

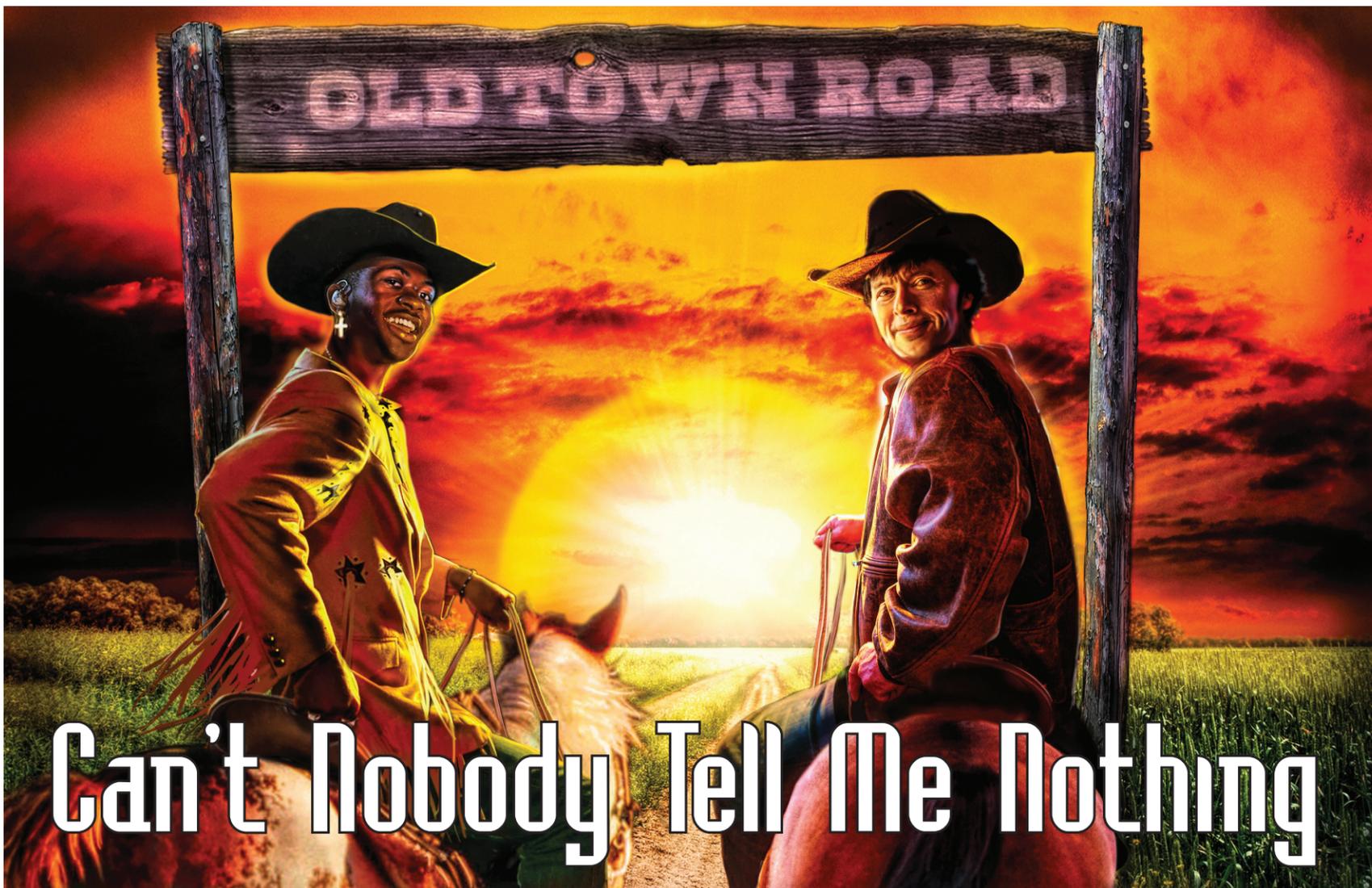
Thank you to our partners
for another great year!



*Santa delivered
our gift early this year!*

*Please make sure you
stop by and see the
house you helped build
if you are ever in town!*

Happy Holidays from the
BBRMG/BMG Family!



Country music managed to both celebrate its identity and experience an identity crisis this year, hitting the mainstream through genre-bending bangers, a genre-probing documentary and a continuance of the gender equality conversation.

While questioning whether songs and artists are “country enough” is nothing new – see Bro Country, the Nashville Sound and the Urban Cowboy movement – the need to define who does and doesn’t fit the format reached a fever pitch. Lil Nas X’s viral hit “Old Town Road” entered public consciousness at the end of 2018, a time when the Yeehaw Agenda was manifesting through cowboy memes on Twitter and Tik Tok’s #yeehawchallenge. Rather than following the typical song trajectory, “Old Town Road” bypassed industry gatekeepers, ascending consumption charts and winning awards, including most recently CMA Musical Event of the Year, without significant Country radio play. On the heels of “Old Town Road” came the release of another viral hit challenging the constraints of radio-focused country tracks, Blanco Brown’s “The Git Up.” The “trailertrap” dance phenomenon further blended elements of what some see as contrasting genres: country and hip hop. Setting it apart, “The Git Up” is being promoted through the very avenues “Old Town Road” never traversed and has seen moderate radio success because of it.

THE YEAR'S TOP STORIES

Changing the Conversation, country music’s gender imbalance continued making headlines. Perhaps consequently, women took center stage at the 53rd CMA Awards, a show boasting three female hosts, an all-female opening number and a collaboration of women representing “the future of country music,” as Little Big Town’s Karen Fairchild said. Jennifer Nettles’ fashion statement at those very awards summarized sentiments, donning a cape with the words “Play our f*#@#!n records, please & thank you” and “Equal Play” penned across it.

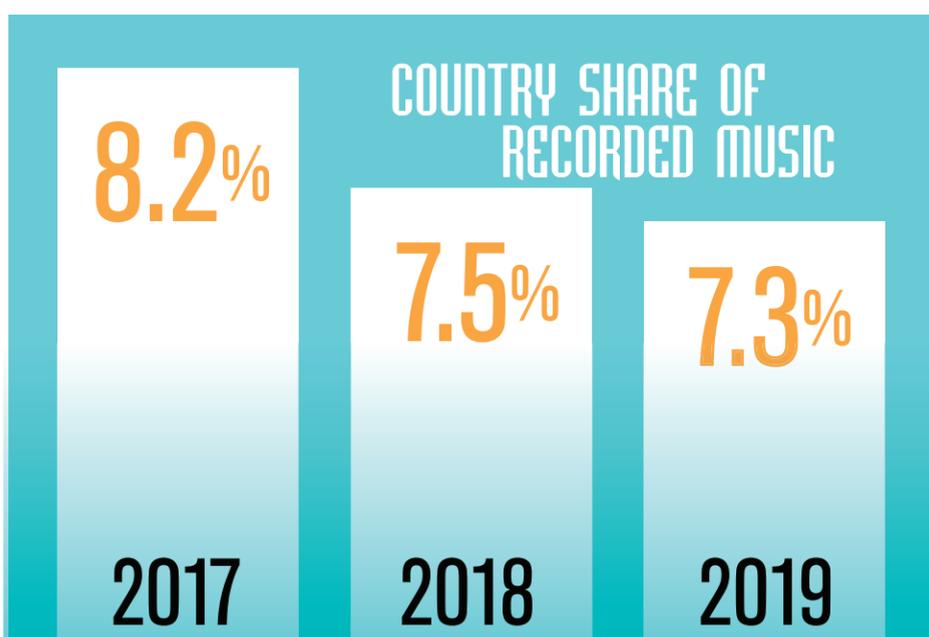
Contemplation on the current state and future of the genre was paired with reflection of its past following the release of Ken Burns’ eight-episode *Country Music* documentary in September. Through an extensive oral history told by many of the people who shaped it, Burns weaved a narrative chronicling the origins of “hillbilly music,” exploring its early influences of gospel, blues and ballads to the beginnings and eventual skyrocketing of its mainstream popularity. A central thread discovered running through the decades that comprise the tapestry of the genre is the persistent desire to answer, “What is country music?” “Country music has something for everybody, and it’s inside the song, it’s inside the characters,” mused Marty Stuart in the finale episode. “It’s really colorful in here. I invite you in.”

SLIDE IN THE DIGITS

Difficult as the “what is country?” question may be, the “how is country?” query is no easier. For instance, Country radio ratings continued years of decline (see graph). In fact, Nielsen Audio’s Jon Miller says, “2019 saw the lowest 6+ share and 25-54 share for Country since the advent of PPM measurement in 2011. Among persons 18-34, 2019 was the second lowest share for the format (with 2011 being the lowest).”

In the record business, country music’s market share (total consumption) fell from 2018’s 7.5% to 7.3%. Further, when isolating on current country releases to better reflect the health of Nashville’s frontline labels, country consumption is down 2% against an overall industry gain of 11.9% YTD. On the plus side, that’s much better than the 13.4% decline country posted at this time last year.

Concurrent (and debatably causal?) to the above noted declines are record setting lows in exposing music on Country radio. This year saw the lowest number of songs hitting the top 50 in more than 30 years (see page 33). Only 68 songs reached the top 15, also a record low, and only five country artists celebrated their first top 15 single in 2019. Related or not, flipping those indicators the other way would be a great way to start the next decade.



Source: Sony/Nashville

COUNTRY PPM SHARE IN DECLINE

With overall radio listening in decline, Country’s share of that listening is also down – at least in PPM (top 50) markets.



Source: Nielsen Audio. Country/New Country combined share for persons 6+, full week Mon-Sun 6a-Mid across Nielsen PPM markets. January to November average.



PACKED REAR VIEW

From crossing the street to crossing formats, shutting it down to starting it all back up, 2019 brought a myriad of shifts and changes. Here are just a few of the major doings:

Smack in the middle of CRS 50's opening ceremony, **Entercom** and **Cumulus** announced a swap sending **WNSH/New York** and two stations in Springfield, MA to Entercom in exchange for its three-station Indianapolis cluster. Cumulus also made headlines when EVP/Content & Programming **Mike McVay** stepped down in May. Media vet **Brian Philips** joined the company as EVP/Content & Audience, and McVay segued into full-time work with his own **McVay Media** consultancy.

Academy of Country Music CEO **Pete Fisher** departed after more than two years and **ACM Awards** Exec. Producer **RAC Clark** took the reigns on an interim basis.

Long-tenured **Grand Ole Opry** SVP/Programming & Artists Relations **Sally Williams** jumped to **Live Nation** as Pres./Nashville Music & Business Strategy.

In June, **Scooter Braun's Ithaca Holdings** purchased **Big Machine Label Group** for a reported \$300 million. BMLG Pres./CEO **Scott Borchetta** remains with the company in the same role and acquired a minority interest in Ithaca as part of the purchase. July saw **Envision Country KNTY/Sacramento** flip to Spanish, leaving a single Country outlet in the market that just a year earlier boasted three. Flipping into the format, however, were four new PDs of note: **KNCI/Sacramento's Joey Tack**, **WKKT/Charlotte's Chuck "DZL" Thompson**, **KVOO/Tulsa's Dena Fletcher** and **WIVK/Knoxville's Rich Bailey**. Retired **KBEQ/Kansas City PD** and **Country Radio Hall of Famer Mike Kennedy** broke out his saddle and rode to crosstown competitor **Entercom WDAF** to take the helm as PD.

Also pulling headphones out of a drawer was **Warner/WMN Dir./National Radio & Streaming Promotion Katie Bright**, who returned to radio in a major (market) way as **Entercom WUSN/Chicago** morning co-host. Long tenured label departures included **WMN Dir./West Coast Radio & Streaming Promotion Rick Young** and **MCA Sr. Dir./West Coast Promotion Louie Newman**, who wrapped more than 43 years in the industry. Finally, as the year wound down, so did **Cold River**, whose Founder **Pete O'Heeron** moved to focusing on his biologics company.

THE YEAR'S TOP STORIES

REMEMBER WHEN

THE DECADE'S TOP STORIES

<p>2010</p> <p>Nashville rebuilds following historic flooding.</p>	<p>2010</p> <p>Joe Galante departs Sony/Nashville.</p>	<p>2010</p> <p>Lyric Street shuts.</p>
<p>2012</p> <p>The rise of country music on television is led by Nashville, The Voice and American Idol</p>	<p>2011</p> <p>UMG/Nashville acquires EMI Nashville.</p>	<p>2011</p> <p>Cumulus purchases Citadel.</p>
<p>2013</p> <p>"Nash" brand launches.</p>	<p>2013</p> <p>Bobby Bones rides into the format.</p>	<p>2014</p> <p>Garth leaves retirement, Taylor leaves country and George leaves tour promoters.</p>
<p>2015</p> <p>Voltair leads to questions surrounding PPM encoding.</p>	<p>2015</p> <p>Bro-mance backlash begins.</p>	<p>2014</p> <p>TomatoGate</p>
<p>2015</p> <p>Clay Hunnicutt leaves radio and is succeeded by Rod Phillips at iHeart; Mary Berner joins Cumulus; Randy Goodman succeeds Gary Overton at Sony/Nashville.</p>	<p>2016</p> <p>Country PPM shares begin decline.</p>	<p>2016</p> <p>Country Aircheck celebrates 10 years.</p>
<p>2018</p> <p>iHeartMedia files for and Cumulus emerges from Chapter 11.</p>	<p>2017</p> <p>Entercom buys CBS Radio.</p>	<p>2017</p> <p>BMG obtains BBR Music Group.</p>
		<p>2017</p> <p>One October</p>

The day after the **CMA Awards**, the life of **Bob Kingsley** was celebrated in the **CMA Theater** by friends and colleagues. Actually, that last phrase is redundant. As was evident in the way he was spoken about that day – if you worked, knew or listened to Bob, he was a friend. As emcee and **CRB** Exec. Dir. **RJ Curtis** said, "If you have a problem with Bob Kingsley, well, that's a you problem." As much as he accomplished with **American Country Countdown** and **Country Top 40**, as passionate as he was about storytelling and songwriters, it was **Bob Kingsley** the person who earned the greatest celebration. Country music and Country radio never had a better friend.

IN MEMORIAM

Paul Bottoms
Harold Bradley
Busbee
Keith Case
Dan Cheatham
Jerry Chesnut
Richard "Mike Lang" Cochrane
Earl Thomas Conley
Chuck Dauphin
James Davidson
Skip Davis
Jim Ditenhafer
Kenny Dixon
Sherry Dollar
John Lester Dougherty
Dick Ellis
Alton "Al" Embry
Steve Ferguson

Brian Ferriman
Fred Foster
Jay Frank
Phran Galante
Jason Gellhouse
Jim Glaser
Chuck Glaser
Dick Gleason
Howard Gloede
William Hoffman
Haydon Payne Ishmael
Boomer Kingston
Joe Mansfield
Herb McCord
Dan Mitchell
Ralph Murphy
Marita O'Donnell
Gilbert "Gil" Poese

Peter Puzo
Dick Raymond
Bruce Reese
Steve Ripley
Dave Robbins
Maxine Brown Russell
Mike Salois
Bob Shannon
Scott Simon
Russell Smith
Joseph A. (Joe) Soto
Bo J. Spates
Margaret "Maggie" Ann Lewis Warwick
"Todd Stone" Willis
Mac Wiseman
Skip Woolwine
Reggie Young



Bob Kingsley
1939-2019