THE DEMISE OF NIMBY

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AARO
Spring Conference
May 3, 2015
MORE....MUCH MORE!
The Demise of NIMBY
As demand for connectivity grows, market resistance wanes
The demand of coverage for the 68% of cell phone users with smart phones has resulted in an explosion of site development in our fastest growing technological industry. The following chart indicates this growth:

The wireless LAN equipment and WiFi phone market is forecast to exceed $7 billion by 2017

© Infonetics Research, Wireless LAN Equipment and WiFi Phones Quarterly Market Share, Size, and Forecasts, August 2013
Facts: In 2015 worldwide, there were 1.2 billion users of the internet (including smart phone users). There will be 5.4 billion Connected Devices by 2020. This will require an additional 28% annual build out in the industry.

Telecommunication sites are nearly everywhere
On Church Grounds
Near your Business Communities

Clarksville Pike, Nashville, Tennessee, United States
Address is approximate
In our school grounds
Demise of NIMBY conclusions:

- Society’s insatiable thirst for increased wireless connectivity is evident by the sheer number of new tower site locations in both large cities and rural communities everywhere. This growing demand for services coupled with suburban/urban sprawl has changed the idea of NIMBY (Not in My Back Yard) forever.

- It is especially true in Tennessee, where you have seen our telecommunication sites on flagpoles in schoolyards, near higher educational facilities, industrial and commercial areas, in church steeples and atop almost every downtown rooftop that could accommodate them.
Recently, our office conducted a study of telecommunication towers for wireless carriers in the state. The study included 1,300 site valuation analyzed from 1996 to 2014 and revealed some noteworthy findings. First, we learned that the number of tower sites in Tennessee has increased from 900 in 1996 to over 3,000 in 2014. We also learned that ground rental rates for tower sites had increased from an average of $500 per month to $777 per month during that same time period. And near the larger population centers, some of the sites rented antenna space for as high as $2,000 a month, indicating the principle of change is more active than ever.
The study also included a revamping of the land cap rate utilized by our office. Our Assistant Director Gary Harris, CAE used the ground rental data collected to consider an overall average cap rate of 8.50 percent. The arrayed site values derived from the study were 10.63 percent for the poorer rural or remote sites to 5.31 percent for the super sites in our best commercial locations. After presenting our findings to the wireless management and wireless carriers in a joint meeting, they agreed that our data conclusions were market based and well founded.
• Recent court decisions have revealed not only a decline in the number of cases but the amount of damages, if any awarded for proximity and any possible fall zone damages. I found that, from the beginning of the build out of telecommunication coverage statewide and nationally, the market resistance for cellular tower sites had not only slowed, but has almost completely stopped. The recent population boom and urban sprawl in many southern states has essentially removed the stigma associated with most public utility facilities.
• The increased demand in rural communities, combined with the needs of their urban counterparts, has led to a new level of expectations for cellular-related services. And as the demand for more and better services grows, residents and businesses will be welcoming other new technologies, such as solar and wind farms.

• NIMBY, as we know it, has been relegated to mostly waste disposal and environmentally sensitive sites, and as such, may be nearing its expiration date.
Noteworthy sites:

http://wireless.fcc.gov/antenna/index
http://www.antennasearch.com/
http://www.steelintheair.com/wireless-industry-timeline.html

Questions?

Thank you for your time.
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