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2025 Edition

Rural



America

at a Glance

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# Rural America

at a Glance

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*RURAL AMERICA AT A GLANCE* is an annual report that highlights recent social and economic conditions in nonmetro areas of the United States. This edition offers aggregate and county-level statistical analyses of population change and indicators of economic well-being for nonmetro areas, including employment, income, and poverty.

# OVERVIEW

The U.S.'s nonmetro population increased from 2023 to 2024 resulting from positive net migration, continuing the trend that began in 2021. Nonmetro counties with recreation-dependent economies in particular experienced growth from net migration. Overall, the economic indicators suggest that nonmetro areas have rebounded from the Coronavirus (COVID-19) pandemic economy (2020–23) with poverty and employment rates reaching pre-pandemic levels in 2023 and 2024, respectively. In conjunction, there has been recent growth in real median household income, albeit to a lesser degree than the growth experienced during the economic expansion that preceded the pandemic. However, income and poverty levels were not uniform across rural America. For instance, an historical north-south divide in relative income and poverty levels remains. Further, nonmetro area employment by industry varied by both growth and shares. For example manufacturing employment in nonmetro areas decreased from 2023 to 2024, continuing a long-term trend of decline, yet the industry continues to be one of the leading employers in rural America. Manufacturing's share of aggregate nonmetro employment was second only to the healthcare and social assistance industry, which experienced growth from 2023 to 2024, continuing an upward trend of employment in that industry. Also, the share of nonmetro counties with low levels of debt to income (DTI) exceeded the share with high levels of DTI in 2024, extending a trend that began after the Great Recession. The low DTI counties were widespread, but particularly concentrated in the Great Plains, whereas there was no distinct spatial pattern for high DTI counties. Taken together, the indicators presented in this report suggest a balance of growth and stability in rural America.



## Nonmetro Population Growth From Net Migration Offsets Population Loss From Natural Change

The number of people residing in nonmetro areas in July 2024 was 46.2 million people or 13.6 percent of the U.S. population.<sup>1</sup> This reflects an increase of over 134,000 nonmetro residents over the last year, but a decrease in the share of the total U.S. population (13.7 percent in July 2023) due to a larger increase in the metro area population. From July 2023 through June 2024, the nonmetro population grew by 0.29 percent while the metro population increased by 1.08 percent (table 1).

Population change can be subdivided into changes due to net migration (the number of people moving in minus the number of people moving out) and natural change (the number of births minus the number of deaths). The higher population growth in metro areas was driven by both positive net migration and positive natural change. In contrast, the nonmetro population gain from net migration offset population losses from natural change. Nonmetro population growth has occurred since 2021 after declining or near-zero annual population growth rates between 2010 and 2020. Net migration was the main driver of total nonmetro population change from 2021 and 2024, with decreased natural loss also having an impact.

Table 1

### Population change and components of change, metro and nonmetro, July 2023–June 2024

|          | Number of counties | Population, July 2024 | Population change |          | Natural change |          | Net migration |          |
|----------|--------------------|-----------------------|-------------------|----------|----------------|----------|---------------|----------|
|          |                    |                       | Number            | Rate (%) | Number         | Rate (%) | Number        | Rate (%) |
| U.S.     | 3,144              | 340,110,988           | 3,304,757         | 0.97     | 518,638        | 0.15     | 2,786,119     | 0.82     |
| Metro    | 1,186              | 293,884,621           | 3,170,217         | 1.08     | 626,841        | 0.21     | 2,543,376     | 0.87     |
| Nonmetro | 1,958              | 46,226,367            | 134,540           | 0.29     | -108,203       | -0.23    | 242,743       | 0.53     |

Note: Metropolitan status is based on the U.S. Office of Management and Budget's 2023 delineation of core-based statistical areas.

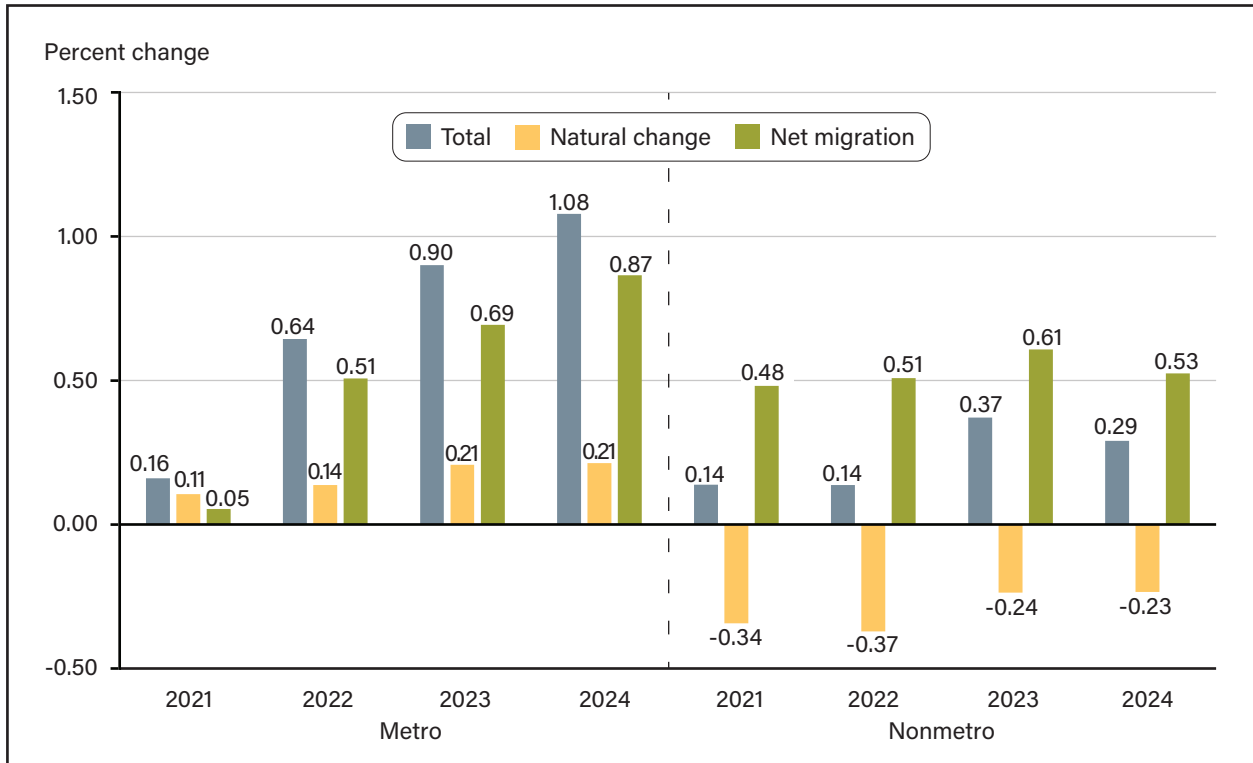
Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census, Population Estimates Program, Vintage 2024.

The total nonmetro population increased each year from 2020 to 2024 (figure 1), driven by positive net migration (more people moving in than moving out). However, net migration from 2022 to 2024 has remained relatively stable. Since 2022, the losses from natural change decreased (i.e., the difference between deaths and births narrowed). Nonmetro population growth in 2023 (0.37 percent) more than doubled the population change in 2022 (0.14 percent) because of the combined effects of net migration and natural change. In recent decades, natural change was positive for metro areas and negative for nonmetro areas. Metro populations have consistently had larger population growth than nonmetro populations each year due to both positive net migration and natural increase.

<sup>1</sup> Throughout this report, the terms “rural” and “nonmetro” are used interchangeably, as are the terms “urban” and “metro.” Unless otherwise stated, statistics are calculated using the 2023 U.S. Office of Management and Budget (OMB) metropolitan area definitions based on data from the 2020 U.S. Census. According to those definitions, there are 3,144 counties or county equivalents, of which 1,958 are nonmetro. For more on definitions of metropolitan and nonmetropolitan areas, as well as related concepts, such as urbanized areas and central counties, visit the USDA, Economic Research Service web page “What Is Rural?”

Figure 1

**Population change and components of change, metropolitan and nonmetropolitan areas, 2020–21 through 2023–24**



Note: Metropolitan status is based on the U.S. Office of Management and Budget’s 2023 delineation of core-based statistical areas.

Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census, Population Estimates Program, Vintage 2024.

## Recent Migration Patterns Have Differed by Nonmetro County Economic Type

Between 2023 and 2024, 67 percent of nonmetro counties experienced positive net migration. However, net migration varied based on the county’s industry dependence.<sup>2</sup> For instance, nonmetro counties with recreation-dependent economies saw especially high net migration rates in the first two years of the COVID-19 pandemic (2020 and 2021) and continued seeing higher rates than metro counties through 2024, although at a declining rate from 2022 to 2024. In contrast, farming-dependent counties, on average, have seen near zero net migration over the same period and mining-dependent counties faced population losses due to migration between 2020 and 2022 followed by modest increases in 2023 and 2024 (figure 2).

<sup>2</sup> The 2025 edition of the USDA, Economic Research Service (ERS) County Typology Codes contains a set of Economic Typology Codes based on the industrial composition of nonmetropolitan (nonmetro) counties and a set of Demographic Typology Codes based on demographic characteristics that are often of interest to rural policymakers and researchers. More information can be found on the USDA, ERS website.

Figure 2  
**Annual average net migration rate for nonmetro counties by economic type, 2020–24**



Note: Includes only nonmetro counties. Metropolitan status is based on the U.S. Office of Management and Budget’s 2023 delineation of core-based statistical areas. Shows average net migration rates per 1,000 people for counties within each type.

Source: USDA, Economic Research Service (ERS) using data from the U.S. Department of Commerce, Bureau of the Census, Population Estimates Program, Vintage 2024 and USDA, ERS, County Typology Codes, 2025 Edition.

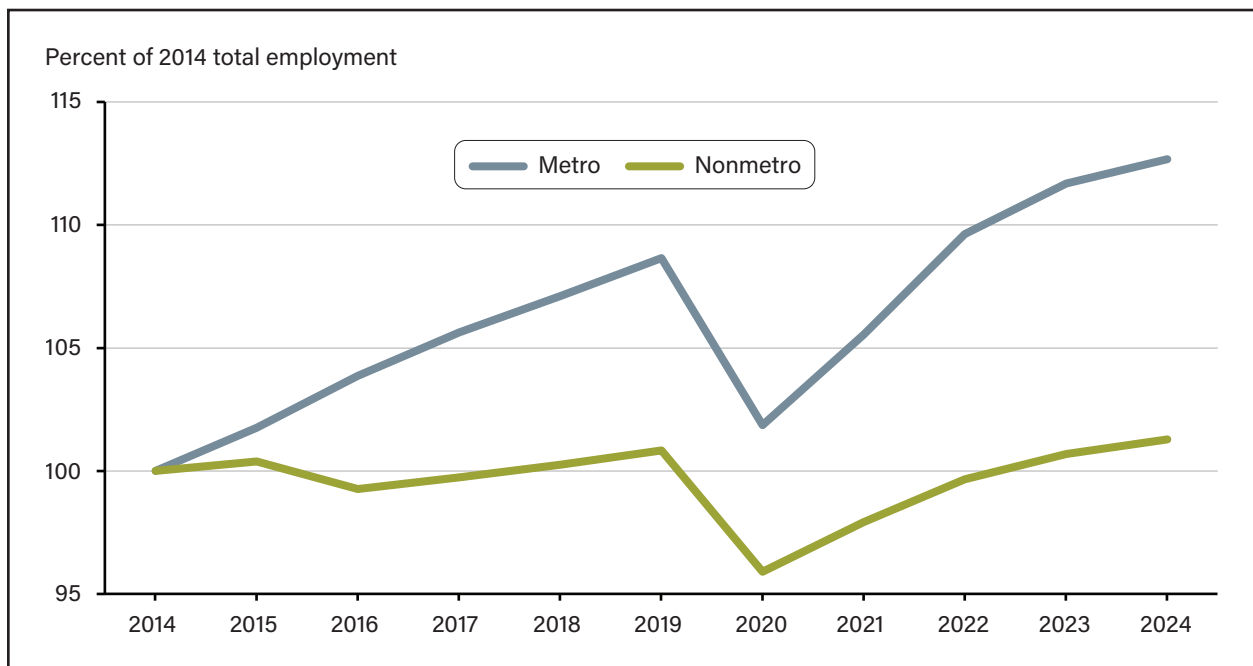


## Total Employment of Nonmetro Residents Increased From 2023 to 2024, Despite Slow Overall Growth

From 2023 to 2024, total employment of nonmetro residents increased by 0.6 percent to 20 million, surpassing the 2019 pre-pandemic employment level (figure 3). The increase of 0.6 percent marked a return to the slower growth rates seen in the years leading up to the COVID-19 pandemic. Prior to this, from 2020 to 2023, there was rapid nonmetro employment growth (on average, 1.6 percent employment growth per year or 315,000 more employed residents per year) due to recovery from pandemic-related employment losses in 2020. The annual average nonmetro unemployment rate increased from 3.7 percent in 2023 to 4.0 percent in 2024 but remained lower than in any year of the expansion period following the Great Recession (2007–09) up to the COVID-19 recession in 2020.<sup>3</sup>

Figure 3

### Change in annual average total employment in metropolitan and nonmetropolitan areas, 2014–24



Note: The figure shows total employment by place of residence in metropolitan and nonmetropolitan areas as a percentage of their respective 2014 total employment levels. Metropolitan status is based on the U.S. Office of Management and Budget's 2023 delineation of core-based statistical areas.

Source: USDA, Economic Research Service using data from the U.S. Department of Labor, Bureau of Labor Statistics, Local Area Unemployment Statistics (LAUS) program.

<sup>3</sup> Based on U.S. Department of Labor, Bureau of Labor Statistics, Local Area Unemployment Statistics (LAUS) estimates, released May 28, 2025.

Growth in nonmetro employment has been consistently slower than growth in metro areas, but rural residents were more likely to be employed in 2024 than they were a decade earlier. The percentage of the population that is employed increased at a similar rate in nonmetro and metro areas from 2014 to 2024. The employment rate for prime-working-age adults (ages 25 to 54) increased about 4.7 percentage points in nonmetro areas over the 10-year period, reaching 76 percent and increased about 4.4 percentage points in metro areas, reaching 81 percent.<sup>4</sup> This increase reflects both a rise of approximately 464,000 (4 percent) employed prime-working-age residents in nonmetro areas and a decrease of about 441,000 (3 percent) total prime-working-age nonmetro residents. Thus, while there were fewer prime-working-age residents due to the long-standing pattern of rural outmigration among people ages 25 to 34 and because of the relatively large Baby Boomer generation aging out of the group, a higher share of prime-age residents had jobs.

## The Manufacturing Industry Remains Central to Employment in Rural America, Despite Lack of Employment Growth

Manufacturing has long been one of the leading employers in rural America. It remains as such despite a significant decline in jobs over the last 40 years, which has coincided with a shift to more service producing jobs nationwide. The continuation of this trend is evident in figure 4, which provides annual employment growth rates by industry for nonmetro areas from 2023 to 2024. Growth rates can be positive or negative depending on whether employment increased or decreased. Service industries were among those with positive growth rates, while many traditional rural employment industries, such as mining, agriculture, and manufacturing, had negative growth rates. Even with the decrease, manufacturing had the second-largest share (13.3 percent) of total nonmetro area employment in 2024 (figure 5). It was surpassed only by the health care and social assistance industry (14.1 percent), which had a positive employment growth rate from 2023 to 2024, continuing a 20-year or more trend of being one of the largest growth industries in rural America.<sup>5</sup>

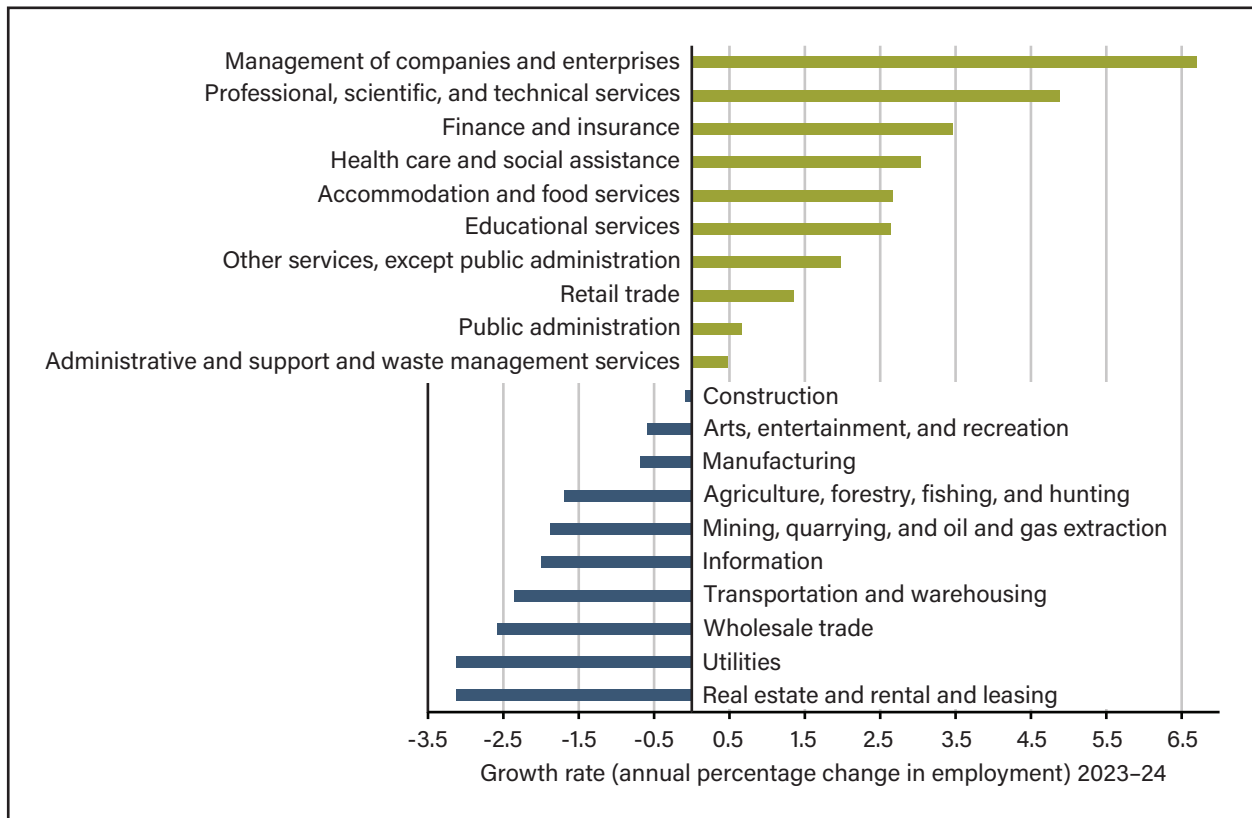


<sup>4</sup> Based on the U.S. Department of Commerce, Bureau of the Census, American Community Survey 1-year estimates.

<sup>5</sup> See Rural America at Glance 2022 and 2024 editions for more detailed discussion of growth in the health care and social assistance industry.

Figure 4

**Growth in nonmetro employment by industry, percentage change 2023–2024**

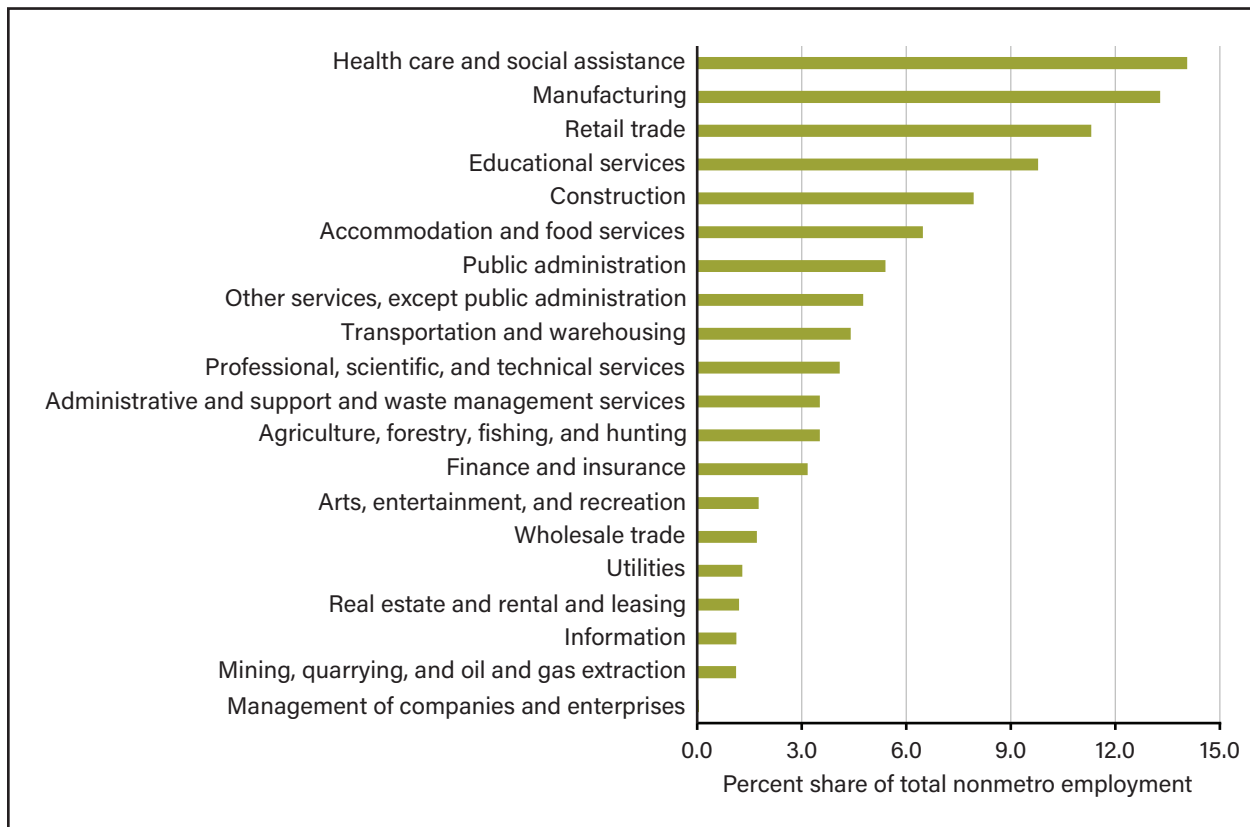


Note: Metropolitan status is based on the U.S. Office of Management and Budget’s 2023 delineation of core-based statistical areas. The sector breakdown follows the North American Industry Classification System (NAICS) alternate aggregation structure for use by U.S. statistical agencies (OMB clarification memorandum 2). In that structure, public administration includes government establishments that manage, oversee, and administer public programs and services, while other government activities are classified elsewhere based on the type of activity performed.

Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census, 2023 and 2024 1-year American Community Survey estimates.



Figure 5  
**Industry share of total nonmetro area employment, 2024**



Note: Metropolitan status is based on the U.S. Office of Management and Budget's 2023 delineation of core-based statistical areas. The sector breakdown follows the North American Industry Classification System (NAICS) alternate aggregation structure for use by U.S. statistical agencies (OMB clarification memorandum 2). In that structure, public administration includes government establishments that manage, oversee, and administer public programs and services, while other government activities are classified elsewhere based on the type of activity performed. The share for management of companies and enterprises may appear to be zero in the chart due to scale but equaled about 0.1 percent. The sum of the shares may not equal 100 percent exactly due to rounding.

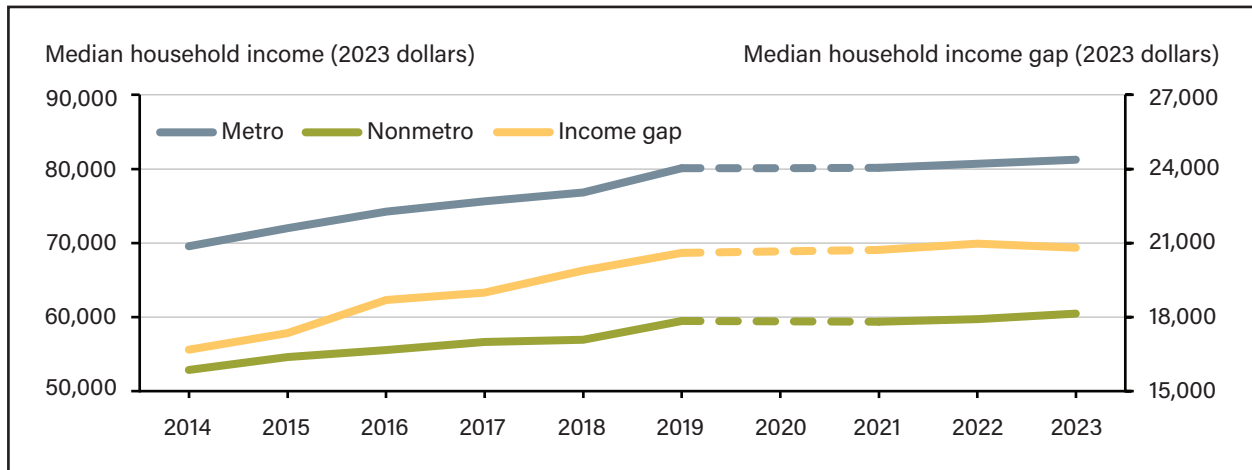
Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census, 2024 1-year American Community Survey estimates.

## Nonmetro Median Income (Inflation-adjusted) Grew From 2021 to 2023, but by Less than Half the Annual Average Increase During the Prior Economic Expansion (2014–19)

Inflation-adjusted median household income in nonmetro areas grew from \$52,872 in 2014 to \$60,459 in 2023 (figure 6), an increase of \$7,587 or 14.3 percent. Most of this increase occurred from 2014 to 2019 when the nonmetro median household income increased by an average of \$1,324 per year. From 2021 to 2023, the nonmetro annual average growth in inflation-adjusted median household income was \$527 per year. This was less than half of the annual average increase prior to the 2020 COVID-19 pandemic recession, primarily due to higher rates of inflation after 2020. The annual average growth in nonmetro nominal (not adjusted for inflation) median household income from 2021 to 2023 was \$3,316—nearly twice the increase from the years prior to the 2020 recession (\$1,684).

Figure 6

**Median household income in 2023 dollars by metropolitan status, 2014–23**



Note: Median household income estimates from the American Community Survey (ACS) 1-year estimates are converted to 2023 dollars using the U.S. Department of Commerce, Bureau of Economic Analysis' Personal Consumption Expenditures Price Index. Comparable 1-year ACS estimates are not available for 2020 as indicated by the dashed line segments. Metropolitan and nonmetropolitan designations change over time as they are updated by the U.S. Office of Management and Budget and the U.S. Department of Commerce, Bureau of the Census.

Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census, 1-year American Community Survey estimates 2014-23 and the U.S. Department of Commerce, Bureau of Economic Analysis, Personal Consumption Expenditures Price Index (retrieved from the Federal Reserve Bank of St. Louis).

Inflation-adjusted median household income also increased in metro areas from 2014 to 2023, rising from \$69,561 to \$81,270, an increase of \$11,079 or 16.8 percent. Similar to nonmetro areas, the growth occurred primarily from 2014 to 2019. However, the growth in metro areas exceeded growth in nonmetro areas during that time. As a result, the nonmetro-metro gap in inflation-adjusted median income increased from \$16,688 in 2014 to \$20,599 in 2019. Since 2021, the gap has remained at about \$20,800.

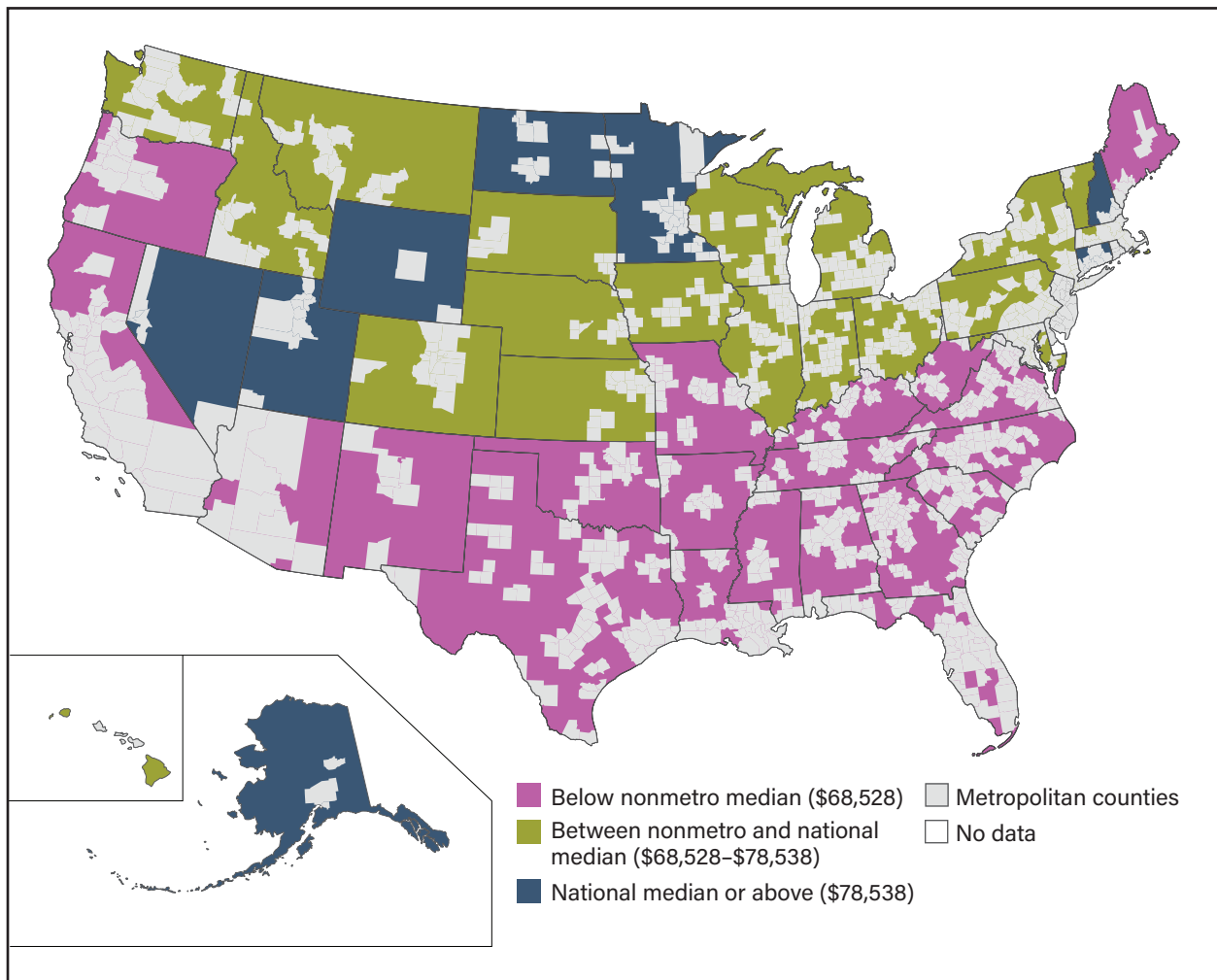
## Cost of Living Adjusted Median Household Income in Nonmetro Areas was Lower than the National Median Income in 2023

An important consideration for understanding buying power in rural America is the cost of living relative to the rest of the nation. The average cost of living in nonmetro areas of the U.S. was estimated to be 12 percent lower than the national average in 2023.<sup>6</sup> Given the lower cost of living in nonmetro areas, the nonmetro median household income of \$60,459 in 2023 was equivalent to \$68,531 in places where the cost of living was equal to the national average. This adjusted value—the real median household income—was \$9,188 lower than the national median household income of \$77,719, meaning that even after adjusting for nonmetro area cost of living differences, nonmetro median household income remained 12 percent lower than the national median household income in 2023.

Income and the cost of living also vary across rural America (figure 7), with real median household income ranging from \$55,179 in the nonmetro portion of Louisiana to \$88,513 in the nonmetro portion of Connecticut from 2019 to 2023. Real median household income tended to be higher in the nonmetro portions of States in the northern half of the country and lower in the southern half of the country. Real median household income in the nonmetro portions of some States was even higher than the national median household income.

<sup>6</sup>U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Accounts, 2023 regional price parities. Regional price parities from the Bureau of Economic Analysis are used to adjust incomes for differences in cost of living across regions.

Figure 7  
**Real median household income in nonmetropolitan portions of States, 2019–23**



Note: Real median household income is calculated using median household income estimates for nonmetropolitan portions of States from the U.S. Department of Commerce, Bureau of the Census and Regional Price Parities (RPPs) for nonmetropolitan portions of States from the U.S. Department of Commerce, Bureau of Economic Analysis. The Census Bureau uses the U.S. Office of Management and Budget’s (OMB) 2023 delineation of metropolitan areas while the Bureau of Economic Analysis uses the Census Bureau’s 2020 delineation of metropolitan areas. Metropolitan counties on the map are based on OMB’s 2023 delineation. Data are unavailable for Delaware, New Jersey, and Rhode Island because all counties in these States were classified as metropolitan under one or both of the 2020 and 2023 metropolitan statistical area delineations. The 5-year average of 2019–23 RPPs are used to calculate real median household income to align with the 5-year median household income estimates from the Census Bureau.

Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census, 2019–23 5-year American Community Survey and the U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Accounts, 2023 Regional Price Parities.





## Low Household Debt-to-income was Prevalent Among Nonmetro Counties in 2024

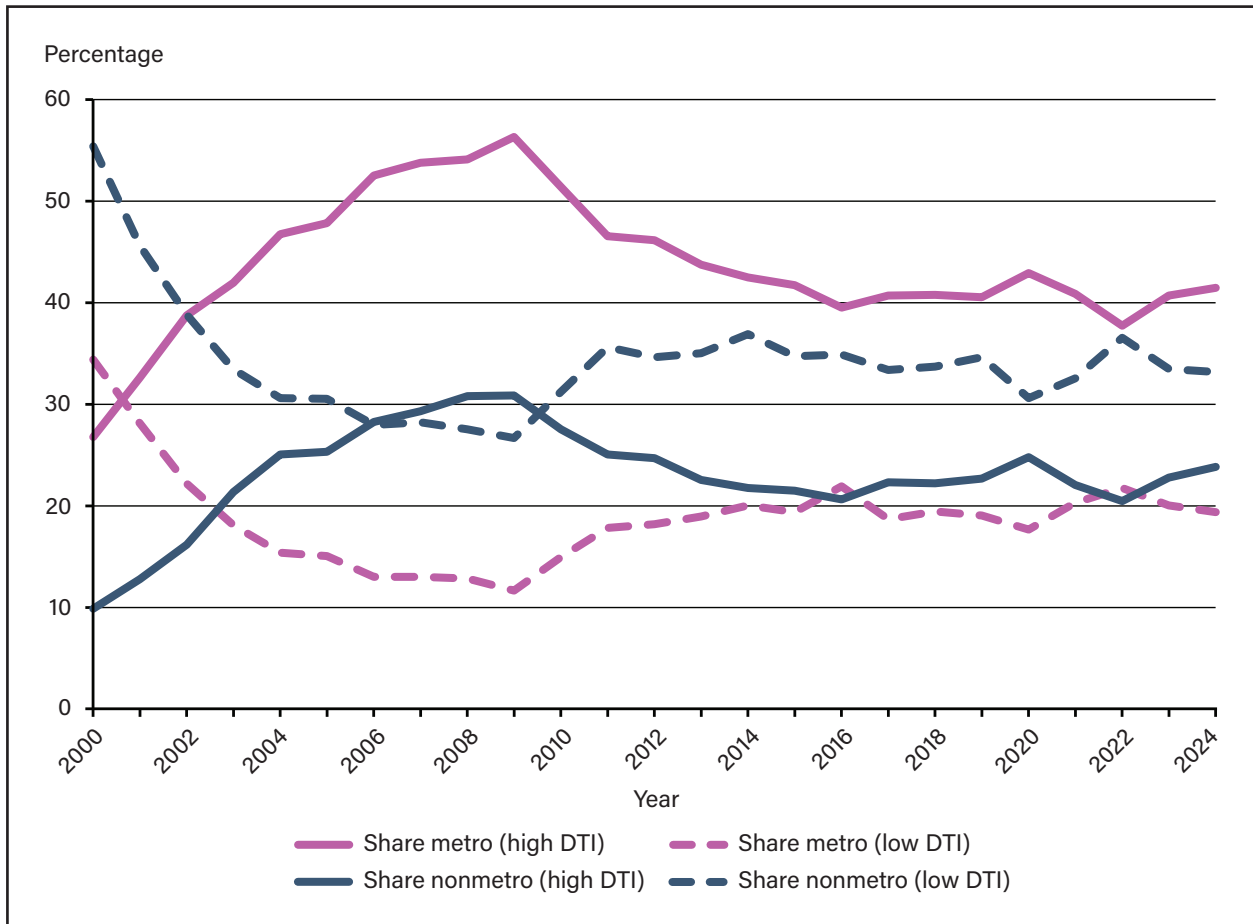
Another measure associated with buying power within an area is the aggregate household debt-to-income (DTI) ratio. DTI is an indicator of income available for household consumption and investment after debt expenses, which can affect the local economy.<sup>7</sup> DTI levels can impact access to credit, which can allow households to smooth economic shocks. A household's ability to access credit can help them build assets over time and enhance financial standing. Further, a lower overall debt-to-income ratio may make nonmetro counties more resilient to economic shocks and stresses.

Figure 8 shows the shares of counties with relatively low and high levels of aggregated household DTI annually from 2000 to 2024 by metro status. The share of nonmetro counties with low DTI was greater than the share with high DTI levels in every year since 2010. Overall, low DTI levels have been more prevalent than high levels across nonmetro counties since recovering from the Great Recession. In 2024, 23.8 percent of nonmetro counties had high DTI levels and 33.5 percent had low DTI levels. In comparison, among metro counties 41.4 percent had high DTI and 19.4 percent had low DTI. Nonmetro counties with low DTI were primarily in the Great Plains (about 30.2 percent), but were also spread across the country, including in Alaska (figure 9). High DTI nonmetro counties were more sporadic spatially than their low DTI counterparts, but tended to be clustered near urban areas, with the highest concentration in the Eastern and Interior Uplands (19.4 percent of all nonmetro high DTI counties).

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<sup>7</sup> Debt-to-income statistics come from the Household Debt-to-Income Ratios in the Enhanced Financial Accounts from the Board of Governors of the Federal Reserve System. The calculation of debt includes all household debt, except for student loans. The data is reported at a county-level and is available in an aggregated form, with 10 levels of DTI reported. Households were considered low (DTI < 1.19) or high (DTI >= 2.15) if they were in the three lowest/highest DTI levels for a given year.

Figure 8  
**Share of counties with low and high household debt-to-income (DTI) ratios**



DTI = debt-to-income ratio.

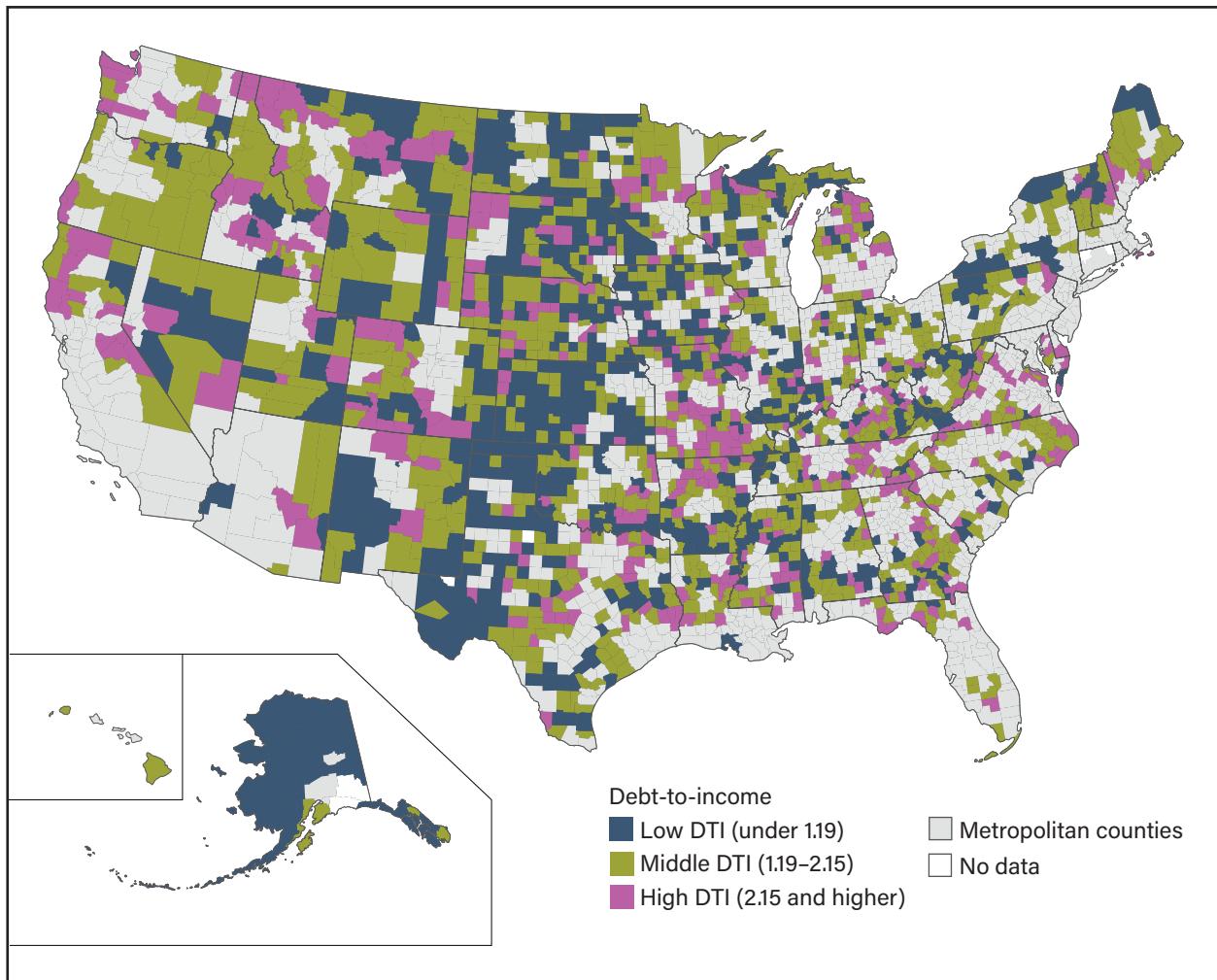
Note: Metropolitan status is based on the U.S. Office of Management and Budget’s 2023 delineation of core-based statistical areas.

Low DTI is defined as a county having an aggregated household debt-to-income ratio of less than 1.19 and high DTI is defined as a county having an aggregated household DTI of 2.15 or greater. Low and high household DTI ratios are available in the data on a quarterly basis; annual third quarter ratios were used for this chart. There are 34 counties/equivalents with missing data that were excluded from the figure.

Source: USDA, Economic Research Service using the Federal Reserve System’s Board of Governors, Enhanced Financial Account: Household Debt, 2000–24, published March 2025.



Figure 9  
**Debt-to-income rates among nonmetro counties, 2024**



Note: Low and high household DTI ratios are available in the data on a quarterly basis; annual third quarter ratios were used for this chart. Metropolitan status is based on the U.S. Office of Management and Budget’s 2023 delineation of core-based statistical areas. There were 17 counties/equivalents with missing data in 2024, including the state of Connecticut, due to boundary changes in 2022.

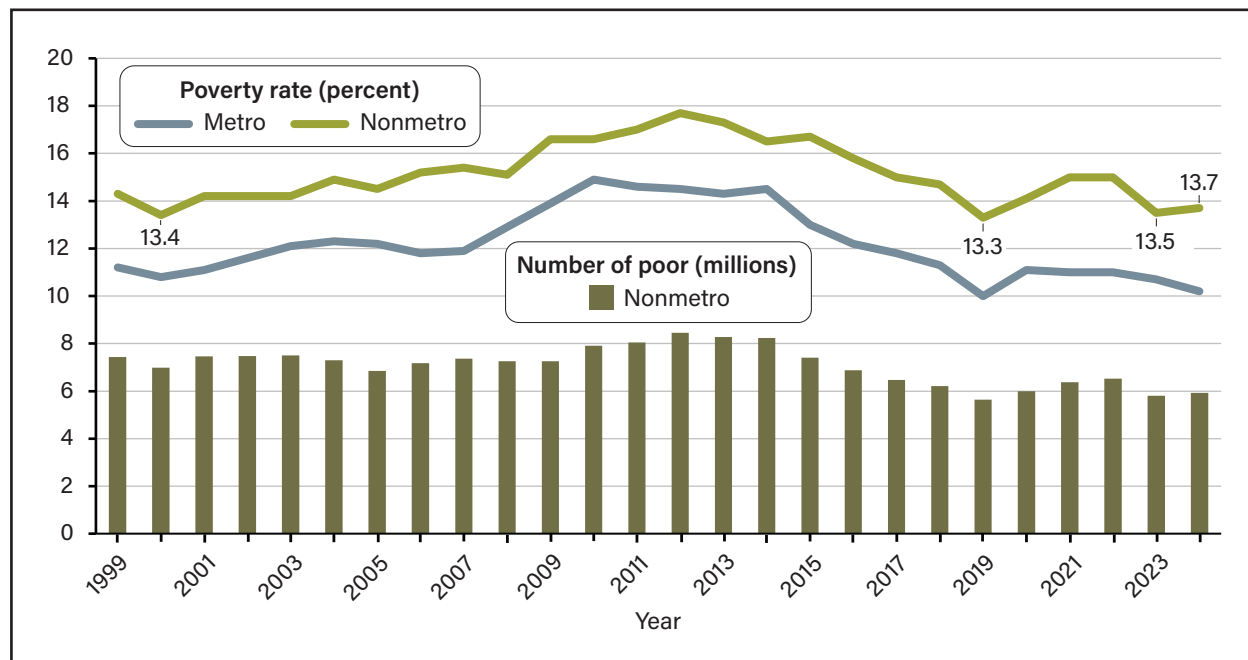
Source: USDA, Economic Research Service using the Federal Reserve System’s Board of Governors, Enhanced Financial Account: Household Debt, 2024, published March 2025.

## The Nonmetro Area Poverty Rate Was One of the Lowest on Record in 2024

In 2024, approximately 5.9 million people or 13.7 percent of the nonmetro population lived in poverty. This was one of the lowest nonmetro area poverty rates over the last 25 years and represents a 1.3 percentage point decrease from 2022 (15.0 percent or 6.5 million people) (figure 10). The metro area poverty rate decreased by less than one percentage point over the same period to 10.2 percent and remains lower than the nonmetro rate with a nonmetro-metro poverty rate gap of 3.5 percentage points in 2024.

Figure 10

**Poverty rate for nonmetro and metro areas and number of nonmetro poor (millions), annually 1999 to 2024**



Note: Poverty status is defined by the official poverty measure of the U.S. Department of Commerce, Bureau of the Census. Metropolitan status is based on the U.S. Office of Management and Budget’s delineation of core-based statistical areas. Metro status of some counties changed in 2004, 2014, 2018, 2020, and 2024.

Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census, Current Population Survey (CPS), 1999–24

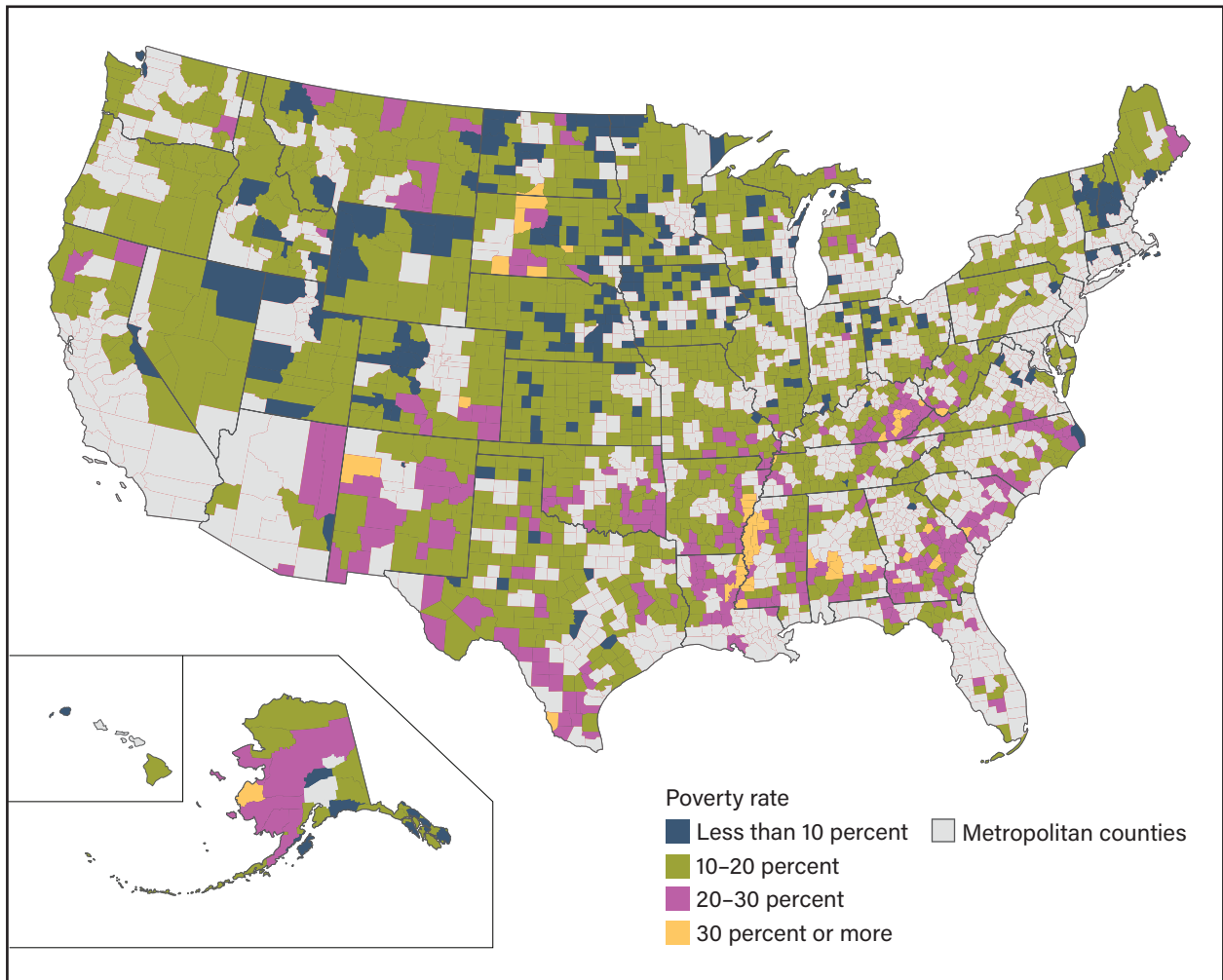
## The Number of Counties with High Poverty Rates Declined, but High Poverty Remained Regionally Concentrated

In 2023 there were 370 high poverty nonmetro counties, where 20 percent or more of the population lived below the Federal poverty level, down from 403 in 2022. They represented about one in five nonmetro counties and 89.1 percent of all high poverty counties (455 counties) in 2023. They included 49 nonmetro counties with poverty rates of 30 percent or more, down from 58 in 2022. Historically, nonmetro counties with high poverty were predominantly located in the South and those with low poverty in the North, creating a distinctive North-South demarcation of low versus high poverty concentrations. Overall, that spatial divide remained in 2023 but with subregional variation. Nonmetro counties with the highest poverty rates were disproportionately concentrated in the Southern Coastal Plain, which includes historically impoverished areas in Mississippi, Arkansas, and Louisiana along the Mississippi Delta and portions of Alabama, Georgia, and South



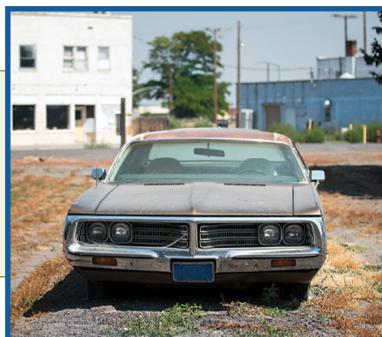
Carolina that comprise the Black Belt (figure 11). They were also prominent in the Eastern and Interior Uplands (e.g., Kentucky) and in northern areas of the Great Plains (e.g., North Dakota, South Dakota, and Montana).

Figure 11  
**Nonmetro county poverty rates, 2023**



Note: Poverty status is defined by the official poverty measure of the U.S. Department of Commerce, Bureau of the Census. Metropolitan status is based on the U.S. Office of Management and Budget’s 2023 delineation of core-based statistical areas.

Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census, Small Area Income and Poverty Estimates (SAIPE), 2023.



## DATA RESOURCES

This report draws upon the work of USDA, Economic Research Service (ERS) researchers. Data used in this analysis come from ERS and a variety of other Federal sources, including the U.S. Department of Commerce, Bureau of Economic Analysis; the U.S. Department of Labor, Bureau of Labor Statistics; the U.S. Department of Commerce, Bureau of the Census; and the Federal Reserve System. The most recent data are provided, ranging from 1999 to 2024.

For more on the 2023 definitions of metro and nonmetro areas, and how they compare with other rural classifications, see the USDA, ERS What is Rural topic page.

For more on county typologies (economic and demographic types), such as farming dependent, recreation dependent, and population loss, see the USDA, ERS County Typology Codes data product.

For more on definitions and measurements of poverty areas, such as high, persistent, and enduring poverty, see the USDA, ERS Poverty Area Measures data product.

## MORE ERS RESEARCH ON RURAL AMERICA

USDA, ERS analyzes ongoing changes in rural areas and assesses Federal, State, and local strategies to enhance economic opportunity and quality of life for rural Americans. Included in this report are current indicators of social and economic conditions in rural areas. The following recent publications feature research on rural America:

Davis, J., Cromartie, J., Farrigan, T., Genetin, B., Sanders, A., & Winikoff, J. (2023). *Rural America at a glance: 2023 edition* (Report No. EIB-261). U.S. Department of Agriculture, Economic Research Service.

Davis, J., Rupasingha, A., Cromartie, J., & Sanders, A. (2022). *Rural America at a glance: 2022 edition* (Report No. EIB-246). U.S. Department of Agriculture, Economic Research Service.

Farrigan, T., Genetin, B., Sanders, A., Pender, J., Thomas, K., Winkler, R., & Cromartie, J. (2024). *Rural America at a glance: 2024 edition* (Report No. EIB-282). U.S. Department of Agriculture, Economic Research Service.

Farrigan, T., & Sanders, A. (2024). *The Poverty Area Measures data product* (Report No. TB-1967). U.S. Department of Agriculture, Economic Research Service.

Nkonya, E., & Pender, J. (2025). *Trends and patterns of job quality in the United States* (Report No. EIB-286). U.S. Department of Agriculture, Economic Research Service.

Rupasingha, A., & Cho, J. (2025). *Federal assistance and rural hospital closings: The impact of the USDA Community Facilities Program* (Report No. ERR-344). U.S. Department of Agriculture, Economic Research Service.

Sanders, A. (2025, August 20). 63 percent of retirement-destination counties are located in rural areas. *Charts of Note*, U.S. Department of Agriculture, Economic Research Service.

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