

The Rural Food-Away-from-Home Landscape, 1990–2019

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What is the Issue?

National trends have shown that food-away-from-home (FAFH) spending rivals and sometimes surpasses food-at-home (FAH) spending (Saksena et al., 2018). Households in sparsely populated areas face unique food access challenges because the type of establishments may be more limited and travel distances may be greater, though certain local economic conditions or adjacency to a metro area may improve food access. Food access affects rural well-being through the abundance, convenience, and nutrition of food options. The relative abundance of FAH establishments has been summarized by Stevens et al. (2021), who found a dearth of food retailers in rural counties compared with urban counterparts, but comparisons of FAFH establishments across rurality have not been comprehensively summarized. Furthermore, FAFH establishments may offer convenient locations and reduce food preparation time when compared with FAH options, so the balance of food sources may also impact lifestyles, particularly for individuals with time constraints (Hamrick and Okrent, 2014). Finally, FAFH tends to differ in healthfulness from FAH, and healthfulness differs between types of FAFH establishments. So the nutritional profiles of residents may be affected by the variety of available establishments. As food access and landscapes interact with overall economies and lifestyles, an investigation of FAFH across geographies can inform future analysis of the differences between urban and rural communities, especially in terms of food and health.

What Did the Study Find?

We studied differences in FAFH access landscapes along the rural-urban continuum between 1990 and 2019, with an emphasis on 2019 for the most current outlook. Overall, rural, nonmetro counties—or those counties with populations under 2,500, regardless of proximity to metro areas—have fewer FAFH establishments per 1,000 people than more heavily populated nonmetropolitan, urban counties (populations between 2,500 and 20,000).

- As of 2019, there were 16 U.S. counties (0.4 percent of all U.S. counties) that did not have any FAFH options.
- Although the median number of FAFH options in a metropolitan county was more than 200, 20 percent of nonmetropolitan counties have fewer than 10 FAFH options.

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- FAFH outlets in sparsely populated areas are smaller operations (as measured by total employment) than their counterparts in more densely populated areas.

Nonmetropolitan counties are often discussed as a collective, but the counties have heterogeneous economies. Counties with recreation as the primary industry have more FAFH options and a greater proportion of FAFH options relative to FAH options, like grocery stores, when compared with similarly sized counties where farming is the primary industry, which demonstrates how the broader local economy relates to the local food landscape in rural areas. Among the rural counties that are not adjacent to a metro area, counties with recreation as their primary industry have 2.8 FAFH establishments per 1,000 people, whereas those with farming as their primary industry have 1.9 FAFH establishments per 1,000 people.

Additionally, the diversity of FAFH options has changed over time, which we investigated by analyzing the prominence of popular national chain restaurants. The chain restaurants with the most outlets in the United States have grown more prominent in the past two decades in rural, nonmetro counties (relative to 1990) and represent a sizeable share of the FAFH options in many nonmetropolitan counties, suggesting that the portfolio of FAFH options may vary less from rural county to rural county than it once did.

FAFH was significantly impacted by the Coronavirus (COVID-19) pandemic, but the impact was disproportionately felt by full-service restaurants, while limited-service restaurants fared better (Marchesi and McLaughlin, 2022). This study summarizes the trends and statistics for different types of FAFH across geographies leading up to the pandemic (through 2019), noting that limited-service restaurants make up a large and increasing share of FAFH options in many nonmetropolitan counties, which may have shielded these counties from some of the FAFH impacts of the pandemic. More broadly, this report shows geographic variation in FAFH options which can be useful in understanding differential impacts on the FAFH landscape after the onset of the pandemic.

How Was the Study Conducted?

Using data from all 50 States and the District of Columbia from 1990 to 2019, the authors obtained a census of establishments from the National Establishments Time Series (NETS) database, which categorized the census of establishments as FAFH or FAH. This report focused on FAFH establishments, such as full- and limited-service restaurants, cafeterias, etc. Data were analyzed at the county level, with each county identified by USDA, Economic Research Service's (ERS) Rural-Urban Continuum Codes (RUCC). These RUCC identifications allowed researchers to differentiate nonmetropolitan counties into three categories by urban characteristics: large urban nonmetro, small urban nonmetro, and completely rural nonmetro counties. Using economic nonoverlapping dependence typologies also defined by USDA, ERS, nonmetropolitan counties were characterized by their primary industry economy (e.g., recreation dependent or farming dependent).