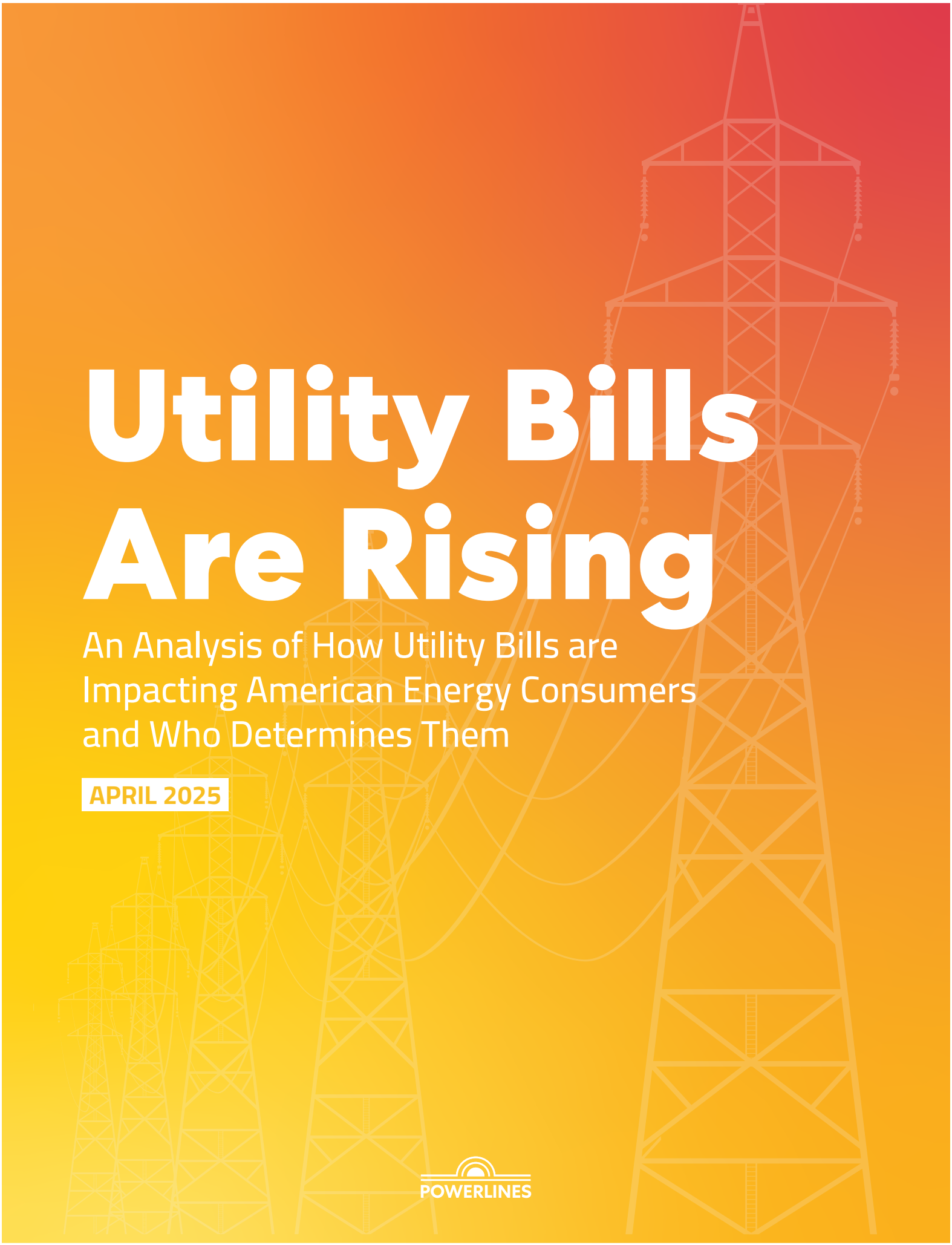
Utility Bills Are Rising

An Analysis of How Utility Bills are Impacting American Energy Consumers and Who Determines Them

APRIL 2025



POWERLINES

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EXECUTIVE SUMMARY

Utility bills are rising. A majority of consumers in the United States are concerned about increasing utility bills, as residential electricity costs have risen by almost 30% since 2021 and residential gas costs have increased by almost 40% since 2019, significantly outpacing inflation. Today, nearly 80 million Americans are struggling to pay their utility bills, forgoing basic expenses like food, education, and health care to keep their lights on.

> **"Nearly 80 million Americans are struggling to pay their utility bills, forgoing basic expenses like food, education, and health care to keep their lights on."**

State public utilities commissions (PUCs), which regulate investor-owned electric, gas, and other utilities in each state, have the power to set electric and gas utility prices. Just 200 PUC commissioners oversee more than $200 billion each year in utility spending—nearly $1 billion per commissioner. The job of PUCs is to ensure that utility rates for consumers are "just and reasonable," as investor-owned utilities are monopoly companies that need effective regulation to ensure consumers are protected. When utility companies wish to increase their rates, they must seek and gain approval from their PUC. Yet, few consumers engage with their PUC, whether during formal PUC proceedings or informally. The lack of adequate representation of consumer perspectives in the utility regulatory system is contributing to this problem of rising utility bills.

New polling by PowerLines, a nonpartisan consumer education nonprofit, reveals the toll of rising utility bills on American energy consumers. Nearly 3 in 4 Americans are concerned about utility bills rising this year, with a majority reporting that utility bills are adding to their financial stress. Yet, few Americans can name the government body that determines their utility bill—namely, their state PUC. Notably, 4 in 5 Americans feel powerless to do anything about these rising utility bills, with a majority also indicating they do not understand the charges on their utility bills.

American energy consumers have reason to be concerned about rising utility bills. In the first quarter of 2025 alone, utilities requested or received approval for rate increases totaling approximately $20 billion, as new data analysis from PowerLines demonstrates.

This situation is untenable. Unlike other economic forces putting upward pressure on consumer costs, rising utility bills can and must be addressed by existing regulatory structures, namely state PUCs. While the factors driving rising utility bills vary by region, the end result is the same: American energy consumers are stressed out about rising utility bills and concerned about what these trends mean for the broader economy. In an era of unprecedented growth in electricity demand not seen at this scale in decades, ensuring that consumer perspectives are central to utility regulatory decision making—both in process and outcome—is key to restoring a system that serves the public interest and maintains the trust of consumers.

It is time to recenter the "public" in "public utilities commission."

01 | Key Trends: Utility Bills Are Rising

Utility bills are rising across the United States. Residential electricity costs have increased nearly 30% since 2021, while residential gas costs have increased nearly 40% since 2019, according to the U.S. Energy Information Administration (EIA).[1] In the past two years, electric utility bills alone have increased by approximately $10 billion annually, directly hitting the pocketbooks of American energy consumers.[2] These costs are significantly outpacing inflation, as illustrated in Figures 1 and 4.[3]

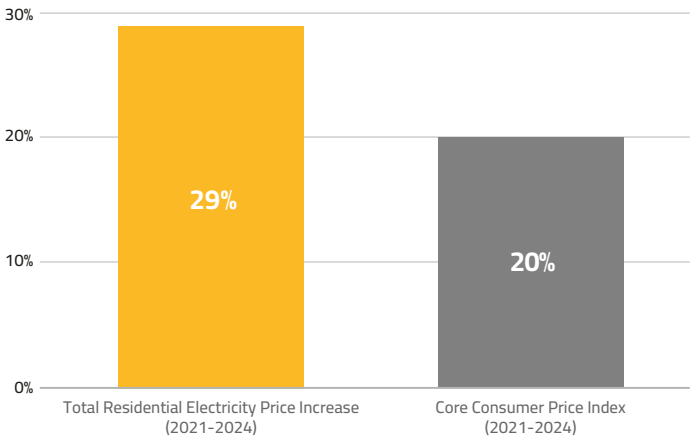


Figure 1. Residential electricity prices vs. inflation
(Source: U.S. Energy Information Administration[4], Federal Reserve Economic Data[5])

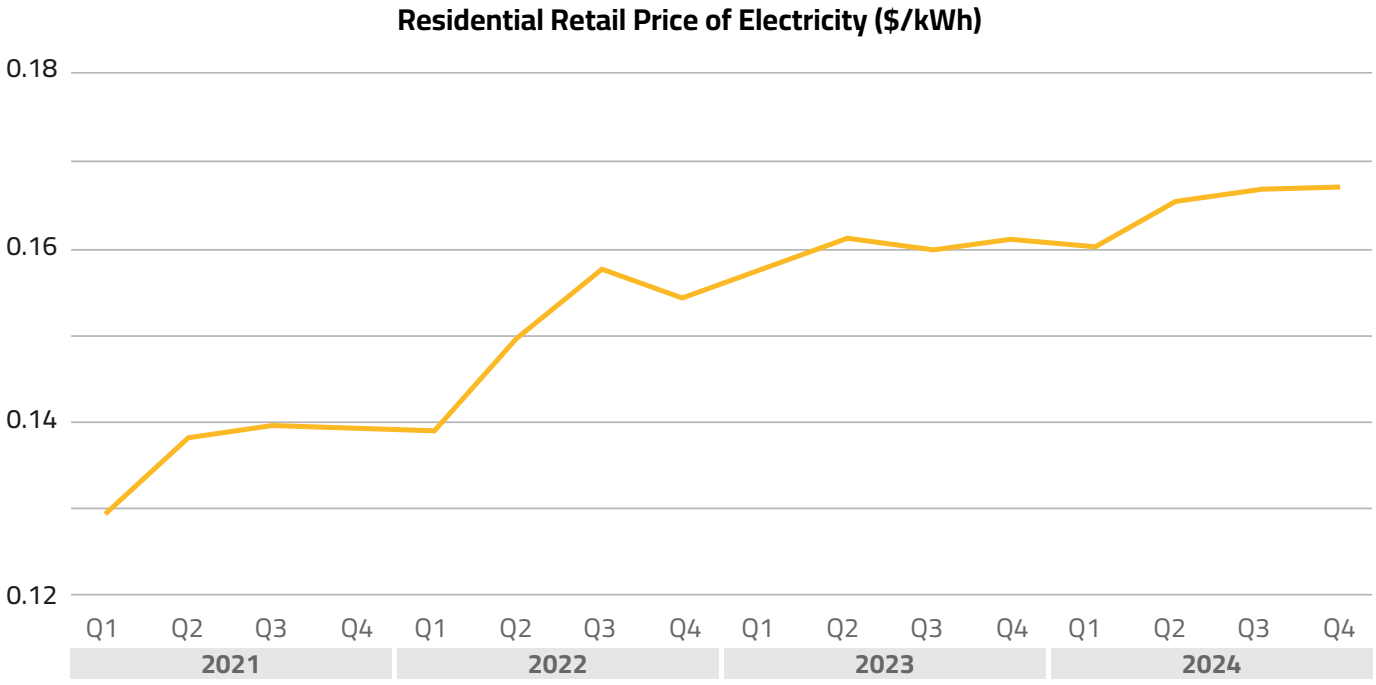


Figure 2. Trends in residential electricity costs: 2021-2024
(Source: U.S. Energy Information Administration[4])

1 U.S. Energy Information Administration, Electricity Data Browser, retail price of electricity compared between January 2021 and December 2024.
2 U.S. Energy Information Administration, based on 2023 data and 2024 forecast for electric utility rate increases, www.eia.gov/todayinenergy/detail.php?id=63024#.
3 U.S. Bureau of Labor Statistics, CPI Inflation Calculator, www.bls.gov/data/inflation_calculator.htm.
4 U.S. Energy Information Administration, Electricity Data Browser.
5 Federal Reserve Bank of St. Louis, Federal Reserve Economic Data, Consumer Price Index for All Urban Consumers: All Items Less Food and Energy in U.S. City Average, fred.stlouisfed.org/series/CPILFESL.

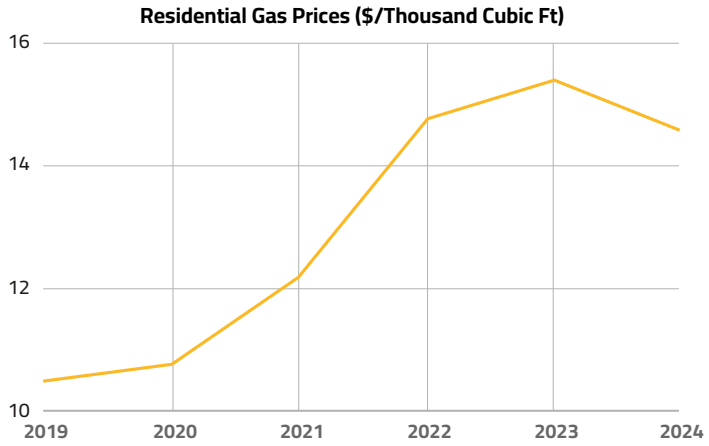


Figure 3. Trends in residential gas prices: 2019-2024
(Source: U.S. Energy Information Administration[6])

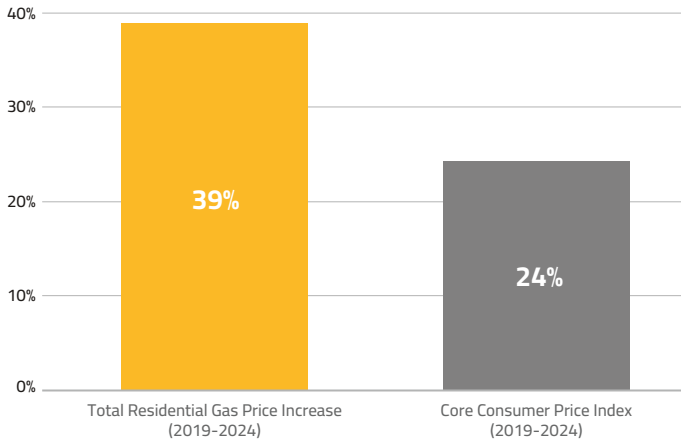


Figure 4. Residential gas prices vs. inflation
(Source: U.S. Energy Information Administration[7], Federal Reserve Economic Data[8])

Furthermore, not only are utility bills rising, they are also rising at a faster rate than previously. The compound annual growth rate for residential electricity prices was 3% between 2001 and 2010 and 1% between 2011 and 2020, but has skyrocketed to 6% since 2021.

While residential consumers are certainly impacted by rising utility bills, so are commercial and industrial consumers. Commercial customers have seen retail electricity prices increase 25% since 2021 and retail gas prices rise 33% since 2019. Meanwhile, industrial customers have experienced a 27% increase in retail electricity prices since 2021, with retail gas prices nearly doubling between 2019 and 2022.[9]

Rising utility bills are primarily driven by significant growth in rate increase requests by electric and gas utilities in recent years, as Figure 6 illustrates. Electricity and gas costs are largely determined by state-level utility regulators that must approve cost increases. While federal decision makers have some degree of influence over these costs, these utility costs are largely determined by state-level decision makers.

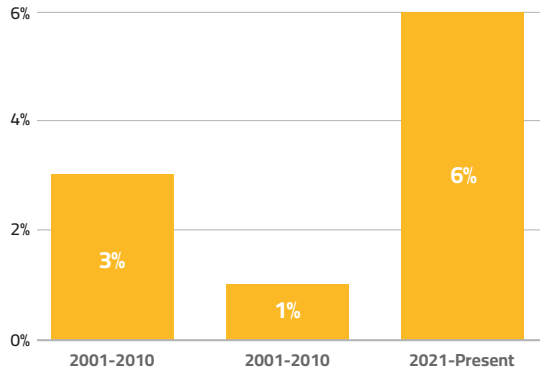


Figure 5. Compound annual growth rate for residential electricity prices over time
(Source: U.S. Energy Information Administration[6])

6 U.S. Energy Information Administration, Natural Gas Prices, www.eia.gov/dnav/ng/ng_pri_sum_a_EPG0_PIN_DMcf_a.htm.
7 U.S. Energy Information Administration, Electricity Data Browser.
8 Federal Reserve Bank of St. Louis, Federal Reserve Economic Data, Consumer Price Index for All Urban Consumers: All Items Less Food and Energy in U.S. City Average, fred.stlouisfed.org/series/CPILFESL.
9 U.S. Energy Information Administration, Natural Gas Prices, www.eia.gov/dnav/ng/ng_pri_sum_a_EPG0_PIN_DMcf_a.htm.

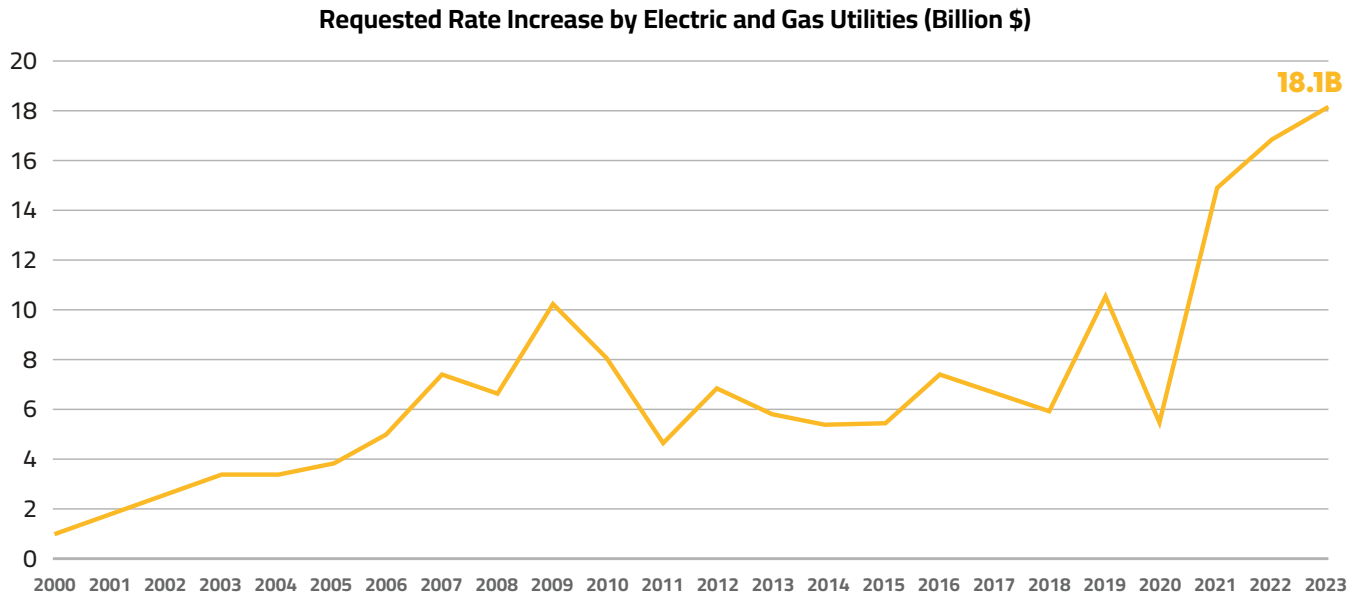


Figure 6. Requested rate increases from electric and gas utilities
(Source: Regulatory Research Associates[10])

Three main expenses contribute to utility bills:

GENERATION
Power plants and other facilities that generate electricity

TRANSMISSION
Larger-scale, high-voltage power lines that deliver electricity across long distances (e.g., along highways), from power plants (generation) to local substations (distribution system)

DISTRIBUTION
Smaller-scale, low-voltage power lines that carry electricity from local substations to end-users—such as homes and businesses in neighborhoods.

Over the past couple of years, state utility regulators have approved requests for utility bill increases totaling $4.4 billion in 2022 and $9.7 billion in 2023. Aging grid infrastructure and increased pressures facing the grid have contributed to rising electricity prices. Significant volatility in gas markets in recent years has resulted in rising gas prices.

The predominant driver of recent utility bill increases has been rising transmission and distribution costs, rather than generation costs. Ballooning distribution system expenses have placed particular upward pressure on utility bills. In 2023, distribution-related costs accounted for 44% of all utility capital expenditures and 35% of all utility costs including capital expenditures and operations and maintenance. These distribution capital expenditures have increased by more than 50% since 2019, more than double the pace of inflation; meanwhile, generation capital investments have decreased during that time frame.[11]

10 S&P Global, Rate requests by U.S. energy utilities set record in 2023 for 3rd straight year.
11 Lawrence Berkeley National Laboratory, Retail Electricity Price and Cost Trends: 2024 Update.

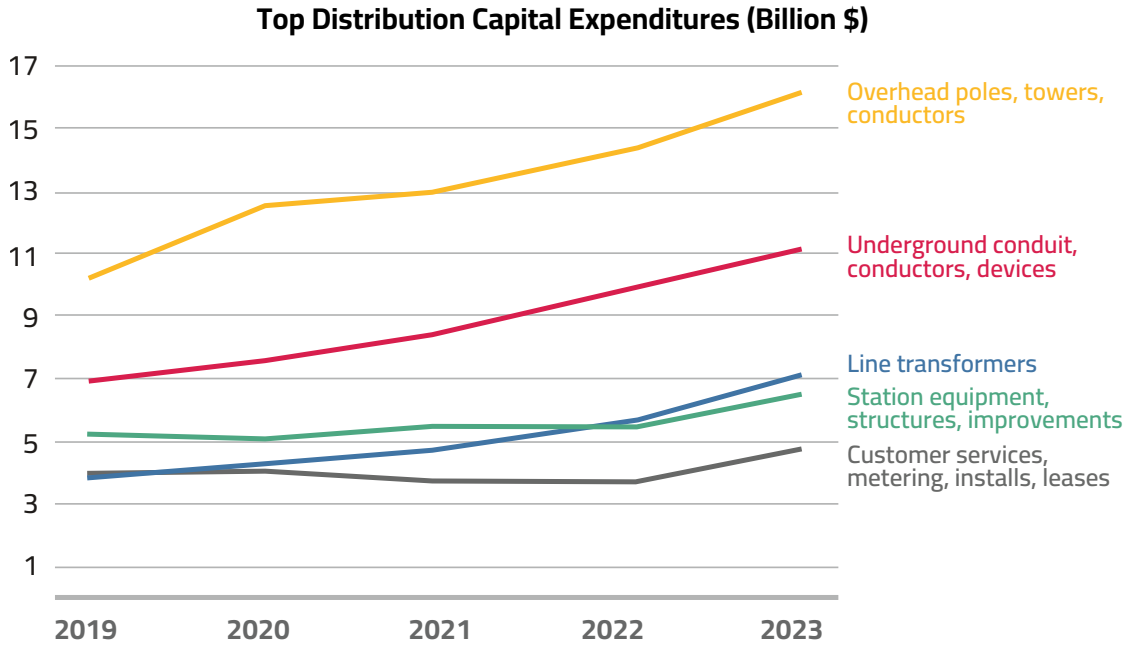


Figure 7. Select distribution capital expenditures. 2019-2023
(Source: FERC Form 1)

Increases in transmission and distribution costs, even if they lead to increased utility bills, are not inherently bad for consumers. In fact, the most cost-effective transmission and distribution investments can actually reduce costs for energy consumers, while some infrastructure is aging so rapidly that replacement is a necessity. However, not all forms of transmission and distribution investments deliver these system benefits from an affordability and/or reliability perspective.[12] It is therefore incumbent upon state and federal utility regulators to ensure to the greatest degree possible that approved transmission and distribution system investments are ultimately delivering these broader system benefits and that more cost-effective solutions are considered and adopted in parallel.

> **"Many states lack an effective market or regulatory mechanism by which these cost savings can flow to residential consumers."**

Furthermore, although wholesale electricity prices have decreased in recent years, retail electricity prices have only increased. These reductions in wholesale prices have not necessarily translated into lower residential utility bills for consumers. Many states lack an effective market or regulatory mechanism by which these cost savings can flow to residential consumers.

12 Catherine Hausman, National Bureau of Economic Research, Power Flows: Transmission Lines, Allocative Efficiency, and Corporate Profits.

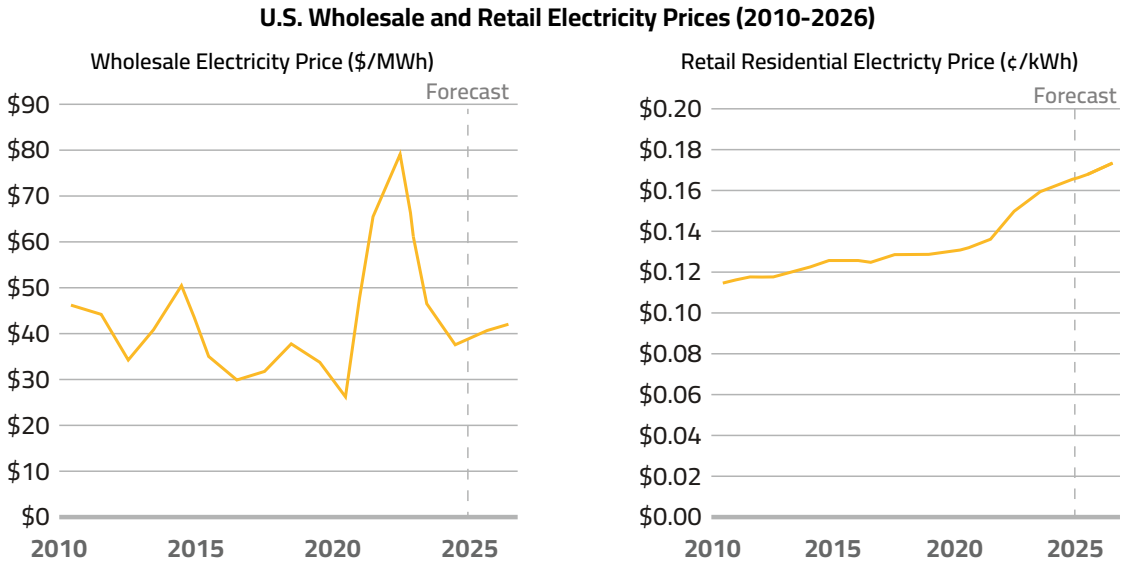


Figure 8. Trends in U.S. wholesale and retail electricity costs: 2010-2026
(Source: U.S. Energy Information Administration[13])

Increases in utility bills have differed by region, with the exact drivers of cost increases varying depending on a variety of state-specific factors. However, a consistent theme across the country is insufficient representation of consumer perspectives in the utility regulatory system and process, even as upward pressure on utility bills continues to increase.

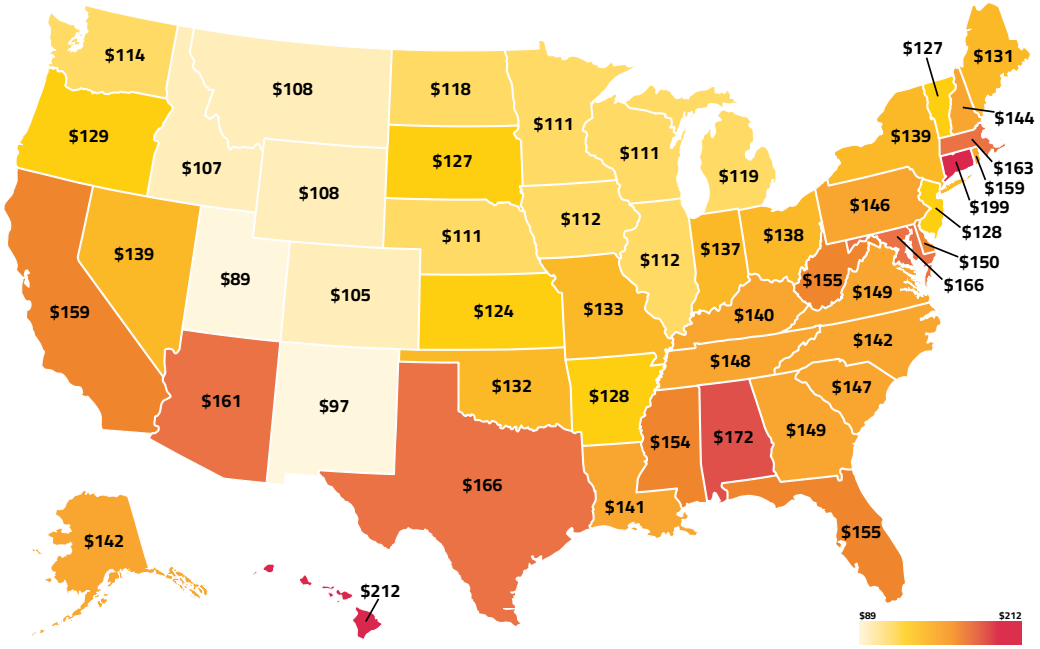


Figure 9. Average U.S. Monthly Electric Bills in 2024
(Source: U.S. Energy Information Administration[13])

13 U.S. Energy Information Administration www.eia.gov/todayinenergy/detail.php?id=64384.

02 | Impacts of Rising Utility Bills on Consumers

Because electricity and gas are necessities, rising utility bills as a non-negotiable expense place an outsized strain on people's pocketbooks. An estimated 80 million Americans, or nearly 1 in 3 people, are struggling to pay their utility bills, needing to forgo basic expenses like medicine and food to afford their utilities.[14] Many of these households have resorted to skipping or partially paying utility bills, keeping their homes in unhealthy conditions to conserve energy, or absorbing significant financial constraints.

Among this population, more than 17 million households using electricity and 11 million households using gas do not have enough money to pay for their utilities and, as a result, are overdue on their utility bills. Utility bill debt totals $17 billion across the United States. When consumers are unable to pay their utility bills, the utility shuts the customer out of electric or gas service, creating significant health, security, and financial risks to the nearly 4 million American households subject to power shutoffs.[15]

While some consumers may have access to federal and state programs that provide assistance for low-income consumers to pay their utility bills, these programs are insufficient to fully address the magnitude of the problem. Furthermore, many consumers may not be aware of or eligible for these programs, or they may require greater assistance to cover rising utility bills than these programs can provide. Additionally, programs like the national Low Income Home Energy Assistance Program (LIHEAP) have an uncertain future, creating significant pressures for individuals that benefit from this support.

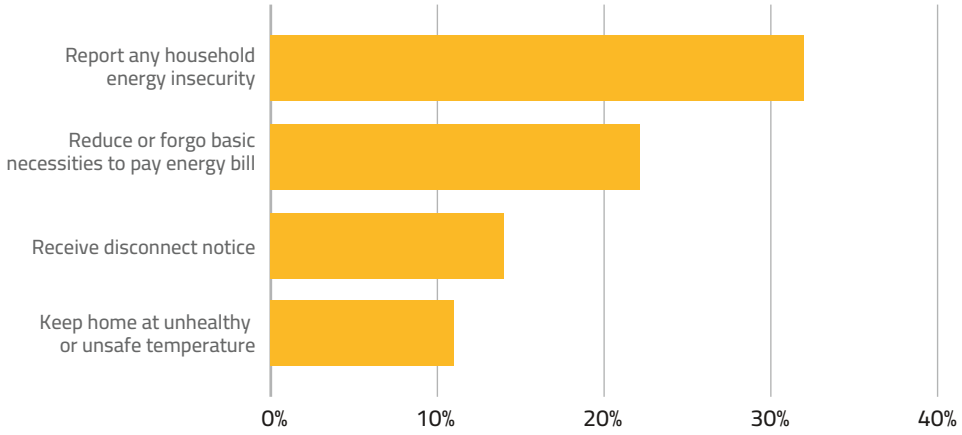


Figure 10. Utility affordability challenges for American households
(Source: U.S. Census Bureau[14])

14 United States Census Bureau, Household Pulse Survey.
15 NEADA, Energy Hardship Report, neada.org/energy-affordability-project/.

03 | How Utility Bills Are Determined

The electricity and gas prices that consumers pay their utility companies are typically set by state-level government regulators known as state public utilities commissions (PUCs). These bodies, which go by other names such as public service commission (PSC) or corporation commission in some states, were established over a century ago to regulate investor-owned monopoly utilities that provide electric, gas, water, telecommunications, and other services. PUCs generally have the power to determine how much people pay for energy, what investments utilities make, and where certain energy projects are located. The process by which PUC commissioners are selected differs by state. In 10 states, utility regulators are elected; in the other states, the governor typically appoints PUC commissioners, with a couple states having commissioners appointed by the state legislature or a hybrid variation.

The job of the PUC is to ensure that utility rates for customers are "just and reasonable." This function is critical, as investor-owned utilities are granted monopoly status and are not typically subject to competition for customers in their utility service territory that would ordinarily ensure optimal consumer prices.

When utilities seek to raise rates on customers, they typically file a rate case proceeding with the PUC, whereby the utility justifies its expenditures, including proposed investments. These costs may include spending on construction, maintenance, operating costs of equipment and infrastructure, and safety and performance improvements. The PUC determines whether this utility spending is prudent. If the PUC deems costs prudent, regulators will grant the utilities the opportunity to recoup those costs through consumer rates, a process known as cost recovery. The frequency of rate cases varies by state, depending on statutory requirements.

During a rate case, the utility and the PUC undergo a formal legal process involving significant information requests and analysis to determine how much a utility should spend over a given time frame. Other parties can participate as intervenors, which may include consumer advocates, trade associations, government bodies, businesses, customers, and other stakeholders. The PUC ultimately determines how much the utility is allowed to charge customers via their rates and collect from utility bills. The conventional process by which utility regulation occurs is known as cost of service regulation (COSR), which reflects the theory that utility rates should be based on the cost that the utility incurs to provide utility service to its customers, and that the utility should have an opportunity to earn a profit on its capital investments.[16]

16 This is in contrast with performance-based regulation (PBR), which explicitly ties a utility's financial performance to its execution against certain predefined target outcomes.

Under the conventional COSR framework, the PUC makes the final decision to approve consumer prices, but the utility drives the ratemaking process. A utility proposes new utility rates by filing its data and analysis that forms the basis of its preferred prices. The utility first establishes its revenue requirement, which refers to the total amount of money the utility reports it needs to collect from consumers in order to operate its assets. Utility regulators then evaluate this revenue requirement and determine the rates customers pay according to the type of customer class they belong to (e.g., residential, commercial, and industrial). The revenue the utility recoups through the utility bills its consumers pay allows the utility to recover its approved revenue requirement.

This revenue requirement is comprised of three key inputs:

- **Capital expenditures (CAPEX):** includes expenses on physical assets such as power plants, transmission lines, distribution poles and wires, and new technologies
- **Operational expenditures (OPEX):** includes the amount that utilities spend on daily operations and maintenance such as salaries, fuel, rent, waste management, and other costs needed to operate
- **Rate of return (ROR):** used to determine the amount of money a regulator authorizes a utility to earn on its capital investments and physical assets

Utilities generally earn a rate of return on capital expenditures but not operational expenditures. As a result, utilities tend to favor capital-intensive infrastructure investments over other types of investments, as these capital investments can yield greater financial returns for their shareholders than deployment of solutions that enhance operational efficiency, even when such solutions may lower utility bills. It is incumbent on state PUCs and consumer advocates to ensure that utility investments are sufficiently protecting the public interest, despite these structural incentives.

Most states have a statutory consumer advocate, which is typically structured as a department within the PUC, a state government agency housed outside of the PUC, or an independent third-party nonprofit organization. However, some states lack a consumer advocate. And in most states, very few consumers are ultimately engaged in PUC processes, which are highly technical and opaque processes that are fundamentally inaccessible to the average utility consumer. Yet, there are few spaces where broader stakeholder, consumer, and public input is more needed yet missing than in state PUCs. Thus, there is a critical opportunity to ensure that consumer perspectives are further centered in utility regulation going forward.[17]

17 National Council on Electricity Policy, pubs.naruc.org/pub/21475F72-1866-DAAC-99FB-1E3EE0593D06.

04 | PowerLines Utility Bill Survey Results

PowerLines conducted a national online poll in March 2025 with the nonpartisan polling company Ipsos using the probability-based KnowledgePanel®, which surveyed 2,036 American adults from March 28 to 30, 2025. See **Appendix A: Methodology** and **Appendix B: Survey Results** for additional details on the survey methodology and results.

Respondents were asked to provide their perspectives on a range of questions regarding their attitudes towards recent utility bills trends, their sense of how much their interests as energy consumers are being protected, and their levels of awareness and familiarity with key aspects of the utility regulatory system. This study revealed three key insights regarding American energy consumers' attitudes toward rising utility bills.

Takeaway #1: Americans are already feeling the pinch of rising utility bills and are concerned their bills are going to go up even further.

- Nearly 2 in 3 (64%) Americans whose household pays a monthly electric and gas utility bill (referred to as "billpayers" in this report) have seen their utility bills increase over the past year.
- Nearly 3 in 4 (73%) Americans are concerned that their utility bills will further increase this year.
- These trends are consistent across political parties, with 74% of Democrats, 71% of Republicans, and 74% of Independents expressing concern over rising utility bills.

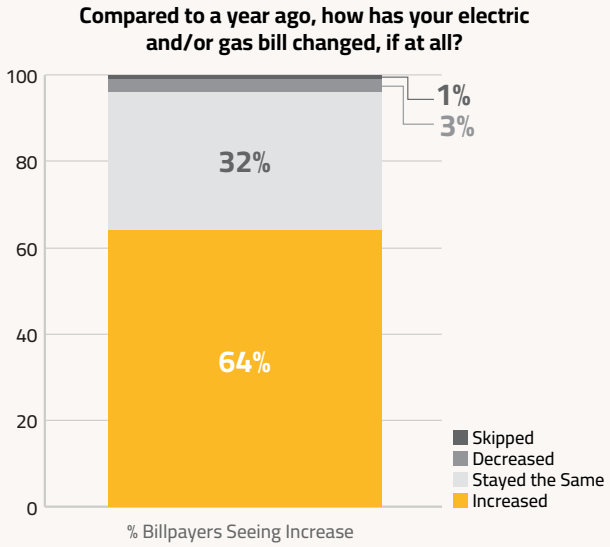


Figure 11. PowerLines survey results: Changes in utility bills among billpayers

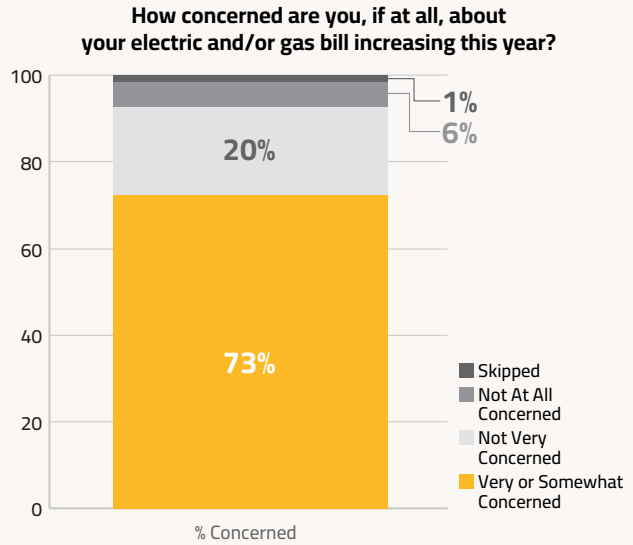


Figure 12. PowerLines survey results: Concern about utility bills

Takeaway #2: Most Americans say utility bills are adding to their financial stress but feel powerless to do anything about these costs.

- Nearly 2 in 3 (63%) American billpayers say that utility bills are adding to their financial stress, a figure that increases to over 3 in 4 (76%) for Americans making less than $50,000.
- 4 in 5 (80%) Americans feel powerless to control how much they're being charged for their utility bills.
- A majority (56%) of Americans do not feel they understand what drives the costs they are charged by their utility companies.

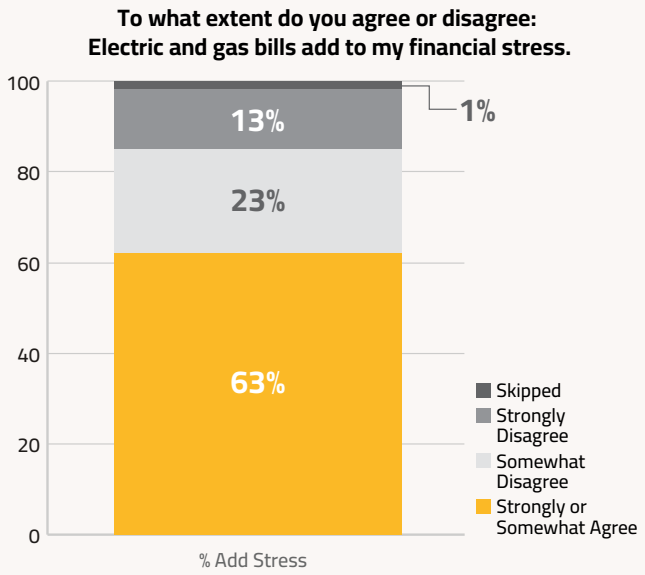


Figure 13. PowerLines survey results: Impact of utility bills on financial stress

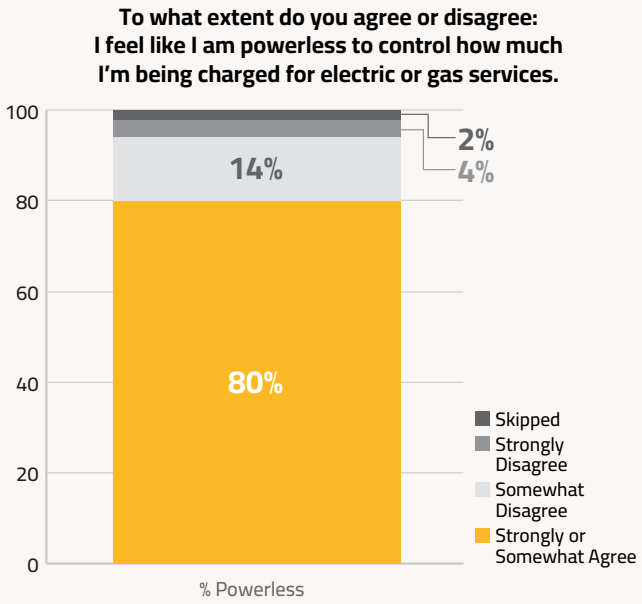


Figure 14. PowerLines survey results: Consumer feeling of powerlessness over utility bills

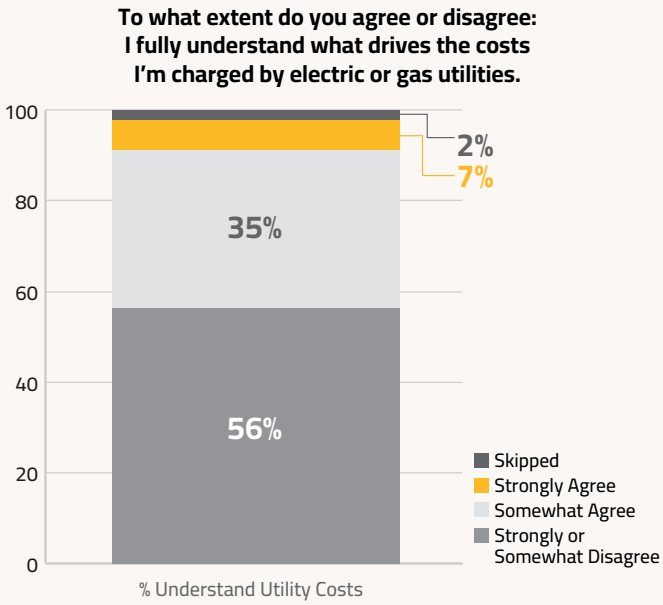


Figure 15. PowerLines survey results: Understanding of cost drivers of utility bills

Takeaway #3: Every state has a regulatory body responsible for keeping utility bills low for consumers, yet few Americans know who they are.

- Nearly 3 in 5 (59%) Americans do not believe their state government is doing a good job protecting their interests when it comes to regulating electric or gas utilities.
- Three in five (60%) Americans say they are not familiar with the state or local regulatory body that determines their utility bills.
- In a separate open-ended question, around 9 in 10 respondents could not correctly name the state government body that regulates their utility bills.

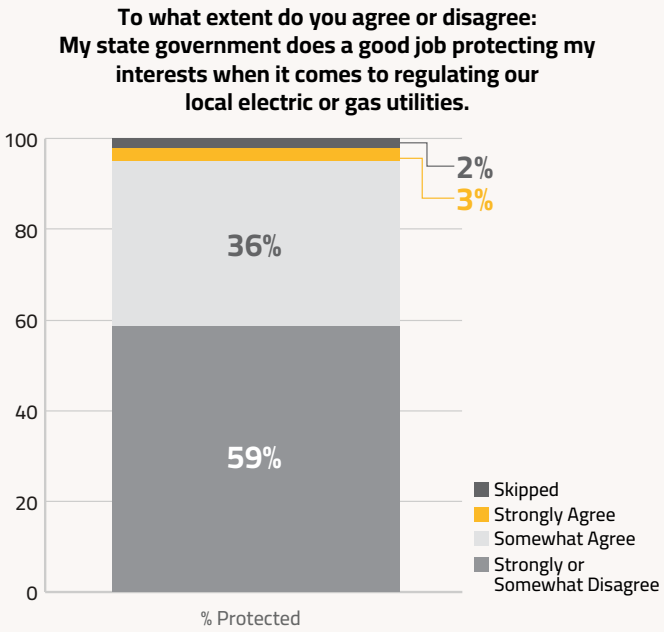


Figure 16. PowerLines survey results: Consumer attitudes toward consumer protection impact

Taken together, these results illustrate a deep and widespread concern among American energy consumers regarding rising utility bills, the impacts on their own household budgets, and implications for the broader economy. The public is largely unfamiliar with these regulatory bodies responsible for setting their electric and gas utility rates, and a majority say they do not understand what is behind the charges on their utility bills. Without visibility into the process or opportunities for education to understand why utility bills are rising, consumers unsurprisingly do not believe the regulatory system is adequately serving their interests as consumers.

If the results show a lack of confidence in the current utility regulatory system, they also illuminate a path forward. Stakeholders should proactively educate consumers about who is making the decisions that will impact their pocketbooks and ensure that consumer perspectives are sufficiently incorporated into decision making. Without an understanding of the regulatory process and how they can make their perspectives heard, consumers feel powerless, and all stakeholders risk experiencing the consequences of a loss of consumer trust and confidence in the current utility regulatory system.

05 | Analysis of Requested 2025 Rate Hikes

Consumers are right to be concerned that utility bills will increase this year. Based on approved and pending rate cases, utility bills are expected to increase in 2025 and beyond. While the exact set of factors contributing to rising utility bills varies by state, there is consistent upward pressure on utility bills across the country due to growing demand for electricity, aging infrastructure in need of replacement or modernization, and reliability and resilience challenges facing utility assets. Several utilities have recently requested rate increases with their PUCs, seeking to tackle these challenges.

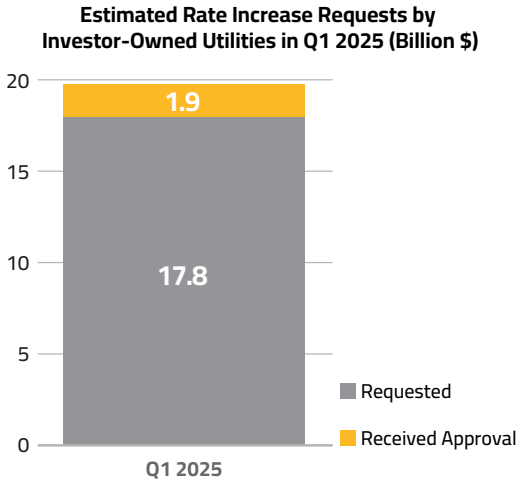


Figure 17. Rate increase requested and approved by investor-owned utilities in Q1 2025

To estimate the magnitude of these potential utility bill increases, PowerLines has identified the full set of investor-owned utilities with currently requested or recently approved utility rate case proceedings and tabulated these utility rate increases. In the three months between January 2025 and March 2025 alone, estimates suggest investor-owned utilities requested approximately $18 billion of rate increases for 2025 and onwards and received approval for approximately $2 billion of rate increases filed prior to 2025 but approved in the first quarter of 2025. While it is unlikely that the requested rate increases will be approved by state utility regulators in full, recent data suggests that, on average, nearly 60% of a utility's requested rate increase is approved.[18]

To produce this estimate, PowerLines collected information on requested rate increases based on a range of publicly available data sources, including rate filings, press releases, and news sources. When utilities only reported per-customer monthly utility bill increases, the total dollar amount of the requested utility rate increase was determined by multiplying this per-customer monthly utility bill increase amount by the number of customers per utility based on publicly available U.S. Energy Information Administration data.

For a more detailed overview of requested rate increases, see **Appendix C: Database of 2025 Rate Increase Requests or Approvals**.

18 U.S. Energy Information Administration, based on 2023 data and 2024 forecast for electric utility rate increases, www.eia.gov/todayinenergy/detail.php?id=63024#.

06 | Conclusion

The U.S. electricity system is facing an unprecedented set of pressures. One of the most critical challenges it must confront is rising utility bills. Energy affordability is essential for a robust economy, including a stronger environment for investment at the macro level and greater economic independence for households at the micro level.

With electricity demand rising at its fastest pace in a generation due to artificial intelligence (AI), data centers, manufacturing, and electrification, the U.S. electricity system faces a crucial inflection point. In theory, increased electricity demand could lower electricity and gas rates by spreading system costs over a wider base of customers. In practice, however, rising demand could put upward pressure on electricity and gas rates depending on the scale of new investments and resources needed to service this rising demand, particularly if consumer interests are not centrally prioritized in decision making. The key to achieving the former is a robust, well-resourced PUC with active engagement from consumers.

Although there are significant concerns about rising utility bills, few consumers currently engage with the body that determines them—namely, their state's public utilities commission (PUC). The lack of adequate representation of consumer perspectives in the utility regulatory system is contributing to this problem of rising utility bills.

Going forward, it is important that the utility regulatory system effectively prioritizes the interests of American energy consumers by keeping costs affordable while advancing economic development. To ensure consumer interests are advanced, states should prioritize investing in state public utilities commissions and consumer advocate offices to effectively serve the public interest at a time of significant complexity and rapid change. Additionally, greater consumer engagement in the utility regulatory system is essential to making sure that the system is sufficiently representing and protecting the interests of American energy consumers.

Lastly, there are many measures that policymakers and regulators in particular can advance to tackle this issue of rising utility bills.

Policymakers, including state legislators and governor's offices, can:

- Invest resources in PUCs and consumer advocate agencies to support greater talent and capacity engaged to benefit consumers.
- Create intervenor compensation programs for external consumer advocacy organizations to participate in PUC proceedings.
- Educate stakeholders, particularly consumers and the general public, about how the utility regulatory system works and how stakeholders can engage effectively.
- Reform rate design structures to incentivize energy consumption during lower-cost periods of system usage.

Regulators, including state public utilities commissioners, can take measures to:

- Provide greater scrutiny of utility investments in different energy resources to ensure consumer interests are centrally protected.
- Convene stakeholders to develop an action plan and strategy for tackling rising utility bills.
- Advance robust governance and accountability structures including greater public engagement and transparency measures.
- Manage rising distribution system costs through integrated distribution system planning.

Appendix A:
Methodology

Appendix A | Methodology

Survey

This PowerLines Utility Bill study was conducted between March 28-30, 2025, by Ipsos using the probability-based KnowledgePanel®. This poll is based on a nationally representative probability sample of 2,036 adults age 18 or older. The sample includes 1,944 respondents who are partially or fully responsible for paying the electricity and gas utility bills in their household each month. The margin of sampling error for this study is plus or minus 2.3 percentage points at the 95% confidence level for results based on the general population sample of adults and plus or minus 2.3 percentage points at the 95% confidence level for results based on the sample of bill payers. The margin of sampling error takes into account the design effect, which was 1.08. In our reporting of the findings, percentage points are rounded off to the nearest whole number. As a result, percentages in a given table column may total slightly higher or lower than 100%. In questions that permit multiple responses, columns may total substantially more than 100%, depending on the number of different responses offered by each respondent. The data were weighted to reflect the U.S. 18+ adult population by gender by age, race/ethnicity, Census region, education, household income, and political party identification.

The survey was conducted using KnowledgePanel, the largest and most well-established online probability-based panel that is representative of the adult U.S. population. Our recruitment process employs a scientifically developed addressed-based sampling methodology using the latest Delivery Sequence File of the USPS – a database with full coverage of all delivery points in the U.S. Households invited to join the panel are randomly selected from all available households in the U.S. Persons in the sampled households are invited to join and participate in the panel. Those selected who do not already have internet access are provided a tablet and internet connection at no cost to the panel member. Those who join the panel and who are selected to participate in a survey are sent a unique password-protected log-in used to complete surveys online. As a result of our recruitment and sampling methodologies, samples from KnowledgePanel cover all households regardless of their phone or internet status and findings can be reported with a margin of sampling error and projected to the general population.

Appendix B:
Survey Results

Appendix B | PowerLines/Ipsos Utility Bills Survey

A survey of the American general population (ages 18+)

Conducted by Ipsos using KnowledgePanel®. View the full polling results here.

Interview dates: **March 28-30, 2025**

Number of interviews: **2,036**

Number of bill payer interviews: **1,944**

Margin of error: +/- 2.3 percentage points at the 95% confidence level for all respondents

Margin of error: +/- 2.3 percentage points at the 95% confidence level for bill payers respondents

NOTE: All results show percentages among all respondents, unless otherwise labeled. Reduced bases are unweighted values.

NOTE: * = less than 0.5%, - = no respondents, N/A = not applicable

Q1. Who is responsible for paying the electricity and gas utility bills each month in your household?

	Total (N=2,036)	Billpayers (N=1,944)
Myself (alone)	42%	44%
Myself and another household member	32%	33%
Another member of the household	22%	23%
I don't pay utilities	4%	-
Don't know	1%	-
Skipped	*	-

Q2. How familiar are you, if at all, with the following? (Total Familiar Summary)

	Total (N=2,036)	Billpayers (N=1,944)
Your local power and/or gas utilities	69%	70%
How your local power or gas utilities source their energy (i.e., coal, gas, nuclear, wind)	47%	48%
The state or local regulatory agency that oversees your local power or gas utilities	39%	40%

Q2-1. How familiar are you, if at all, with the following? Your local power and/or gas utilities.

	Total (N=2,036)	Billpayers (N=1,944)
Very familiar	26%	26%
Somewhat familiar	43%	44%
Not very familiar	19%	19%
Not at all familiar	11%	10%
Skipped	1%	1%
Familiar (Net)	**69%**	**70%**
Not Familiar (Net)	**31%**	**29%**

Q2-2. How familiar are you, if at all, with the following? The state or local regulatory agency that oversees your local power or gas utilities.

	Total (N=2,036)	Billpayers (N=1,944)
Very familiar	10%	10%
Somewhat familiar	30%	31%
Not very familiar	37%	37%
Not at all familiar	23%	22%
Skipped	1%	*
Familiar (Net)	**39%**	**40%**
Not Familiar (Net)	**60%**	**59%**

Q2-3. How familiar are you, if at all, with the following? How your local power or gas utilities source their energy (i.e., coal, gas, nuclear, wind)

	Total (N=2,036)	Billpayers (N=1,944)
Very familiar	12%	12%
Somewhat familiar	35%	36%
Not very familiar	32%	33%
Not at all familiar	20%	19%
Skipped	1%	1%
Familiar (Net)	**47%**	**48%**
Not Familiar (Net)	**53%**	**52%**

Q3. To the best of your knowledge, is the electric or gas utility company that services your home...?

	Total (N=2,036)	Billpayers (N=1,944)
Private or investor-owned	29%	30%
Public or municipal	30%	31%
A Co-operative	11%	11%
Don't know	33%	31%
Skipped	1%	*

Q4. Compared to a year ago, how has your electric and/or gas bill changed, if at all?

	Total (N=2,036)	Billpayers (N=1,944)
Increased	62%	64%
Stayed the same	33%	32%
Decreased	3%	3%
Skipped	2%	1%

Q5. How concerned are you, if at all, about your electric and/or gas bill increasing this year?

	Total (N=2,036)	Billpayers (N=1,944)
Very concerned	30%	31%
Somewhat concerned	42%	43%
Not very concerned	20%	20%
Not at all concerned	6%	6%
Skipped	1%	1%
Concerned (Net)	**73%**	**73%**
Not Concerned (Net)	**26%**	**26%**

Q6. Do you think increasing electric and gas bills for consumers like you is a sign that the economy is doing well, a sign that the economy is doing poorly, or neither?

	Total (N=2,036)	Billpayers (N=1,944)
Good sign	1%	1%
Neither good nor bad	50%	50%
Bad sign	47%	48%
Skipped	1%	1%

Q7. To what extent do you agree or disagree with the following statements? (Total Agree Summary)

	Total (N=2,036)	Billpayers (N=1,944)
I feel like I am powerless to control how much I'm charged for electricity or gas services.	80%	80%
Electrical and gas bills add to my financial stress.	62%	63%
I fully understand what drives the costs I'm charged by the local electric or gas utilities.	42%	42%
My state government does a good job protecting my interests when it comes to regulating our local electrical or gas utilities.	38%	38%

Q7-1. To what extent do you agree or disagree with the following statement? My state government does a good job protecting my interests when it comes to regulating our local electric or gas utilities.

	Total (N=2,036)	Billpayers (N=1,944)
Strongly agree	3%	3%
Somewhat agree	36%	36%
Somewhat disagree	37%	37%
Strongly disagree	22%	22%
Skipped	2%	2%
Agree (Net)	**38%**	**38%**
Disagree (Net)	**59%**	**59%**

Q7-2. To what extent do you agree or disagree with the following statement? I feel like I am powerless to control how much I'm charged for electric or gas services.

	Total (N=2,036)	Billpayers (N=1,944)
Strongly agree	42%	42%
Somewhat agree	38%	38%
Somewhat disagree	14%	14%
Strongly disagree	4%	4%
Skipped	2%	2%
Agree (Net)	**80%**	**80%**
Disagree (Net)	**18%**	**18%**

Q7-3. To what extent do you agree or disagree with the following statement? Electric and gas bills add to my financial stress.

	Total (N=2,036)	Billpayers (N=1,944)
Strongly agree	23%	23%
Somewhat agree	40%	40%
Somewhat disagree	23%	23%
Strongly disagree	13%	13%
Skipped	2%	1%
Agree (Net)	**62%**	**63%**
Disagree (Net)	**35%**	**36%**

Q7-4. To what extent do you agree or disagree with the following statements? I fully understand what drives the costs I'm charged by the local electric or gas utilities.

	Total (N=2,036)	Billpayers (N=1,944)
Strongly agree	7%	7%
Somewhat agree	35%	35%
Somewhat disagree	37%	37%
Strongly disagree	19%	19%
Skipped	2%	2%
Agree (Net)	**42%**	**42%**
Disagree (Net)	**56%**	**56%**

Q8. What, in your view, drives increases in electric or gas utility bills?

Open-ended responses provided separately.

Q9. To the best of your knowledge, about how much did you pay for your electric and/or gas bill last month?

	Billpayers (N=1,944)
Mean	$191.82
Don't know	16%
Skipped	2%

Q10. What is the name of the body that regulates your electric and gas utility and sets your electric and gas rates, if you know it?

Open-ended responses provided separately.

Appendix C:

Rate Case Tracker

Database of 2025 Rate Increase Requests or Approvals

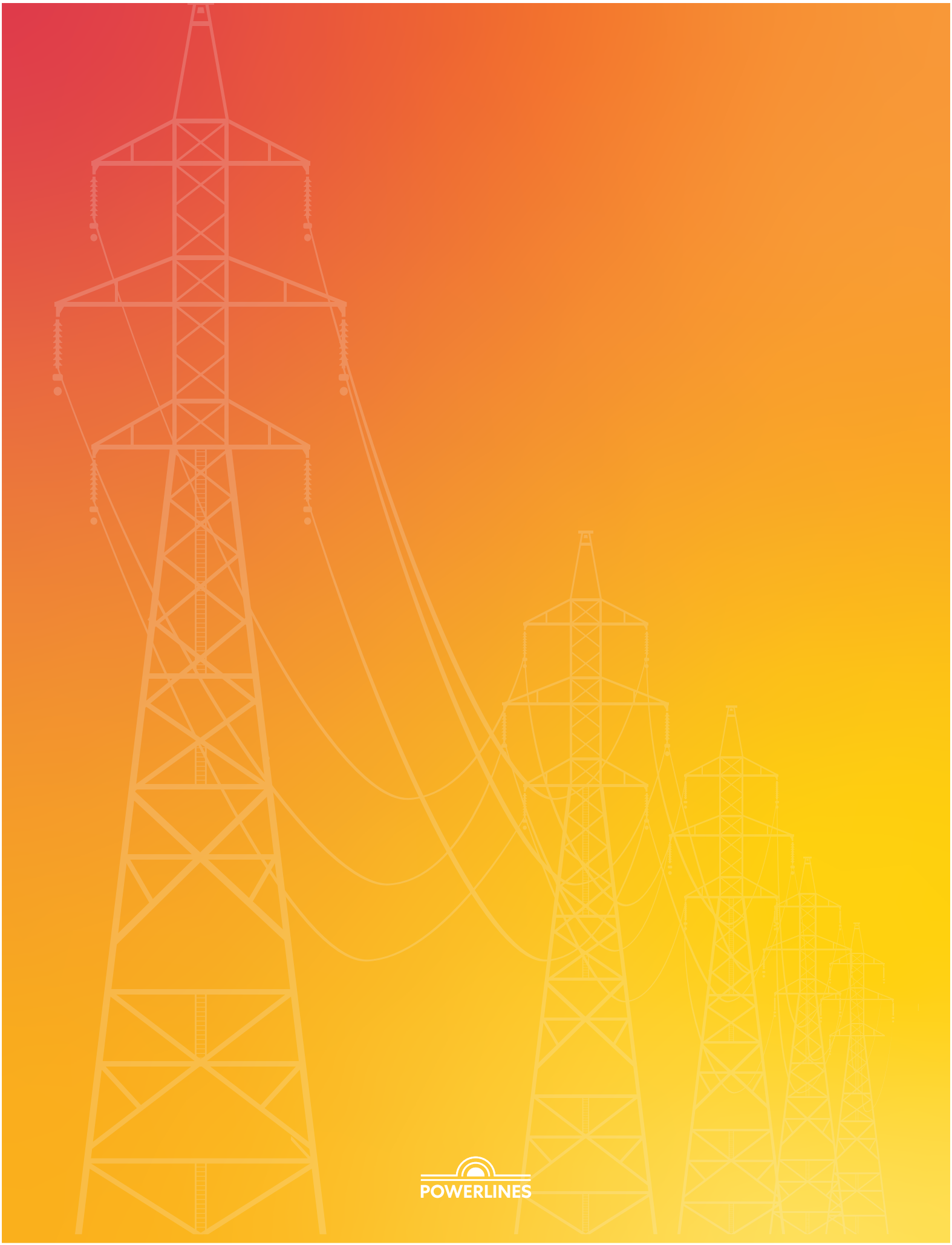
Utility	State	Type	Status	Decision	Requested Rate Increase ($B)[19]
Avista	ID	Electric	Requested	January 2025	0.1
Con Edison	NY	Electric	Requested	January 2025	1.6
El Paso Electric	TX	Electric	Requested	January 2025	0.1
Evergy Kansas Central	KS	Electric	Requested	January 2025	0.2
Florida Power & Light	FL	Electric	Requested	February 2025	9.0
Nevada Power	NV	Electric	Requested	February 2025	0.2
Alliant Energy	WI	Electric	Requested	March 2025	0.2
Dominion	VA	Electric	Requested	March 2025	1.3
Pacific Gas & Electric	CA	Electric	Requested	March 2025	0.5
San Diego Gas & Electric	CA	Electric	Requested	March 2025	0.1
Xcel	WI	Electric	Requested	March 2025	0.2
Eversource	CT	Electric	Requested	To Be Announced	3.2
DTE	MI	Electric	Approved	January 2025	0.2
Duke Energy Indiana	IN	Electric	Approved	January 2025	0.3
Public Service Company of Oklahoma	OK	Electric	Approved	January 2025	0.1
Puget Sound Energy	WA	Electric	Approved	January 2025	0.5
Idaho Power	ID	Electric	Approved	February 2025	0.1
Appalachian Power	WV	Electric	Approved	March 2025	0.0
Black Hills Energy	CO	Electric	Approved	March 2025	0.0

19 Rate increase requests are rounded to the nearest $0.1 billion, so rate increases of less than $50 million appear as $0.0 billion.

Database of 2025 Rate Increase Requests or Approvals

Utility	State	Type	Status	Decision	Requested Rate Increase ($B)[20]
Consumers Energy	MI	Electric	Approved	March 2025	0.2
Florida Public Utilities Company	FL	Electric	Approved	March 2025	0.0
Oklahoma Gas & Electric	OK	Electric	Approved	March 2025	0.1
Versant Power	ME	Electric	Approved	March 2025	0.0
Ameren Illinois	IL	Gas	Requested	January 2025	0.1
Avista	ID	Gas	Requested	January 2025	0.0
Con Edison	NY	Gas	Requested	January 2025	0.4
Northern Illinois Gas	IL	Gas	Requested	January 2025	0.3
UGI Utilities	PA	Gas	Requested	January 2025	0.1
Puget Sound Energy	WA	Gas	Approved	January 2025	0.1
Black Hills Energy	KS	Gas	Requested	February 2025	0.0
Oklahoma Natural Gas	OK	Gas	Requested	February 2025	0.0
Cascade Natural Gas	WA	Gas	Approved	February 2025	0.0
Xcel	MN	Gas	Approved	February 2025	0.1
Alliant Energy	WI	Gas	Requested	March 2025	0.0
Southern California Gas	CA	Gas	Requested	March 2025	0.1
Xcel	WI	Gas	Requested	March 2025	0.0
Southwest Gas	AZ	Gas	Approved	March 2025	0.1

20 Rate increase requests are rounded to the nearest $0.1 billion, so rate increases of less than $50 million appear as $0.0 billion.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