

HONORING THE OUTSTANDING WOMEN POWERING THE MACHINE!



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BIG MACHINE

LABEL GROUP

2021



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MARY



MISSY



INGRID



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**THE WOMEN
OF UMPG**

**INDUSTRY LEADERS
ON AND OFF
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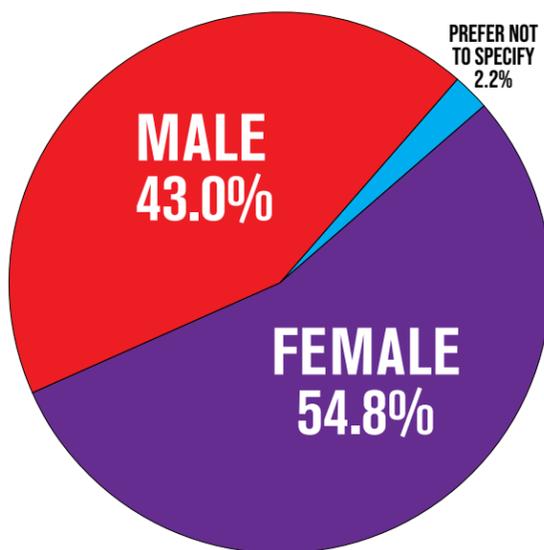
A recent survey completed by 600 music and radio professionals found that nearly half (45%) have experienced sexism in country music first-hand in the last three years. An additional 16% said they'd witnessed one or more examples of it. The findings were cited not only by women, but also by men – many of them. While respondents are split 36% to 33% on whether airplay opportunities are worse or better for women artists vs. men, agreement is widespread they are better than three years ago. Likewise, signing and development opportunities for artists, and advancement opportunities for women in the business, are seen as improving. Nevertheless, a marked disparity exists between how women and men perceive and experience these issues across all topics.

Arguably the largest-ever survey of its kind, Women in Country 2021 was distributed to Country Aircheck's entire readership of more than 6,000 subscribers, and responses were accepted May 5-18, 2021. Participants provided information about their industry sector, gender, years of experience and employment level; no personal information was asked. The survey's 11 questions dealt with development and airplay opportunities for female artists compared to male artists in the past three years, as well as career opportunities for women within the radio and music industries. The survey provided examples of sexism that they may have experienced or witnessed, among other issues. A remarkably high 97% of the participants answered every question.

The survey generated an even 600 industry responses. In the comments section, more than 100 respondents anonymously furnished personal stories and observations. This research used an opt-in methodology and not a randomly selected panel of readers, meaning the findings are not necessarily reflective of their various industries as a whole.

Among the respondents, 54.8% (329) were women and were split about 42% radio and 58% music industry/associated categories (below, right). Radio-related and record company personnel accounted for approximately 61% of the total. Apart from the small sample of songwriters and record producer/production/studio personnel, the radio industry is the only segment where male respondents outnumbered female participants.

RESPONDENTS BY GENDER

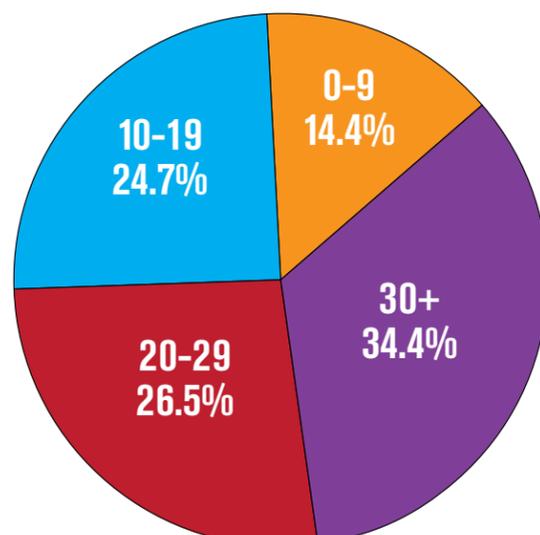
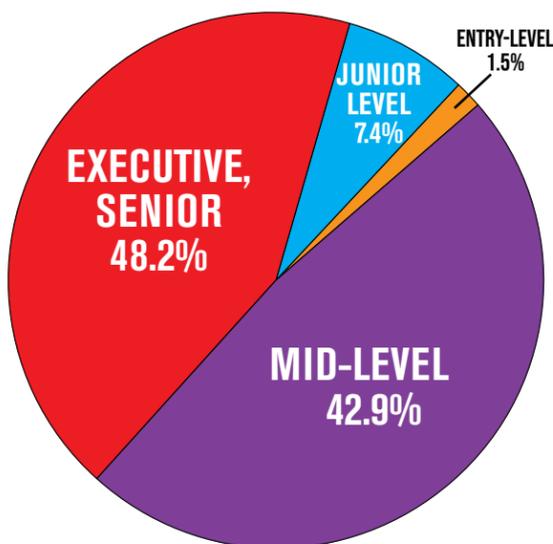


WHO PARTICIPATED

More than 90% of participants ranked their jobs as being mid-level or executive. Of those describing themselves as executive/senior level, male respondents were a majority (55%). Female respondents represented a large majority at all other levels.

Similarly, more than 85% of respondents have at least 10 years of industry experience. This figure indicates they have had ample opportunity to become familiar with the issues. Only about 3% (19 individuals) reported having less than five years' experience. More than half of the male respondents have at least 30 years' experience. Men represent a solid majority of those with that level of tenure, whereas female respondents comprised the majority of those in all experience segments of less than 30 years. Women represented about three-fourths of those with less than 20 years' experience.

Apart from the very few entry-level respondents, females describing themselves at junior-level, mid-level and executive/senior level positions hold those ranks with eight fewer average years of experience than their male counterparts. This doesn't necessarily mean that females achieved those levels sooner; it's possible that males could have achieved those ranks sooner and simply have more longevity. A follow-up asking respondents how long it took to achieve their current position would help answer that question.



SEXISM IN COUNTRY?

Industry Says YES

by Stone Door Media Lab partners Jeff Green and Lauren Virshup

RESPONDENTS BY JOB SECTOR

Survey Question: Check the one description most closely associated with your main duties unless your work is equally divided between two or more descriptions.

Radio (all positions at station, group, network, syndication or consultant)	41.7%
Record Company	19.2%
Artist Management	9.8%
Marketing/Promotion/Distribution Services	8.2%
Publishing/PRO	6.5%
Touring Business/Booking Agent/Venue	4.8%
Affiliated Media (TV, cable, video production, websites, press)	4.3%
Publicity	3.7%
Songwriter	2.5%
Digital Service Providers (DSPs)	1.8%
Legal/Business Affairs	1.8%
Trade Association	1.8%
Record Producer/Music or Video Production/Studio Business	1.7%
Artist/Musician	1.3%
Academic/Scientific (educator, student, research, analytics)	0.5%

SEXISM EXPERIENCED

If there was any doubt about whether those in the music and radio industries experience sexism, the findings from this question put the issue to rest: More than 45% said yes, and another 16% noted that they had witnessed it, for a total of 61%. Looking into the numbers, the gender gap here is huge. Women experience far more sexism, with only 20% saying they had not, compared to only 21% of men who said they had. Among those in radio, men said no at three times the level of women, and it was by nearly four times higher at record companies.

SEXISM IN COUNTRY?

The proportion of women who've experienced sexism first-hand "often" compared to men was more than 4:1. The bottom line is that the situation, as reported, is widespread, as overall, more than 45% of respondents said either "often" or "a few times." Among the four business sectors with at least 40 respondents, at least 40% of all of them reported "often or a few times." Separating "often" from other responses, artist management personnel generated a higher proportion by far (29%) than the others or the average, including half the female artist management respondents.

Although there were fewer participants in other categories, at least half of the 327 female participants experienced sexism in all 15 business sectors except for legal/business affairs.

There were 252 women who said they experienced or witnessed sexism, and 248 identified the types they encountered. There were 110 men who said they experienced or witnessed sexism, and 103 identified the types they encountered.

As for types of sexism, it's worth noting that participants listed a wide range of combinations. For example, some said they were verbally and/or sexually harassed, but didn't experience receiving a lower salary or chances for promotion, while others noted the opposite. Several documented unequal workplace treatment in conjunction with one of the other five forms listed.

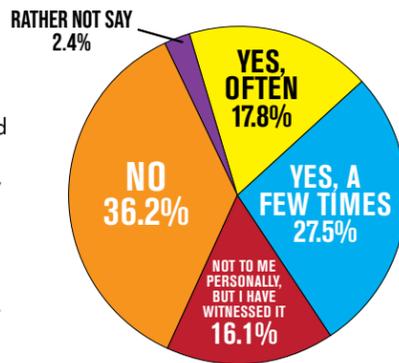
About a third of male respondents experienced or witnessed only one form of sexism, while less than a quarter of female respondents said so. More than 25% of women in the survey listed four or more forms of sexism – twice as large a proportion as did male respondents.

Among women specifically, 90 of the 252 female respondents who said they experienced or witnessed sexism in the past three years noted that they had experienced it often (27.5%). Of those 90, 75 mentioned lower salary, while 52 cited sexual harassment and 10 cited sexual assault.

Those who say they've experienced or witnessed sexism "often" are outnumbered by those who experienced it "a few times." However, those "often" respondents frequently tally more total examples and higher proportions of sexist treatment. While further research and a larger sample are warranted, the responses suggest that for women, the more severe sexist activity (harassment, assault) may bend towards those who experience/witness it often.

Finally on this topic, there are multiple unknowns that could be examined in a follow-up research: 1) Whether the specific form of sexism was both experienced personally and witnessed; 2) Whether the respondent experienced sexism by someone of the same gender; 3) Whether or how much the "witness" observed sexism against someone of the same gender as the respondent; 4) Whether there were any career consequences for either party resulting from any of those situations.

Different Treatment: Regarding the "Bias As Experienced" results, what

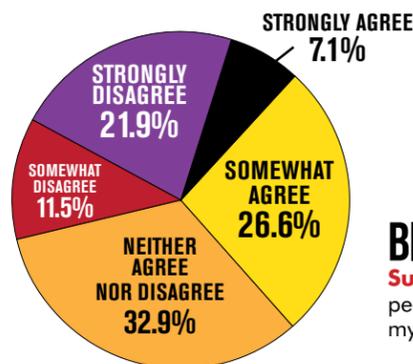
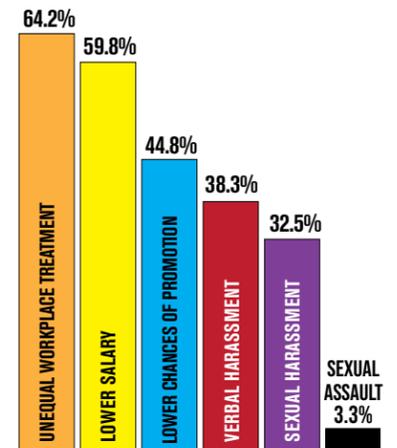


SEXISM ON THE JOB

Survey Question: I've experienced first-hand what I regard as sexism on the job, either overt or subconscious, in the past three years (whether in behavior, attitude, job assignments or compensation).

SEXISM AS EXPERIENCED

Survey Question: If you said yes to the above question about sexism on the job, what issues have you faced? (You may choose more than one). (Ed. Note: Response total for this question was 366.)



BIAS AS EXPERIENCED

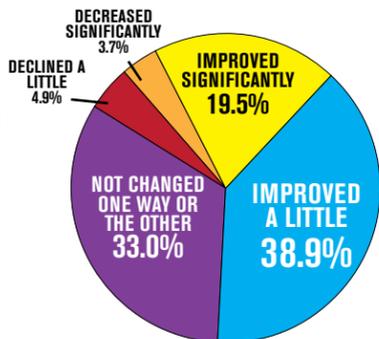
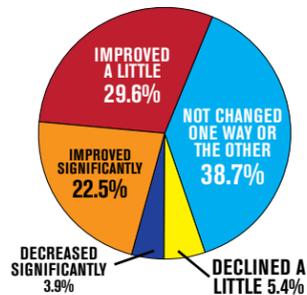
Survey Question: My industry peers treat me differently because of my gender.

"differently" means is open to individual interpretation, but those who said they "strongly disagree" led "strongly agree" by a 3:1 margin. Otherwise, this is the one question that generally was equally divided in overall opinion. A third of respondents agreed with this statement, a full third disagreed, and the other third neither agreed nor disagreed. By gender, the story is considerably different. Women agreed with this statement by more than a 2:1 margin (45%-20%) compared to men. Nearly 44% of women in radio agreed, more than twice the proportion of male broadcasters (20%). Similarly, women at record companies led their male counterparts by a 41%-17% margin.

Among women in radio, the proportion of those in mid-level roles agreed at more than twice the level of those in executive capacities (53%-25%). However, nearly the reverse was true at labels, where executive-level women agreed in much higher proportions than mid-level women (57%-34%).

EMPLOYMENT OPPORTUNITY

Survey Question: Entry-level employment opportunities for women in my field in the past three years have ...



ADVANCEMENT OPPORTUNITY

Survey Question: Mid-to-senior-level advancement opportunities for women in my field in the past three years have ...

EMPLOYMENT ISSUES

It's a relatively good outlook for those seeking to work in the record business. A majority of opinions by both women and men were positive, but some concerns were expressed about radio, where consolidation has taken a toll. About one in four women in radio feel opportunities have decreased, compared to only one in eight among men in radio. However, senior-level radio executives – both female and male – were far more positive about entry-level jobs than were mid- or junior-level staff.

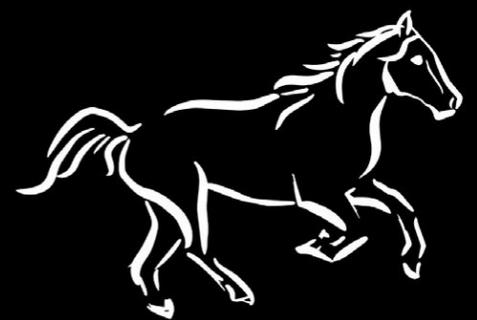
The outlook in artist management and marketing/promotion was also favorable. Nearly six-in-10 artist management personnel viewed opportunities as better. Men at those companies were significantly more upbeat than women, perceiving improvement by a 68% to 48% margin. And half of those in marketing/promotion/distribution viewed entry-level opportunities as improved.

Even better news was found on the advancement front, where respondents see improvement by an overwhelmingly positive 58% to 9% margin. However, there were some notable gender differences. In terms of stating "improved significantly," men overall registered 2:1 compared to women. At record companies, that ratio leaned male by nearly 3:1. At radio, 59% of mid-level men felt positively, compared to only 45% of mid-level women. In artist management, 86% of men felt the situation had improved, compared to 61% of women. Among those in marketing/promotion/distribution, 71% of men gave a favorable view, compared to just 42% among women.



THANK YOU

Lon, Chuck, April, Caitlin,
Chris, Monta, Kelley & Addie
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I CAN'T (FEATURING OLD DOMINION)

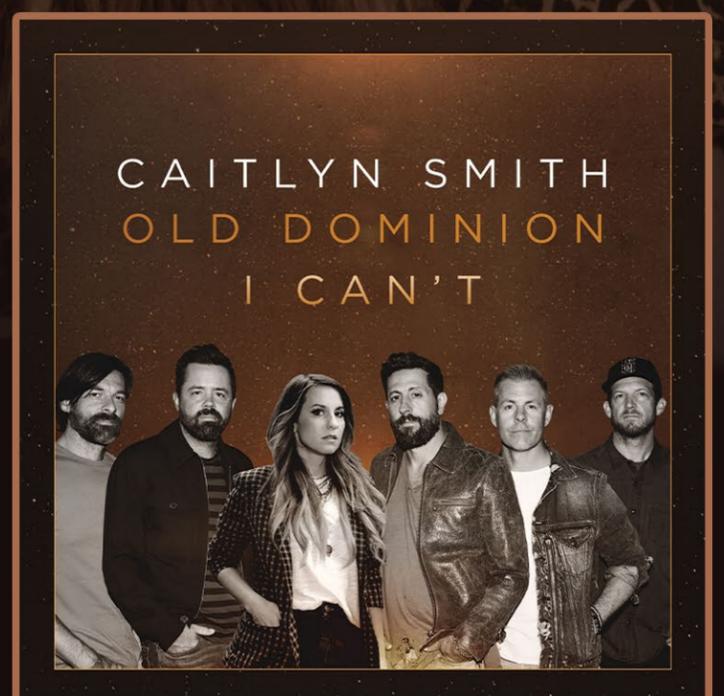
NOW PLAYING ON

WKXC WXBQ KKGO WNSH WDRQ KMNB WJVC KBEQ WDAF WGAR
WFMS WGH WYRK WHKO KHKI WXCX WQMX WWQM WPOR WTHT
WQHK KPLX KKBQ KKWF WGKX WLFP WKMK KYGO WYCD KEEY KUPL
KWJJ KCYY KSOP KRTY KJKE WNOE KIIM KWEN KHGE KSKS WSOC
WWKA KRST WTGE KDRK KXLY KJUG KPLM WCKN WUSY WRNS
KUBL KCYE WUSN WKHX WUBL WKIS WKKT WKDF WGNE WPAW WIRK
WWGR WIVK KATM KCCY WKRO WDRM WUSJ WKML MUSIC CHOICE
AND MORE

ON TOUR THIS YEAR WITH
GEORGE STRAIT
LITTLE BIG TOWN
OLD DOMINION



MONUMENT



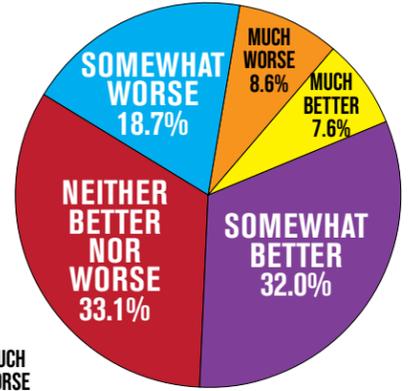
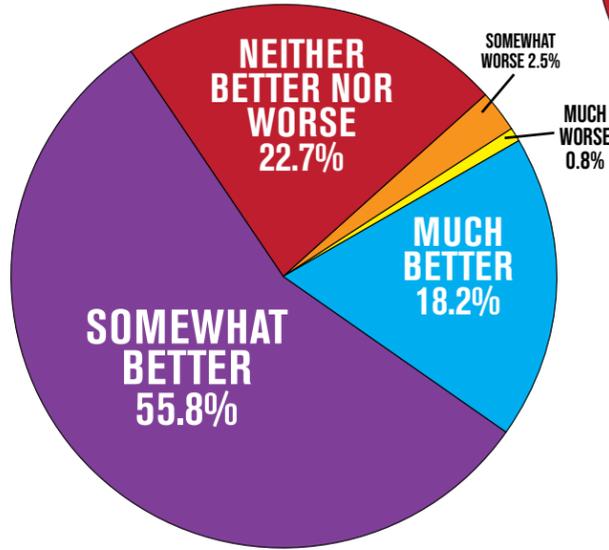
SEXISM IN COUNTRY? CREATIVE CONCERNS

In one of this study's most lopsided findings, nearly three-quarters say opportunities for signing and developing women artists have improved in recent years, compared to less than 4% who say they have decreased. In radio, records and artist management, more than 70% of both women and men felt opportunities for women artists and songwriters are better than three years ago. This consensus of 70% or more also applied to those at most position levels. Men were more positive than women in citing "much better" opportunities. At radio and overall, male respondents believe conditions are "much better" by more than a 2:1 margin compared to female respondents. Both men and women in artist management were particularly upbeat, with more than 85% collectively saying opportunities have improved.

While responses showed that participants overwhelmingly agree that signing/development opportunities are better than three years ago, there was much less positivity when framed as a question comparing women's opportunities with men's. More than 27% of respondents felt the situation is disadvantageous for women. Women in radio were more than twice as inclined to say "somewhat worse," while men in radio were nearly twice as inclined to say "somewhat better." Meanwhile, 40% of both women and men in record companies had a positive outlook ("much better" or "somewhat better").

ARTIST SIGNING & DEVELOPMENT VS. 2018

Survey Question: Compared to three years ago, signing or development opportunities for women country artists and songwriters today are ...

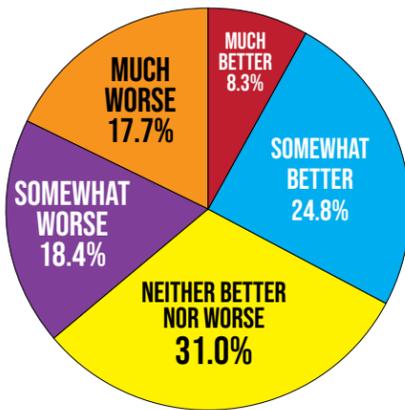
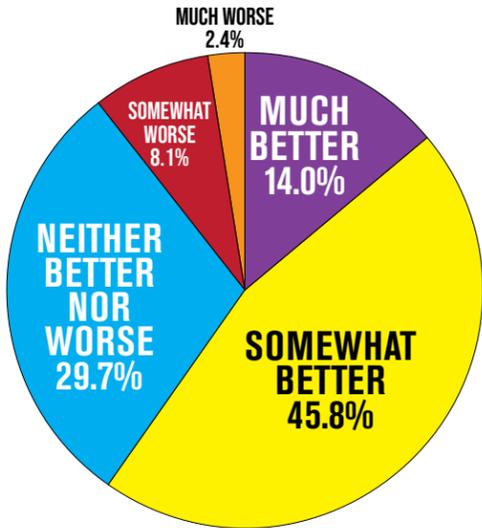


ARTIST SIGNING & DEVELOPMENT VS. MEN

Survey Question: Compared to men, signing or development opportunities for women country artists and songwriters today are ...

AIRPLAY OPPORTUNITIES VS. 2018

Survey Question: Compared to three years ago, radio airplay opportunities for women Country artists today are ...



AIRPLAY OPPORTUNITIES VS. MEN

Survey Question: Compared to men, radio airplay opportunities for women Country artists today are ...

AIRPLAY IS MIXED

Although not overwhelmingly so, there was general overall agreement across the board that radio opportunities have improved in recent years. Two notable differences: Men overall felt matters were "much better" by more than a 2:1 margin compared to women overall; men in record company roles regarded opportunities "much better" than their female counterparts by a huge 5:1 margin.

Regarding airplay opportunities for women versus men, the pessimistic perspective of "much worse" won by more than a 2:1 margin over "much better." In marketing/promotion/distribution, 26% said matters were "much worse" – the highest strong negative response among the four major industry segments. The downcast outlook was particularly true among women overall, who viewed matters "much worse" at about a 5:1 ratio over "much better," and overall worse than better by a 45%-25% split. This contrasts notably with men, who leaned just slightly towards "much worse" than "much better" and were overall 55% more positive than negative.

About 42% of female staff in both radio and records were downbeat compared to 33% of men in record companies and just 14% of men in radio. Approximately half of men in radio felt opportunities were better for women than men, compared to just 31% of women in radio. The proportion of female artist management personnel regarding matters as worse versus better was about 4:1, while men in that field were nearly equally split. The proportion of women in marketing/promotion/distribution who felt opportunities were worse compared to better was a lopsided 41% to 16%.

HUMAN RESOURCES

With the considerable amount and degrees of sexism issues reported by respondents, it's unsettling to see that more than half (55%) said they have no one to talk to or aren't sure if someone is even available. The "no" and "not sure" proportions were significantly higher for radio staffers (53%) than record company personnel (37%), and particularly so for women in radio posts (61%) vs. their counterparts in record professions (41%). For those in artist management, where firms may only employ a handful of employees and typically have no HR personnel, only 19% responded affirmatively, with those in marketing/promotion/distribution responding at a somewhat higher level (31%).

While only 45% of respondents said they had someone to talk to at their company, 64% said they had been or would be comfortable doing so. Among women, the respondents between the two questions climbed from 42% to 55%. Among men, the "yes" answer soared to an even wider margin, from 49% to 75%. While a more in-depth study would be more determinative, these differences suggest there's a need for more HR investment in the radio and music industries.

Nonetheless, while a majority of women responded affirmatively regarding being comfortable talking with someone at their company about sexism, more than 45% were negative or unsure. Among women in mid-level radio positions, nearly two-thirds were unsure or negative, more than twice the proportion of the 30% of female senior-level radio executives. Men in radio were far more comfortable compared to their female colleagues, by a 73%-45% margin. The "yes" differential leaned nearly 2:1 male among those at the mid-level position. Women overall said "no" at more than a 4:1 ratio compared to men, and by more than 3:1 in both radio and records. At labels, the "yes" ratio also strongly leaned male by an 81%-51% margin, including 88%-48% among those in executive capacities.

Survey Says: In addition to multiple choice survey responses, participants were offered a comment box, which more than 100 employed. Commonly mentioned is what's perceived as the long-running "old boys' club" operation with all its attendant accoutrements: salary discrepancies, opportunity stagnation, unequal treatment in various forms, verbal and sexual harassment, and worse. Many women have been and remain fearful of speaking out, knowing they risk being ignored, demeaned, retaliated against or even losing their careers.

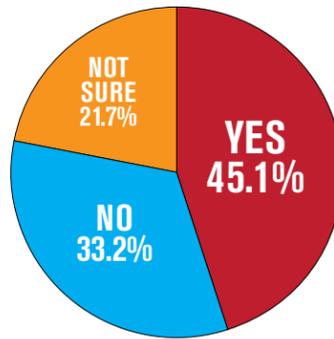
While not to the degree that women in country do, the results and comments show that men recognize these problems exist. Many women feel positive change is coming, but too slowly. By contrast, some men see a rapid political shift to address the imbalance, which they view as resulting in an over-correction or reverse bias, where decisions are based more on social pressure to fulfill a quota than on one's creative or business talent.

Opinions on some of the survey questions are lopsided by gender or career segment, but there are several examples of consensus as well. Even though many agree that the best artists, songs and staffers should win, the persistent problems make fairness and equal opportunity an elusive goal.

CAC

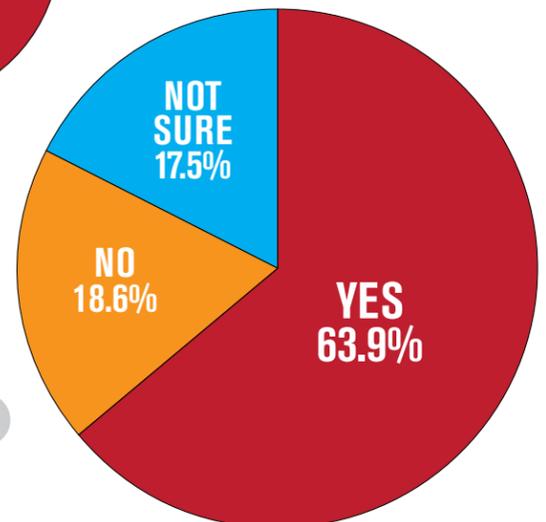
COMPANY SUPPORT

Survey Question: There is a person at my company whose job includes addressing sexism issues confidentially.



CONFIDENCE IN COMPANY SUPPORT

Survey Question: I have been/would be comfortable approaching someone at my company about issues around sexism.



About the Stone Door Media Lab: Founded by partners Jeff Green and Lauren Virshup, the research firm has made annual presentations in the past five years for Country Radio Broadcasters at CRS and for CRB webinars, among other projects including Arbitron/Nielsen's four annual national radio studies for seven years.

Green is a longtime industry veteran whose executive background includes the CMA, Country Aircheck, Radio & Records, Billboard's European publication Music & Media and the Americana Music Association. A Leadership Music and Disney Leadership Institute alum, he holds a BA degree in Radio & Television from San Francisco State University and an MBA from the University of Massachusetts Amherst.

Virshup holds both a BA degree in Psychology and an MBA from Yale University, a Master's in Public Health in population and family health from Columbia University, and a Master's in Sociology from Vanderbilt University, where her social psychology concentration focused on feminism and gender stratification.



JESSI ALEXANDER



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MIRANDA LAMBERT



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DOLLY PARTON



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MACKENZIE PORTER



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