



A Comparison of Attitudes in Goshen & Platte Counties vs. Wyoming Residents Overall

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Heart + Mind
STRATEGIES

Methodology











May 2009 Quantitative Survey

- 894 Wyoming Residents (general public)
- Online
- 15 minutes

July 2010 Quantitative Survey

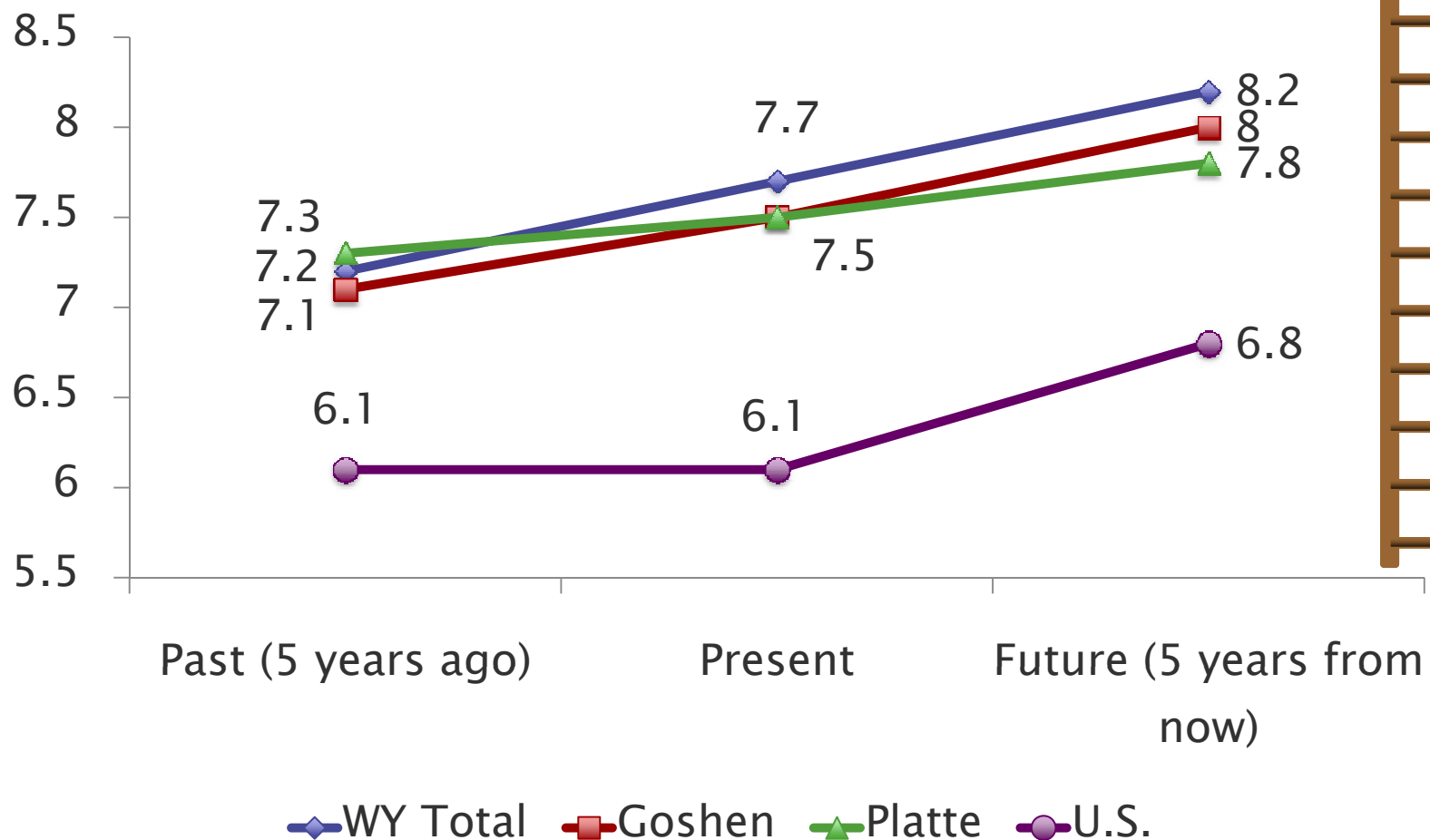
- 110 Residents of Goshen County
- 110 Residents of Platte County
- Telephone
- 10 minutes

Top 10 Learnings:

-  1. The dominant values orientation for both counties is positive—Caring and Safe Community—as opposed to the rest of the state which is focused on Wyoming’s Remoteness
-  2. Platte and Goshen counties report a higher quality of life now and looking into the future compared to the national average
-  3. Platte and Goshen counties are more optimistic about their local communities—believing they are on the right track
-  4. Platte and Goshen counties strongly support wind energy
-  5. Goshen county is much more interested in protecting the environment than the economy compared to the rest of the state (both ‘environment’ and ‘land and water’)
-  6. Platte county believes that doubling the population of the American West in the next 25 years is a good thing, and are more likely to believe growth should be encouraged and fostered
-  7. Goshen county agrees with the rest of the state that doubling the population of the American West in the next 25 years is a bad thing—though to a much stronger degree
-  8. Both counties view farm/ranch/agricultural lands, senior centers, and churches as more important ideal community elements compared to the rest of the state
-  9. Both counties view public/state lands, places of work, and entertainment/restaurants as less important ideal community elements compared to the rest of the state
-  10. Poor healthcare programs and doctors is an issue far more top of mind for Goshen county

DETAILED REPORT

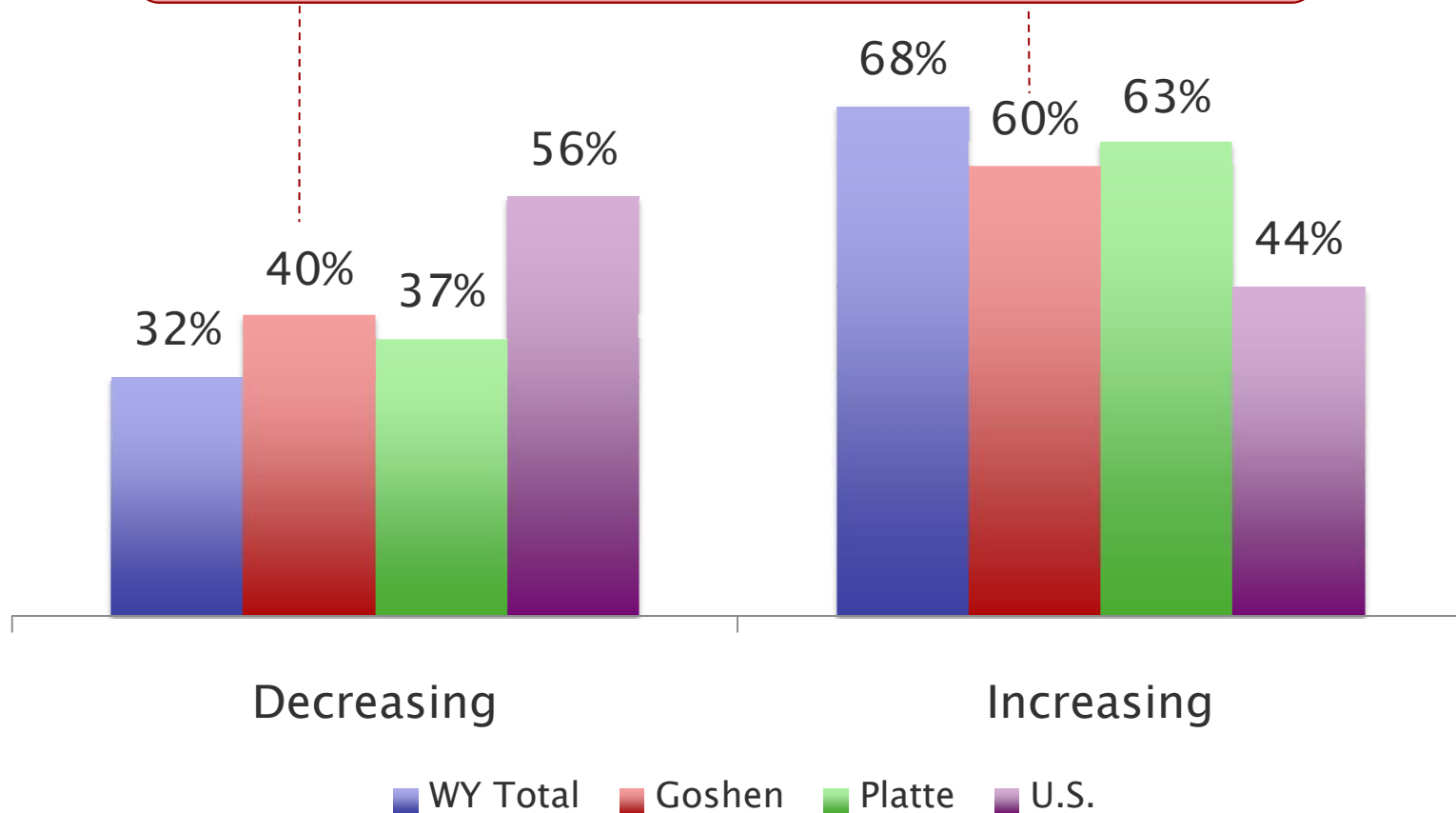
Ladder of Life



Q600. Thinking about the overall quality of your life here in Wyoming, please imagine a ladder with ten steps representing the "ladder of life." Let's suppose the top of the ladder, the tenth step, represents the best possible life for you; and the bottom, the first step, the worst possible life for you. On a scale of 1 to 10, on which step of the ladder do you personally stand at the present time?

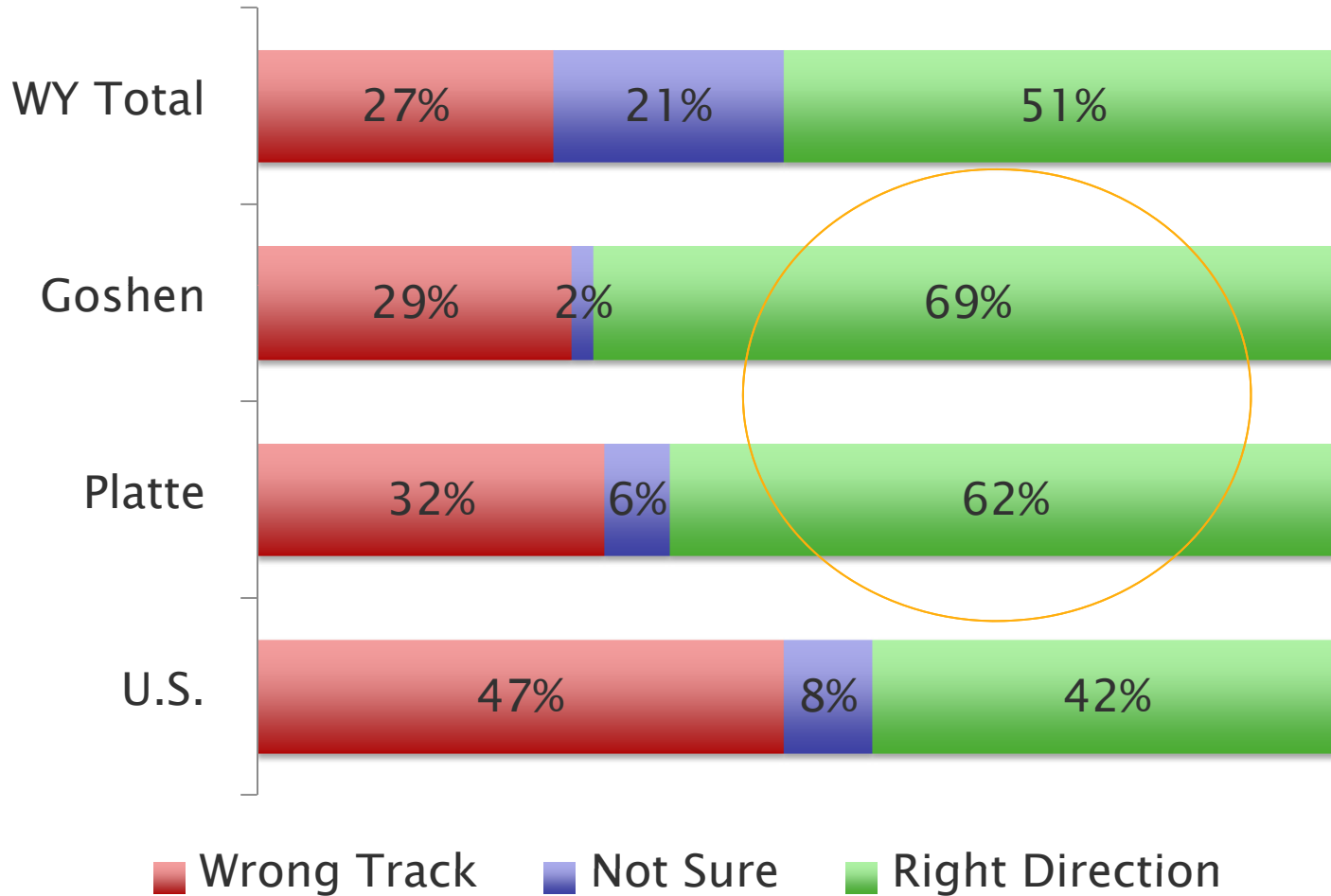
Most WY Residents Expect Quality of Life to Increase for Future Generations

Goshen: Those who believe growth will make things better are more likely to think quality of life will increase (74%), while those who think growth will make things worse are more likely to think quality of life will decrease (60%)



Q620. Thinking about the quality of life that will be here for you or your friends' children and grandchildren, do you see their quality of life in Wyoming increasing or decreasing in the future?

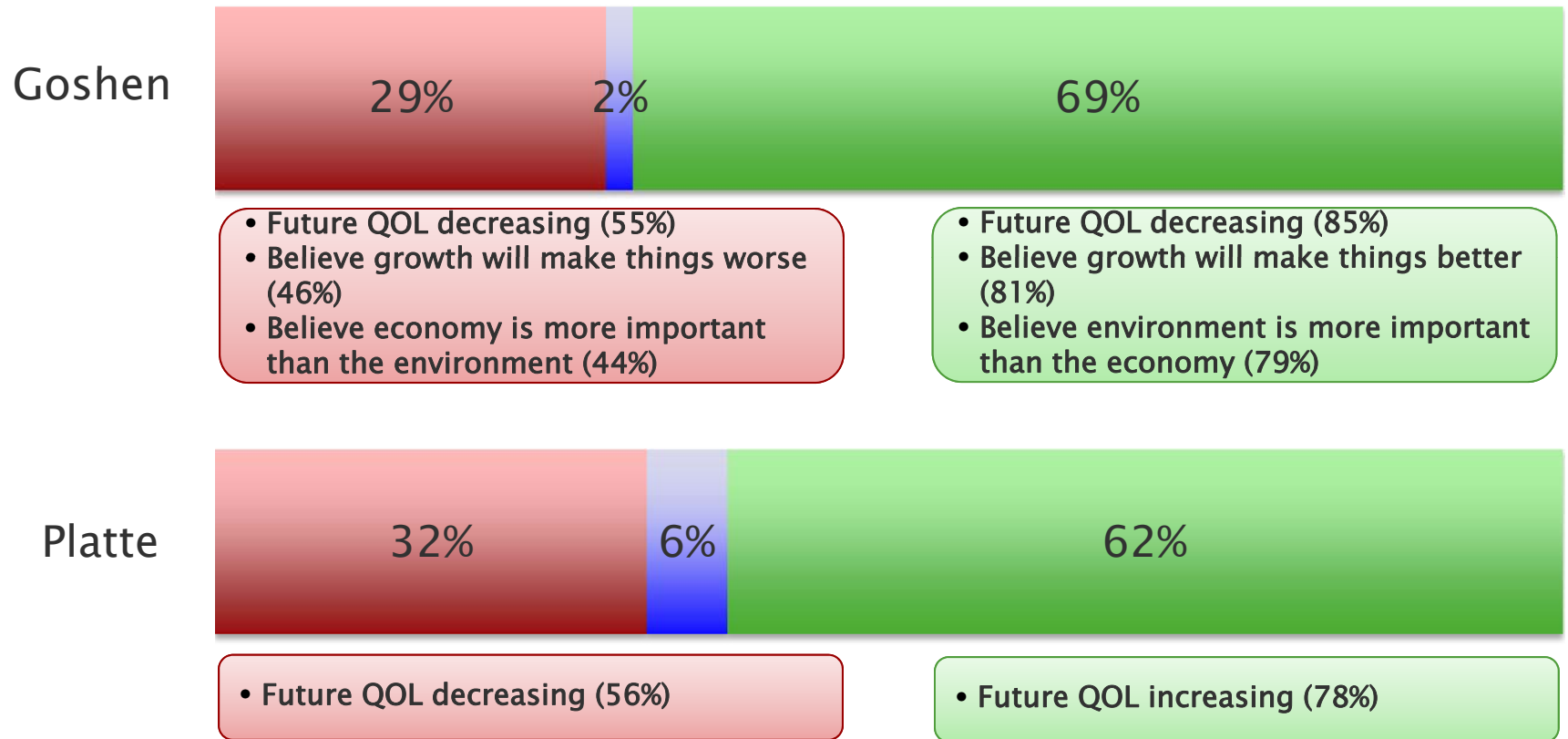
Local Community Headed in Right Direction



Goshen and Platte counties are more optimistic about their local communities than the rest of the state and country at large.

Q630. On another subject, do you feel things in your own community today are going in the right direction or do you feel things have pretty seriously gotten off on the wrong track?

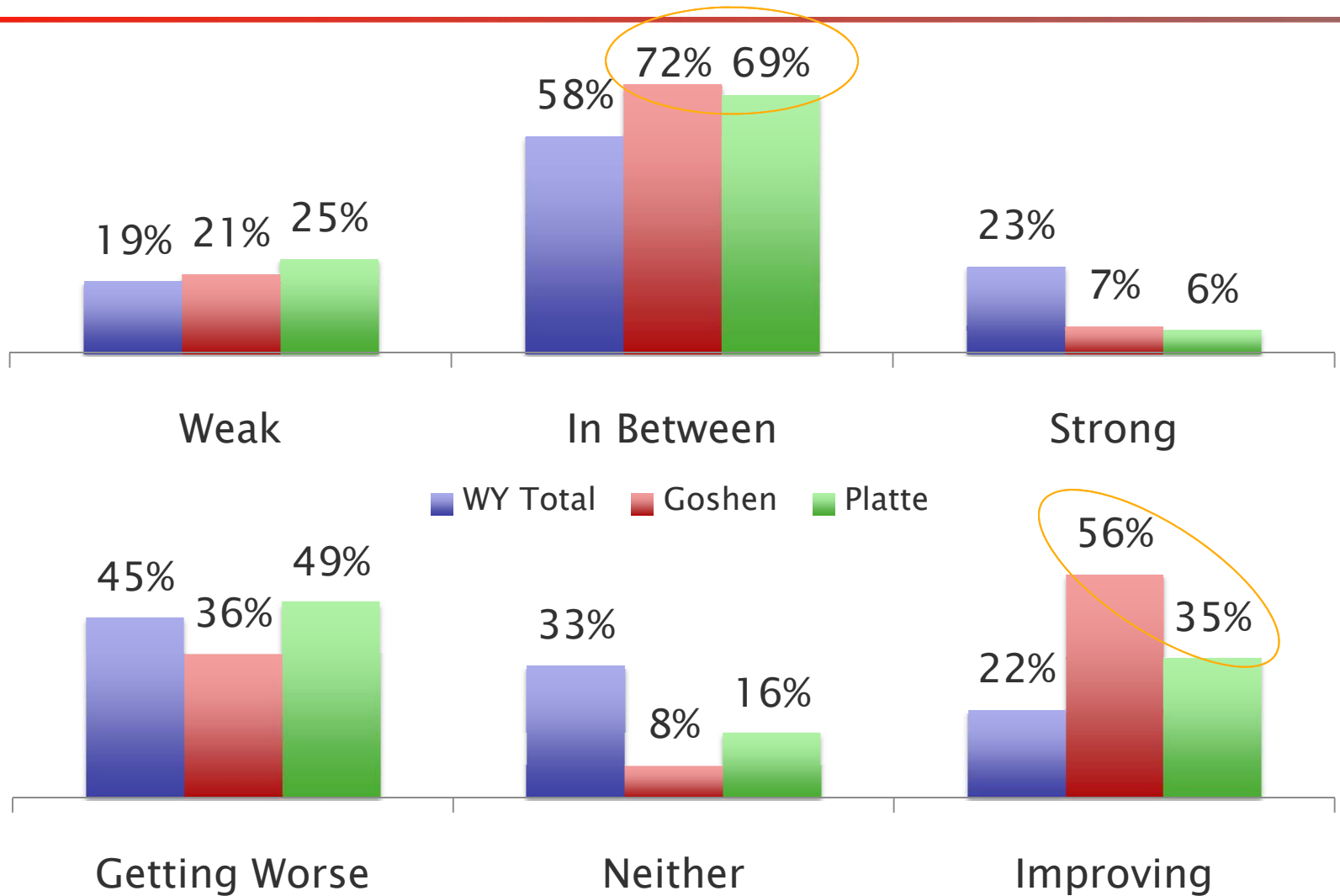
Local Community Headed in Right Direction



■ Wrong Track
 ■ Not Sure
 ■ Right Direction

Q630. On another subject, do you feel things in your own community today are going in the right direction or do you feel things have pretty seriously gotten off on the wrong track?

How's Your Local Economy?



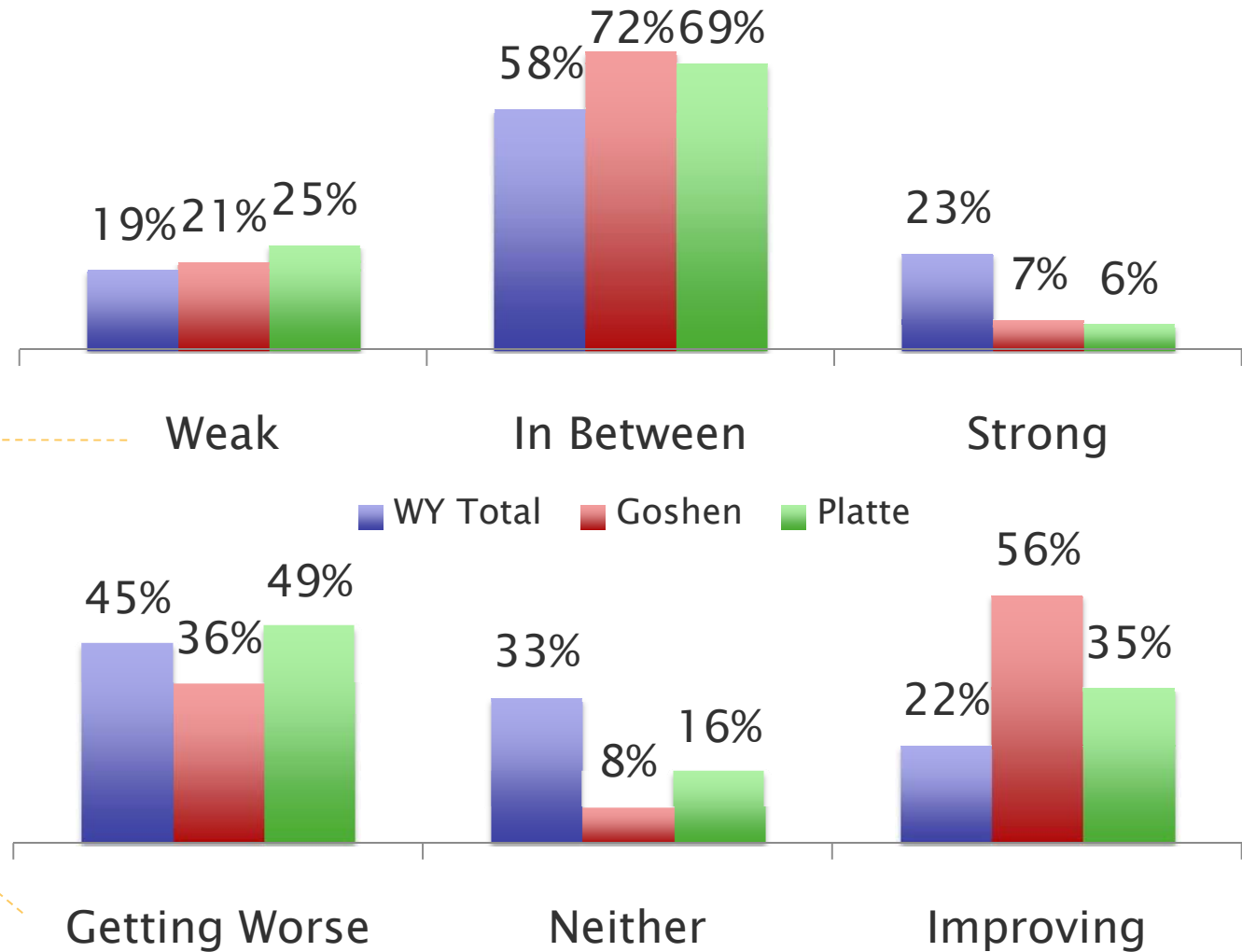
Q825. Based on what you are seeing and hearing from others in the community, would you say the local economy is strong, weak, or somewhere in between?

Q830. Do you think your local economy is improving or getting worse?

How's Your Local Economy?

Most Pessimistic:

- Believe the economy is more important than the environment
- Believe future quality of life is decreasing
- Believe growth will make things worse

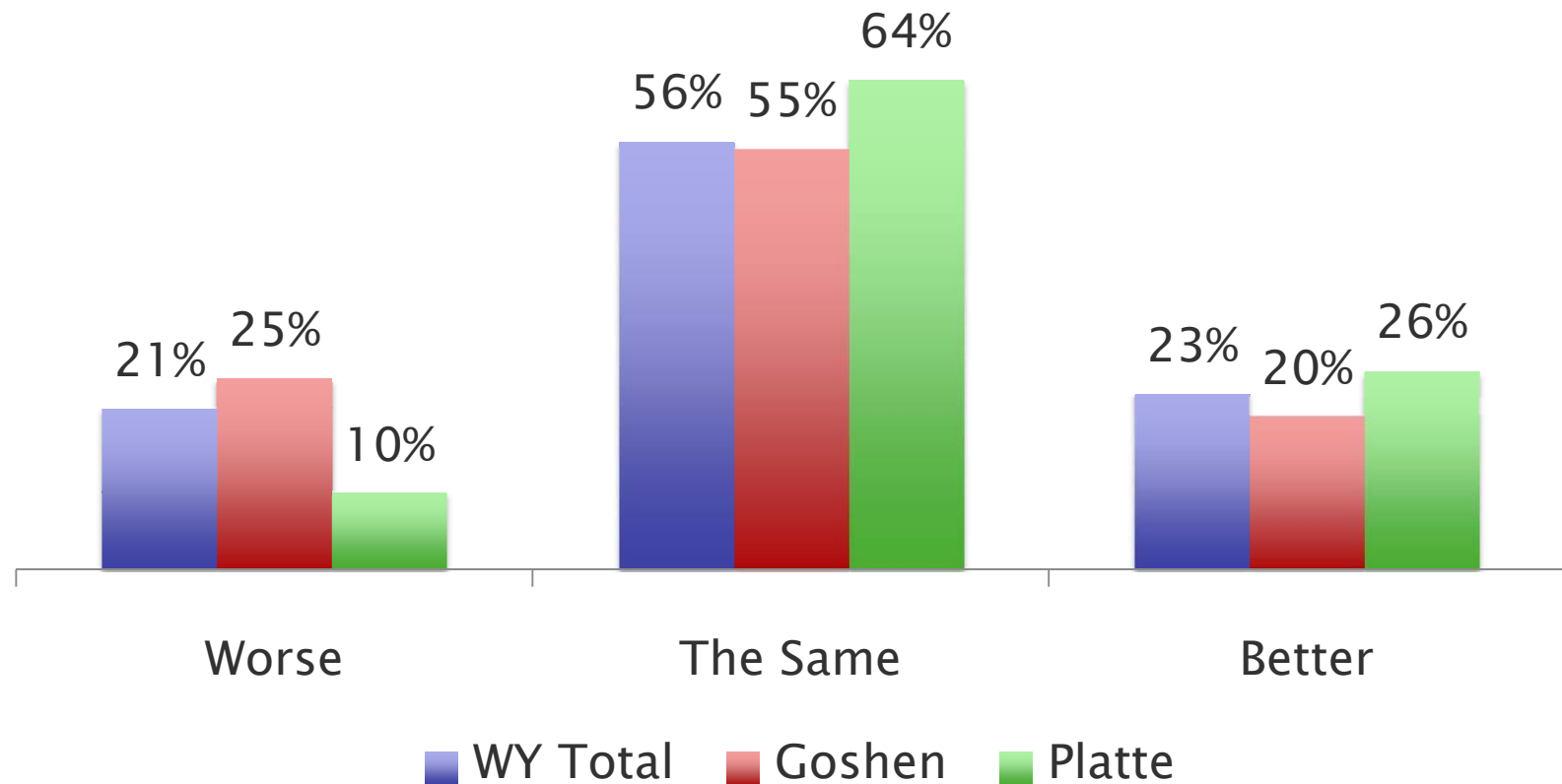


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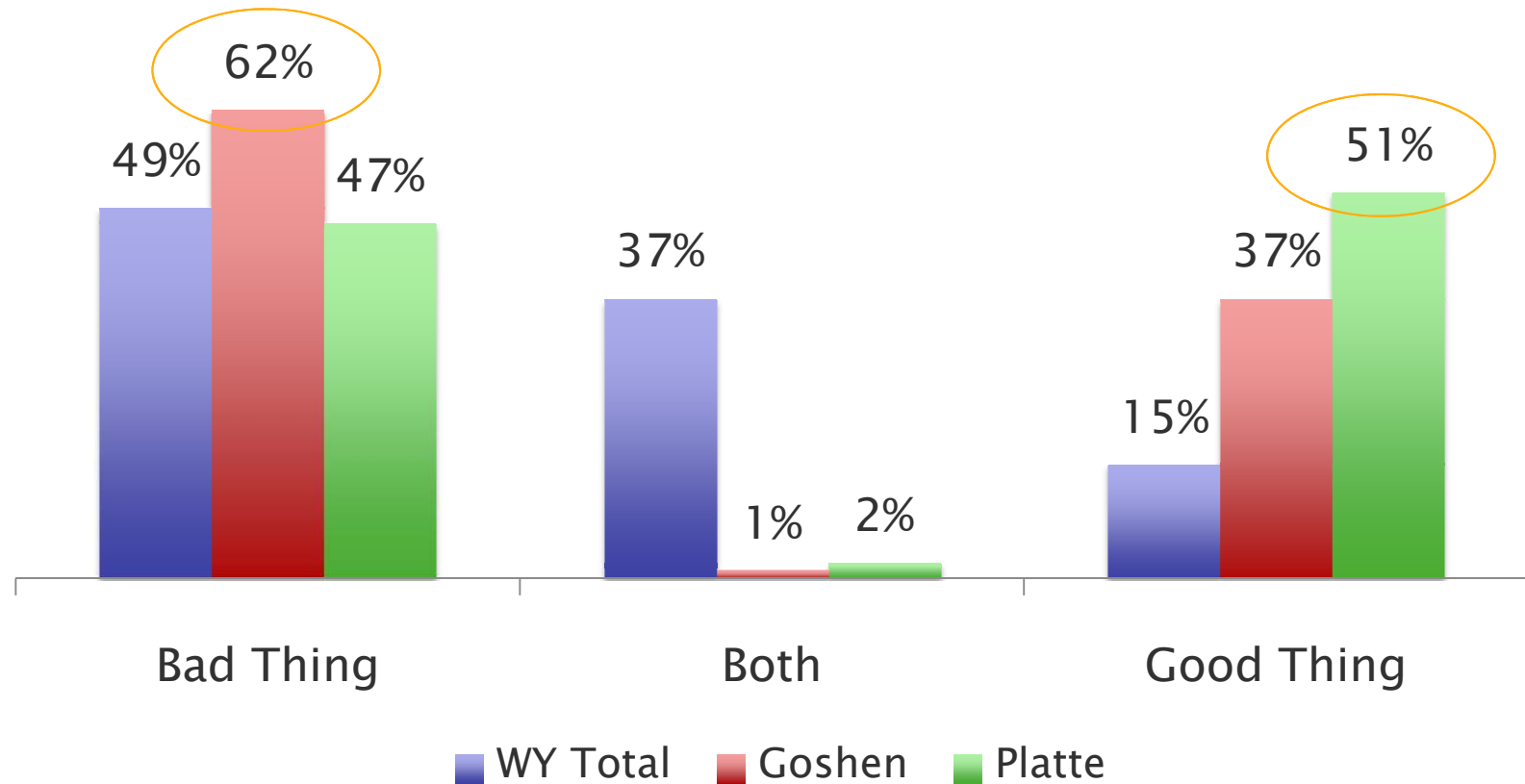
Local vs. State Economy



Q845. In your opinion, how does the economy at the state level differ from your local economy?
Is your local economy doing better, worse or about the same?

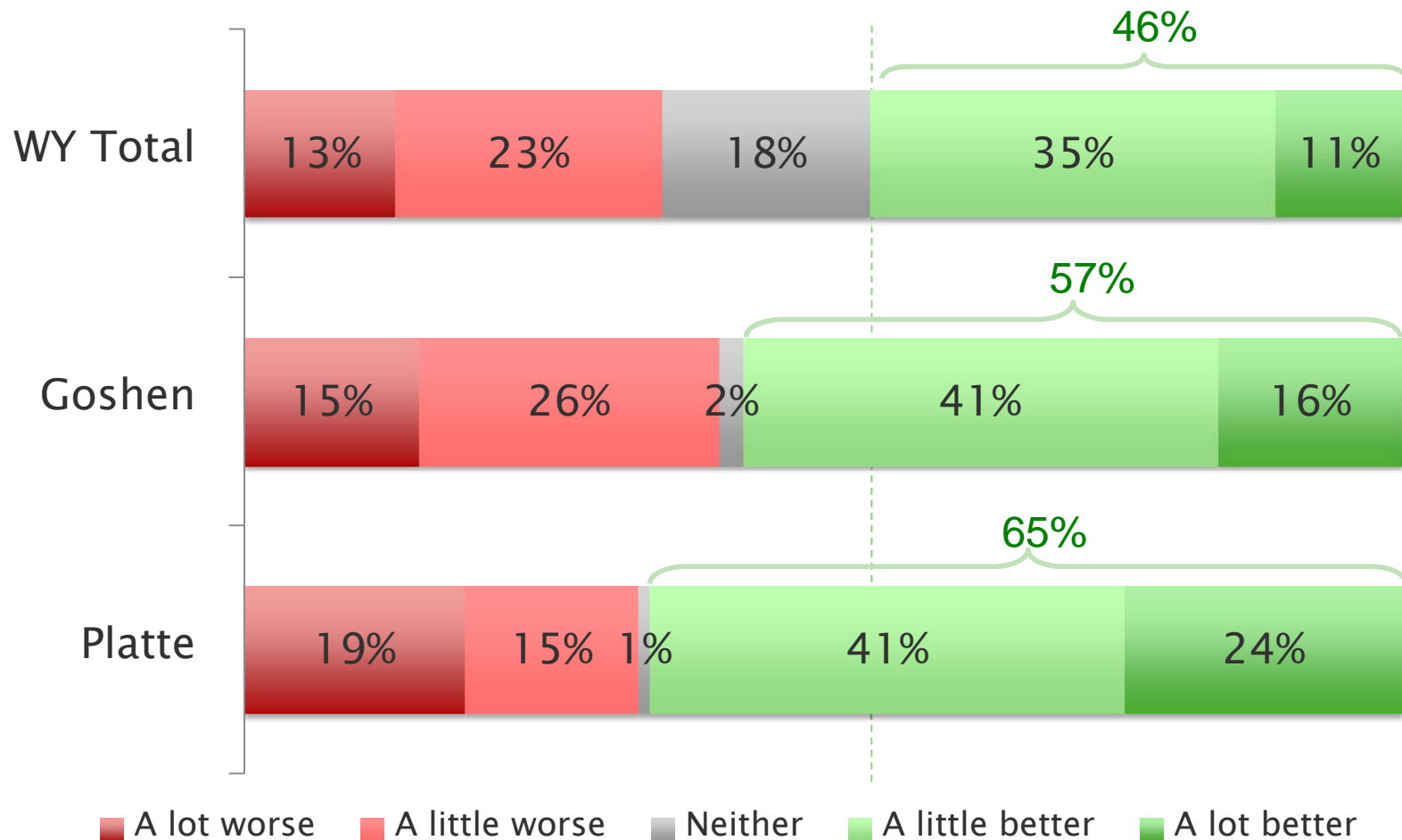
ATTITUDES TOWARDS GROWTH

Population Growth: Good or Bad?



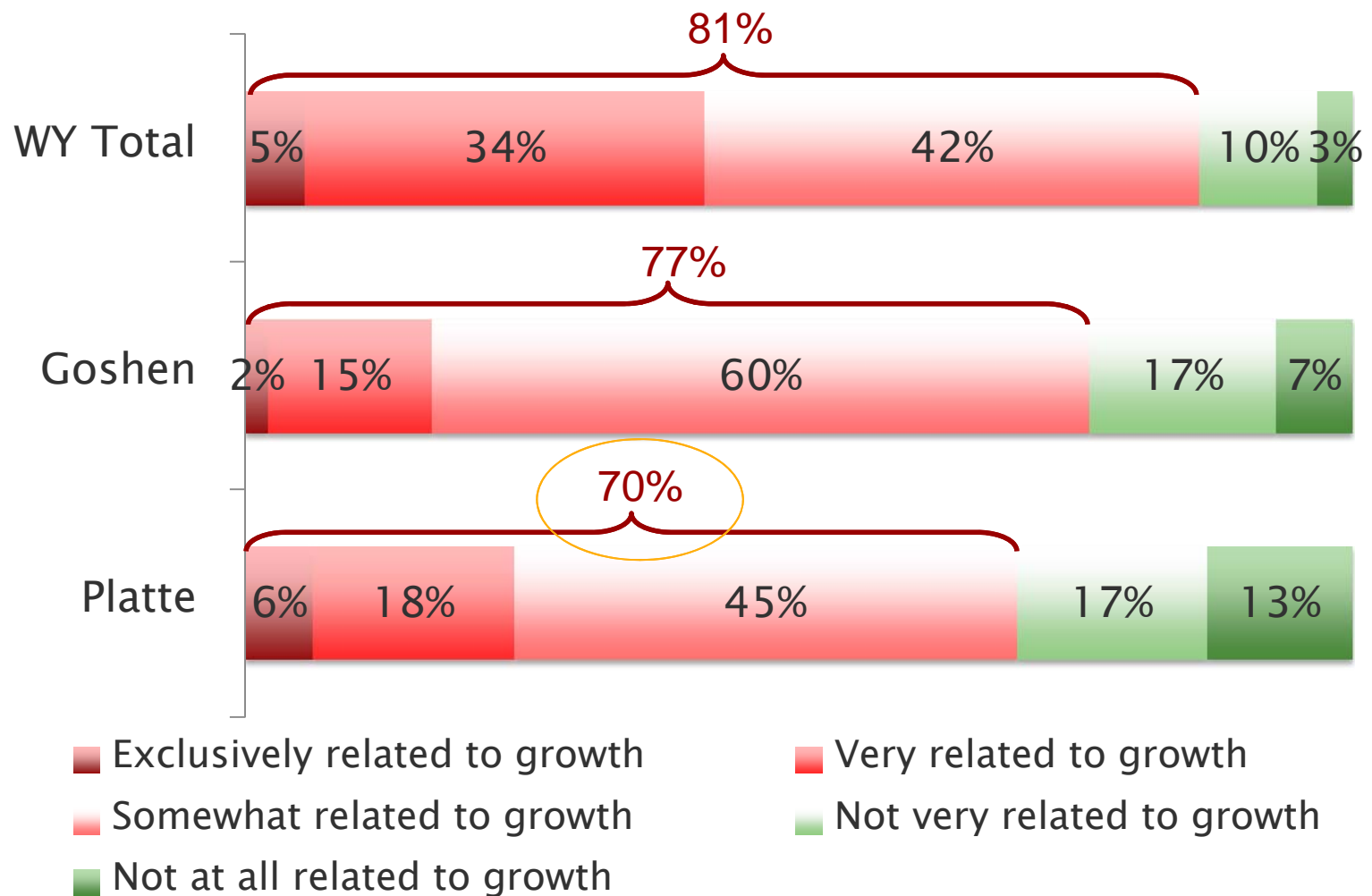
Q855. As you may have heard or read, the American West is one of the fastest growing regions in the country. In fact, experts project the American West's population to more than double over the next 25 years. Do you think that is a good thing or a bad thing?

Most Feel Future Growth Will Make Things Better



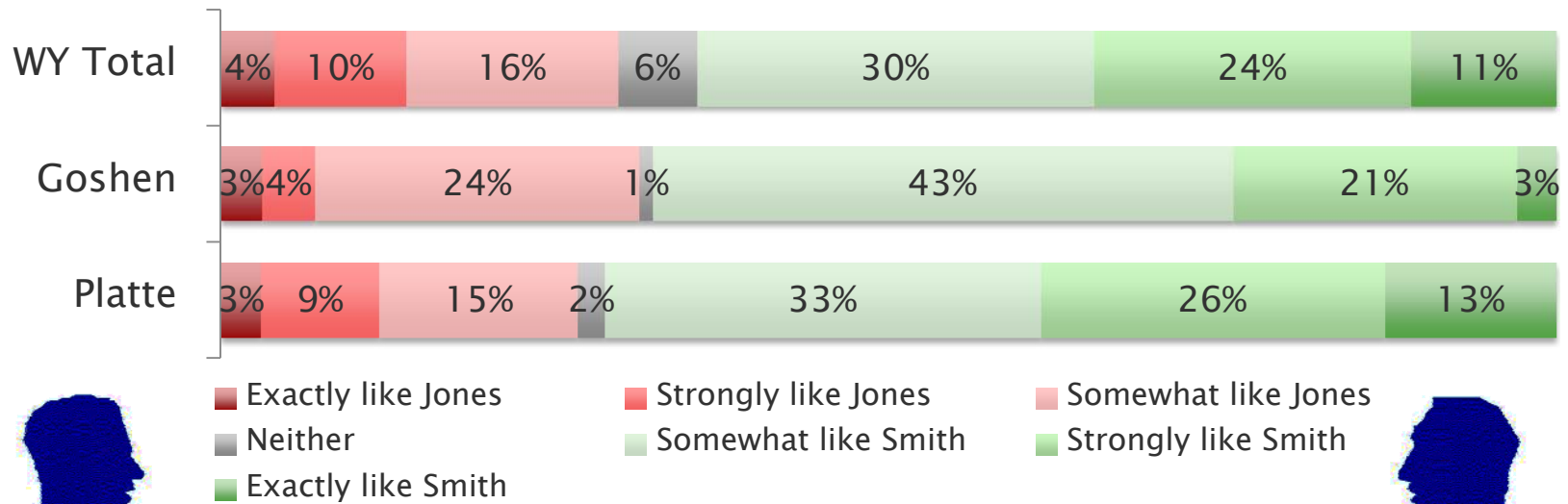
Q875. Most people see both positive and negative aspects of the changes taking place in the region where you live. Based on your own personal feelings, do you believe future growth in the region where you live will make things better or make things worse?

Challenges Often Linked to Growth



Q980. The region where you live faces many challenges and problems today, and many causes underlie these challenges and problems. In your opinion, are the challenges and problems your region faces:

Residents Believe Growth Can Bring Benefits

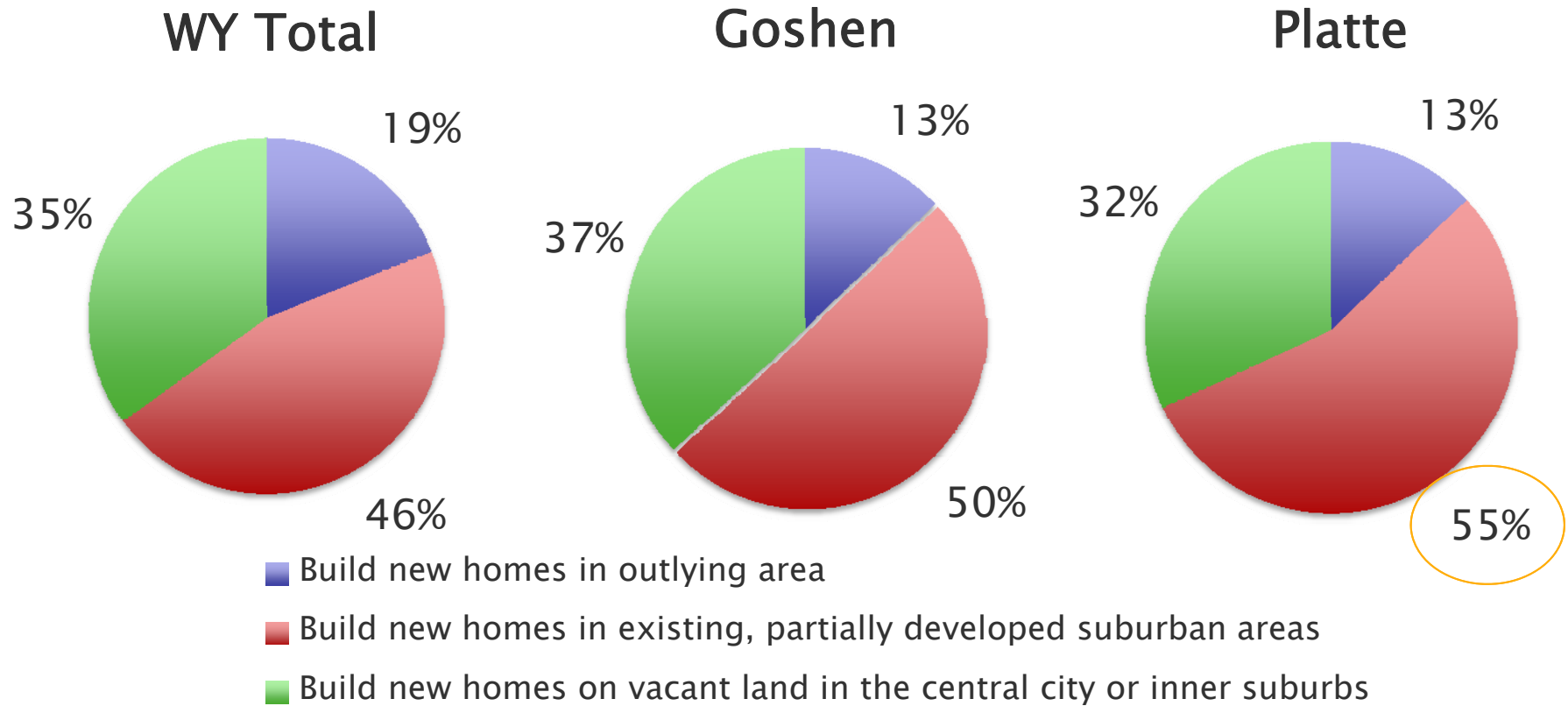


Mr. Jones believes that growth of any kind in the region will jeopardize the quality of life for the people in this part of the State. Mr. Jones believes that growth should be strictly managed or limited.

Total Jones		Total Smith
29%	WY Total	65%
31%	Goshen	67%
26%	Platte	72%

Mr. Smith believes that growth in the region, if done right, will bring many benefits and advantages to the people in this part of the State. Mr. Smith believes that growth should be strongly encouraged and fostered.

Housing Development Preferences



#1 Rankings Shown

Q950. There are at least three ways to direct development to meet housing needs due to growth in number of households. Please rank them from one to three, where a 1 means you think it is the best way. Please use the numbers 1 – 3 only once.

Growth Strategies

	WY	Goshen	Platte
Encourage walkable neighborhoods	86%	88%	87%
Preserve open space	86%	94%	93%
Preserve agriculture	85%	96%	99%
Encourage more affordable housing	84%	96%	92%
Encourage a range of housing types	78%	85%	78%
Locate growth around existing employmt ctrs	71%	93%	90%
Locate employment closer to where people live	71%	93%	88%
Expand regional public transportation options	65%	69%	52%
Locate growth along major transport. corridors	63%	79%	84%
Encourage more mixed-use development	55%	87%	72%
Widen existing regional highways	53%	74%	63%
Maintain the region's existing densities	50%	79%	77%
Locate growth in new suburban centers	39%	73%	58%
Locate growth in surrounding rural areas	38%	72%	60%
Allow areas to build at higher densities	32%	41%	41%
Build more regional highways	29%	48%	31%

VALUES LADDERS

Values-Based Strategic Hinge

There is a “strategic hinge” which exists, linking the attributes and benefits of life in Wyoming to the people



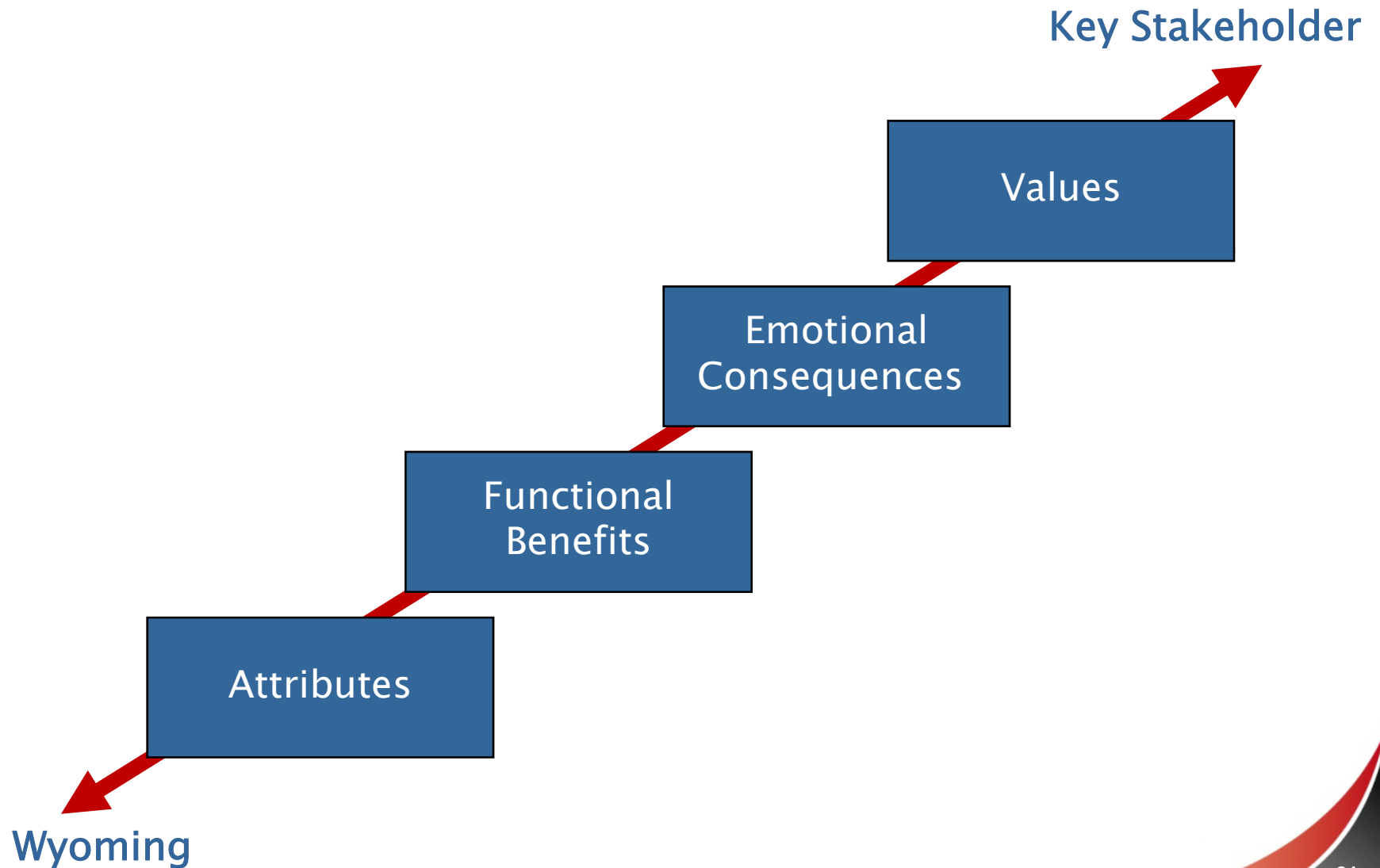
Reason
Emotion

Identifying the rational and emotional drivers of this hinge is the purpose of “values” research.

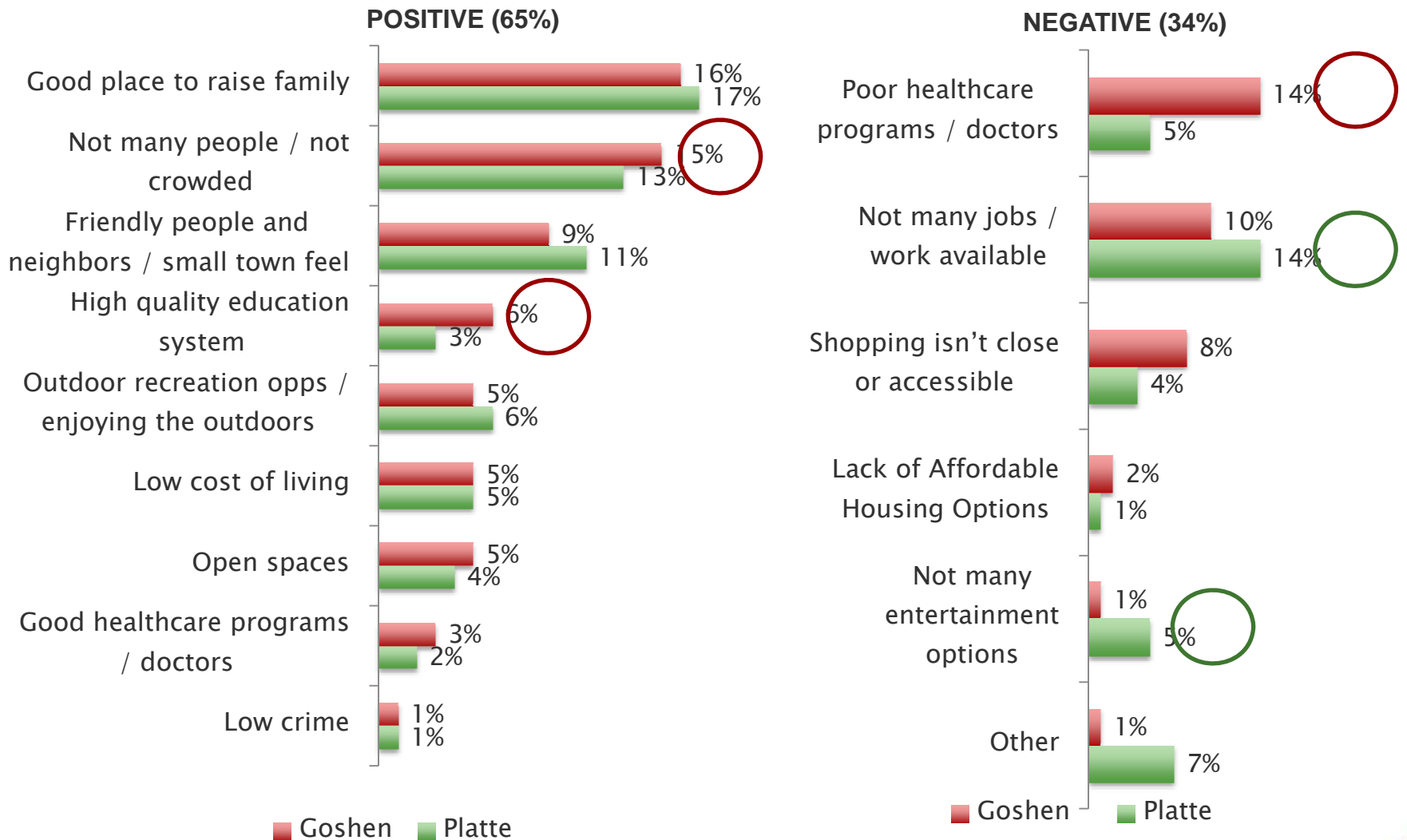


Strategic Hinge: Levels

Heart + Mind STRATEGIES

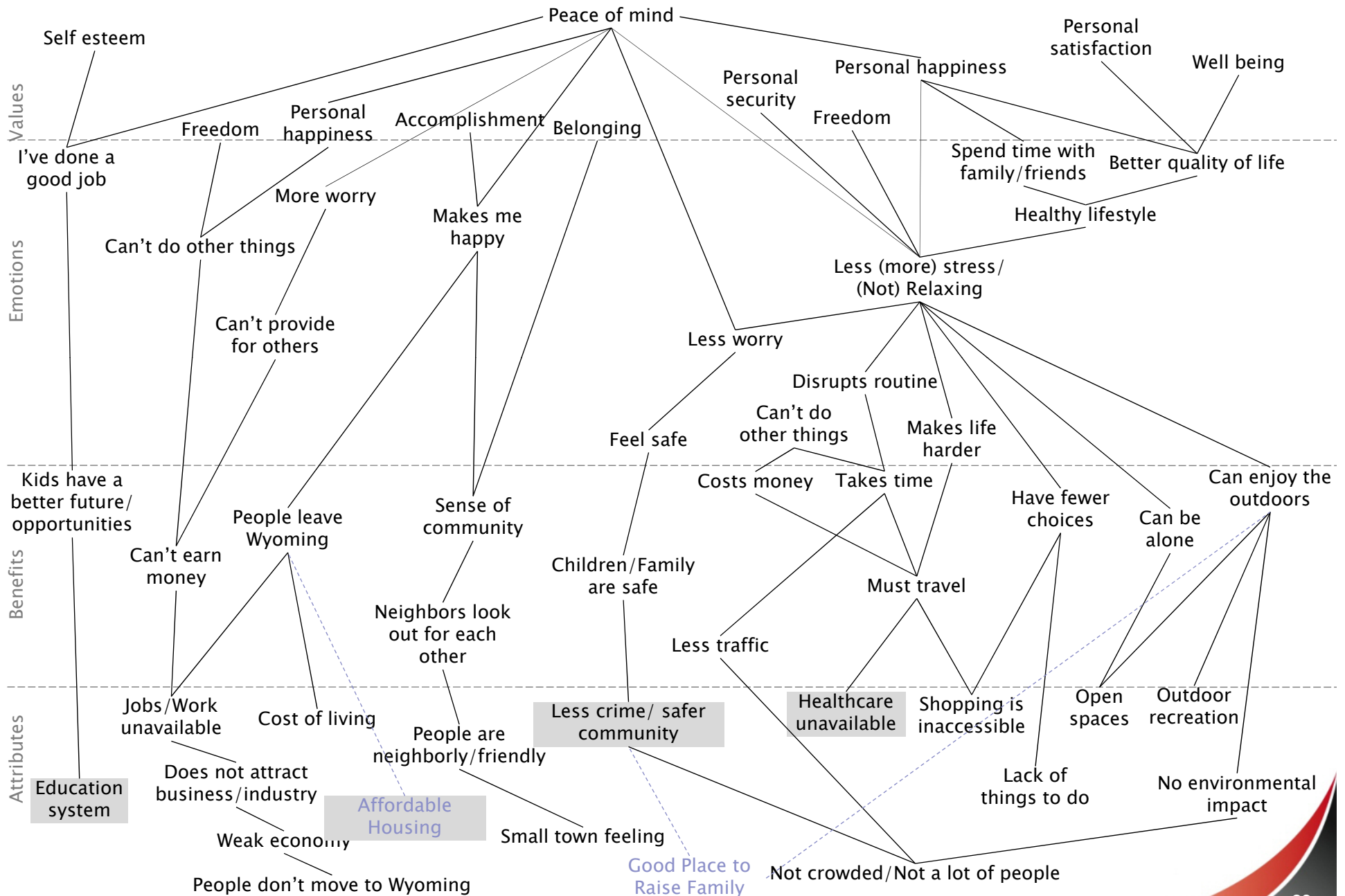


Most Impact on Quality of Life:

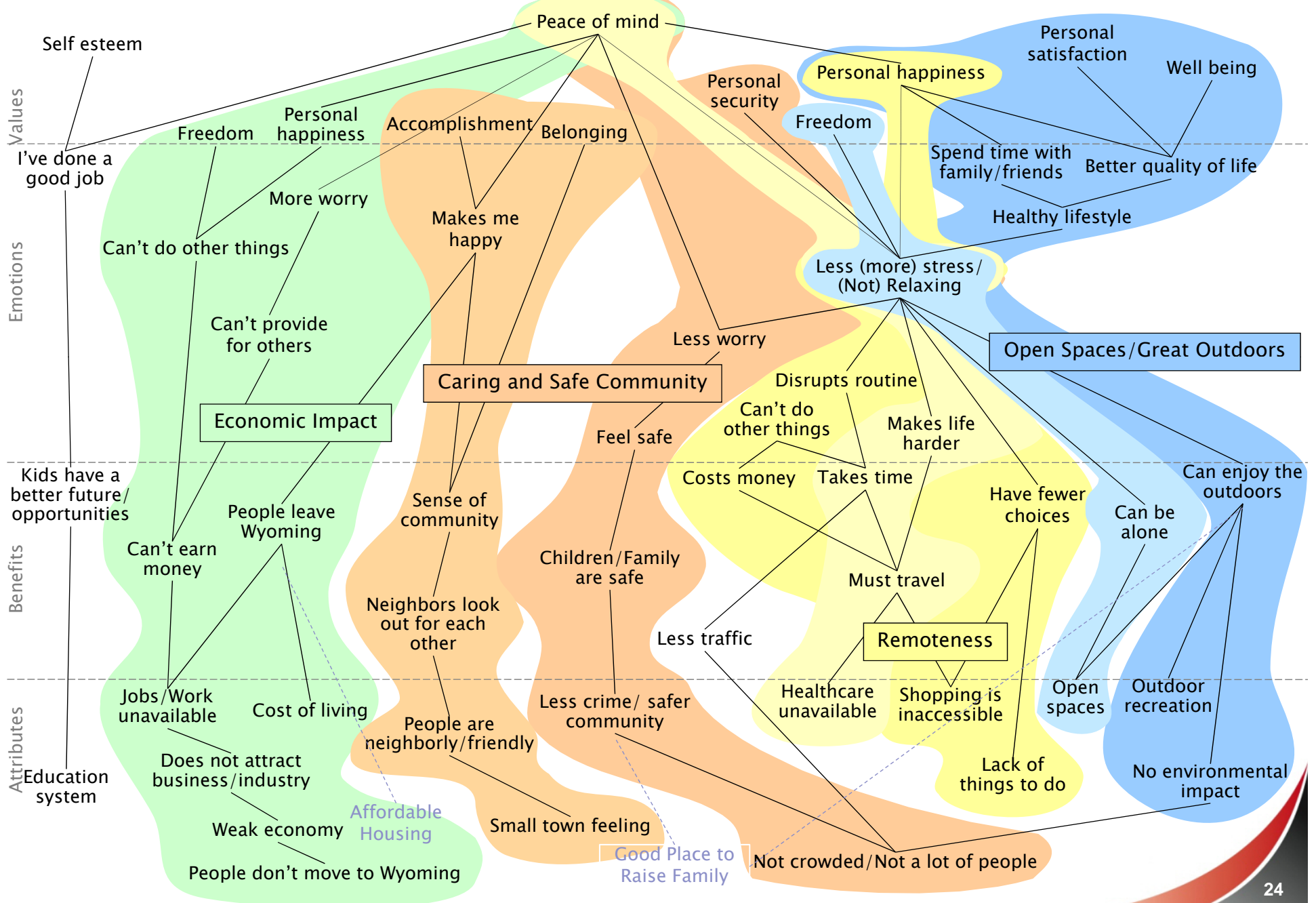


Q700. The people of Wyoming have mentioned many factors—both positive and negative—that contribute to or detract from their quality of life. Thinking about the quality of life in Wyoming, please identify which one of the following factors has the most significant impact on the overall quality of life for you personally.

Envision Wyoming Pathways 2009



Envision Wyoming Pathways 2009



Caring and Safe Community: Strategic Hinge

Wyoming residents enjoy the small town feeling, where neighbors are friendly and people care about each other. Crime is low and people feel safe outside their homes. This creates a sense of community and a feeling of belonging

Key Stakeholder

Belonging,
Personal Security,
Peace of Mind

Less Worry,
Less Stress
Sense of community

Neighbors look out
for each other,
Family is safe

Fewer People, Less
Crime, More Friendly,
Small Town Feeling,

Wyoming

Wyoming	23%
Platte	32%
Goshen	32%

Open Spaces / Great Outdoors: Strategic Hinge

Wyoming's open spaces give residents unparalleled access to the great outdoors where they can participate in recreation, or relax in solitude and enjoy the peace and beauty of nature, which promotes feelings of happiness and freedom

Key Stakeholder

Happiness,
Freedom, and
Personal Satisfaction

Relaxation,
Less Stress and
Higher Quality of Life

Solitude, or
Enjoyment
with others

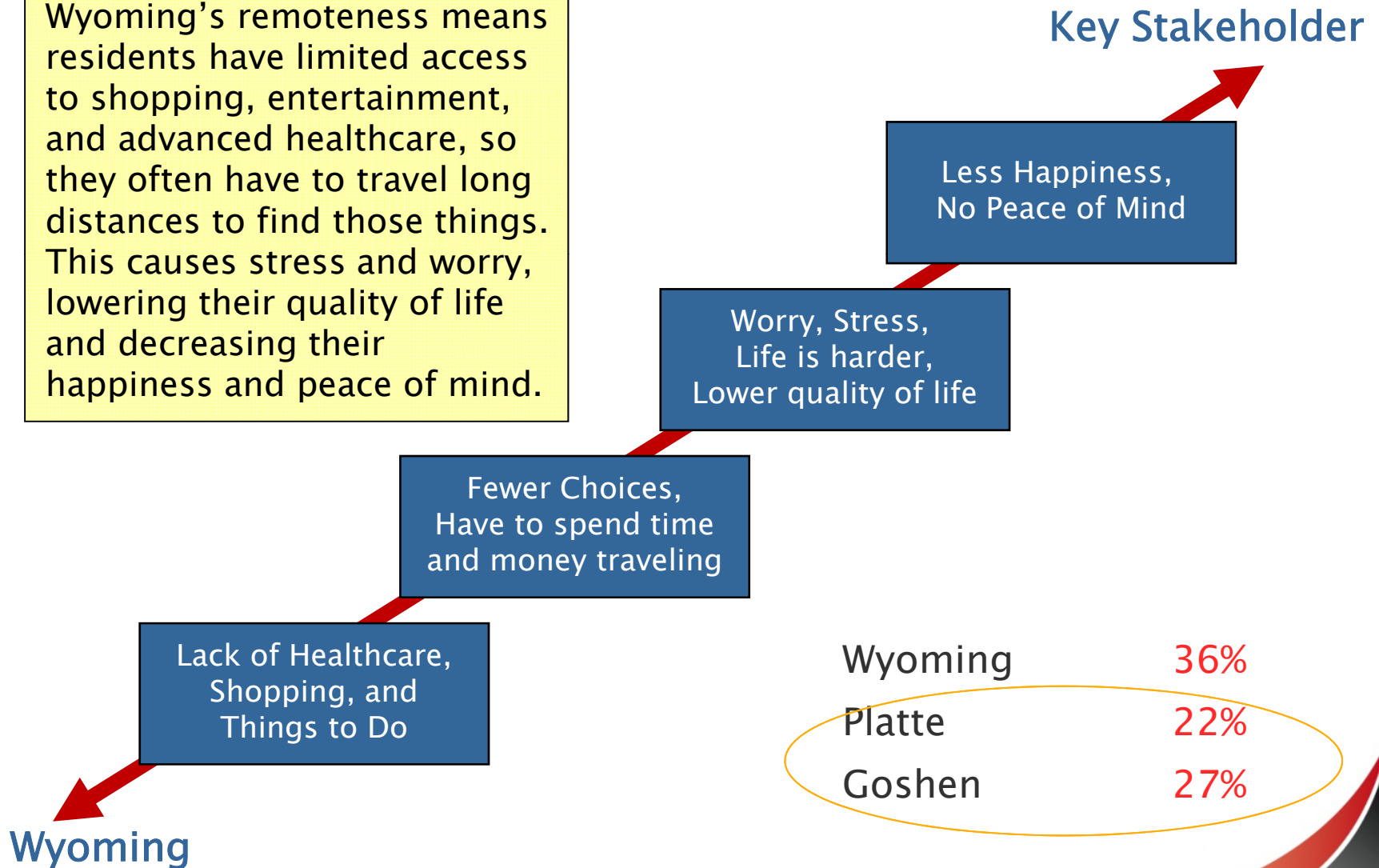
Open Spaces,
Outdoor Recreation

Wyoming

Wyoming	19%
Platte	17%
Goshen	19%

Remoteness: Strategic Hinge

Wyoming's remoteness means residents have limited access to shopping, entertainment, and advanced healthcare, so they often have to travel long distances to find those things. This causes stress and worry, lowering their quality of life and decreasing their happiness and peace of mind.



Wyoming	36%
Platte	22%
Goshen	27%

Economic Impact: Strategic Hinge

Wyoming's low population and cyclical economy make it hard to attract businesses to the state. Many residents can't find jobs to support their families so they are forced to leave the state, even though they would rather stay

Key Stakeholder

Lack of Freedom,
No Peace of Mind,
Unhappiness,

Hard to provide for
family, Worry, Can't
do other things

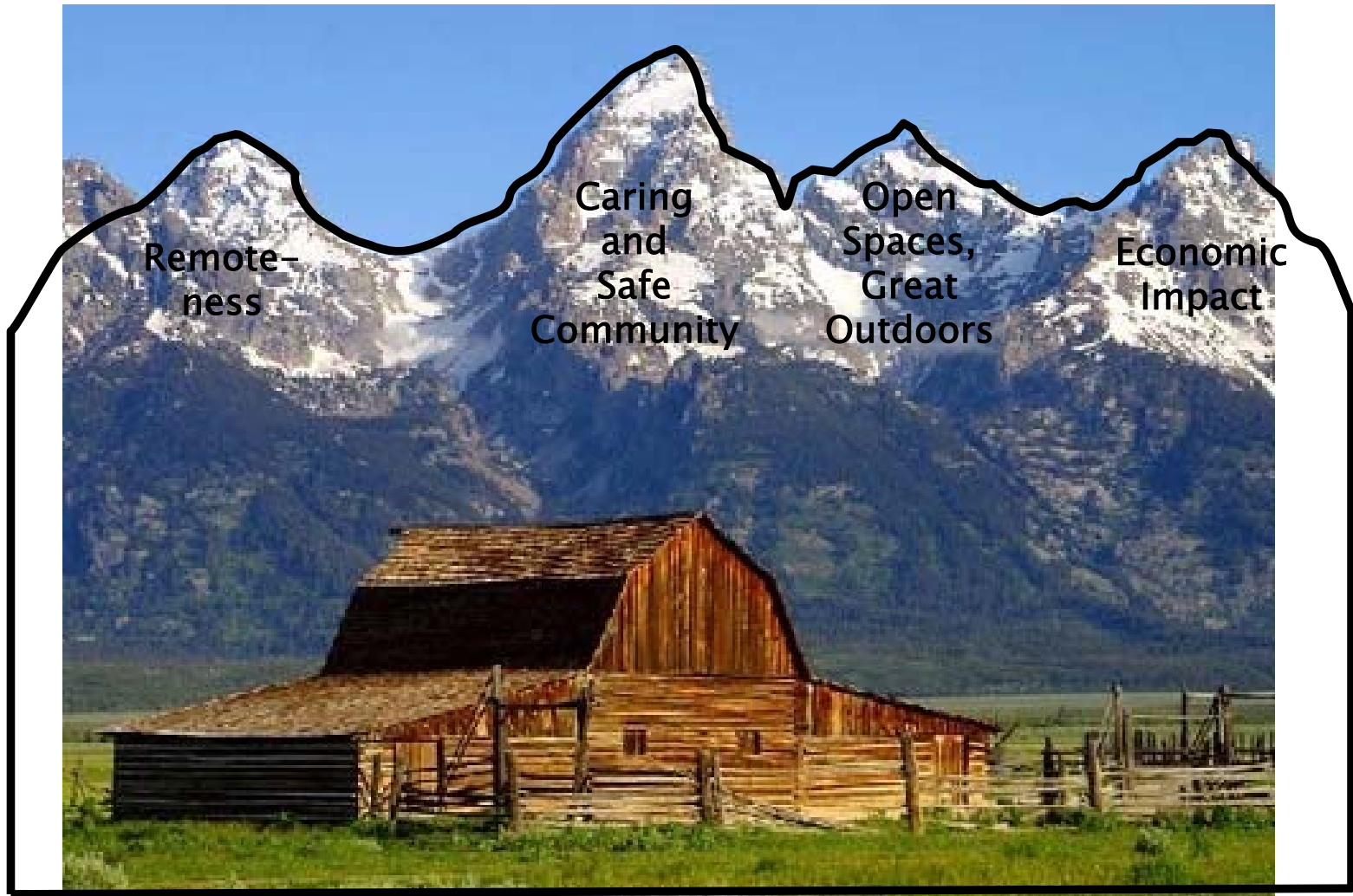
People can't
earn a living,
leave WY

Weak Economy,
Not attract businesses,
Lack of jobs

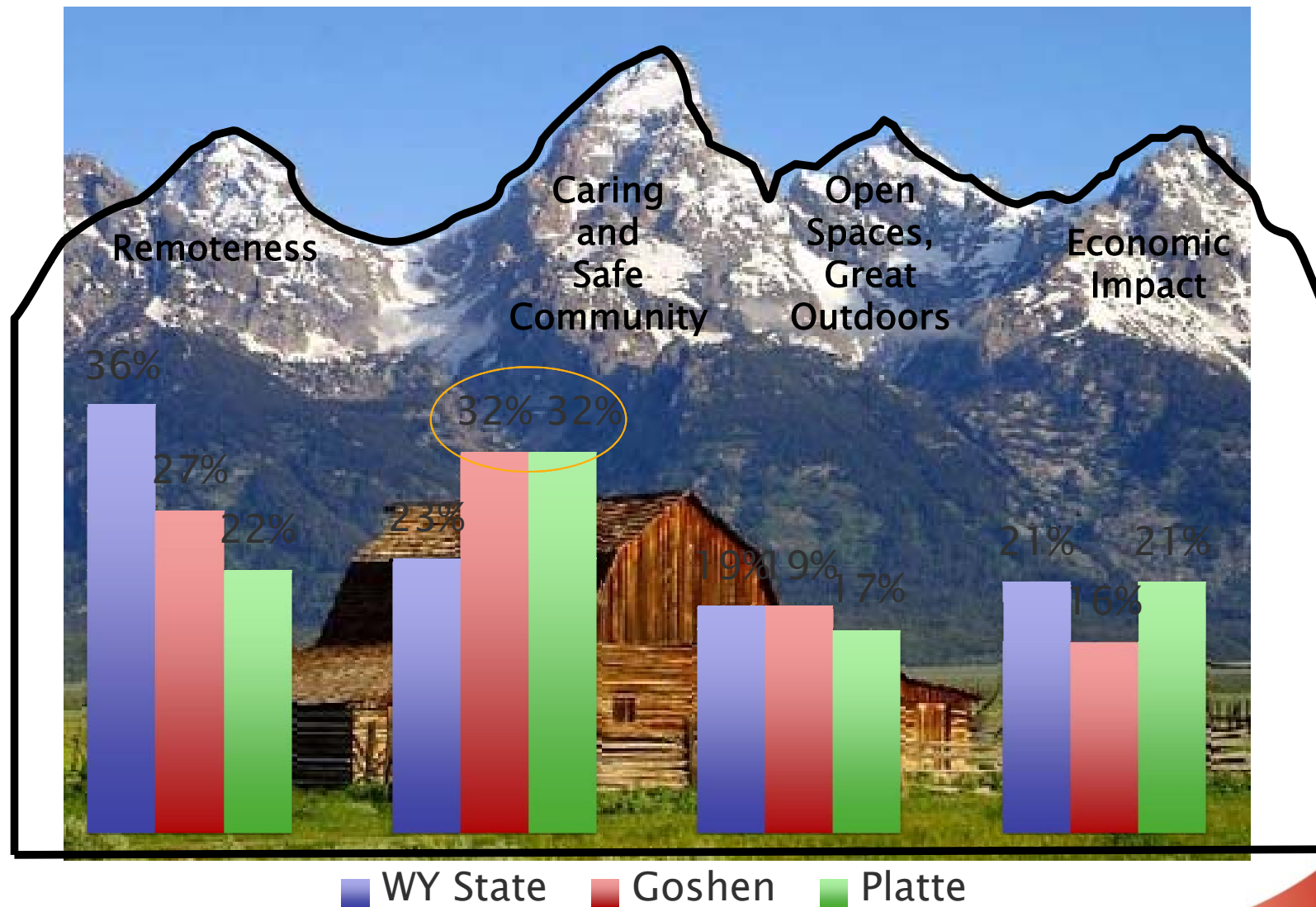
Wyoming

Wyoming	21%
Platte	21%
Goshen	16%

Summary: Wyoming Resident Values



Summary: Wyoming Resident Values



IDEAL COMMUNITY

Components of an Ideal Community

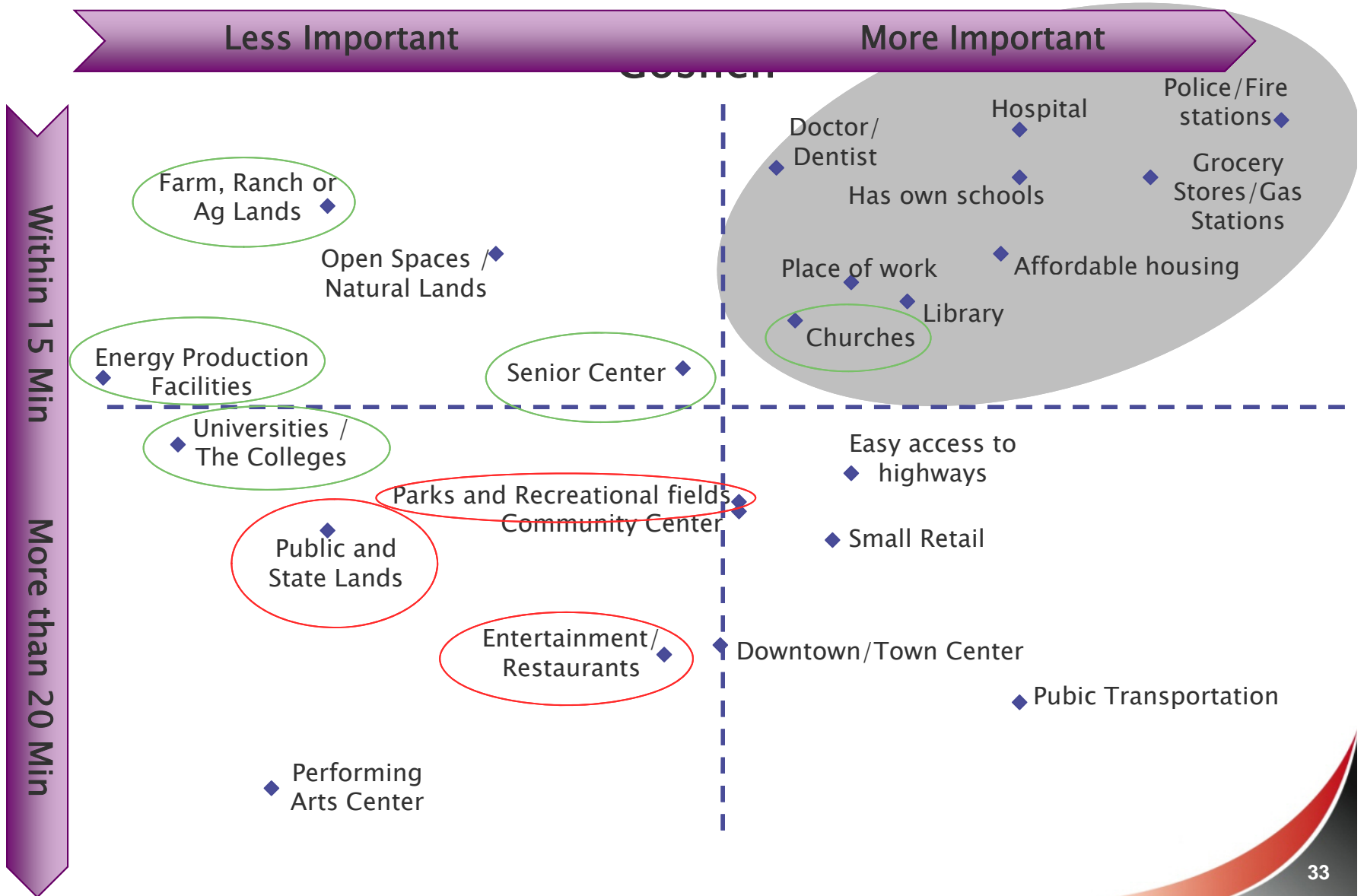
TOTAL IMPORTANT	WY State	Goshen	Platte
Hospital	88%	92%	85%
Grocery stores/gas stations	86%	87%	81%
Police and fire stations	85%	93%	83%
Doctor/Dentist offices	85%	89%	80%
Open spaces or natural lands	83%	79%	70%
Has its own elementary, middle and high schools	80%	87%	94%
Affordable housing	78%	79%	75%
Public and state lands	72%	50%	61%
Library	72%	74%	81%
My place of work	68%	76%	72%
Parks and recreational fields	68%	53%	57%
Farm, ranch or other agricultural lands	64%	84%	79%
Senior Center	57%	67%	67%
Church, synagogue, or other place of worship	58%	72%	64%
Easy access to highways	56%	56%	48%
Small retail services (dry cleaners, hair salons, copy centers, etc.)	55%	49%	43%
Energy production facilities / utilities	55%	66%	61%
Entertainment and restaurants	52%	37%	32%
Universities/Community or Technical colleges	50%	59%	38%
Community Center (pool, fitness center, etc.)	48%	52%	48%
Downtown/Town center	41%	38%	36%
Easy access to air travel	38%	n/a	n/a
Public transportation	29%	32%	18%
Performing arts center	25%	23%	9%
Shopping malls	20%	n/a	n/a

**Differences of 10
pts. or more vs.
State highlighted**

Q900 . Please imagine your own ideal community and indicate how important it would be to you to have each of the following close to your "ideal community".

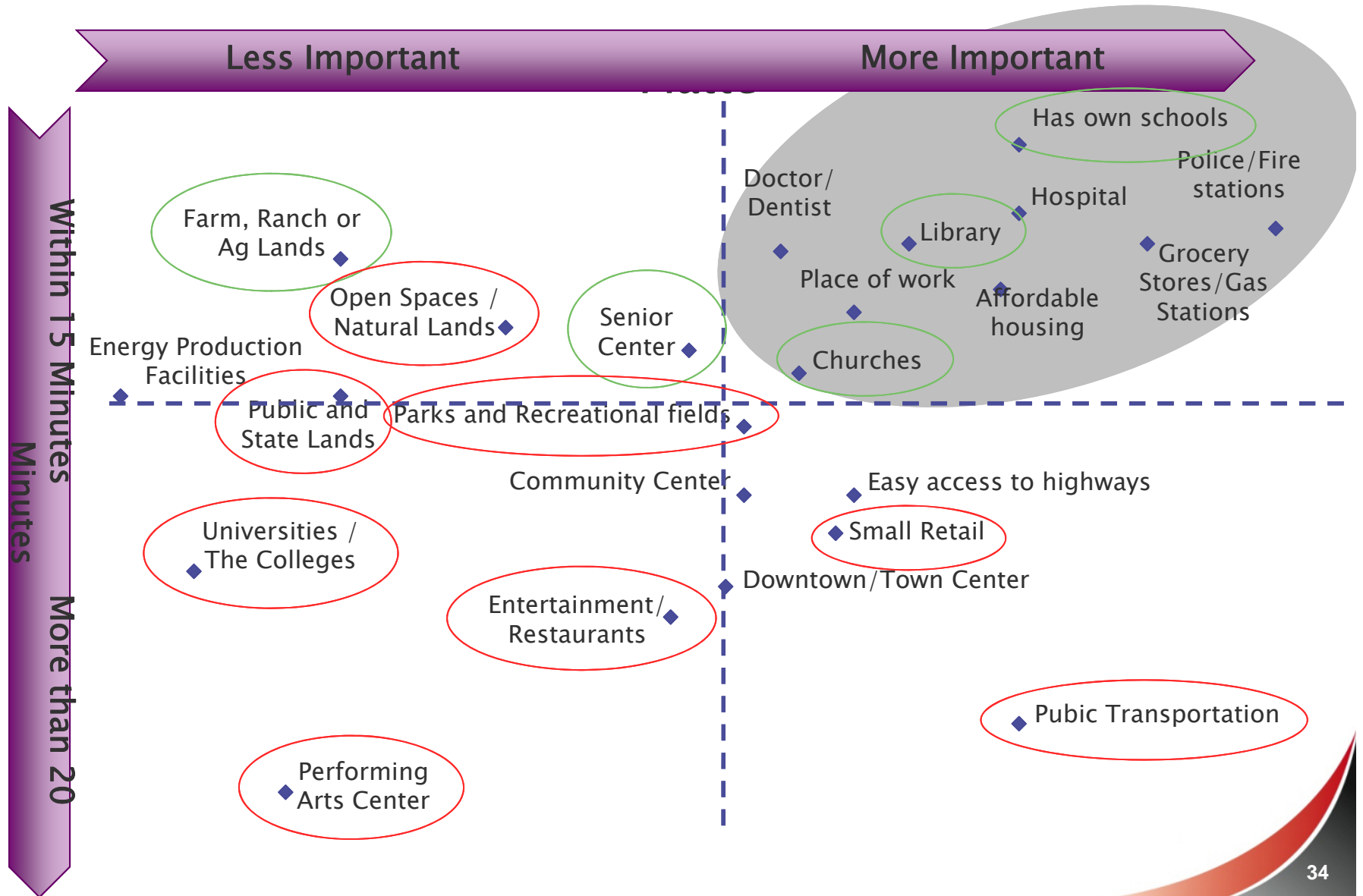
Ideal Community Map: Goshen

Heart + Mind STRATEGIES



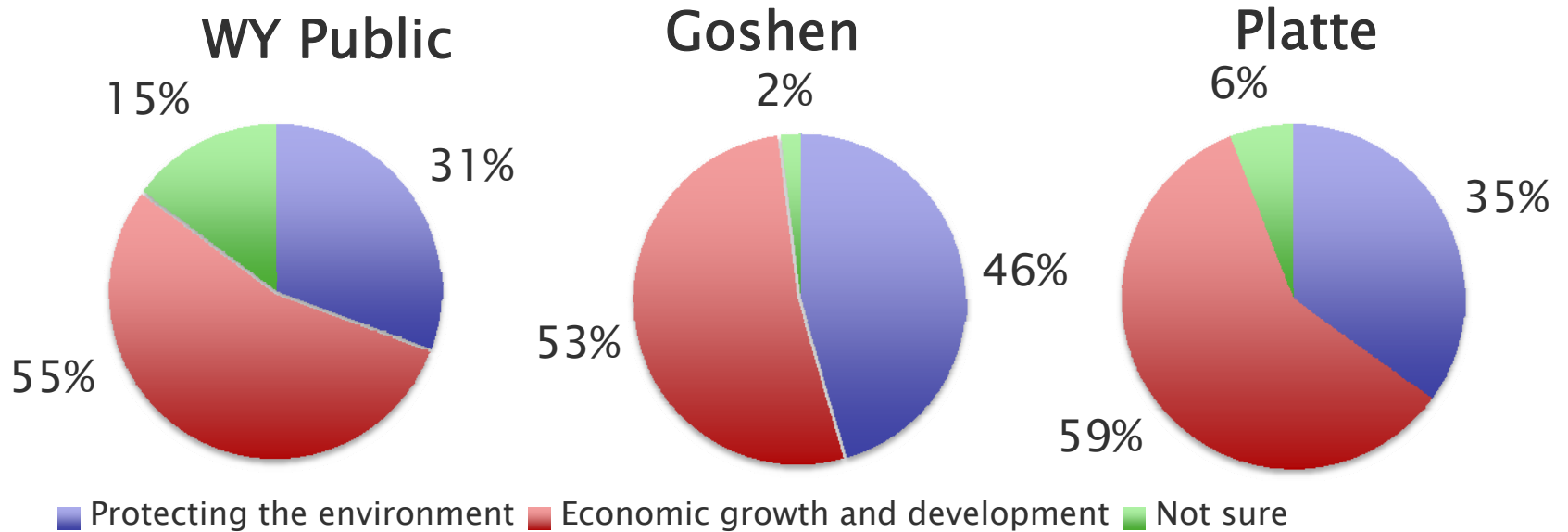
Ideal Community Map: Platte

Heart + Mind STRATEGIES



ENERGY + ENVIRONMENT ISSUES

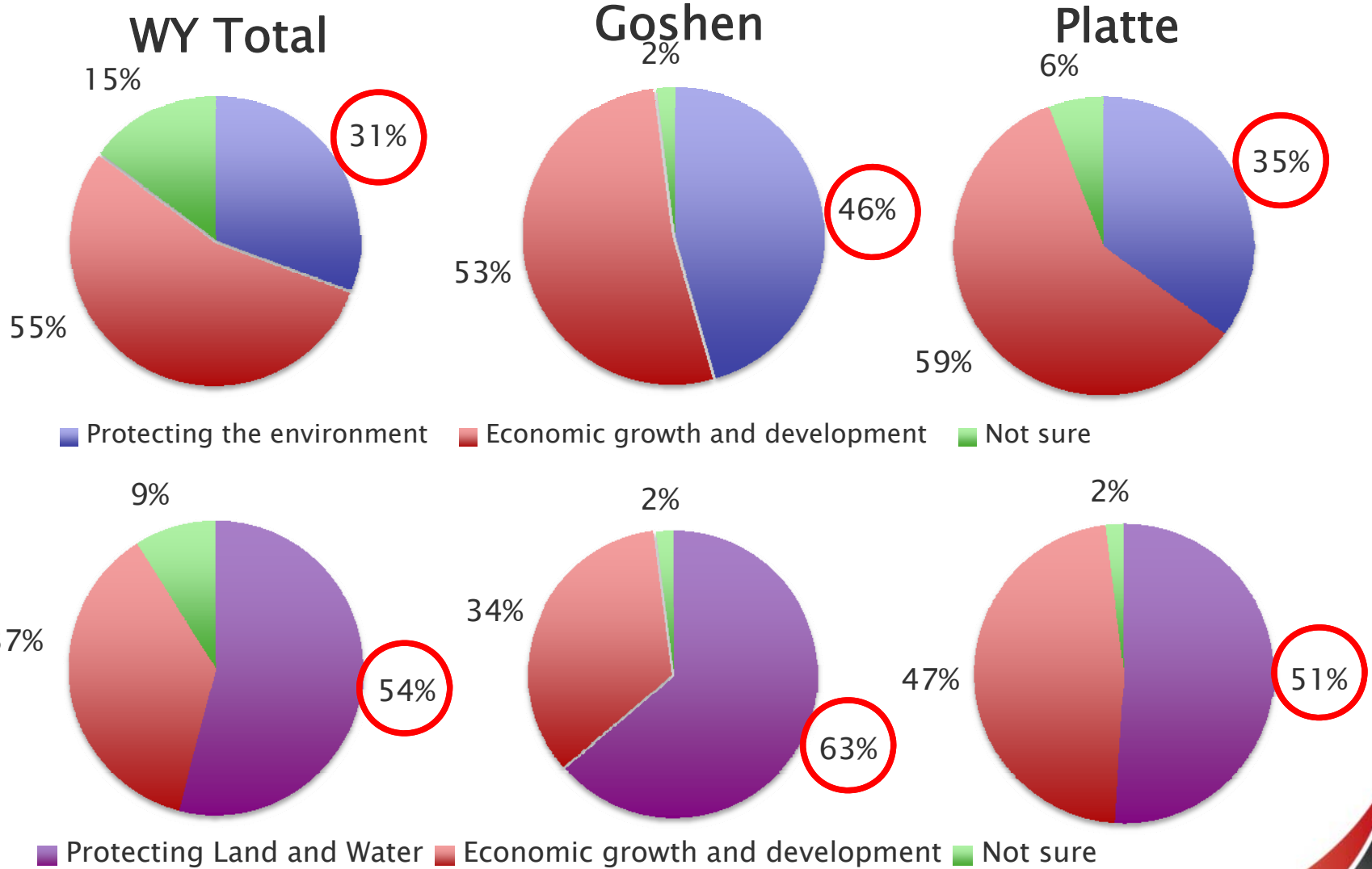
Environment vs. Economy?



	U.S.	Arizona	Grand Traverse	Ko'olau Loa	Utah	Florida
Protecting the environment	27%	37%	42%	43%	35%	39%
Economic growth and development	63%	52%	52%	39%	53%	53%
Not sure	10%	11%	6%	18%	12%	8%

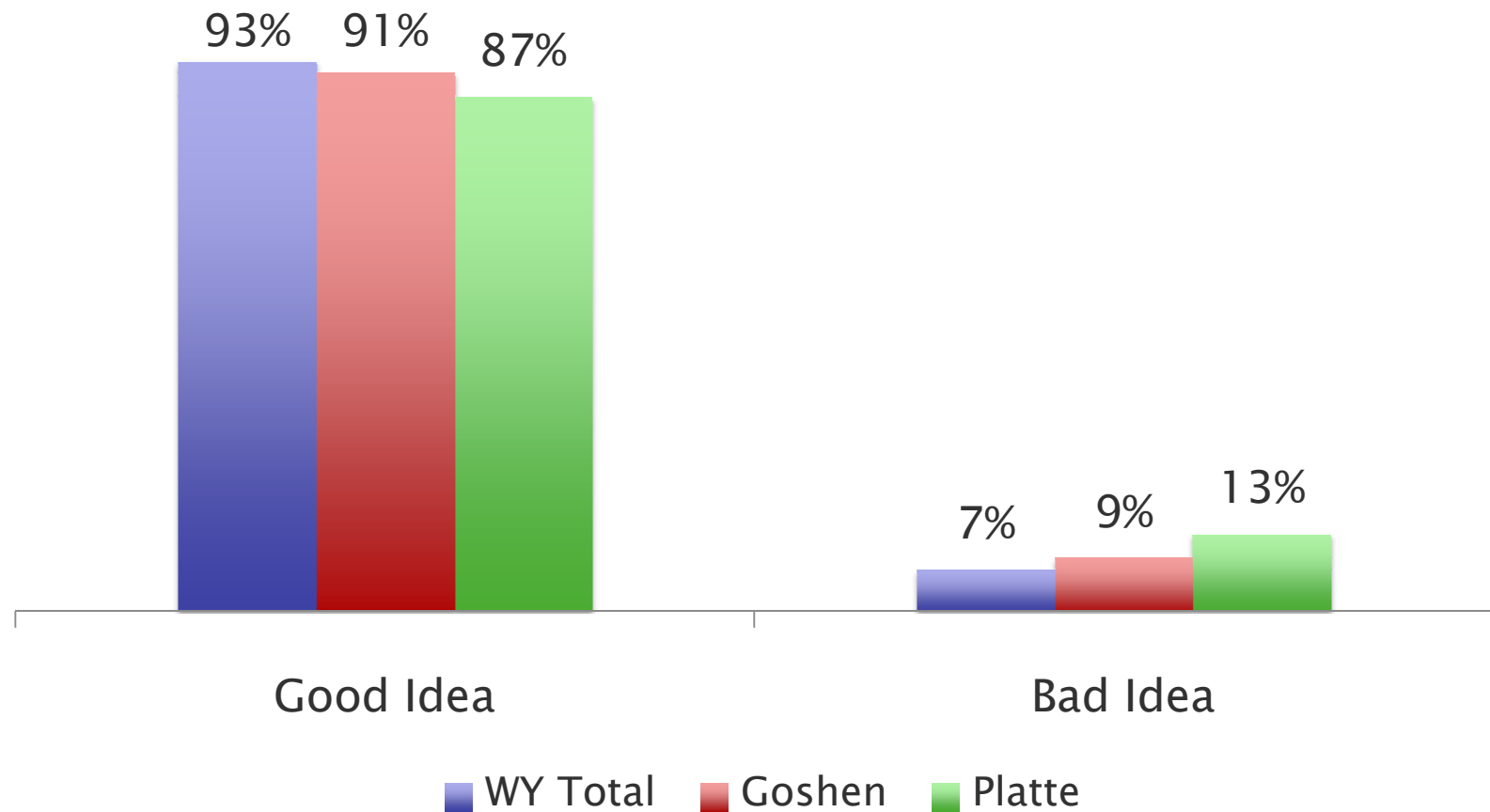
Q805. Which of the following would you say is more important to the state of Wyoming?

“Protecting Land and Water” has stronger support than “Protecting the Environment”



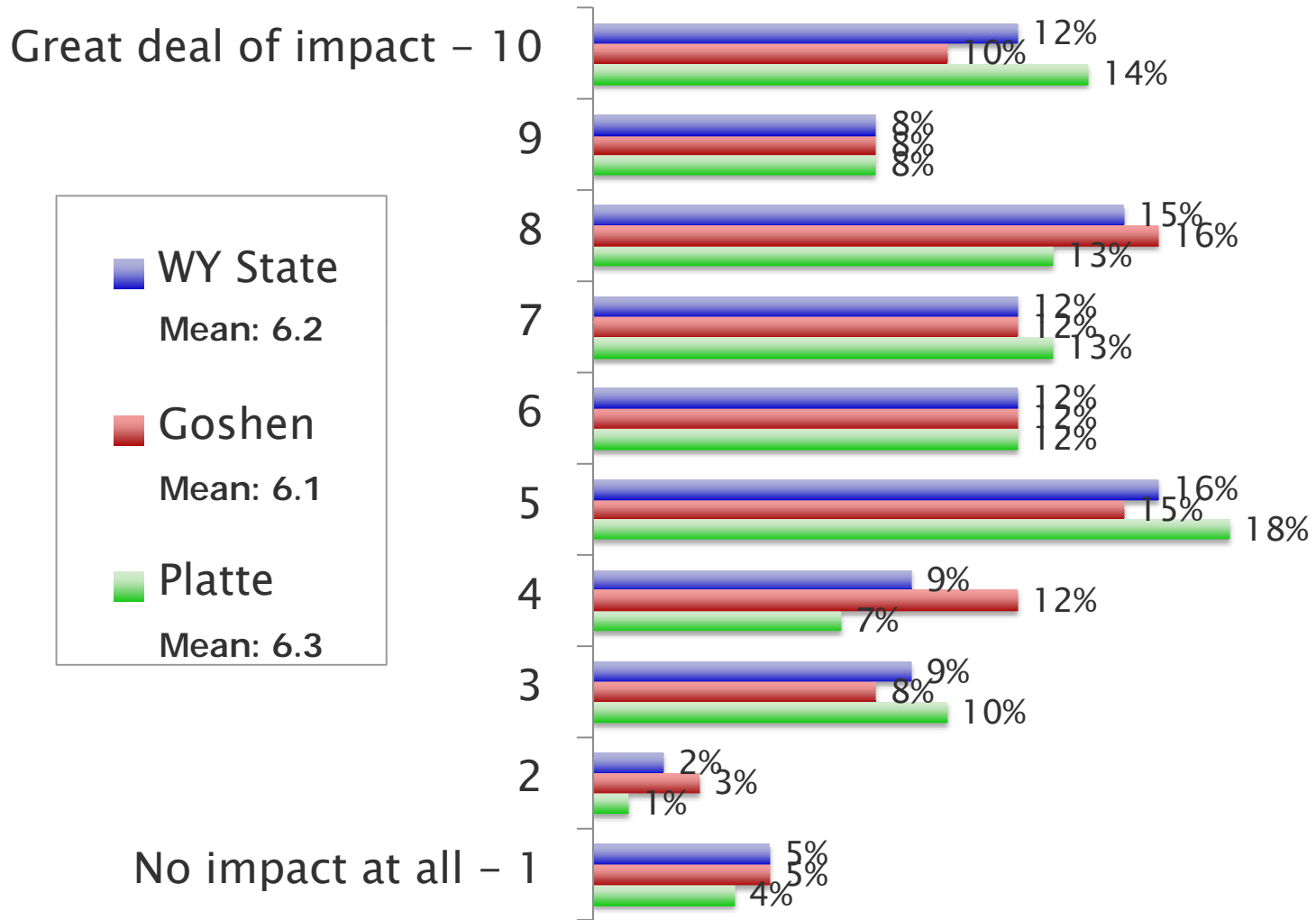
Q806. Which of the following would you say is more important to the state of Wyoming?

Strong Support for Wind Energy



Q1050. There has been lots of discussion recently about renewable energy and in particular wind energy. Overall, do you think the growth and development of wind energy in the state is a good idea or a bad idea?

Impact of Wind Energy Industry



Q 1061: What kind of an impact do you think the Wind energy industry will have on growing your region's economy and providing more jobs? Please use a scale from 1 to 10 where a 10 means you think it can have a great deal of impact in growing the economy and providing jobs and a 1 means it will have no impact at all.