

# Social License for Wyoming's Energy Future: What Do Residents Want?

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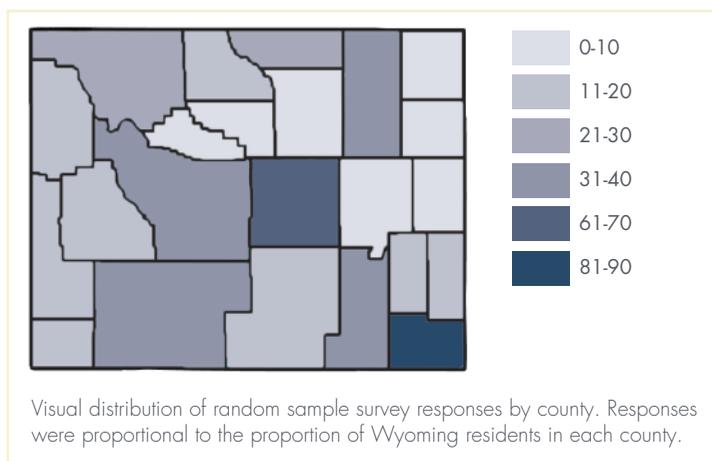
## Why this study was needed

Wyoming has long been one of the leading energy-producing states in the US, ranking as the nation's top coal producer since 1986 and among the top ten states for crude oil and natural gas production throughout the past several decades. Energy-related mining and minerals extraction is the largest industry in Wyoming and for much of the last century production of these resources has fueled the state's economy, employed thousands of workers at family-sustaining wages, and filled state coffers with energy-related royalties, severance payments, and other taxes that have historically accounted for roughly two-thirds of Wyoming's annual revenue.

In recent years, however, Wyoming's core fossil-fuel industries have declined due to a combination of new and disruptive technologies like hydraulic fracturing and wind energy, shifts in public policy to favor low-carbon energy sources, and changes in public perceptions related to climate change. Wyoming now faces a huge budget shortfall as the state and its residents grapple with the consequences of a new energy landscape. With the state at a crossroads, the researchers in this study explored Wyoming residents' values, beliefs, and perceptions regarding the future of the state's energy economy through the lens of "social license"—that is, a community's acceptance or approval of an industry's activities and operations.

## How it was done

The study consisted of two phases. In the first phase, researchers interviewed 10 key stakeholders in Wyoming's energy industry to identify primary topics and questions to include in a statewide survey of Wyoming residents. They then designed a survey to explore residents' preferences regarding different energy types, the reasons for those preferences, and their beliefs about the future of Wyoming's energy economy. The researchers sent the survey to 3,100 households in Wyoming resulting in 522 completed surveys that included responses from all 23 Wyoming counties.



Visual distribution of random sample survey responses by county. Responses were proportional to the proportion of Wyoming residents in each county.

In phase two of the project, the research team conducted follow-up interviews with 24 individuals who represent diverse interests related to energy in Wyoming, including people from industry, government, agriculture, conservation, recreation, higher education, and utilities, as well as the 10 key stakeholders interviewed in phase one of the project.

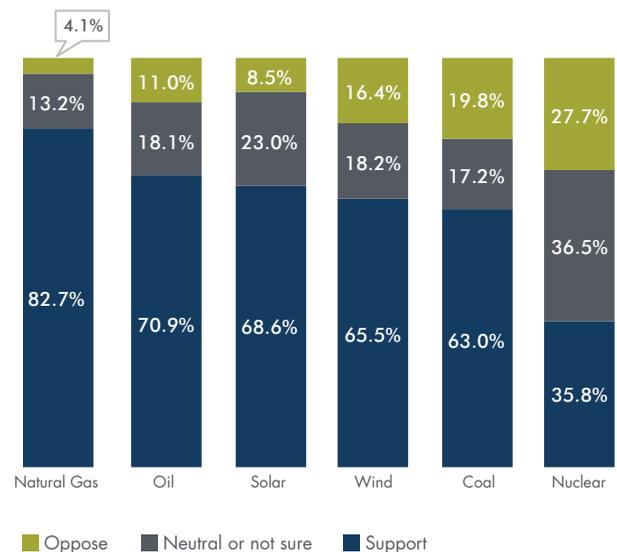
## What the researchers discovered

Results from the study showed that Wyoming citizens want innovative and all-inclusive solutions to address the state's economic downturn, even if that means future energy production in Wyoming looks different from the past. Residents support both conventional and renewable energy development, but need more information to decide whether they support energy storage, nuclear energy development, carbon capture and storage, and rare earth elements. Findings also revealed that most Wyomingites believe climate change is happening and that they are concerned about its impacts to the state. Moreover, residents acknowledged that customers outside Wyoming are making decisions about the types of energy they use in response to the threat of climate change. Respondents see conventional energy production as a strategic bridge to a more diverse and resilient economic future that includes renewables as well as other activities such as information-based industries.

Importantly, the survey showed that what Wyomingites value most about the state are its aesthetics (scenery and landscapes), biodiversity (fish and wildlife), and recreational opportunity, closely followed by economic and community values. This suggests that residents' place-based identity is even stronger than a production or occupation-based one.

Several key concerns residents identified in the study relate to quality of life, including job availability and job security, access to healthcare, and the impacts of energy development on wildlife. Participants expressed frustration at the lack of policy support for renewable energy, which they see as hampering Wyoming's ability to attract more diverse businesses and industries to the state. Residents want state leaders to be proactive in establishing a comprehensive energy strategy that supports all forms of energy and which is developed in line with the preferences and demands of Wyoming residents and customers outside its borders.

## Wyoming residents' support & opposition for types of energy production



Percentage of Wyoming residents who support, oppose, or are neutral/not sure about different types of energy production in the state.

## Why it's important

The findings suggest that residents give state leaders the social license to activate an energy strategy that considers quality of life factors, improves the state's economy, and benefits the environment. Although there exists a strong cultural identity for Wyoming as an "energy state," the characteristics residents value most about the state are its scenery and landscapes, wildlife, and opportunity for recreation—fundamental values that decision makers will need to consider when designing a strategy for the state moving forward.

### About the authors

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### Read the paper

Jessica Western and Selena Gerace. 2020. "Social License for Wyoming's Energy Future: What Do Residents Want?" University of Wyoming, Laramie, WY: School of Energy Resources and Ruckelshaus Institute of Environment and Natural Resources. <https://bit.ly/2LSC0jP>.



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