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KEEPERS OF THE FLAME

UTAH COUNTY: VALLEY OF OPPORTUNITY

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POLICY INSTITUTE**
THE UNIVERSITY OF UTAH
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KEEPERS OF THE FLAME MONOGRAPHS

At the dawn of the 21st century, Utah leaders placed a time capsule below the front steps of the Utah State Capitol. The historic cache included a leather-bound book with letters to the future from 124 executive, legislative, and judicial branch leaders. Former governor Mike Leavitt's opening letter memorialized the solemn responsibility of Utah leaders to serve as "keepers of the flame." The flame symbolizes all that is great about Utah and the light it shares with the world.

The Kem C. Gardner Policy Institute prepares and shares economic, demographic, and public policy research that helps policymakers keep Utah's flame burning bright. This monograph, the third in a series called "Keepers of the Flame," presents Utah County's past, present, and likely future. It documents Utah County's emergence as one of Utah's most dynamic, fastest growing, youngest, and rapidly changing counties in the state. It also juxtaposes the extraordinary possibilities with the very real challenges that accompany growth. Utah County is a "Valley of Opportunity," and what happens next depends on the choices made today.

Special thanks to the team of researchers at the Gardner Institute for their assistance in synthesizing the data and reviewing the contents of this monograph. The authors also acknowledge the insights shared in interviews with Utah Valley Chamber CEO Curtis Blair, Representative Stephanie Gricius, Provo Mayor Marsha Judkins, and Economic Development Commissioner Jefferson Moss.



INTRODUCTION

Rising 7,000 feet above the valley floor, Mount Timpanogos stands as the defining natural landmark of Utah County. Tall, prominent, and spectacularly beautiful, it serves as a symbol of the dynamic, youthful, fast-growing, and promising valley below. Utah County faces a future filled with possibility – a new cancer institute and medical school, an expanding airport, an ever-changing technology corridor, a state-of-the-art chip-making facility, newly discovered minerals, and more. It is a Valley of Opportunity. What Utah County becomes will not be limited by its economic and demographic potential, but by the choices made.



Utah County continues to evolve at a rapid pace. This growth and change create a county “on the move,” transitioning from a collection of cities intermixed with agricultural, industrial, and educational land uses to one of Utah’s youngest, fastest-growing, and most economically dynamic counties.

As Utah County’s economy and demography evolve, the county will likely lose the colloquial label of “Happy Valley” and be known increasingly as a “Valley of Opportunity” where businesses, families, and individuals thrive.

Such an exciting and challenging transition will not come without tradeoffs and difficult decisions. Some may even feel a sense of loss as congestion increases, agricultural lands convert to residential uses, and other changes occur. But if handled correctly, residents and community leaders face a future filled with possibility.

“Our challenge is to manage growth and not let it manage us. Done well, we can achieve both growth and prosperity at the same time.”

Curtis Blair, President and CEO, Utah Valley Chamber of Commerce

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This monograph describes Utah County’s “Runway to Opportunity” and its “Destination” by summarizing its past, present, and likely future. The authors identify five “Gateways of Opportunity” and provide insights to help Utah County residents steward future growth. Equipped with this timely information, Utah County residents and leaders can protect what they hold dear and simultaneously capitalize on a promising future.

RUNWAY TO OPPORTUNITY: UTAH COUNTY'S PAST

From its humble pioneer beginnings to its modern diversified economy, Utah County has experienced rapid demographic and economic transformations. The county evolved from an agricultural economy to a manufacturing center and ultimately to a diversified urban economy with a nationally recognized tech sector.¹ Education maintains a constant presence, cultivating investments in human capital and feeding the county's entrepreneurial spirit. Today, Utah County ranks among the youngest mid-sized counties in the nation with educational attainment well above the national average. These factors fuel its ongoing economic momentum.

Distinctive Demographics

Utah County stands out as having one of the most distinctive demographic profiles in the state and nation.

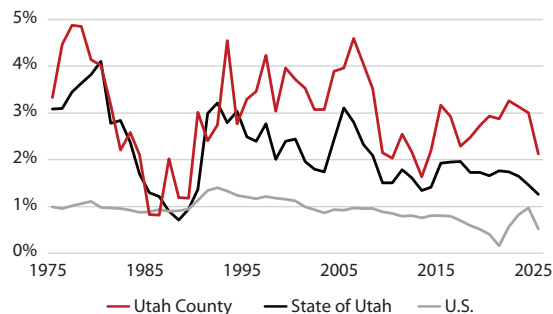
It consistently ranks among the youngest mid-sized counties in the nation, maintains a still relatively high fertility rate, and attracts thousands of in-migrants annually. In part due to historical reliance on natural change, the population remains relatively homogenous, although the rise of net migration introduces greater diversity.

Table 1: Utah County Demographic Rankings Among Utah Counties, Select Years

Utah County's Distinct Demographics	Measure	Ranking
Population Growth	Absolute Change (2020-2024)	1 st
Natural Change	Absolute Change (2020-2024)	1 st
Net Migration	Absolute Change (2020-2024)	1 st
Youthfulness	Median Age (2020-2024)	1 st
Household Size	Average Household Size (2020-2024)	1 st
Total Fertility Rate	Total Fertility Rate Among Metro Counties (2021-2023)	2 nd
Educational Attainment	Share of Adult Population Holding a Bachelor's Degree or Higher (2020-2024)	3 rd
Urban	Share of Population Living in Urban Areas (2020)	3 rd
Married-Couple Households	Married-Couple Households as a Share of Total Households (2020-2024)	5 th

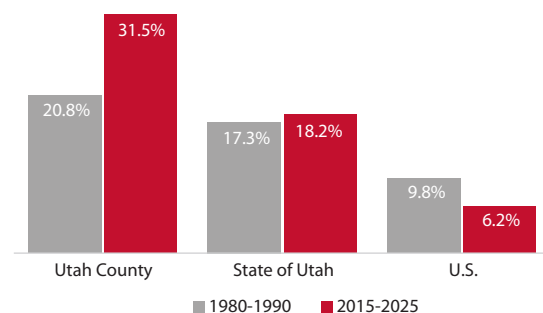
Note: Metro counties include all within a Census-designated metropolitan statistical area.
Source: Kem C. Gardner Policy Institute, Utah Population Committee, U.S. Census Bureau ACS 5-year estimates, and Kem C. Gardner Policy Institute analysis of Utah Department of Health and Human Services Vital Records data

Figure 1: Population Percent Change, Year-Over



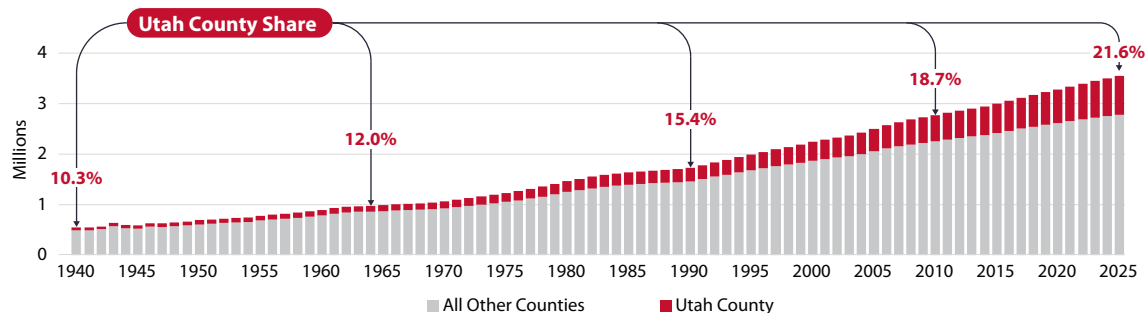
Source: Utah Population Committee and U.S. Census Bureau

Figure 2: Cumulative Population Percent Change



Source: Utah Population Committee and U.S. Census Bureau

Figure 3: Utah Population



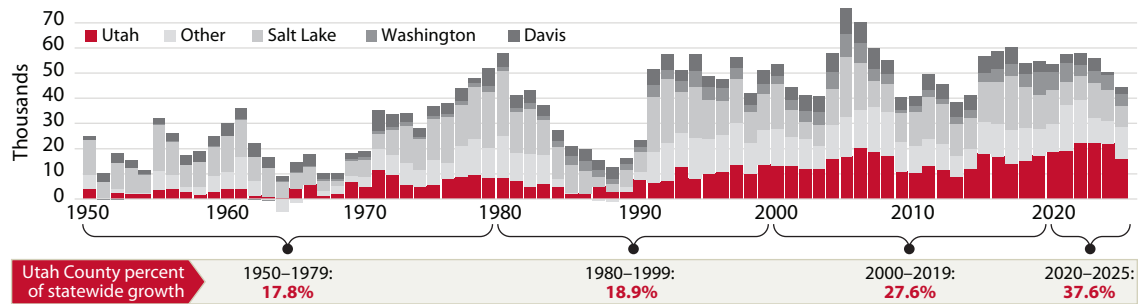
Source: Utah Population Committee

An abundance of opportunity, buildable land supply, location in the state's urban core, and rich educational opportunities contribute to Utah County's emergence as the state's population growth engine. In addition, a young, well-educated workforce and appetite for new business ventures create fertile ground for economic vitality.

Size

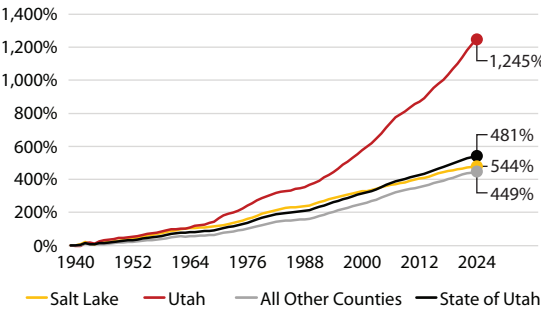
Home to more than one in five Utahns, the county boasts the second largest population in the state after Salt Lake County. With 765,515 residents in 2025, Utah County's population exceeds the current population of three states (Alaska, Vermont, and Wyoming) and the District of Columbia.²

Figure 4: Utah Population Change



Source: Utah Population Committee and U.S. Census Bureau

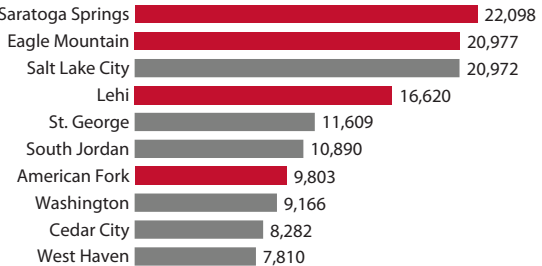
Figure 5: Cumulative Population Growth



Source: Utah Population Committee

Utah's population grew by 266,327 residents from 2020 to 2025, with Utah County accounting for 38% of that growth. Utah County's total population growth over the last five years totaled 101,257, adding approximately the current population of Orem (97,486). This represents approximately 15% cumulative growth, or about 3% annualized compounded growth. Utah County recorded the largest

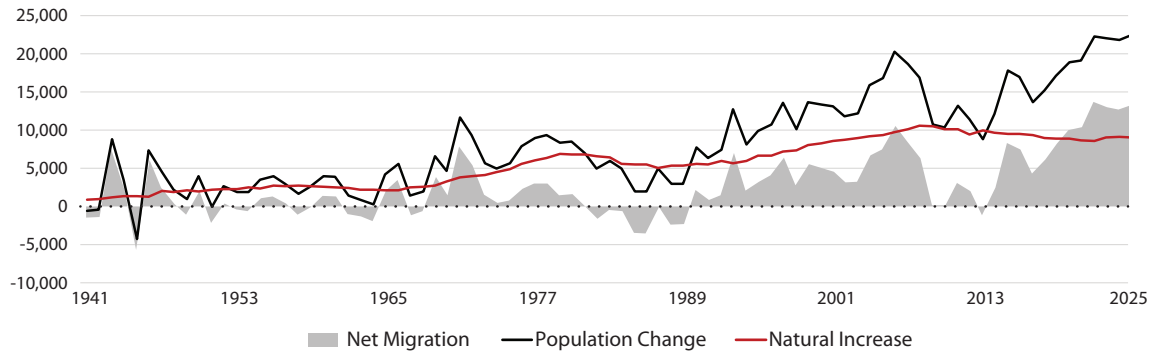
Figure 6: Population Growth in Utah's 10 Cities with the Largest Population Gains, 2020-2025



Source: Kem C. Gardner Policy Institute

population increase of any Utah county for seven consecutive years, driven by both robust net migration and strong natural increase.

The county's year-over population percent change exceeded the state's for the past 31 years, indicating faster growth than one of the nation's fastest growing states. Additionally, its 10-year cumulative percent population change increased from a robust 21% from 1980 to 1990 to an even higher 31% from 2015 to 2025.

Figure 7: Utah County Components of Change and Total Population Change

Source: Kem C. Gardner Policy Institute

Three of Utah's 10 largest cities reside in Utah County – Provo (4th), Orem (6th), and Lehi (8th).

From 2020 to 2025, four of Utah County's cities ranked in the state's top 10 by absolute population growth – Saratoga Springs (1st), Eagle Mountain (2nd), Lehi (4th), and American Fork (7th). These four cities accounted for 26% of the state's growth since 2020. Eagle Mountain and Saratoga Springs quickly climbed the rankings of largest cities – rankings among these cities grew from 20th to 12th and 23rd to 15th largest in the state, respectively, in this same timeframe.

The U.S. Census Bureau recognized Eagle Mountain as the 9th fastest growing city in the nation from 2024 to 2025.³

Components of Change

Utah County's net migration ranked first in the state for the past seven consecutive years, and natural change ranked first for the past six consecutive years through 2025.

Natural Change – Natural change measures the difference between births and deaths. Reliance on natural change (more births than deaths) tends to correlate with younger median age, which corresponds with a strong labor supply.

Natural change historically made up the lion's share of Utah County's population growth, representing the larger positive population driver in 46 of the 50 years prior to 2020. Net migration, however, accounted for the majority of the county's growth from 2020 to 2025.

Notably, from 2020 to 2025, Utah County's cumulative absolute natural change ranked 10th highest nationally.⁴

Net Migration – Utah County experienced positive net migration in 35 of the last 36 years. While historically making up less than half of the county’s total population growth, net migration grew robustly shortly after the onset of the COVID-19 pandemic. In 2022, Utah County’s net migration share of population growth peaked at 61.5%.

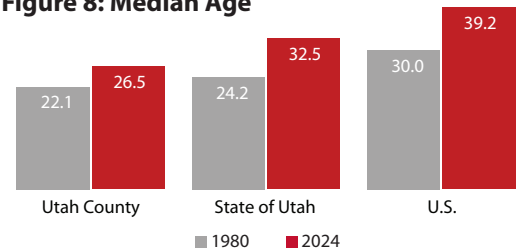
Employment opportunities attract additional residents, and population growth increases demand for additional services. Utah County finds itself in the heart of this cycle, with transformative economic growth generating the conditions for added growth.

Characteristics

Utah County’s demographic characteristics position it for near-term economic growth and long-term economic opportunity.⁵

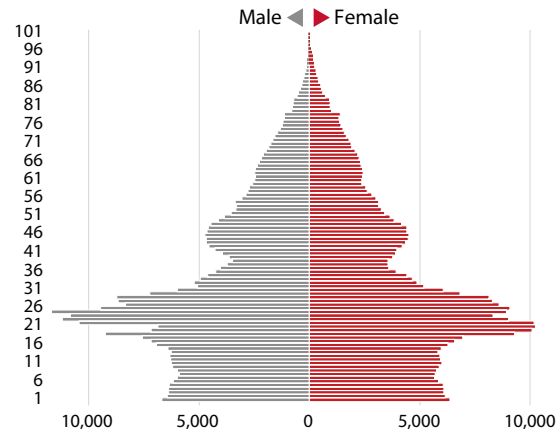
Age Composition – Higher levels of natural change contribute to lower median age. The county’s median age in 2024 tallied 26.5 years, 6.0 years below the state median (32.5) and 12.7 years below the national (39.2).⁶ Utah County ranked as the youngest county in the state when using 2024 five-year American Community Survey (ACS) estimates and among the youngest mid-sized counties in the nation. While aging like the rest of the state and nation, Utah County aged more slowly over the last several decades as measured by median age, largely due to significant population growth from natural change.

Figure 8: Median Age



Note: Estimates of 1980 rely on Decennial Census data while 2024 estimates reflect 2024 1-year ACS estimates.
Source: U.S. Census Bureau

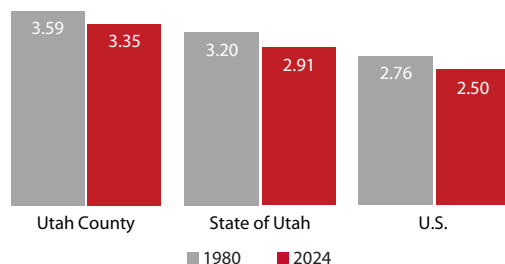
Figure 9: Utah County Population Pyramid, 2025



Source: Utah Population Committee

Two major institutions of higher education contribute to a high concentration of college-aged residents and a young post-college demographic.

Utah County’s under-18 concentration ranks third highest in the state behind Juab and Duchesne counties. Its traditional college-age

Figure 10: Household Size

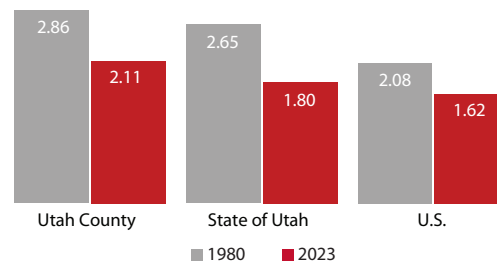
Note: Estimates of 1980 rely on Decennial Census data while 2024 estimates reflect 2024 1-year ACS estimates.

Source: U.S. Census Bureau

(ages 18-24) concentration comes in second behind Cache County, while its 25-to-34-year-old concentration ranks first.

Utah County's population pyramid clearly demonstrates a unique demographic makeup, including sizeable concentrations of college-age and early-career populations. The pyramid also reveals a noticeable gap among Utah County's missionary-age residents, reflecting the outmigration of many who depart on multi-year religious missions for The Church of Jesus Christ of Latter-day Saints.

Households – Higher fertility rates, a younger population, and multigenerational family structures can contribute to larger household sizes. Utah County's 2024 household size equaled 3.35, coming in significantly above the state (2.91) and nation (2.50). Its household size ranked largest in the state when using 2024 five-year ACS estimates.

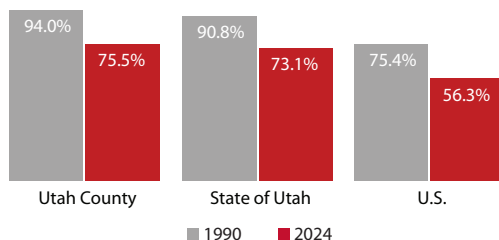
Figure 11: Fertility Rates

Source: National Center for Health Statistics; Kem C. Gardner Policy Institute analysis of Utah Department of Health and Human Services Vital Records data

Household composition in Utah County also differs from the state and nation. Married-couple households in 2024 represent 67.7% of Utah County households, compared with 57.4% statewide and 46.7% nationally. As of 2024, nearly 80% of Utah County residents lived in a married-couple household (77.0%), compared to 70.2% statewide and 59.5% nationally.

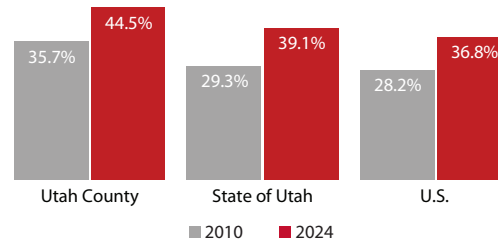
Fertility Rate – A region's total fertility rate represents the average number of children a woman is expected to have if she survives all her reproductive years, using present trends. While total fertility rates in the nation and state fall below replacement (2.10), Utah County's 2023 fertility rate of 2.11 lands narrowly above replacement. Higher fertility rates contribute to higher natural change.

Figure 12: Share of Population, White Alone, Not Hispanic or Latino



Note: Estimates of 1990 rely on Decennial Census data while 2024 estimates reflect 2024 1-year ACS estimates.
Source: U.S. Census Bureau

Figure 13: Share of 25+ Population with a Bachelor's Degree or Higher



Note: Estimates of 2010 rely on Decennial Census data while 2024 estimates reflect 2024 1-year ACS estimates.
Source: U.S. Census Bureau

Racial & Hispanic or Latino Origin – While less racially and ethnically diverse than the state, Utah County’s demographic makeup ranked 4th most racially and ethnically diverse among the state’s counties using 2024 five-year ACS estimates. In 2024, 24.5% of the county identified as non-White or of Hispanic or Latino origin, up from 6.0% in 1990.

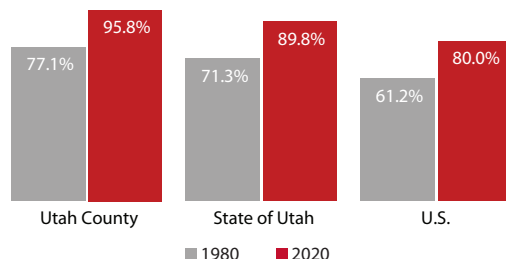
Population growth from natural change generally reflects the county’s existing demographic composition, while a growing share of net migration increases diversity that can carry forward through natural change.

Educational Attainment – Studies find that higher educational attainment levels correlate positively with employment growth.⁷ In Utah County, more than two in five (44.5%) residents 25 years or older held a bachelor’s degree or higher in 2024. This exceeds both the state (39.1%) and national averages (36.8%).

This educational characteristic serves as a major advantage to Utah County’s economy. Higher education institutions help prepare workers for skilled, high-paying jobs, strengthening the local talent pipeline and supporting business development in the region.

Additionally, the county’s comparatively high educational attainment contributes to the county’s entrepreneurial ecosystem. For example, Utah County’s Silicon Slopes benefits from a steady pipeline of graduates who both join existing companies and start new businesses.

Figure 14: Share of Population Living in Urban Areas



Note: Estimates reflect Decennial Census data.
Source: U.S. Census Bureau

Urbanization – Utah County, along with most counties in the state, historically comprised rural towns. Its urban center resided in Provo, surrounded by predominantly rural communities.

Economic growth and diversification led to greater urbanization in recent decades. Retail and other business space expanded as new residents contributed to a growing economic base.

As of 2020, the Census Bureau estimates that 95.8% of Utah County's population resides in urban areas, which "represent densely developed territory, and encompass residential, commercial, and other non-residential urban land uses."⁸ This is up sharply from 77.1% in 1980.⁹

This change ranked the county third highest in the state by the share of residents living in urban areas, after Salt Lake and Davis counties.

Evolving Economy

Economies organize according to purchasing patterns and commutersheds rather than political boundaries. Utah County constitutes a significant portion of the Greater Salt Lake economic region, which consists of 12 northern Utah counties.¹⁰

The economic connection between these counties underscores the need to consider the wider region when examining Utah County's economy as measured by county boundaries.

When measuring according to county lines, Utah County contains the state's second largest economy. It blends a young population and abundant educational opportunities with a spirit of entrepreneurship. The county's young, well-educated, innovative, and tech-friendly workforce contributes to an evolving, diversifying, and thriving economy.

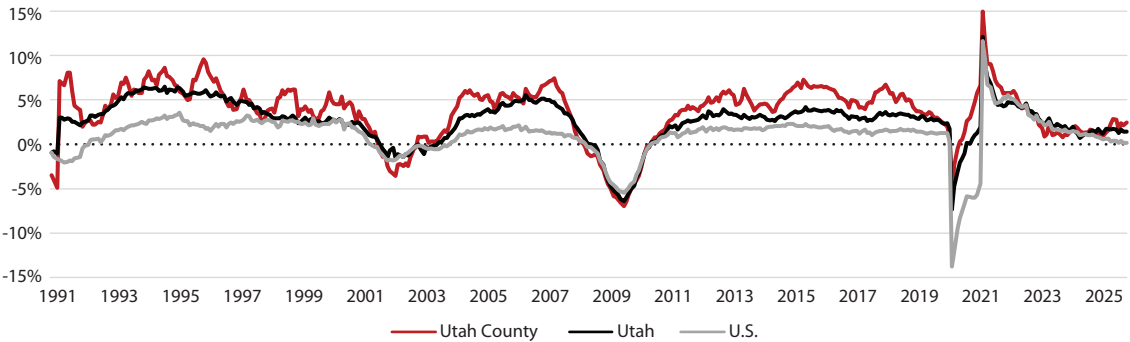
Table 2: Utah County Economic Rankings Among Utah Counties, Select Years

Utah County's Evolving Economy	Measure	Ranking
Tech Concentration	Concentration of Tech-Related Jobs (2025)	1 st
Job Growth	Absolute Change (2020-2024)	2 nd
Entrepreneurship	Business Applications per 1,000 Adults (2025)	3 rd
Economic Diversity	Hachman Index (2024)	4 th

Note: Tech-related jobs align with the 2026 tech sector definition from the Computing Technology Industry Association.

Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics, Utah Department of Workforce Services, and U.S. Census Bureau data

Figure 15: Historical Job Growth, Year-Over Percent Change



Source: U.S. Bureau of Labor Statistics and Moody's Analytics

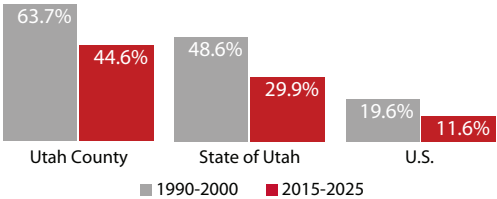
Jobs

Strong job growth accompanies both economic and demographic growth. Utah County accounts for 19.8% of the state's employed residents and 17.3% of the state's payroll jobs as of 2025.¹¹ Since 1990, Utah County's compound annual payroll job growth averaged 3.6%, while Utah's averaged 2.7%, and the nation's averaged 1.1%. Its cumulative job change also exceeds both the state and nation.

While historically concentrating jobs in goods-producing industries such as agriculture and manufacturing, Utah County shifted gradually to an economy more reliant on service-providing industries.

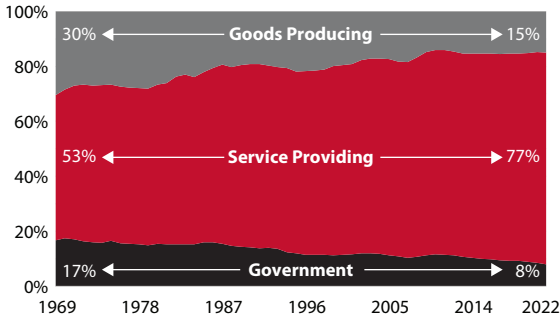
Utah County's goods-producing job share declined from 30.4% to 15.0% from 1969 to 2022, while service jobs increased from 52.8% to 76.9%.

Figure 16: Cumulative Percent Change in Jobs



Source: U.S. Bureau of Labor Statistics

Figure 17: Utah County Concentration of Jobs



Source: U.S. Bureau of Economic Analysis

Source: U.S. Bureau of Economic Analysis

Entity	Percentage
U.S.	4.5%
State of Utah	6.3%
Utah County	7.6%

Source: U.S. Bureau of Economic Analysis

Utah County's GDP ranks second largest in the state. At \$47.9 billion, it represents 16.0% of Utah's economy, which exceeds \$300.0 billion. The county's GDP growth outpaced the state – in 2001, it accounted for 12.1% of the statewide economy. From 2001 to 2024, Utah County's nominal GDP grew at a 7.6% annualized growth rate, surpassing the state's 6.3% and the nation's 4.5% growth.

Legend:

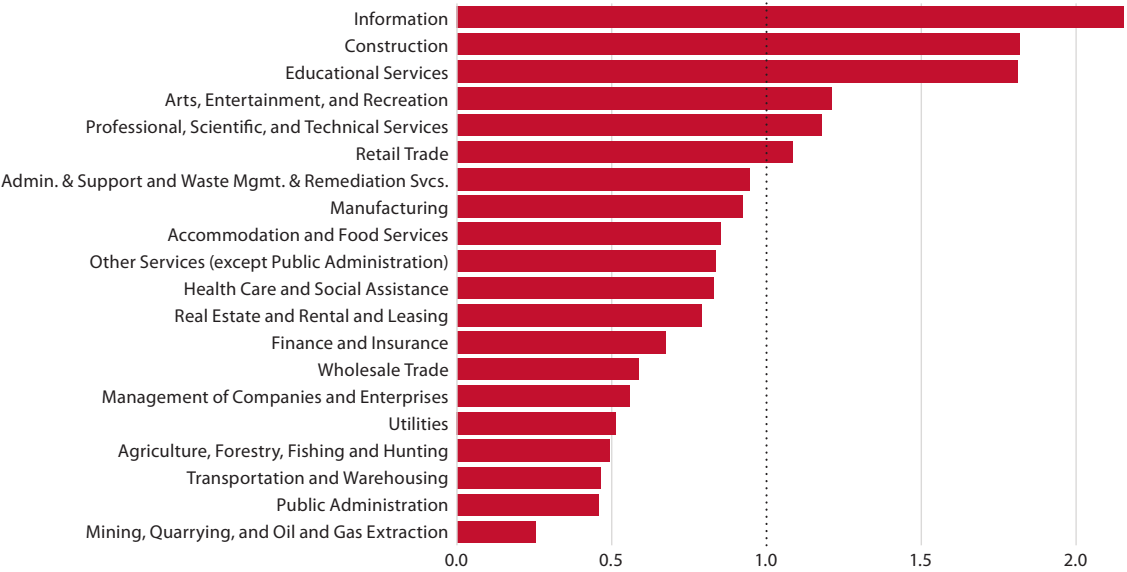
- 75.0-94.0
- 55.0-74.9
- 35.0-54.9
- <34.9

Map Data (State to Percentage):

State	Percentage
Alaska	54.5
Idaho	75.8
Montana	26.4
Wyoming	84.9
Utah	85.0
Colorado	54.7
Nebraska	94.0
Kansas	73.8
Oklahoma	84.8
Arkansas	69.2
Mississippi	32.4
Alabama	16.9
Georgia	10.2
South Carolina	54.5
North Carolina	47.8
Tennessee	15.5
Missouri	42.1
Illinois	45.2
Indiana	25.5
Ohio	51.7
Pennsylvania	38.9
West Virginia	78.4
Maryland	84.1
Delaware	48.0
District of Columbia	27.2

The Hachman Index, a measure of economic diversity, ranked Utah County fourth highest in the state in 2024, preceded by Salt Lake, Davis, and Weber counties. This measure compares the employment industry composition of a given region to the well-diversified national economy. A score of 100 represents an economy with the same industrial composition as the U.S. economy. Utah County scored 84.8 in 2024.

Figure 21: Utah County Employment Location Quotients, 2024



Note: A location quotient of one indicates industry employment concentration equal to the U.S. concentration.
Source: Kem C. Gardner Policy Institute analysis of Utah Department of Workforce Services data

In 2001, Utah County's Hachman Index score equaled 79.0. The county's score has remained stable or increased nearly every year since. Notably, during 2022 its diversity score fell. Tech hiring surged that year, contributing to a higher tech employment concentration in the region.

Industry Specialization

Location quotients measure the industry employment concentration, with a location quotient of one signifying that the industry concentration equals the U.S. concentration.

Utah County's overrepresented industries include the following:

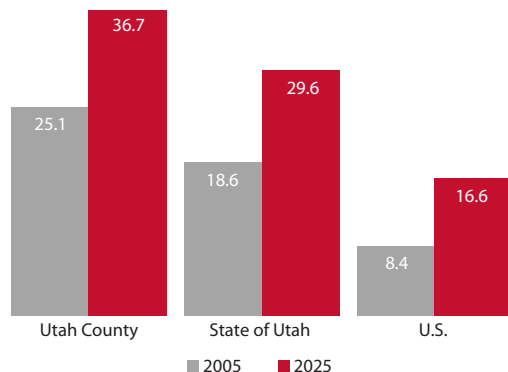
- Information;
- Construction;
- Educational services;
- Arts & entertainment;
- Professional, scientific, & technical services; and
- Retail trade.

This overrepresentation indicates specialization in these industries. Notably, Utah County's information concentration more than doubles the U.S. concentration, with a location quotient of 2.2.

Entrepreneurship

Utah has long possessed a spirit of entrepreneurship. According to a 2022 study, one in 61 venture capital-backed companies in the state becomes a unicorn (a company valued at over \$1 billion). Nationally, one in 101 becomes a unicorn.¹² Two of Utah's largest research universities rank high in a 2026 study measuring the likelihood that graduates create a unicorn. Their respective rankings are first (University of Utah) and 11th (Brigham Young University).¹³ Utah County benefits greatly from this widespread entrepreneurial spirit.

Figure 22: Business Applications per 1,000 Adult Population



Note: Per 1,000 20+ population.

Source: Kem C. Gardner Policy Institute analysis of U.S. Census Bureau data

“We have an entrepreneurial spirit that relies on innovation to solve problems.”

Curtis Blair, President and CEO of Utah Valley Chamber of Commerce

The U.S. Census Bureau publishes estimates of people beginning the business-creation process by county, providing a valuable gauge of entrepreneurial activity. In 2025, Utah County recorded 36.7 business applications per 1,000 adults, compared with 29.6 statewide and 16.6 nationally.¹⁴

Founders and employees in Utah County's startup community remain well-connected, offering mentorship, investment, and overall knowledge to young entrepreneurs. The connectedness of this startup community sets it apart as a place of collaboration and knowledge sharing.

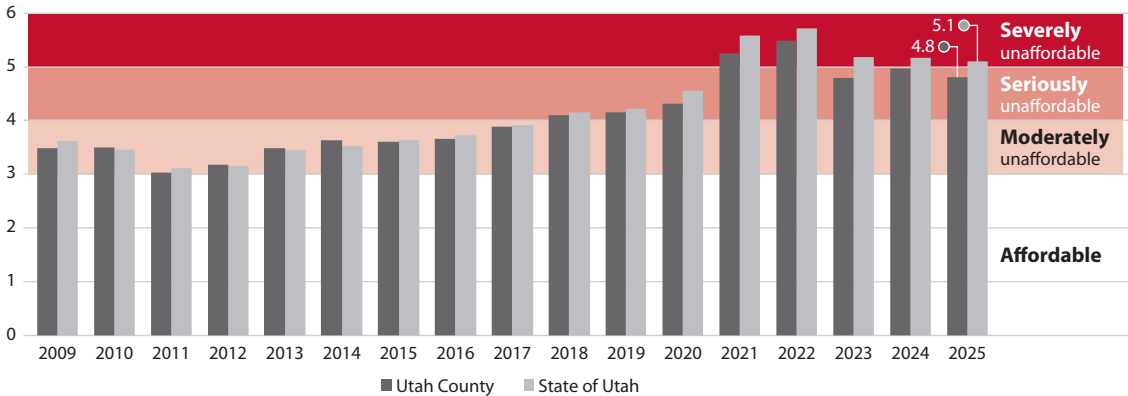
The county's startups have access to a rich supply of incubators, mentorship opportunities, educational programs, and investor networking, including the Launch Pad Incubator Program, iHub Utah, Entrepreneur Launch Pad, BYU Rollins Center for Entrepreneurship & Technology, UVU Baugh Enterprise Institute, Utah Valley Chamber of Commerce, and more.

“Utah County has always had an entrepreneurial vibe.”

Jefferson Moss, Commissioner of the Governor's Office of Economic Development and CEO of Nucleus Institute

Figure 23: Median Multiple

Median Home Sales Price Divided by Median Household Income



Note: Estimates for 2025 are preliminary.

Source: Kem C. Gardner Policy Institute analysis of U.S. Census Bureau and Utah Realtors Association data

Housing

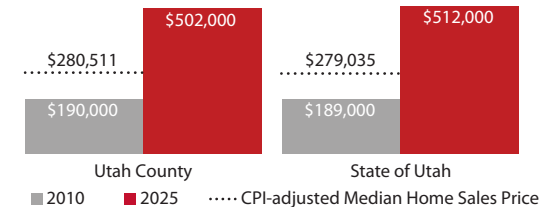
Utah County faces housing challenges similar to the state. Lower mortgage rates, strong population growth, and supply constraints (land, labor, and materials) contributed to a surge in home prices, putting homeownership out of reach for many would-be buyers.

Utah County's 2024 homeownership rate of 68.6% lagged the state (69.6%) but exceeded the nation (65.3%), in part due to a larger concentration of college-age residents. Similarly, its 2025 median home sales price of \$502,000 trails behind the state's (\$512,000) but increased 39.8% since 2020.¹⁵ Statewide, the median home sales price rose 44.4% in the same timeframe. The county's median household income did not keep pace, growing 21.0% through 2024. The state's median household income grew 24.2% from 2020 through 2024.

Utah County's median home sales price trails the state's largely due to the composition of housing stock; in recent years, multifamily homes made up a growing share of Utah County's residential units.

The county's estimated 2025 median multiple equaled about 4.8, meaning the median home sales prices totaled nearly five times the median household income. This measure fell from its 2022 peak of 5.5 but remains elevated.

Figure 24: Median Home Sales Price



Source: Utah Association of Realtors and U.S. Bureau of Labor Statistics

DESTINATION: UTAH COUNTY'S FUTURE

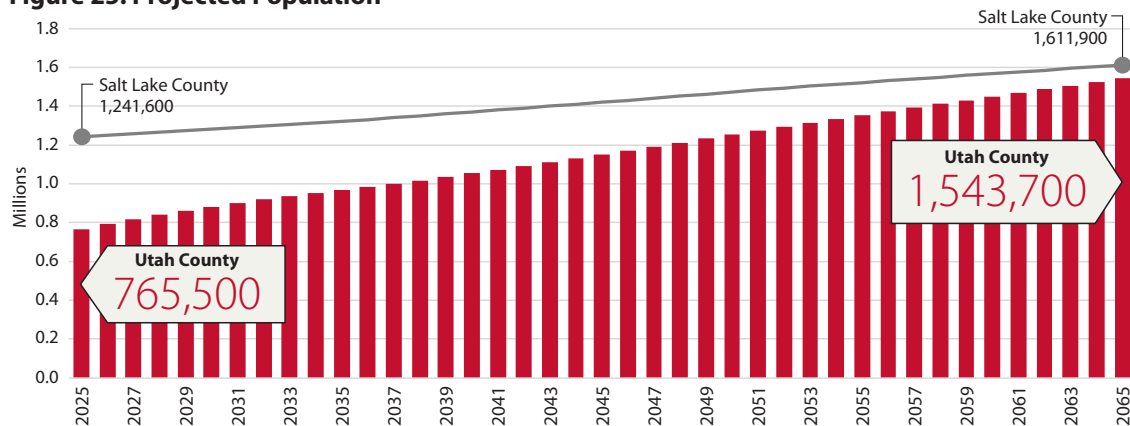
The hallmarks of Utah County's future include rapid population and job growth; sizeable net migration, while still maintaining high levels of natural change (births in excess of deaths); and youthfulness. Over the next 40 years Utah County is expected to exhibit the fastest growing job market, second fastest growing population, and second youngest median age in the state. While not surpassing Salt Lake County in population size, Utah County will get close, even as Salt Lake County remains, by a large margin, the dominant economic center of the state. Overall, Utah County will stand out as one of Utah's most dynamic, fastest growing, youngest, and rapidly changing counties.

Size

Projections indicate Utah County's population will more than double over the next 40 years from approximately 765,500 in 2025 to 1,543,700 in 2065. While Utah County's population will not eclipse Salt Lake County's over this time horizon, it will come within approximately 68,000 people of the capital county's population size. This increment is about the size of the current population of Herriman.

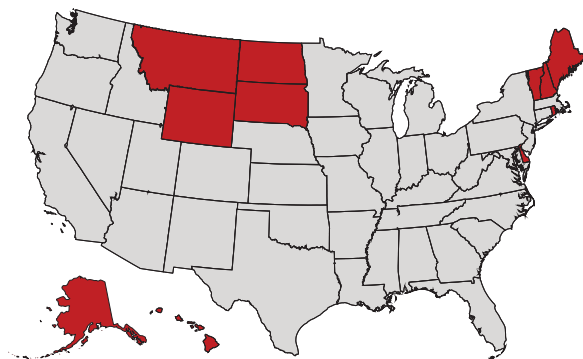
Over this 40-year projection horizon, Utah County's 2065 population will become larger than the current population of 11 states and the District of Columbia.

Figure 25: Projected Population



Source: Kem C. Gardner Policy Institute

Figure 26: Utah County Projected to Exceed Current Population of 11 States and Washington, D.C. by 2065



Source: Kem C. Gardner Policy Institute

Only Wasatch County has a higher projected population growth rate from 2025 to 2065. Wasatch County's growth contributes to Utah County's growth dynamics as both counties share economic and demographic linkages. The population growth of each contributes to the growth of the other.

For example, commuting flow data from 2017 to 2021 show nearly equal flows of commuters in both directions between Wasatch County and Utah County each day for work.¹⁶ The connection between the two counties will likely intensify as both counties continue as growth leaders within the state.

Components of Change

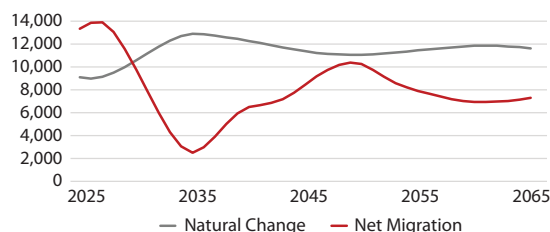
Over the projection horizon, natural change (births minus deaths) will likely account for approximately 60% of the population change, fueled by a projected 698,300 cumulative births that will continue to foster a young population base.

Projections indicate that the county will attract 312,100 net new migrants over the 40-year period, a population slightly smaller than the current size of Davis County (381,339) and slightly larger than the current size of Weber County (272,929). These net new migrants will bring their life experiences and preferences with them, creating a change dynamic within the county.

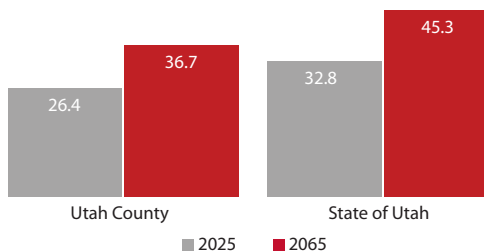
Age Composition

Similar to the rest of the state, Utah County is projected to age, while still maintaining a younger population than the state. Projections indicate Utah County's median age will increase from 26.4 in 2025 to 36.7 in 2065. Cache County (home to Utah State University) replaced Utah County as the youngest county in 2025. With a projected 2065 median age of 29.1, Cache remains the only county younger than Utah County in the projection horizon. By contrast, over this same period, projections indicate the state's median age will increase from 32.8 to 45.3.¹⁷

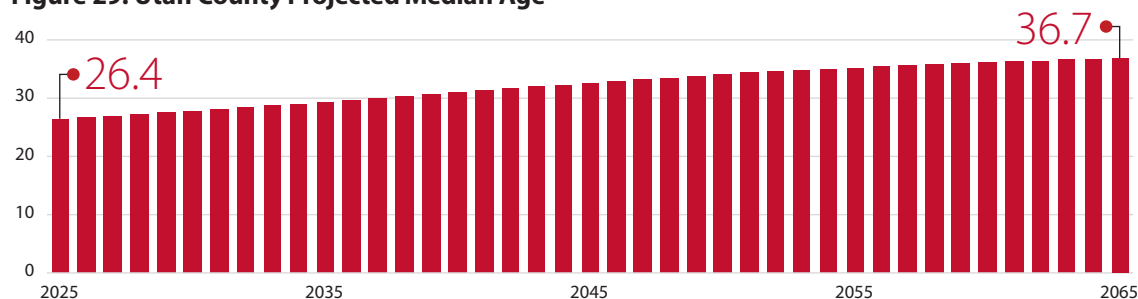
Over the next four decades, Utah County's school-age population (ages 5-17) will likely climb from about 163,500 children to nearly 235,000, an

Figure 27: Utah County Projected Components of Population Change

Source: Kem C. Gardner Policy Institute

Figure 28: Projected Median Age

Source: Kem C. Gardner Policy Institute

Figure 29: Utah County Projected Median Age

Source: Kem C. Gardner Policy Institute

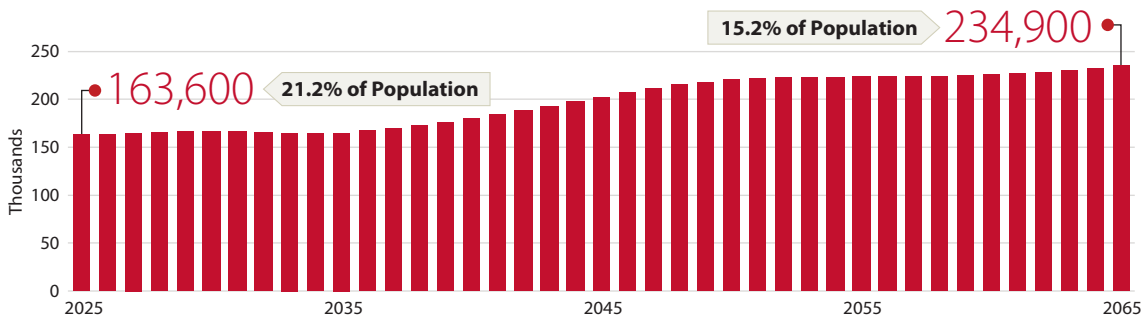
approximately 43.6% increase. This school-age growth in Utah County stands out, with only six other counties experiencing an increase in this age group, none of which share the scale of the growth. School district leaders will need to budget for growth at a time when many education leaders in other counties wrestle with a shrinking school-age population.

Similar to the state, Utah County's college-age population (ages 18-24) will experience a "dip" (not to be confused with a cliff) and marginal

rebound over the next four decades, with an increase of roughly 31,000 college-age residents by 2065.¹⁸

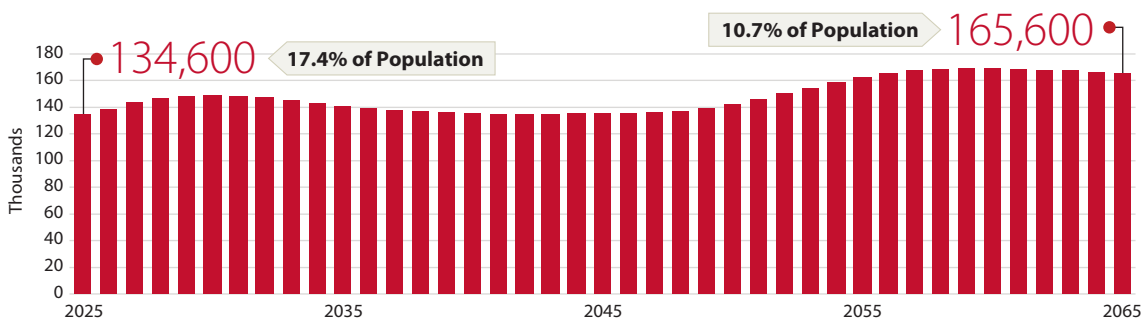
Even as Utah's second youngest county, Utah County's 65-years-and-older population will soar over the time period. Projections estimate that the senior population will increase from nearly 62,500 in 2025 to roughly 262,500 in 2065. This growth means that the 65-plus population will likely increase from 8.1% of the county's population today to 17.0% in 2065.

Figure 30: Utah County School-age Population – Ages 5-17



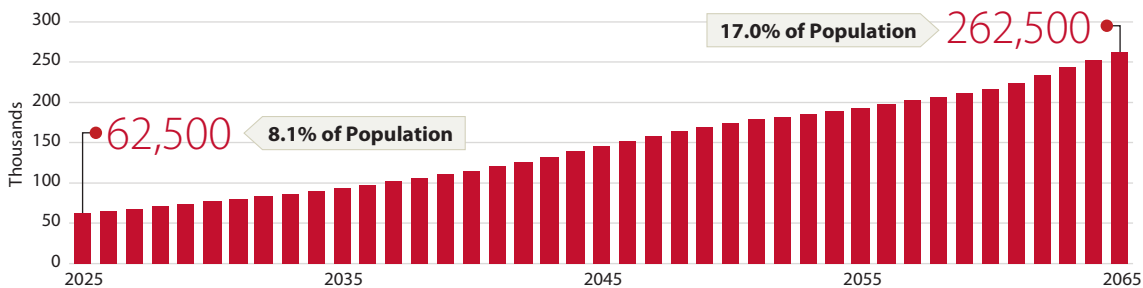
Source: Kem C. Gardner Policy Institute

Figure 31: Utah County College-age Population – Ages 18-24



Source: Kem C. Gardner Policy Institute

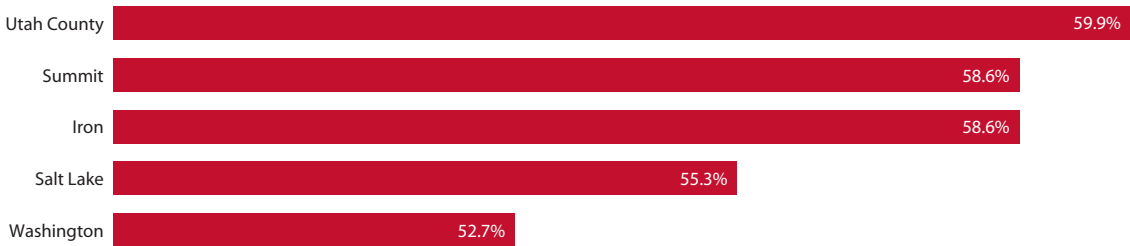
Figure 32: Utah County Older Population – Age 65+



Source: Kem C. Gardner Policy Institute

Figure 33: Projected Job Growth

Top Five Counties, 2025-2065



Source: Kem C. Gardner Policy Institute

Jobs

Utah County’s 2025 job count of about 471,000 ranked second highest in the state. Salt Lake County serves as the undisputed center of the Utah economy, representing approximately 43% of all jobs in the state.

Over the 40-year projection horizon, economists expect Utah County’s job count to increase to nearly 753,000, a 59.9% increase. Utah County’s job growth over this time period ranks highest in the state, followed by Summit County (58.6%), Iron County (58.6%), Salt Lake County (55.3%), and Washington County (52.7%). Together these five counties, led by Utah County, stand out as the top five projected fastest growing job markets in the state. In 2065, a projected three in four Utah jobs will be within these five counties.

Land Availability and Conservation

The available land supply within Utah County near jobs and other opportunities contributes substantially to the county’s population growth. Wasatch Front Regional Council estimates about 122,600 acres of developable parcels exist in Utah County. This compares with 13,900 acres in Salt Lake County and 13,600 acres in Davis County.¹⁹

Recent public dialogue regarding development proposals in or near the canyons, foothills, Utah Lake shoreline, and other open spaces illustrate the challenges in a high-growth county with preferences about critical land conservation.

Metro Area Designation

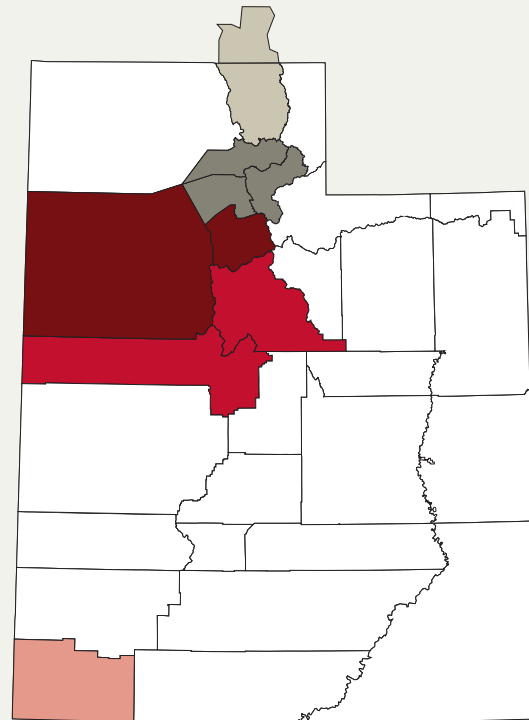
Utah County's growth will at some point impact the federally designated boundaries of the state's metropolitan areas. Currently, Utah features five Metropolitan Statistical Areas (MSAs) as defined by the federal Office of Management and Budget (OMB). Many ask the question, "When will the Salt Lake County and Utah County metros combine?" Analysts acknowledge the uncertainty but do not expect the metros to merge in the near term.

OMB sets the requirements for the creation of an MSA. The current requirements set a commuting threshold of 25%. This means at least 25% of workers living in Salt Lake or Utah counties must commute into the other county. In both directions the current commuting flows fall well short of this threshold.

An estimated 13.4% (40,640 workers) of Utah County workers flowed into Salt Lake County for work, based on 2017-2021 data. In the other direction, 3.4% (20,645) of Salt Lake County workers flowed into Utah County each workday.

Figure 34: Metropolitan Statistical Areas (MSAs)

2025 population and included counties shown in parentheses



- Logan, UT-ID** (160,889; Cache County (Utah) and Franklin County (Idaho))
- Ogden, UT** (672,784; Davis, Morgan, and Weber counties)
- Salt Lake City-Murray, UT** (1,308,777; Salt Lake and Tooele counties)
- Provo-Orem-Lehi, UT** (773,426; Utah and Juab counties)
- St. George, UT** (213,670; Washington County)

Source: Kem C. Gardner Policy Institute

Connectivity of Utah and Salt Lake Counties

THE POINT OF THE MOUNTAIN

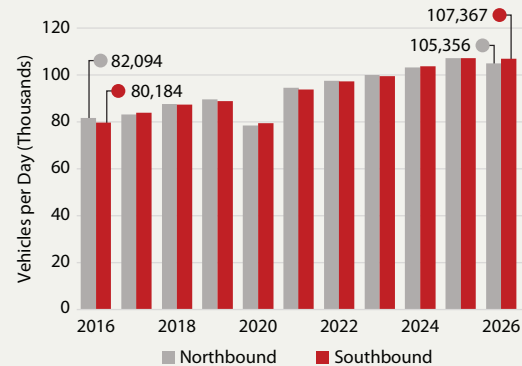
Locals refer to the gateway between Utah's two largest counties as the "Point of the Mountain." This geographic marker includes the narrow passage where the east-west trending Traverse Mountains project into the valley floor and create a natural divide between both counties and a prominent "point" on the mountain ridge. Traffic counts at the Point of the Mountain provide a useful marker of the connectivity of Utah and Salt Lake counties.

Traffic counts between the two areas demonstrate a strong, growing, and near-equal connectivity. Average vehicles per day by year at the Point of the Mountain have increased from approximately 82,000 (northbound) and 80,200 (southbound) in 2016 to 105,400 (northbound) and 107,400 (southbound) in 2026, a more than 30% increase. In seven of the past 10 years, traffic northbound exceeded southbound, but in each year the difference in flows fall within approximately 2,000 of each other, demonstrating the near-equal traffic connection. Average daily traffic flow in January since 2008 moving in both directions has more than doubled.

The Point, a large and prominent development led by the Point of the Mountain State Land Authority both exemplifies and benefits from the connectivity of Utah and Salt Lake counties and will contribute to increased traffic levels in the future.

Figure 35: Point of the Mountain Average Vehicles Per Day

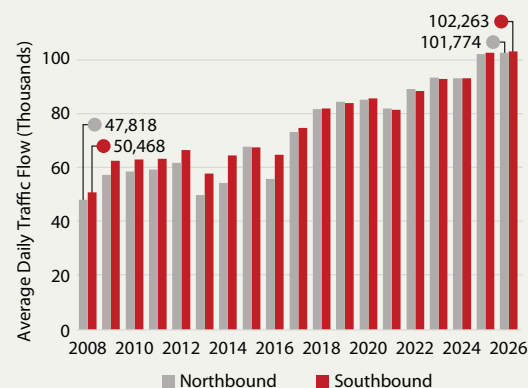
Monday through Friday, Excluding Holidays



Source: UDOT PeMS System and Kem C. Gardner Policy Institute

Figure 36: Point of the Mountain Average Daily Traffic Flow

Monday through Friday, Excluding Holidays, January of Each Year



Source: UDOT PeMS System

GATEWAYS OF OPPORTUNITY

Utah emerged over the past four decades as a major economic success story driven by many factors. These include, but are not limited to, the following:

- **Demographics** – Favorable demographic forces such as relatively high fertility rates and steady net migration.
- **Business climate** – A business-friendly tax and regulatory environment.
- **Social cohesion** – Nation-leading social capital.
- **Infrastructure investment** – Extensive transportation infrastructure investment (including the rebuild of I-15 through the Greater Salt Lake economic region, the new Salt Lake City International Airport, and a modern transit system).
- **Economic diversity** – A well-diversified economy, enhanced by the growth of the tech economy (including Silicon Slopes).
- **Olympic Games** – Success of the 2002 Olympic Winter Games.
- **Financial services** – The transformation into the Intermountain West’s financial and business services center.

These attributes provided gateways of opportunity to what Utah is today – an elite economy with a promising future. These factors also contribute to Utah County’s economic success.

Utah County benefits from additional “Gateways of Opportunity.” Among the most important are transportation infrastructure (including air, roadway, transit, and active transportation), BYU Medical School, Huntsman Cancer Institute, critical minerals, and tech sector assets that will propel the county’s development.

Utah County’s Five Gateways of Opportunity

- 1 **Transportation Infrastructure**
- 2 **BYU Medical School**
- 3 **Huntsman Cancer Institute**
- 4 **Critical Minerals**
- 5 **Texas Instruments**

1 Transportation Infrastructure

Provo Municipal Airport (PVU)

On April 14, 2025, the Provo Municipal Airport broke ground on a three-year, \$78 million expansion project. The expansion will increase the airport’s gate count from four to 10 and further strengthen the facility as Utah’s second largest commercial airport.

The Provo Airport expansion will enhance the economic competitiveness of Utah County, provide air ambulance service, serve as a travel amenity to residents, and further strengthen the county’s education assets (Brigham Young University and Utah Valley University, which utilizes the airport for its flight training program).

Roadways and Transit

On December 19, 2025, the Utah Department of Transportation (UDOT) opened the first section of freeway on the Mountain View Corridor in Utah County. This corridor represents one of 185 projects, totaling approximately \$1.35 billion, in Utah County over the past 10 years on roadway, trail, and transit projects.

Major projects include investments in I-15, Mountain View Corridor, the UVU pedestrian crossing over I-15, US-89, US-6, SR-68, the Vineyard Commuter Rail Station, and more.

Notably, UDOT invested in sidewalks, protected bike lanes, and trails. For example, UDOT invested over \$12.0 million in six trail projects over the past decade.

In total, Utah County’s multimodal investments over the past decade represent an approximate \$1,764 investment for every person in the county.

Table 3: Value of Major Transportation Investments in Utah County, 2015-2025

Projects greater than \$10 million

Project Name	Project Value
MVC from 2100 N to Porter Rockwell	\$427,537,933
I-15; Lehi Main to SR-92, Technology Corridor	\$404,106,539
SR-85; Mountain View Corridor, SR-73 to 2100 North	\$43,636,136
SR-68; Village Pkwy. to Grandview in Saratoga Spgs	\$26,518,092
US-89 (500 W); 500 S to Bulldog Blvd in Provo	\$24,699,407
UVU Ped. Crossing Over I-15	\$24,639,294
Vineyard Commuter Rail Station	\$20,442,376
US-89; University Ave to 500 West, Provo	\$19,128,703
Provo Westside Connector Airport to I-15	\$17,619,267
SR-68; Centennial Blvd to Pioneer Crossing	\$16,296,783
Springville/Spanish Fork Interchange Phase 1	\$15,944,592
US-89 (300 S); 200 W to 700 E Provo	\$14,835,450
PG Interchange Area Capacity Improvements	\$14,705,809
US-6 Improvements in Spanish Fork	\$14,474,000
Alpine Hwy to No. County Blvd; Connector Road	\$10,487,303

Note: The total investment over the past decade includes 185 projects and \$1.35 billion in investments.
Source: Utah Department of Transportation

FrontRunner 2X

The Utah Department of Transportation and Utah Transit Authority plan to double FrontRunner train frequency to increase ridership and reduce congestion. Funded with federal and state dollars, the \$3.2 billion project includes 11 double-track sections, a new station, a track realignment, 10 new trainsets, and a maintenance facility.

Current FrontRunner ridership reaches 90% of capacity in peak hours. The double tracking will increase frequency to 15-minute headways during peak hours and 30-minute headways during non-peak hours. Transportation planners estimate this investment will lead to a 53% increase in ridership, in part due to improved reliability. Planners project that by 2050 FrontRunner will move 17% faster than I-15 during peak hours.

2 BYU Medical School

On July 29, 2024, the Church of Jesus Christ of Latter-day Saints announced its intent to establish a teaching-focused, faith-centered medical school that prepares physicians to heal through clinical excellence. According to the Church, a major focus will be international health issues affecting members of the Church and support for the Church's worldwide humanitarian efforts.²⁰

Plans call for the construction of the medical school at the former Provo High School site, adjacent to Intermountain Health's Utah Valley Hospital. This strategic location will support classroom instruction and clinical training.

The Brigham Young University (BYU) School of Medicine strengthens the county's position as a center for knowledge industries by adding medicine to an already powerful ecosystem of

engineering, computer science, entrepreneurship, and other fields. Its location creates the foundation for a major academic health district that can attract physicians, researchers, biotechnology firms, and health-care innovation while improving access to clinical education and specialized medical services.

The school's planned focus positions Utah County to become a recognized center for humanitarian medicine and global health. Over time, the medical school will likely generate substantial economic spillovers through high-wage employment, research partnerships, startup formation, and increased demand for professional services. On October 14, 2026, BYU announced preliminary accreditation and authorization to launch the MD program in July 2027.

3 Huntsman Cancer Institute

On April 8, 2025, community leaders broke ground in Vineyard, Utah on a 272,000-square-foot University of Utah, Huntsman Cancer Institute facility. The facility will open to patients in Fall 2028, providing world-class cancer care for an estimated 40,000+ patient visits annually.

The first phase includes multidisciplinary cancer clinics, medical oncology, radiation oncology, infusion services, pharmacy, comprehensive cancer imaging, endoscopy, screening and early detection, wellness and integrative health, an acute care clinic, clinical trials, research laboratories, and AI-enabled computational science and data analytics. The University of Utah will offer education and training programs in partnership with Brigham Young University and Utah Valley University.

The Vineyard campus represents a transformational economic investment that extends well beyond health care. As the only National Cancer Institute-designated Comprehensive Cancer Center in the Mountain West, Huntsman Cancer Institute will establish Utah County as a major center for biomedical research, precision medicine, and cancer

innovation, while complementing its nationally recognized strengths in technology and entrepreneurship. The institute is expected to attract highly skilled physicians, scientists, researchers, and biotechnology companies; deepen research collaborations with Brigham Young University and Utah Valley University; and expand opportunities for clinical trials, workforce development, and commercialization of medical discoveries.

Beyond creating high-paying jobs, the facility strengthens Utah County's ability to recruit businesses and talent by providing world-class specialty health care close to home. It also reduces travel burdens for thousands of cancer patients while anchoring the continued development of innovation in Utah County.

Together with the BYU School of Medicine and surrounding life sciences investments, the Huntsman campus positions Utah County to become one of the nation's leading centers for integrated health care, precision medicine, cancer innovation, medical education, and biomedical innovation.

4 Critical Minerals/Utah's Silicon Ridge

In 2025, Ionic Mineral Technologies discovered a critical mineral reserve in the Lake Mountains, a mountain range directly west of Utah Lake in Utah County. The deposit, located on a 12,176-acre School and Institutional Trust Land lease, includes 19 rare earth elements. In an interview published in the Wall Street Journal, the company referred to the discovery as potentially the “most significant critical mineral reserve in the U.S.”²¹

The discovery presents an outstanding economic, national security, and education funding opportunity for Utah County, the state, and nation.

Critical minerals serve as inputs to semiconductors, energy systems, advanced manufacturing, and national defense. Because the U.S. currently relies on China for the vast majority of rare earth elements used in the U.S., the Silicon Ridge discovery serves a national security imperative.²²

Importantly, minerals mined and processed from Silicon Ridge generate royalties for Utah's school trust fund.

Ionic MT processes the mined materials within Utah County, adding to the economic impact. The company reports that it currently processes materials at an 84,000-square-foot facility in Provo, Utah, with a build out planned in Eagle Mountain.

Utah County is not alone in its mineral assets. The Utah Mining Association reports that 50 of the 60 rare earth minerals identified by the U.S. Department of Interior exist in Utah. Over the next several decades, as Utah develops its treasure trove of critical minerals, look for Utah County to make a substantial contribution.

5 Texas Instruments

On February 15, 2023, Texas Instruments announced plans to build a 300-millimeter semiconductor wafer fabrication plant (or fab) in Lehi.

The \$11 billion investment represents the single largest private-sector capital investment in Utah history.

Designed to dramatically expand Texas Instruments' domestic semiconductor manufacturing capacity, the project will produce tens of millions of analog and embedded processing semiconductor chips each day. The chips will support the automotive, industrial, medical, aerospace, communications, and consumer electronics markets.

Texas Instruments estimates the expansion will create approximately 800 additional company jobs as well as thousands of indirect jobs.

The investment will further establish Utah County as one of the nation's premier semiconductor manufacturing centers at a time when microchips have become essential to economic competitiveness and national security.

Texas Instruments further diversifies Utah County's tech offerings and strengthens supply-chain resilience for the United States. The investment will attract engineering talent, stimulate research partnerships with Utah's universities, and reinforce Utah's reputation as a destination for advanced manufacturing.

As software, semiconductors, and advanced manufacturing increasingly intersect, Utah County will strengthen its position as a leading technology corridor. The investment supports long-term growth in high-wage employment, exports, productivity, and technological innovation.

INSIGHTS FOR DECISION-MAKERS

Utah County's demographic and economic growth creates an imperative for action. Residents can sit back and observe this growth and change, or engage as active participants and leaders in guiding, and even inventing, the future. The Kem C. Gardner Policy Institute offers five overarching insights to consider as Utah County decision-makers guide fast-paced change and extraordinary opportunity.

- 1 Prioritize Quality Growth**
- 2 Invest Even More in Infrastructure**
- 3 Capitalize on Youthfulness**
- 4 Preserve a Sense of Community**
- 5 Lead with Dignity**

1 Prioritize Quality Growth

As a growth leader, Utah County will continue to change rapidly. A posture of guiding growth rather than reacting to growth will position the county for success. Community leaders can embrace the wisdom of a Utah County tech leader who said: "You can fight change and die. You can accept change and survive. Or you can lead change and prosper."²³

"Thoughtful design helps Utah County communities grow without losing their historically rural character or sense of community where neighbors still know one another."

Stephanie Gricius, State Representative, District 50

Utah's state-level growth planning offers Utah County a valuable model and template for county-level growth planning.

Governor Cox organizes growth planning through the BUILD Coordinating Council. The Council, which consists of Cabinet members and community leaders, aligns long-range planning efforts across state agencies and all levels of government. The effort seeks to align interests and help Utahns "row in the same direction" so the state can maximize impact, leverage resources, and avoid duplication. Robust strategies can advance multiple objectives simultaneously when counties face increasing

“The sentiment is shared throughout Utah County that we need to protect the precious resources that we have. The agriculture land that we have, the canyons, the lake. We still have the ability to do that, but we have to be proactive about it. We can lose these things. They’re not a guarantee.”

Marsha Judkins, Mayor of Provo

demands and stretched resources. This same organizing structure and the core values, outcomes, and strategies employed offer a starting point for Utah County.

Core Values

At the state level, the BUILD Coordinating Council adopted six core values that inform its work. These same values serve as a great starting point for Utah County to personalize its own core values related to future growth. The state’s core values include the following:

- Strong families and communities.
- Stewardship.
- Liberty and choice.
- Collaboration and social cohesion.
- Dignified dialogue.
- Innovation, entrepreneurship, and opportunity.

Outcomes

In addition to these values, the BUILD Coordinating Council embraces eight aspirational outcomes for the future of the state and its communities. These outcomes also offer valuable guidance to Utah County residents and leaders. They include the following:

- **Culture** – Utah is a model for the nation where people collaborate to solve hard problems and strengthen communities.
- **Housing** – Every Utahn has access to safe, affordable, and stable housing.
- **Energy** – Utah has affordable, reliable, and dispatchable energy to power our economy.
- **Transportation** – Our transportation system offers all Utahns convenient and safe access when, where, and how they want to go.
- **Water and air** – Utah has well-managed water resources, a thriving Great Salt Lake, and clean air.
- **Public lands, recreation, and agriculture** – Healthy and accessible public lands, abundant recreation assets, and productive agricultural lands are key features of Utah’s landscape and culture.
- **Employment and education** – Quality jobs and education empower Utahns to build brighter futures for themselves and their families.
- **Safety and health** – Our communities are safe, support physical and mental health, and are good places to live for families and people of all ages.

Strategies

The BUILD Coordinating Council endorses robust strategies that Utah County residents and leaders can model as they evaluate their own strategies. The state strategies, which can also be viewed as challenges, that relate to Utah County include the following:



Invest in regional infrastructure –

Target public investments in system-level infrastructure to support or connect more than one community over a larger geographic area. Infrastructure may include transportation, drinking or wastewater, energy production and transmission, recreation, or broadband.



Advance agricultural resilience and innovation –

Drive innovations and efficiency in agricultural production through education, incentives, research, and policy. This may include changes to crop types, irrigation practices, vertical farming, soil management, and continued flexibility in water rights management.



Cultivate human capital –

Proactively develop Utahns' skills, knowledge, and health through activities like training, education, and mentorship. Create safe and healthy communities and places for positive social connection.



Guide technology integration with good data science –

Invest in technology to modernize infrastructure, leverage data analytics for efficiency, automate processes, and foster innovation across multiple sectors and policy areas (transportation, energy, utilities, education, economic development, etc.).



Build communities with a vibrant center –

Co-locate housing, public amenities, transportation infrastructure, and employment to create centers of activity and anchor communities.

2 Invest Even More in Infrastructure

Utah County's rapid growth creates an investment imperative. Even with massive state and local infrastructure investment over the past decade, state and local government investment in infrastructure has not kept pace with residential growth, particularly in northwestern Utah County.

Transportation planners identify the geography and topography of the Eagle Mountain and Saratoga Springs area as a major connectivity challenge. Utah Lake creates a significant transportation bottleneck for residents west of Utah Lake as they travel to the east side of the lake, which remains the county's economic and population center. The Lake Mountains west of Utah Lake and the mountains along the Utah County and Salt Lake County border (where the Camp Williams Military Installation resides) create additional barriers for transportation corridors.

In addition, much of the traffic that travels to and from Saratoga Springs and Eagle Mountain traverses through Lehi. Lehi's increasing development limits options for alternative transportation corridors. Utah County's rapid population growth additionally creates the need for greater investments in public transit.

The Utah Department of Transportation (UDOT) completed a Utah County traffic study in 2025. The study identified the following top congestion spots:

- I-15 Northbound: Orem Center Street to American Fork Main Street
- I-15 Southbound: 14600 South to Pioneer Crossing
- I-15 Southbound: American Fork Main Street to Orem Center Street
- I-15 Northbound: Lehi Main Street to 14600 South
- I-15/SR-125 (Pleasant Grove Boulevard) Interchange
 - Westbound Pleasant Grove Boulevard: North County Boulevard to I-15
 - I-15 Southbound Exit Ramp
 - I-15 Northbound Exit Ramp
- I-15; SR-52 (800 North) Westbound: 800 West to I-15

State and local government will need to focus on these highly congested areas as they prioritize transportation investments.

"Infill development and high-density housing must be done right, particularly around transit corridors. To be sustainable, public transportation must be aligned with land use. We have to be really intentional about our development."

Marsha Judkins, Mayor of Provo

Table 4: Utah County Planned or Approved Trail Investments

Project Name	Project Value
Highline Canal Trail - Phase I	\$16,954,520
UTN: Timpanogos Highway Trail	\$9,500,000
UTN: Vineyard Connector Trail	\$6,500,000
Tickville Trail - Eagle Mtn.	\$4,108,120
Mapleton Lateral Canal Trail Phase 3	\$3,798,594
American Fork Art Dye Trail	\$1,447,000
*Utah Lakeshore Trail Spring Creek Area	\$1,100,000
Mapleton US-89 Trail	\$1,023,000
US-89 Trail Widening; Cougar Blvd to Provo River	\$500,000
UTN: Utah Lakeshore Trail; Saratoga Springs (Study)	\$350,000
UTN: Art Dye Trail (Study)	\$250,000
UTN: Utah Lakeshore Trail to UVU Ped Bridge (Study)	\$150,000
*Woodland Hills Trail Feasibility Study	\$100,000
TOTAL	\$45,781,234

Source: Utah Department of Transportation

Table 5: Utah County Planned or Approved Transportation Investments

Projects greater than \$50 million

Project Name	Project Value
Cory Wride Freeway; Ranches Pkwy to MVC	\$1,011,950,000
SR-194; Lehi 2100 N Freeway	\$621,317,523
I-15; Santaquin to Payson	\$296,599,134
Springville 1600 S./2700 N, S.F.Main St. to SR-51	\$116,855,767
I-15; Payson Parkway Interchange	\$95,090,358
SR-241;Orem 1600 N from 1200 W to State Street	\$64,314,315
US-189; University Ave Viaduct replacement (0F-84)	\$61,550,393
Pioneer Crossing Improvements Phase 1	\$60,350,000
Springville Sharp/Tintic RR Connection	\$58,767,143

Source: Utah Department of Transportation

Utah Lake Crossing

Utah Lake simultaneously creates a valuable natural amenity and a transportation barrier. The Utah Department of Transportation (UDOT) intends to execute a contract with a firm to conduct field surveys and geotechnical investigations on the lake to analyze the feasibility of a lake crossing. This geotechnical data, combined with traffic analysis, will help identify the optimal location to maximize benefits for traffic and future growth.

Information from this study will help determine the benefit of a lake crossing and include estimates of the cost. UDOT will then be able to evaluate the overall cost-benefit of the investment. UDOT expects the work to be completed in early spring 2027.

Utah state government recognizes the investment imperative. The Northwest Utah County transportation program includes these major projects:

- Mountain View Corridor extension - Lehi 2100 North to Porter Rockwell Blvd in Bluffdale (completed in December 2025).
- Pioneer Crossing flex lanes (under construction).
- Lehi 2100 North freeway (under construction).
- Mountain View Corridor further extension - Lehi SR-73 to Lehi 2100 North (in planning/design; construction scheduled to begin early 2029).
- SR-73 Cory Wride Freeway Phase 1 - Mountain View Corridor to Ranches Parkway in Eagle Mountain (in planning/design; construction scheduled to begin early 2029).

In addition, the full list of planned/approved transportation investments in Utah County includes 168 projects/studies totaling \$3.07 billion. Nine of these projects exceed \$50 million each.

UDOT also plans significant investment in trails. Fourteen major trail projects/studies are planned/approved, tallying approximately \$45.8 million in investments that contribute to residents' quality of life.

Transportation infrastructure investment will continue as an essential and expensive component of Utah County's future.

3 Capitalize on Youthfulness

Utah County possesses the state's second youngest median age in 2025 at 26.4, more than six years younger than the state average. Only Cache County, another major university county, possesses a younger median age in 2025 at 25.8, approximately seven years younger than the state average.

This relative youthfulness holds over the projection horizon. While every county in Utah ages, Utah County is expected to remain the state's second most youthful county in 2065, with a projected median age of 36.7. Despite increasing, Utah County's median age will likely remain below the present median age of the United States.

To put this in perspective, the median age in nine Utah counties is projected to be 50 years old or older in 2065. These counties include Beaver,

Daggett, Garfield, Kane, Piute, Rich, Summit, Wasatch, and Washington. Piute County is projected to reach a median age of 62.2 by 2065.

Places with young populations possess many attractive attributes that increase an area's economic competitiveness. Younger populations tend to be less expensive, healthier, and more tech savvy. These attributes, and more, will continue to strengthen Utah County's economic competitiveness.

Utah County can tap into its youthful vigor to benefit the county. This "youthquake" can take the form of increased volunteerism, service corps, AI readiness, educational opportunities, or other forms of youth development and engagement.

4 Preserve a Sense of Community

Utah County residents recognize and speak about a special sense of charm and community within the county. You feel this community character when you are in it, and you recognize when it leaves. Maintaining this sense of community will be challenging as the county grows.

Development pattern choices can either build or detract from community. Center-based development patterns create spaces where communities can gather, celebrate events, and interact with one another, building a strong sense of unity and connection.

The existence of a large water body right in the middle of the county makes cultivating a neighborly and unified feel even more difficult to achieve. Fortunately, the county already benefits

from local coordination through the Metropolitan Planning Organization and monthly meetings among municipal mayors across the county. Local leaders report an interest in preserving the local culture. Collaboration will be essential to preserving Utah County's customs and culture.

“Utah County mayors get together at least once a month. Even though they’re responsible for their one community, they still have a pulse on what’s going on in the rest of the county. This enables collaboration. They align and look out for each other.”

Stephanie Gricius, State Representative, District 50

5 Lead with Dignity

Utah and Utah County benefit from significant networks of trust (also known as high social capital). These networks help residents prevent and solve problems. This associational life fosters collaboration and supports successful communities.

Unfortunately, Utah County mirrors state and national trends of significant polarization and mean-spirited, sometimes even violent, expression and actions. By leading with dignity, Utah County leaders and residents can set a national standard for civic life.

Too often contempt, in all its forms, permeates public policy discussions and prevents progress. To make full use of the intelligence, creativity, ingenuity, and love that have always been the authors of great human achievements, Utah County will be advantaged by infusing greater dignity into the public square. Utah County can be a model for the nation in leading with dignity.

“The current polarization creates too large of a gap for any one leader, chamber, or business to overcome. We must curate leadership that is principle based and understand the entire dynamic taking place, not just in Utah County, but in the state and nation. If any county in the nation could lead out on dignity, it should be Utah County.”

Curtis Blair, President and CEO of Utah Valley Chamber of Commerce



FINAL WORD

Utah County's remarkable economic and demographic trajectory creates extraordinary opportunities but also places increasing demands on infrastructure and life quality. The economy will continue to grow as Utah County's five "Gateways of Opportunity" supplement the many additional economic strengths of Utah and Utah County. These gateways include significant investment in transportation infrastructure, the BYU Medical School, the Huntsman Cancer Institute, critical minerals, and Texas Instruments.

As Utah County more than doubles in size and approaches the population size of its larger neighbor to the north, Salt Lake County, leaders will benefit from prioritizing quality growth, investing even more in infrastructure, capitalizing on its youthfulness, preserving a sense of community, and leading with dignity. Utah County's future as a "Valley of Opportunity" will ultimately be determined not by its growth, but by how residents and leaders guide future development.



“We have to invest in the future and protect what we value. Growth is a given. Let’s make sure we preserve our critical lands, invest in infrastructure, and be thoughtful and purposeful in our economic development and redevelopment. Our children and grandchildren will be the beneficiaries.”

Marsha Judkins, Mayor of Provo

Endnotes

1. See accompanying publication, "Valley of Opportunity: Economic Origins," Kem C. Gardner Policy Institute.
2. State of Utah and Utah county population estimates throughout the report rely on Utah Population Committee (UPC) estimates unless otherwise noted.
3. Rankings consider cities and towns with a population of 20,000 or more. See <https://www.census.gov/newsroom/press-releases/2026/vintage-2025-city-town-pop-estimates.html>.
4. U.S. Census Bureau, "County Population Totals and Components of Change: 2020-2025," <https://www.census.gov/data/datasets/time-series/demo/popest/2020s-counties-total.html>.
5. Comparative estimates of age, household size & composition, racial & Hispanic or Latino origin, educational attainment, and share of population living in urban areas rely on U.S. Census Bureau American Community Survey estimates. Utah County's population pyramid uses Kem C. Gardner Policy Institute data, and total fertility rate estimates rely on Kem C. Gardner Policy Institute analysis of Utah Department of Health and Human Services Vital Records data.
6. U.S. Census Bureau, 2024 American Community Survey 5-year estimates.
7. Federal Reserve Bank of Chicago, "Do Higher Education Levels Matter for Regional Growth?," March 2026, <https://www.chicagofed.org/publications/chicago-fed-insights/2026/higher-education-levels-regional-growth>.
8. U.S. Census Bureau, "Urban and Rural," <https://www.census.gov/programs-surveys/geography/guidance/geo-areas/urban-rural.html>.
9. U.S. Census Bureau updates their urban area definition periodically, meaning differences exist between the 1980 and 2020 definitions. For more information on the historical definition, see https://www2.census.gov/prod2/decennial/documents/1980a_usC-08.pdf.
10. Kem C. Gardner Policy Institute, "Utah's Economic Regions," November 2020, <https://d36oiwf74r1rap.cloudfront.net/wp-content/uploads/EconRegions-Nov2020.pdf>.
11. Employed-resident statistics rely on BLS Local Area Unemployment Statistics, and payroll jobs statistics rely on BLS Quarterly Census of Employment and Wages.
12. Utah Business, "Utah has More Unicorns than Any Other State. Why?," November 2022, <https://www.utahbusiness.com/entrepreneurship/2022/11/30/utah-startup-success-2/>.
13. Deseret News, "Bankable News for University of Utah Student-Entrepreneurs Envisioning \$1B 'Unicorn' Business," June 2026, <https://www.deseret.com/education/2026/06/26/university-utah-business-unicorns/>.
14. Adult is defined as anyone 20 years and older.
15. Utah Association of Realtors. Values represent the median home sales price of all homes sold.
16. U.S. Department of Transportation, Bureau of Transportation Statistics, Census Transportation Planning Package, 2017-2021.
17. Kem C. Gardner Policy Institute, "Utah's Aging Population: The Demographic Dividend," September 2026, <https://d36oiwf74r1rap.cloudfront.net/wp-content/uploads/2026/09/AgingPop-Fiscallmp-Sep2026.pdf>.
18. Kem C. Gardner Policy Institute, "Utah's Aging Population: The Demographic Dip: Updated Projections and Strategies for Higher Education," September 2026, <https://d36oiwf74r1rap.cloudfront.net/wp-content/uploads/2026/09/AgingPop-DemDip-Sep2026.pdf>.
19. Wasatch Front Regional Council. Estimates represent total acreage of developable parcels according to WFRC's land use model inputs. The estimates exclude large parcels containing only one building.
20. The Church of Jesus Christ of Latter-day Saints, "First Presidency of the Church of Jesus Christ Announces New Medical School for Brigham Young University," July 2024, <https://newsroom.churchofjesuschrist.org/article/first-presidency-of-the-church-of-jesus-christ-announces-new-medical-school-for-brigham-young-university>.
21. Wall Street Journal, "Trove of Critical Minerals Uncovered in Utah Desert," December 2025, <https://www.wsj.com/articles/trove-of-critical-minerals-uncovered-in-the-utah-desert-9bc509f9>.
22. Ionic MT, Public Briefing Memo, July 2026.
23. Attributed by Gov. Mike Leavitt to a conversation he had with Novell leader Ray Noorda.

A stylized, low-poly illustration of a mountain range in shades of gray. A prominent, jagged mountain peak is centered in the upper half. A solid red horizontal banner spans the middle of the image, containing the title text. Below the banner, the mountain range continues with smaller peaks and a line of evergreen trees at the base.

KEEPERS OF THE FLAME



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