

EVSEs in MUD Research (Electric Vehicle Supply Equipment in Multi-Unit Dwellings) Executive Summary

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Executive Summary

Background

To identify obstacles faced by landlords, property managers, and residential tenants in expanding EVSE availability in Multi-Unit Dwellings (MUDs) to support equitable access to EVSEs.

Objectives

- Identify cost and non-cost barriers to EVSE installation in MUD-owned parking facilities.
- Understand landlord and property manager attitudes, awareness, and perspectives on EVSE installation.
- Identify what, if anything, prevents property managers from advocating for the installation of EVSE on behalf of their tenants.
- Gauge resident perspectives on EVSE availability, including how access to on-premises charging influences property choice and tenant satisfaction.
- Determine whether incentives (financial and non-financial) would motivate property owners and managers to install EVSE.
- Capture current experiences of EV-driving residents in MUDs with and without L2 chargers to highlight benefits and pain points.
- Assess interest in a free ComEd EVSE installation assessment service for landlords/owners/PMs.
- Uncover expectations of ComEd's role in expanding EVSE access generally, across its service territory, and specifically for MUDs.
- Explore downstream effects on EV adoption—including whether access to newly installed EVSE would influence tenants to purchase or lease EVs.
- Confirm and explain the low prevalence of at-home charging among MUD EV owners.

Methodology

- 27 online in-depth interviews conducted between March 2 and April 13, 2026
- Each session lasted approximately 45 minutes

Table 1. Customer Segments interviewed and number of interviews per segment:

Segment	# of Interviews
Building owners/property managers of MUDS with <6 units without on-premises EVSE	3 interviews
Building owners/property managers of MUDS with 6+ units with on-premises EVSE	3 interviews
Building owners/property managers of MUDs with 6+ units without on-premises EVSE	3 interviews
Building owners/property managers of MUDs with 7-20 units without on-premises EVSE	3 interviews
MUD residents with an EV and with on-premises EVSE	1 interview
MUD residents with an EV but without on-premises EVSE	9 interviews
MUD residents without an EV and without on-premises EVSE	5 interviews

Key Findings

As Illinois advances its transportation-electrification goals, the multi-unit dwelling (MUD) segment represents a significant equity opportunity and a persistent structural barrier to electric-vehicle (EV) adoption. Residents of apartments, condominiums, and townhomes cannot simply install a charger in a private garage; their access to home charging depends on decisions made by building owners, property managers, and condo boards. To understand what stands in the way of that access—and how ComEd can most effectively help remove it—Escalent conducted qualitative research comprising 27 in-depth interviews with ComEd customers: 12 with building owners and property managers and 15 with MUD residents, spanning EV owners, prospective owners, and non-owners, in buildings both with and without on-premises charging.

The central conclusion is that the MUD charging gap is not primarily a technology problem, nor is it one that financial incentives alone will solve. It is a demand-and-confidence problem. Building owners are not resisting charging infrastructure so much as waiting for a reason to act – a reason that today's quiet tenant demand does not yet provide. Residents, meanwhile, are held back less by skepticism toward EVs than by uncertainty about where and how they would charge. The result is a self-reinforcing standoff: owners will not build charging without demand, and residents will not adopt EVs without charging. Breaking that cycle, rather than subsidizing one side of it, is where ComEd's Beneficial Electrification initiative can create the most value.

The findings below should be read as directional and qualitative. They explain the motivations, hesitations, and language of the market rather than measure its size, and they point clearly toward the role stakeholders expect ComEd to play.

Owners

The absence of visible demand is the single largest barrier to installation. Owners and property managers consistently report that few tenants drive EVs today, and even those who do rarely request on-premises charging. Without a clear signal of demand, most see no compelling reason to investigate installation, let alone absorb its cost or navigate a condo board's approval. The barrier is not opposition to charging, but the absence of a trigger to consider it. It also reframes the challenge as one ComEd is well positioned to influence, because demand is a function of resident awareness and confidence, both of which can be cultivated.

Cost, installation logistics, and electrical capacity are also major barriers. Beyond demand, owners cite the full cost of ownership (e.g., equipment, installation, insurance, and liability) as a serious deterrent, particularly when uncertain demand makes return on investment difficult to project. Questions of where chargers can physically be placed, how conduit would be run, and whether aging electrical infrastructure can bear the additional load cause concern, especially in older buildings. Notably, financial incentives raise interest but do not, on their own, overcome these concerns. Owners need both a feasible installation path and a credible reason to expect utilization.

Owners nonetheless recognize a clear long-term upside. Even those without charging today anticipate meaningful advantages: greater building marketability, a wider and often higher-caliber pool of prospective tenants, and new revenue through rents or usage fees.

Residents

EV enthusiasm is real but is often tempered by charging anxiety. Fuel savings, convenience, and low maintenance drive EV interest among owners and intenders alike. However, range concerns, especially in Illinois winters, and the friction of locating reliable public charging are common frustrations. On-premises charging can dramatically reshape behavior: residents with home access do nearly all of their charging there, while those without it improvise across workplaces, relatives' homes, and public stations.

Charging access functions primarily as an enabler of EV ownership rather than its initial spark.

The influence of charging access is greatest among non-owners, for whom on-premises charging can move from a "nice-to-have" to a genuine factor in both vehicle purchase and choice of residence.

EV owners' have established charging workarounds and routines, making on-premises EVSE less of a concern and a lower priority, with limited influence on their future vehicle or housing decisions. EV drivers were not overly concerned with the lack of EVSEs in their building or a possible lack of EVSEs in a prospective building. They have all found viable work arounds and almost never have to go hunting for public chargers in the Chicagoland area.

Expanding EVSE Access

Stakeholders assign responsibility to owners and government and expect ComEd to help. Owners and residents alike view building decision-makers as the primary agents of expansion, with government in a supporting financial role through rebates and subsidies. Mandates, however, are met with resistance, even among those who personally favor expansion.

Most expect ComEd to participate and envision a role that is both financial and educational, yet few can articulate what they would expect specifically. As a result, ComEd has both an opportunity and an obligation to define its role clearly.

EVSE Installation Assessment Service

The proposed EVSE installation assessment service is met with genuine enthusiasm. When introduced to a conceptual ComEd assessment service, owners and property managers respond positively and express real interest. They value the prospect of rebate guidance and site-specific evaluation (e.g., electrical capacity, charger placement, etc.) precisely the areas of greatest uncertainty, and they welcome ComEd's standing as a trusted, unbiased expert in a market they perceive as crowded with opportunistic vendors.

Their outstanding questions are practical: who conducts the assessment, what rebates actually amount to, and which equipment ComEd would recommend.

Recommendations

The research points toward a coordinated strategy that addresses both sides of demand and confidence. Escalent suggests the following recommendations for ComEd's consideration as it shapes its MUD electrification efforts:

Cultivate resident demand as the precondition for owner action. Because owners wait for demand and residents wait for charging, ComEd can gain the most leverage by stimulating informed resident interest. Targeted education that dispels EV misconceptions, particularly around range and charging, and that pairs credible facts with relatable owner testimonials can convert passive curiosity into the visible demand that prompts owners to act. Identify a value proposition for property managers, *from the resident's perspective*.

Position ComEd as the trusted source of feasibility uncertainty. Owners' sharpest anxieties (e.g., electrical capacity, safety, and installation viability) fall within ComEd's expertise. By advancing the assessment service and reducing its practical friction around assessor identity, rebate amounts, and equipment guidance (a public FAQ would go far), ComEd can occupy a role no other party can credibly fill and that the market is actively inviting.

Lead with financial relief, then reinforce with guidance. Since cost is the most tangible barrier and incentives are the most immediate draw, ComEd should focus on rebates and financial support, then layer site-specific guidance as a way to build confidence.

Frame the owner value proposition around marketability and revenue. Rather than focusing solely on environmental duty, ComEd should amplify the advantages owners already perceive; differentiated, more marketable buildings, an expanded tenant pool, and new revenue potential. These self-interested motivations are the most reliable drivers of adoption.

Prioritize segments where influence is greatest and promote enablement over mandates.

Larger and professionally managed properties, where decision-making is centralized and marketability pressures are strongest, offer more fertile ground than owner-occupied condos and townhomes, where individual owners hold dispersed authority (e.g. ownership of a garage) and little urgency. Additionally, voluntary, incentive-led enablement will succeed where mandates could provoke resistance.