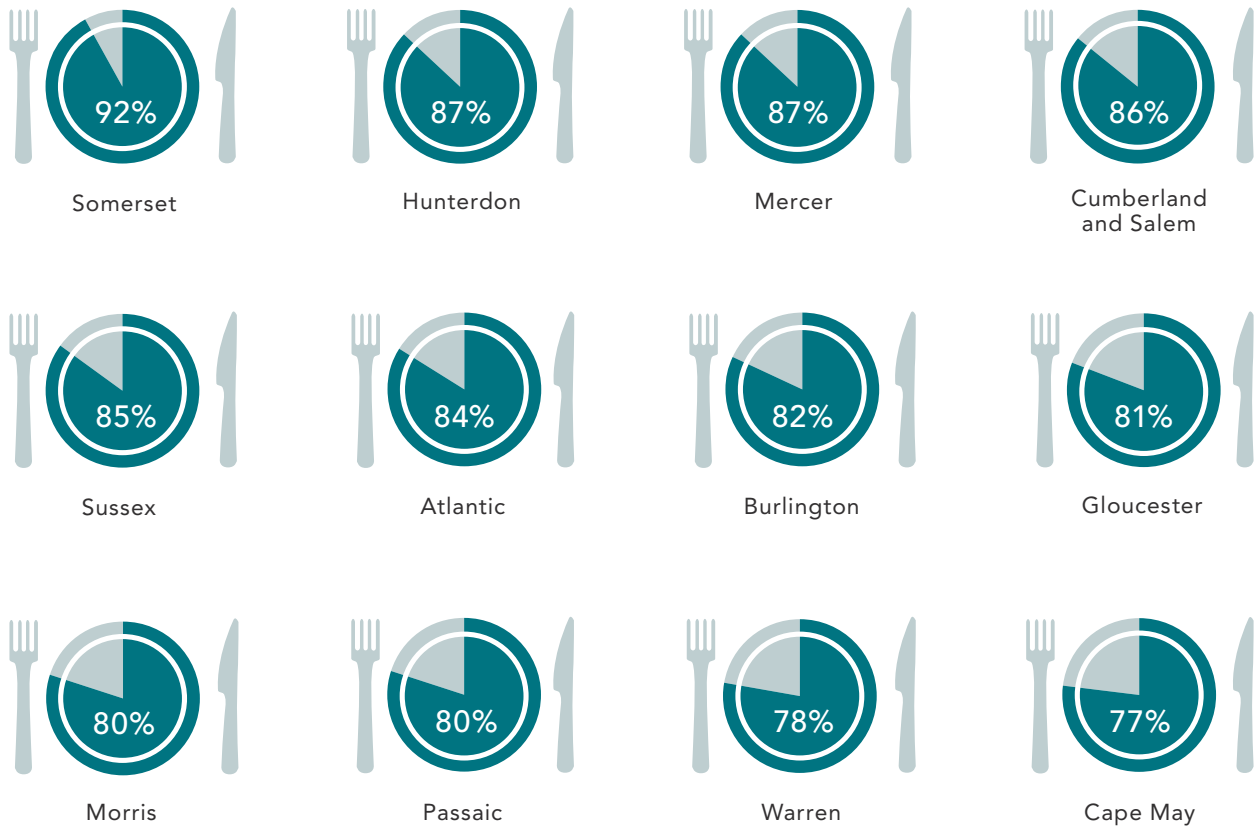


Table 13: County Food Purchases (Drank Any SSB Last 7 Days) by Race/Ethnicity

Overall	69%	78%	71%	77%	N/A	69%	70%	66%	68%	73%	69%	68%	55%
White Non-Hispanic	65%	77%	69%	77%	N/A	69%	72%	49%	65%	62%	68%	69%	57%
Black Non-Hispanic	72%	87%	69%	100%	N/A	69%	N/A	72%	25%	77%	64%	N/A	N/A
Hispanic	76%	85%	86%	17%	N/A	81%	43%	63%	82%	83%	68%	0%	0%
Asian or Other Non-Hispanic	82%	49%	63%	N/A	N/A	47%	100%	68%	81%	94%	82%	N/A	N/A
	New Jersey	Atlantic	Burlington	Cape May	Cumberland and Salem	Gloucester	Hunterdon	Mercer	Morris	Passaic	Somerset	Sussex	Warren

Overall drank any SSB in the past 7 days



## Lifestyle and Activities

How we live our lives and spend our free time has significant bearing on our overall health. Whether we choose to bike to work or drive, decide to take a walk after dinner or watch TV, or opt to grow a real garden versus playing a computer game like Farmville all having real effects on our lives. Below we will look at some of the trends we find in which choices New Jerseyans make.

Anyone who has spent any time at all in New Jersey knows that we have an incredibly dense system of highways and roads that are filled with cars. But interestingly enough, one in every four residents makes a regular attempt to find ways to drive less, like using public transportation, carpooling, biking or walking. In fact, 7% of

residents say they rode a bike for transportation in the past 7 days, while a full 27% said they'd ridden in the past year. State residents also did a fair amount of walking, with 28% saying they walked between 1 and 3 miles in the past week, and another 22% reporting they walked 3 miles or more. On the other end of the spectrum, a full 25% of New Jerseyans did not walk recreationally at all in the past 7 days, and another 25% walked less than one mile.

Walking and bike riding aren't the only activities that New Jerseyans participated in during the past year though: 42% gardened, 38% swam and 27% jogged or ran.

Figure 36: Miles Walked In The Past 7 Days

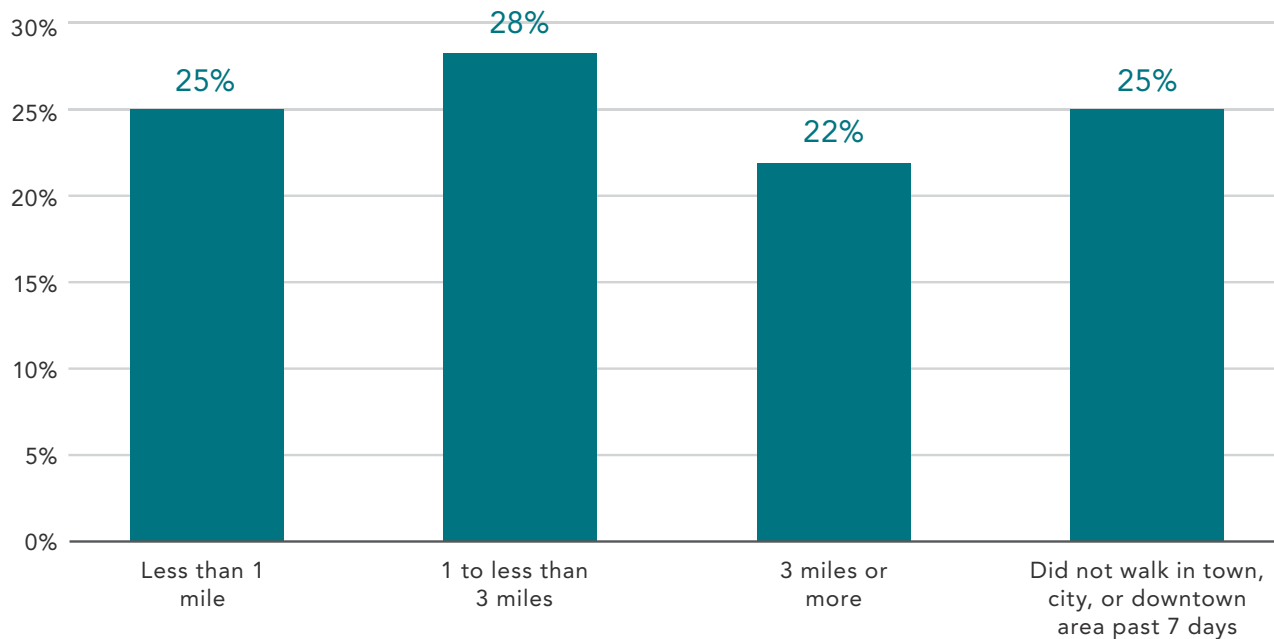


Figure 37: Top 20 Activities Participated in During Past 12 Months, New Jersey, by Race/Ethnicity

■ White (non-Hispanic)   
 ■ Black (non-Hispanic)   
 ■ Hispanic   
 ■ Other and Asian (non-Hispanic)



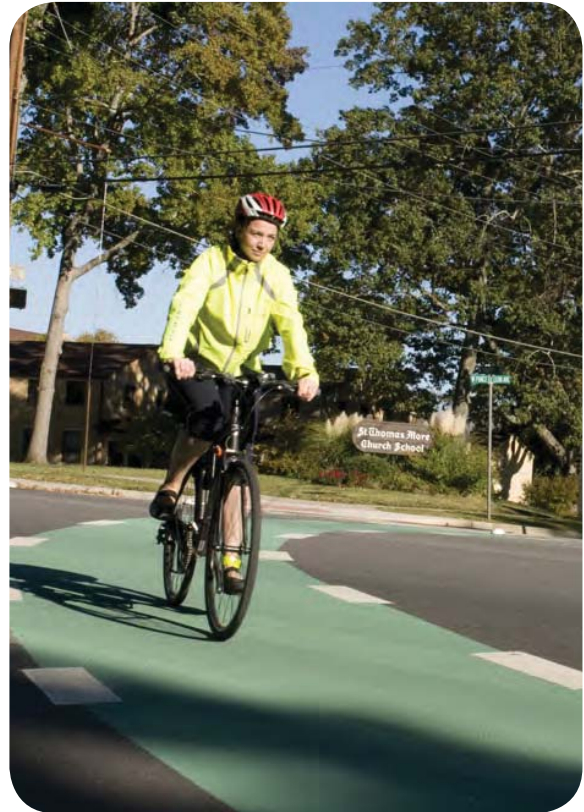


Figure 38: Top 20 Activities Participated in During Past 12 Months, New Jersey, Overall

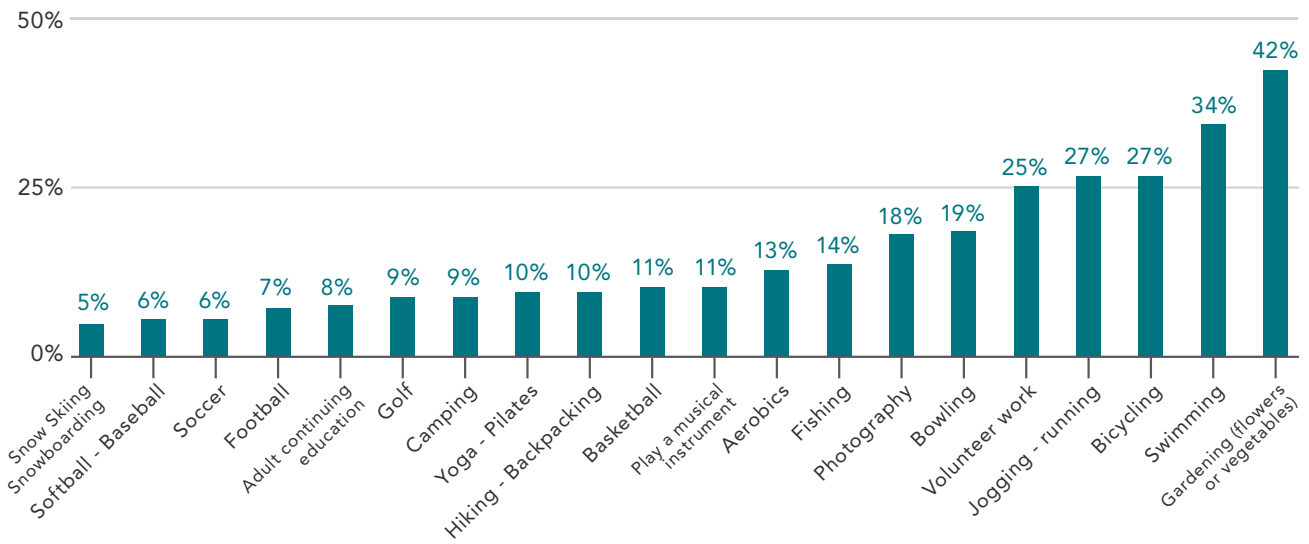




Table 14: Activities by County

	Bicycling	Boating	Bowling	Fishing	Gardening (flowers or vegetables)	Jogging - running	Lawn care	Photography	Swimming	Used home exercise equipment (weights, treadmill, etc.)	Volunteer work
Atlantic	40%				39%	32%	46%		34%		
Burlington	31%				46%		51%		31%		26%
Cape May	36%	36%			65%		56%				28%
Cumberland and Salem	43%		29%		40%		40%		48%		
Gloucester	29%				52%	26%	51%		27%		
Hunterdon	41%		33%		62%	41%				50%	
Mercer	27%				47%		40%		31%		26%
Morris	23%				60%				45%	44%	26%
Passaic					37%	27%		23%	35%	36%	
Somerset	30%				45%				35%	37%	30%
Sussex				30%	63%				32%	52%	29%
Warren	29%			35%	36%				36%	28%	

NOTE: Due to the data collection methodology used by Scarborough, not all communities reported the same activities. The chart above shows the five most reported activities for each county.

## Health and Healthcare

Another important determinant of health is, not surprisingly, health insurance. According to the United States Census Bureau in 2012, 86% of New Jersey residents had health insurance, ranking 28th among all states and the District of Columbia. Scarborough respondents reflected this percentage closely, reporting 88% coverage. Of that 88%, a third (33%) are covered by a preferred provider organization (PPO), while just under a fourth (23%) are covered by Medicare. Health maintenance organization (HMO) coverage accounts for another 18% of those covered. Additionally, 7% of state residents are covered by Medicaid and 2% have military coverage.

Medication usage is another area where trends regarding the health of New Jersey residents start to become clearer. One number that jumps out from the data is that 23% of adults report that someone in their household purchased blood pressure medication in the past 12 months. Other medication purchases with broader health implications include cholesterol medication (18%), diabetes (9%), weight loss (4%) and smoking cessation (2%).

To further flesh out the picture of health we can get from this data set, we can look at reports of medical services received. In 11% of households, at least one person received cardiac care from a hospital or medical institution in the past 3 years. The number of households reporting someone who had received mental health services came in at 5% in the past three year, while numbers of those receiving help for smoking cessation, substance abuse or nutrition came in at 2%.

Add to the above that 16% of New Jerseyans have gone to see a cardiologist in the past 12 months, and 2% used a fee-paid weight loss program.

However, the largest number by far is that 74% of New Jersey households had someone use a hospital in the past 3 years.



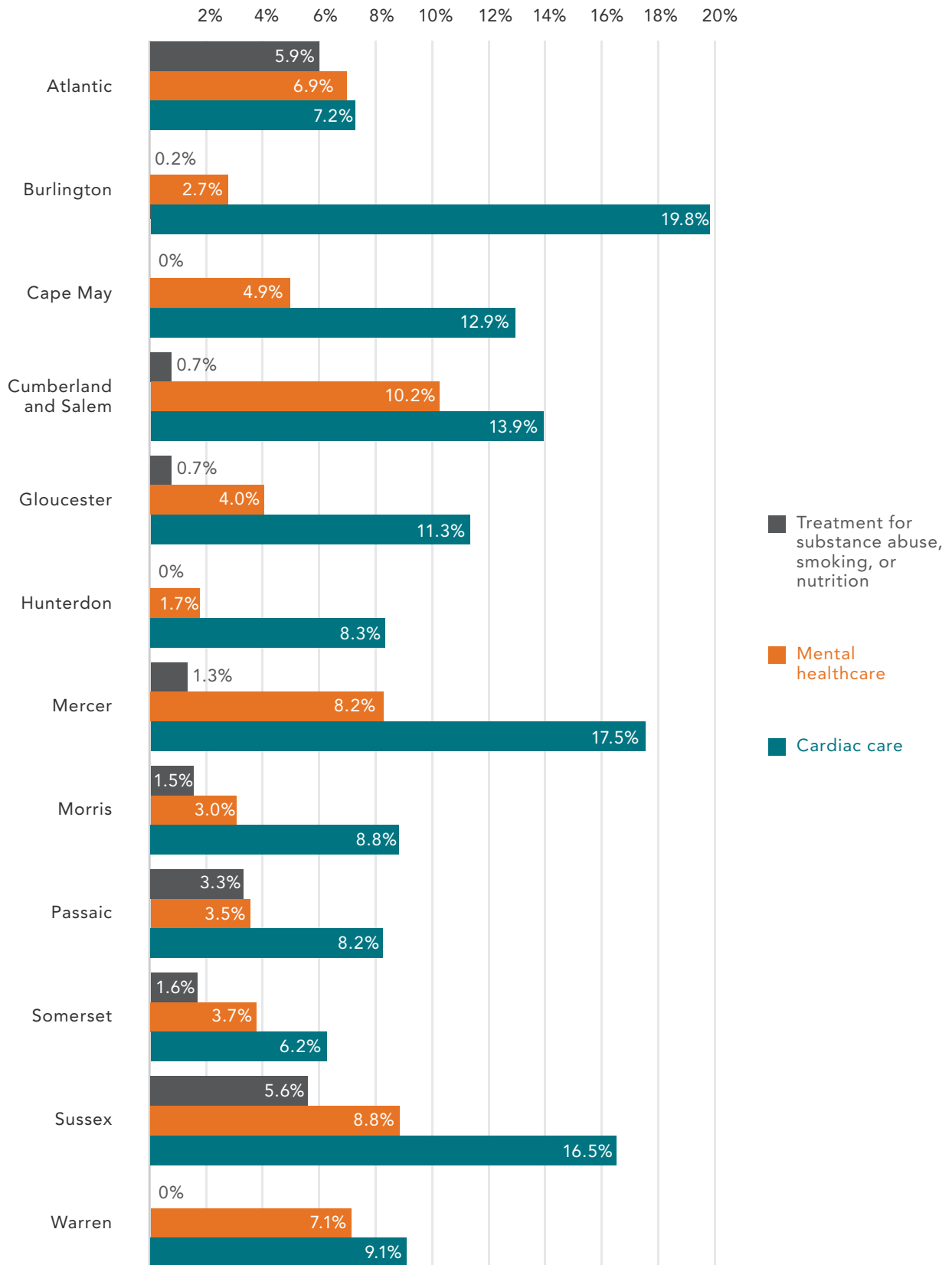
Table 15: Insurance Type by County

	HMO (Health Maintenance Organization)	Medicaid/ public assistance/ welfare	Medicare (Social Security health insurance program)	Military health insurance (CHAMPUS/ TRICARE)	None	Other type of health insurance	POS (Point of Service)	PPO (Preferred Provider Organization)
New Jersey	18%	7%	23%	2%	12%	15%	6%	33%
Atlantic	22%	15%	21%	2%	8%	17%	4%	25%
Burlington	17%	4%	19%	3%	9%	13%	5%	43%
Cape May	20%	1%	37%	18%	4%	22%	2%	26%
Cumberland and Salem	15%	16%	18%	1%	9%	17%	0%	36%
Gloucester	16%	7%	21%	2%	10%	14%	7%	38%
Hunterdon	9%	5%	21%	0%	5%	20%	9%	47%
Mercer	18%	4%	26%	1%	11%	17%	3%	34%
Morris	16%	0%	23%	1%	10%	8%	17%	38%
Passaic	17%	14%	23%	1%	15%	14%	4%	26%
Somerset	13%	5%	21%	1%	6%	14%	13%	41%
Sussex	24%	2%	25%	6%	3%	17%	12%	36%
Warren	21%	12%	25%	4%	4%	28%	4%	23%

Table 16: Medications Taken by County

High Blood Pressure	23%	23%	25%	48%	18%	25%	21%	26%	23%	24%	18%	27%	28%
Cholesterol	18%	21%	23%	34%	9%	19%	18%	20%	17%	18%	16%	25%	25%
Diabetes	9%	10%	8%	31%	5%	7%	8%	10%	7%	8%	6%	7%	11%
Quit Smoking	2%	10%	4%	4%	3%	7%	1%	2%	6%	4%	0%	3%	4%
Weight loss	4%	1%	0%	0%	2%	4%	1%	1%	1%	1%	0%	3%	0%
	New Jersey	Atlantic	Burlington	Cape May	Cumberland and Salem	Gloucester	Hunterdon	Mercer	Morris	Passaic	Somerset	Sussex	Warren

Figure 39: Medical Services Received by County



One of the more surprising insights that Scarborough Data provides is the consumption rates of sugar-sweetened beverages by those who purchased diabetes medication. Atlantic county had the highest percentage of people purchasing diabetes medications also consuming sugar-sweetened beverages (94%) which is more than three times the county with the highest percentage of people purchasing diabetes (Cape May at 30%). Most counties have more than half of those purchasing diabetes medications also consuming sugar-sweetened beverages in the past 7 days.

Table 17: Residents Who Purchased Diabetes Medication by SSB Consumption

	Percent of Population Who Purchased Diabetes Medication	Percent of Those Who Purchased Diabetes Medications Who Consumed SSB in Past 7 Days
Atlantic	12%	94%
Burlington	8%	73%
Cape May	5%	67%
Cumberland and Salem	11%	67%
Gloucester	6%	66%
Hunterdon	9%	65%
Mercer	9%	54%
Morris	10%	53%
Passaic	7%	42%
Somerset	18%	30%
Sussex	3%	28%
Warren	8%	27%

