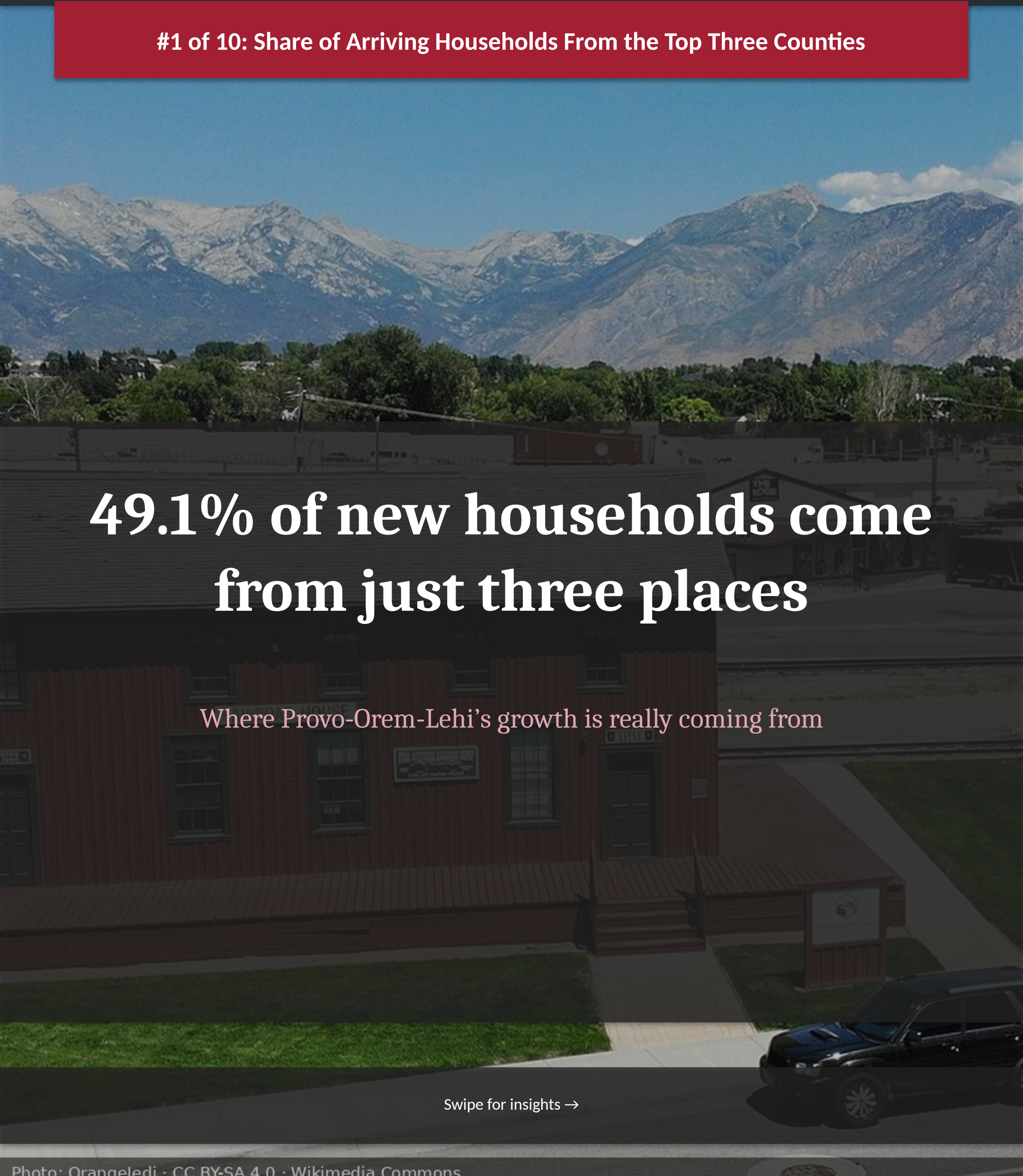
#1 of 10: Share of Arriving Households From the Top Three Counties



49.1% of new households come from just three places

Where Provo-Orem-Lehi's growth is really coming from

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THE DATA

49.1%

Share of Arriving Households From the Top Three Counties (2024)

The Provo-Orem-Lehi market's inbound migration is highly concentrated in just three sources.

This figure—49.1%—means nearly half of all new households arriving in the Provo-Orem-Lehi metro originate from Salt Lake County, Davis County, and Maricopa County, Arizona. This pattern reflects a deeply localized, intra-state, and inter-state migration funnel, not broad national movement. The data reveals a market increasingly shaped by regional flows, not dispersed national migration.

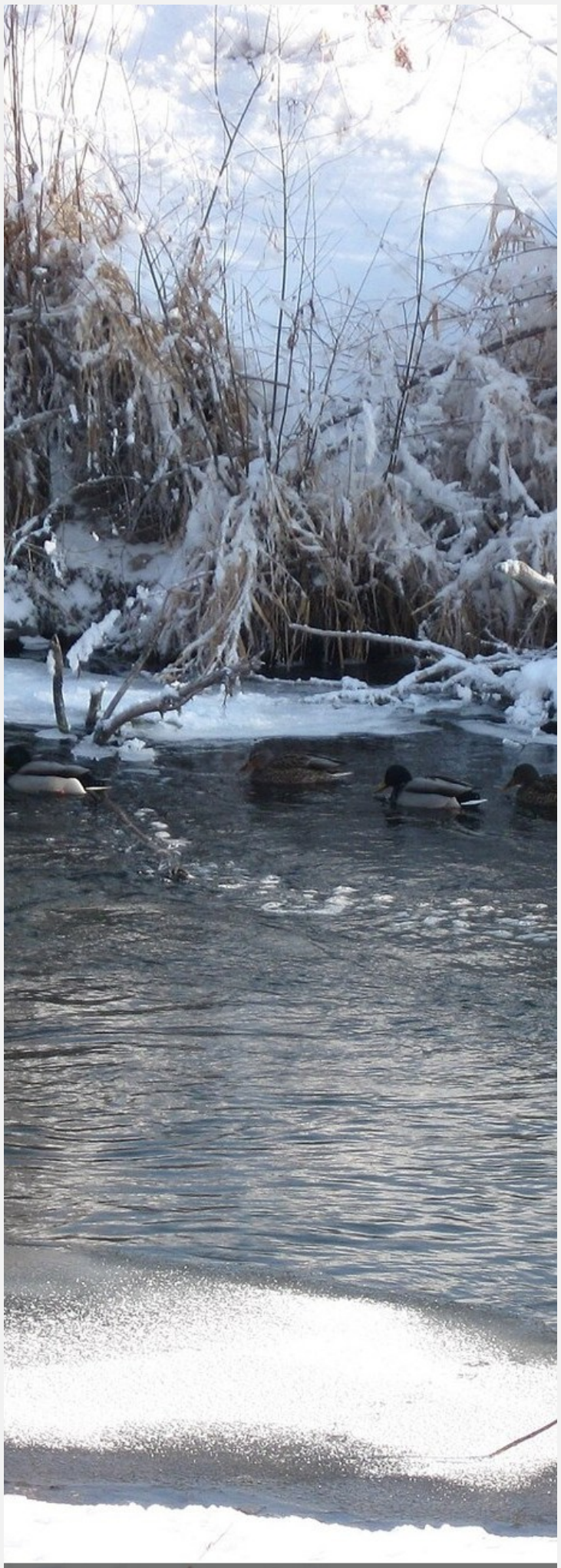


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Source: U.S. Internal Revenue Service, Statistics of Income Migration Data, county-to-county inflows, 2023-24 · ALEX Intelligence computation
https://alex-companies.com/data/2026-11-27-provo-orem-lehi-mig-county-top3

01

Migration is a funnel, not a flood

The implications are structural: the market's growth is not sustainable without continued inflow from these three nodes. If any one of them slows—due to economic shift, policy change, or housing market saturation—the Provo-Orem-Lehi metro could face a sharp deceleration in net migration, even as it remains resilient to broader economic trends.

Photo: Farragutful · CC BY-SA 4.0 · Wikimedia Commons

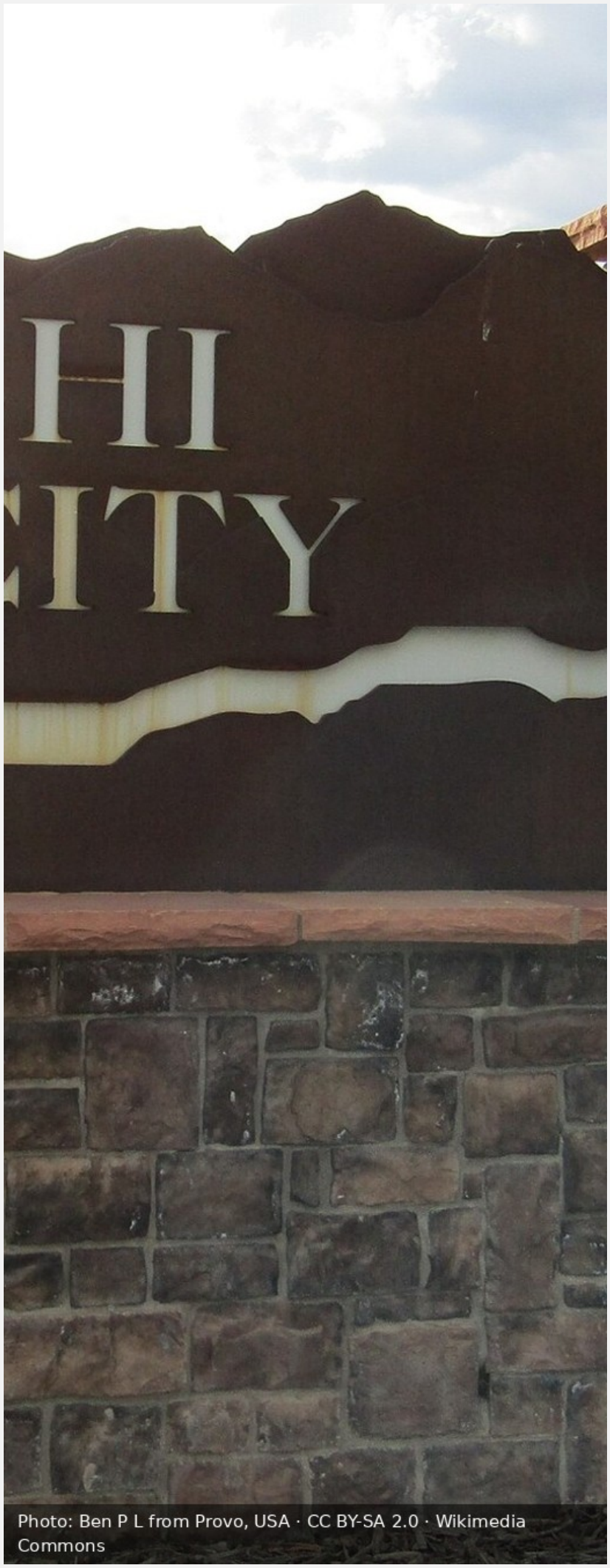


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02

The market is its own ecosystem

This shift has profound implications for long-term planning, infrastructure investment, and real estate strategy. If the market is increasingly self-reinforcing, then growth will depend less on attracting people from distant places and more on retaining and integrating those who already live nearby. The future is not about capturing new users—it's about deepening the existing network.

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