

SONY MUSIC NASHVILLE

CONGRATULATES OUR
COUNTRY AIRCHECK

TOP PERFORMERS OF 2020

LUKE COMBS

#1 MOST HEARD
OVERALL & MALE



MAREN MORRIS

#1 MOST HEARD
FEMALE



OLD DOMINION

#1 MOST HEARD
DUO/GROUP



THANK YOU COUNTRY RADIO!

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How Sony/Nashville Gave Them Something (Else) To Talk About

Summer of 2015 was a low point. While the roster was still formidable, the once-dominant Sony Music Nashville was resting primarily on legacy. Leaderless and the subject of months of incoming-executive rumors, the label group was dogged by many questions. One stood out: Could anyone remember the last time Sony broke an act?

Five years later, the reversal is astounding. Punctuated by a prevailing night at November's 54th Annual CMA Awards, Sony/Nashville closes 2020 with a roster comprised of proven talent at every level of career development – among them the format's hottest artist – and earns its second consecutive market share crown for current music. Country Aircheck spoke with a number of executives representing the broader staff, whom Chairman/CEO Randy Goodman credits with authoring the new narrative around the company – one born of a very intentional challenge.

MY CHURCH

Goodman and his new executive team introduced themselves to staff in the chapel of Sony's old building on Music Row. "My opening line was, 'The change has happened. Take a moment. Breathe, and exhale,'" he told the weekly version of this publication dated July 13, 2015. "Then I said, 'What do you think the music industry will have to gossip about now? I have an idea. Let's keep them talking about us, but let's give them a new Sony storyline.' I described the things I thought we should aspire to become and said the only way they become real or believable is when people see us living them out daily. It's great to have plans, but you must execute. You have to hold one another accountable

overnight, but it was a very intentional thing. We needed to not be territorial, communicate better and, as the marketplace has gotten more dispersed, we've found that was essential."

What did happen almost overnight was the revamped team's first signing, Maren Morris. "Even for 2015, that happened fast," says Hodges. "Everyone in the company – temps to executives, and whether they'd just joined or been there 25 years – jumped on the train. The mission was to take care of the artists and do what's right."

The signing also set a tone. Current SVP/A&R Taylor Lindsey had been with the company for two years at that point. "We talked regularly about

President – Jed Bartlett of *The West Wing* – show me the numbers," he says. "This is an age of analytics, and on its very top level, this story is told in the numbers – specifically market share.

"What we strive to do as a major label is to show consistent growth without wild highs and lows," he continues. "The idea is to build a roster that reflects that consistency. Mike Dungan and the UMG/Nashville team have done an amazing job over the last decade building superstar acts, and their long tail is formidable. So I said to our team, let's become the No. 1 current country market share leader. And that's how we tell the story – in a very objective and analytical way – about sustaining and building artists."

Sony reached the current country consumption market share pinnacle last year and holds the title again in 2020 (see graph). The genesis of that precedes widespread country adoption of streaming. "Even five years ago, Randy and the team recognized this is where it was going – not only for the sake of our label, but for the sake of country music overall," Atwood explains. "Five years later, the album and download market is so poor, it's a good thing we focused on the right kind of consumption."

Goodman's catchphrase became "lean in to streaming." He explains, "Whatever plans we were developing, we were continually questioning what it would mean for streaming three or four years down the road. Now it's as normal as breathing, but back then, it wasn't necessarily that way." He traveled extensively to the West Coast and New York meeting



Taylor
Lindsey



Ken
Robold



Steve
Hodges



Caryl
Atwood



Margaret
Tomlin



Jim
Catino



Olivia
Laster



Lauren
Thomas



Randy
Goodman

for that. My message was to change the storyline and become this new, energized Sony that is represented by these values and these commitments. Let's get people talking about us in that way."

"Sony had been in the news for all the wrong reasons," says EVP/COO Ken Robold, who was joining the company along with Goodman and EVP/Promotion & Artist Development Steve Hodges. "There was an interim CEO in [Sony/New York EVP] Julie Swidler. Market share had dropped. Imagine what the psyche of that building was like."

Twenty-year company vet Caryl Atwood doesn't have to. Now SVP/Sales & Streaming, she and others recall a decentralized and highly siloed structure that often created conflict between departments. Calling the new approach "a complete 180," she says, "Randy revamped the entire culture of the company. We just weren't working and communicating as well as we could, so that was a remarkable change. The other big part was adjusting the roster."

Robold adds, "I'm not saying it happened

building a new storyline," she says. "And we signed artists who are some of the most talented, hard-working people. They truly know their brand and have a real idealism in honoring their fans. That began with Randy and trickled down to a team that mirrors the work ethic and vision of our artists."

Robold agrees. "Signing Maren was an inflection point. It was risky, but we had passion to get that deal done. Lanco were our second signing, then you get Kane Brown, who is probably our earliest example of working the analytics. His iTunes sales were exploding. Everyone thought that was a Jay Frank creation, but it wasn't. The guy was building a fanbase on Facebook and we were building a roster. Out of 26 or 27 artists in 2015, only four remain: Miranda, Old Dominion, Chris Young and Brad Paisley."

1, 2 MANY

The "A" word is a big topic in the halls of Sony, and Goodman points there first in assessing the past half-decade. "In the inimitable words of my favorite

DSPs before they built out their current Nashville operations. And his encouragement has paid off internally. "Caryl and her team have been incredibly aggressive trying new things," he says.

Streaming's greatest benefit – beyond revenue, of course – is in those analytics. "The info we receive allows us to better understand the fans and what they want," Atwood says. "They tell us what the hits are going to be, and that direct feedback is extremely important. It's so much different than wondering who the random person was who pulled a CD off a shelf."

IT ALL COMES OUT IN THE WASH

Streaming and data have permeated every aspect of the label business, including radio promotion, which found success from the jump. "We had early traction with Maren, Lanco, Cam and Old Dominion," Hodges says. "That gave us positive momentum. By the time we got heavily into streaming consumption, we were firing on all cylinders. And we still see the biggest successes in getting songs to critical mass at radio."



Since 2015, Sony/Nashville has given nine new artists their first No. 1:

OLD DOMINION

Break Up With Him (RCA)
Debut 5/11/15, peaked 11/9/15,
29 weeks on.

CAM

Burning House (Arista)
Debut 7/13/15, peaked 12/20/15,
27 weeks on.

LUKE COMBS

Hurricane (Columbia)
Debut 12/6/16, peaked 5/15/17,
27 weeks on.

KANE BROWN

What Ifs (RCA)
Debut 3/27/17, peaked 10/16/17,
31 weeks on.

MAREN MORRIS

I Could Use A Love Song (Columbia)
Debut 4/13/17, peaked 1/15/18,
44 weeks on.

MICHELLE TENPENNY
Drunk Me (Riser House/Columbia)
Debut 4/23/18, peaked 12/10/18,
38 weeks on.

MATT STELL

**Prayed For You (Wide Open/Records/
GCE/Arista)**
Debut 4/15/19, peaked 10/14/19,
29 weeks on.

LANCO

Greatest Love Story (Arista)
Debut 5/15/17, peaked 11/27/17,
31 weeks on.

JAMESON RODGERS

Some Girls (River House/Columbia)
Debut 12/16/19, peaked 10/26/20,
48 weeks on.



Worldwide Beautiful: Celebrating at the 2019 Grammys are (l-r) Kane Brown, Ryan Hurd, Maren Morris, Clive Davis, Sony Music Entertainment CEO Rob Stringer, Goodman, Sony Music Entertainment/UK Chairman/CEO Jason Iley and Luke Combs.

Changing the Narrative

He cites the recent No. 1 for Jameson Rodgers as an example. "Consumption jumped to more than 5.5 million streams those weeks he was in the top five," Hodges says. "It might take a while to get there, and we have to be patient early on, so it's a contrast to Pop. They'll put songs out on DSPs, chase it, blow it up and move on."

Goodman also sees Country differently than Top 40 ... for now. "In our world, it's still radio on the front end. It's beginning to shift, but that's a bit off in the future. We still need Steve, Shane, Dennis, Josh and their teams to secure critical mass airplay and drive consumption. That said, having LT in a marketing, content capture and support role opens up all kinds of artist development opportunities within promotion."

LT, of course, is VP/National Promotion **Lauren Thomas**, who joined the company in 2009. "As a baby regional, I'd walk into station and hand over a CD," she says. "Now if I do that, they don't even have a CD player. We've had to change as the business has changed and use the tools that make sense. The conversion from sales to streaming means it's important to understand the consumption chart, although my personal report card is still the airplay chart."

While airplay may be the most reliable fuel driving consumption, Sony also has a stable of artists releasing music before promotion plans are set. "Every artist is different," Thomas explains. "It's pretty collaborative, and we get invested in artists from the beginning. Having an in-house content person gives us the ability to get things out early on artists. The second they're signed, it goes up on the Sony prep site so if someone is in there looking for assets on Luke Combs, they might also discover Andrew Jannakos, Kameron Marlowe or Jameson Rodgers."

To similar ends, Assoc. Dir./Promotion & Artist Development **Olivia Laster** serves as a liaison between promotion and other departments. "My role gives us the opportunity to be innovative with our partners, including radio," she says. "We want to maximize artist exposure on all our partner platforms – social media, podcasts and online events. And as the industry is adapting to this new reality, there's even more focus on digital engagement with fans and listeners. It's a great challenge."

"The whole team is heavily involved," says Hodges, who points to results in the form of nine Sony artists who've had their first No. 1s in the last five years (see sidebar). "We encourage open dialogue and opinions. And new music discovery is still very popular, which is why we've seen the business

sustaining itself in a crazy pandemic. For a fan, there's no greater experience than having your favorite morning person introducing the next big thing from Nashville – and that might be the new song from Miranda Lambert. We really saw that groundswell from her fanbase with 'Bluebird.'

Streaming data makes identifying that groundswell a richer experience, buoyed by the addition of data miners across Sony's department. "It's a highly passionate staff of analysts," Hodges says. "They care deeply about country music and the artists, and I learn so much from them every day. They may not get the credit or show up in the plaque photos, but if it wasn't for them, we wouldn't have bullets in the gun – those stories we need when presenting an artist in the marketplace."

SONG FOR ANOTHER TIME

The greatest internal transformation has occurred in Artists & Repertoire. "That's an area that has moved from a classical, static platform of finding unique and compelling artists and songs to signing someone like Andrew Jannakos because he was blowing up on TikTok," Goodman says. "The idea of what A&R means is constantly being challenged, and that's been a real disruption."

For EVP/A&R **Jim Catino**, adapting to the new model has been a process. "There have been years of internal conversations with the executive team – and even me and Randy going back and forth about what it looks like to develop talent in this era."

Goodman is blunt: "On one side, you have me saying I'm right; on the other, you have Catino saying he's right. We had contentious conversations about what the new world of A&R looks like. But it's been a seismic shift in how they think, and they've done a tremendous job in viewing artists in a holistic way – radio, DSPs, and engaging a fan base."

Dir./A&R **Margaret Tomlin**'s five-year tenure has coincided with the new executive team's. "When I started, we were still doing traditional signings – showcases, meeting artists referred by publishers and the like," she says. "Jim and Taylor split the roster and also worked on a lot together. We were at a size where that was doable. He brought me on as SiriusXM and playlisting were getting analytics going. It was starting to become impossible to keep up with. I would follow the DSP info, clunkily setting up ways to measure data, but I'm a true creative so it was a lot of stretching my brain into new realms."

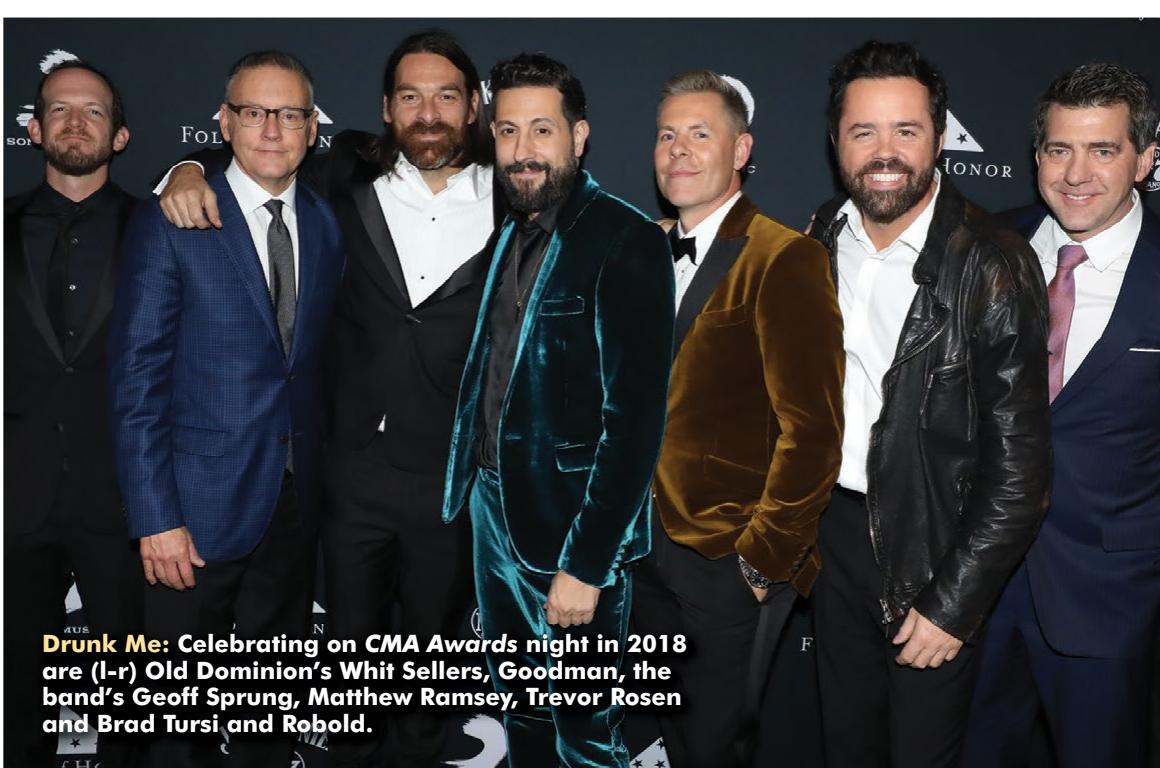
Kane Brown's pre-signing success was a harbinger. "Kane was our first big social media signing when he blew up on Facebook shortly after Randy started," Tomlin says. "The way the world was changing, we needed more staff to do the job properly. We've since followed in the footsteps of the Pop labels in monitoring all the platforms."

The Sony A&R department now includes an analyst and an artist development staffer. "We have a studio in the office that's as capable as any in town," Tomlin says. "From master recordings to video shoots, we can be very self-sufficient at a small scale. Jim runs the department, Taylor and I split the roster and we all work with the support staff who create content, handle analytics and oversee artist development."

"We're truly developing talent, not just signing it," Catino says. "As a department, we have the staff and tools to help young acts by creating an identity on socials or taking it to new levels if they already have that. We're speaking into marketing and the digital plan, burning in streaming numbers and a fanbase so momentum is built before we go to radio."

LOSING SLEEP

This brave new world's challenges and opportunities aren't unique to Sony. Most of them center on artist development taking place on national platforms, in the public eye, in real time. "Because of the access fans have to artists, they get a front row seat to that evolution and growth," Tomlin says. "As an A&R team, we do, too. With some artists, growth follows a traditional path. Others get catapulted in non-traditional ways. In some cases they're twenty-



Drunk Me: Celebrating on CMA Awards night in 2018 are (l-r) Old Dominion's Whit Sellers, Goodman, the band's Geoff Sprung, Matthew Ramsey, Trevor Rosen and Brad Tursi and Robold.

THANKS

WGAR WKDF
KKBQ WNSH
WKRO WDXB
WUBL WGNA
WOKQ WYRK
WGH KUAD
KMDL WITL
WKIS WDAF
WTGE KATC
KHKI KIIM
KWJJ KIZN
KPLX KRST
KUBL WCTO
WFMS WGKX
WIVK WKHX
WCKN WYCD
WPAW WQNU
WDRM WWQM
WNOE WZZK
KFDI KTTS
WKHK WWGR
WCOL KATM
WXCY WQDR
KCYY WKXC
WGNE WUSH
KXLY WQMX
KJUG KKWF
KSOP KCCY
WRNS WJVC
KRTY WPOR
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WKMK KSKS
WTHT WGYT
WQHK KMLE
WQYK
MUSIC CHOICE

MORE COMING SOON IN 2021

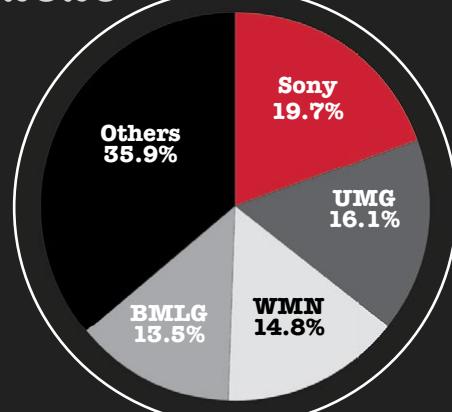
TEDDY ROBB

HEAVEN ON DIRT

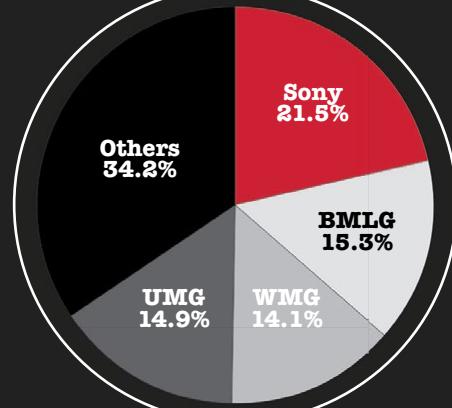


Current Country Activity Share

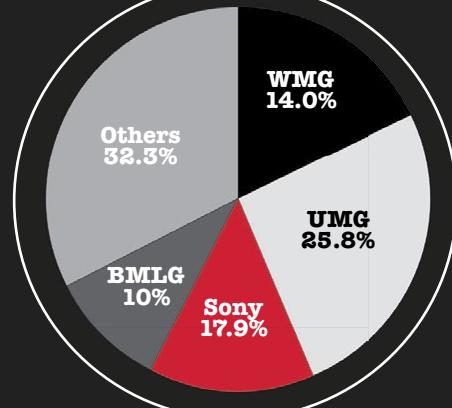
2020



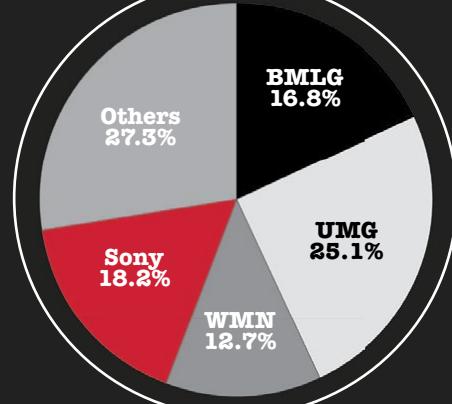
2019



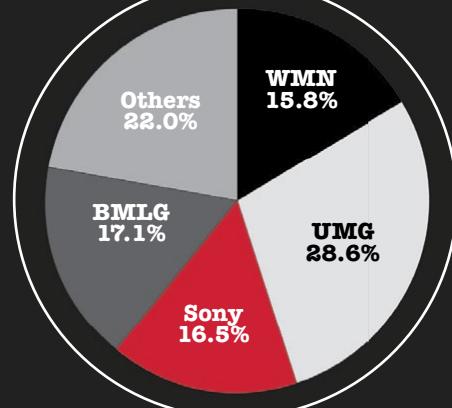
2018



2017



2016



Source: Sony/Nashville



Changing the Narrative

something kids still learning who they are as an artist and even a person. You have to allow each to have their own approach."

As Goodman says, "An artist may have immediate value in the marketplace that heretofore didn't exist, but now you have to work to get them in writers' rooms while at the same time furthering and building the fan base. Being an artist now can mean spending a third of the day on online content and execution, another third on writing and the final third recording."

Not only do digital platforms start an artist's introduction much earlier, but they offer instant, nationwide access to aspirants, too. "You can't sign them all," Catino says. "There are a lot of artists with decent followings, but is it materializing into something significant and does it fit the roster? We don't want to cannibalize what we already have. Those are the things that keep me up at night."

The global nature of streaming and social media has also changed the game. "My role has shifted to having more 30,000-foot conversations with New York," Catino says. "When I started, those discussion might have happened once every four or five years with the right artist or song. Now it's weekly. We're talking constantly to figure out what's next for certain artists."

"Part of that is the advantage of having fresh artists who are busting out and really in tune with their fans. Having that open communication with L.A. and New York helps us see things coming – when to pull the trigger on something, engage in a new area or tackle that next territory. We're able to be ahead of the curve and it's panning out."

And the worldwide challenge of COVID-19 has also forced adaptation. Jannakos, for instance, was signed without physically meeting with the label after going viral on TikTok. "The benchmarks shift quickly as people adopt new platforms," Catino says. "People

highlight. Same with Luke and Kane. Getting to witness careers skyrocketing is a testament to the leadership and dedication we have."

Atwood recalls the launch of Morris' *Girl* album, which she and her all-female team saw as a milestone release. "I, another team member and Maren's marketing lead were in New York that week to cover events. The night the album came out, the three of us stayed up until midnight to see it come to life. It felt like Christmas morning, because we knew that album was something special, and it reflected that shift we'd gone through. We weren't just co-workers; we were people who wanted to hang out together and celebrate something important."

Infamy marks Thomas' memory. "When Old Dominion won ACM Group, I jumped up and spilled my drink all over Katie Dean's wife, Paige. Justin Cole snagged the video, the band put it on their socials and I became accidentally viral. That was just pure joy."

The other obvious commonality is the extent to which each individual believes they are heard and valued. "The big thing I admire about Sony is how the company and my coworkers challenge traditional ideas," Laster says. "It's important to continue learning, improving for yourself and your artists and to better help our partners. You really feel that within the company. We talk about it a lot."

Even when plans don't work, growth is encouraged. "You learn a lot and miss some opportunities, but it just makes you fight harder for things you believe in," Tomlin says. "Early on, I didn't speak up enough, but now no one will ever be confused about how I feel. If I'm passionate and it still doesn't work out, that's fine now, because I did all I could. Jim, Taylor and Randy have all encouraged that."

Lindsey adds, "Randy's leadership has empowered us to speak our minds and then go after those ideas in a real way. Moving like that afforded us so much time to figure out what works and adjust quickly. There's not a lot of red tape from the top. And our artist partners

It's been a challenging year, but the value placed on all of us as members of the Sony community has really been felt from the company and from each other.

– Taylor Lindsey

have been learning new technologies they want to use at home or on their phones. Our job is to find and dig into those platforms, whether its young people or older demos using it. It's exciting to see fan engagement that isn't driven by passive listening. Getting under the hood and seeing that intel is fascinating."

Technology may allow insight into fan reactions, but that only goes so far. "It takes some of the guess work out of it, so what we're trying to do is marry traditional A&R gut with great data and analytics," he says. "There have to be elements of both. Lots of young artists can create moments on socials, but are they going to be able to become an artist like Luke, Kane, Brad or Miranda, or just an influencer?"

Striking the right balance is the real trick. "That comes with experience and knowledge of the marketplace," Lindsey says. "Gut tells us if a song is on-brand, if it shares the artist's vision and can reach fans. We can think it's a hit, but the opportunity to measure that makes the job a lot more fun."

GREATEST LOVE STORY

Asked what they remember most about Sony's current five year run and the answers are very similar. "It's all about this team and the artists," Lindsey says. "Beyond superstars like Miranda and Brad, the others we've signed in this period started from virtually nothing, and we've gotten to watch every benchmark: The first No. 1, the club shows to two nights in an arena, the 10,000 Instagram followers rising to 100,000, or their first million streams – those are the most rewarding moments. Each one is just as fun as the one that came before."

Laster echoes, "Listening to the first demo by Maren and sitting in on some of those meetings before her signing was official, then watching her become a global cross-genre superstar has been a

huge part of that in how they collaborate. We are a true extension of them, but more than that, we all care about each other on this staff. It's been a challenging year, but the value placed on all of us as members of the Sony community has really been felt from the company and from each other. There's a strong human aspect at every turn and we don't take it for granted."

Another inflection point – for staff, certainly – may be the abrupt shutdown in March. "Nobody missed a beat," Atwood says. "Monday morning, we were doing the same meetings, just remotely. Nobody slacked off. If anything, they were inclined toward being more productive to keep our business moving forward. Had the culture of the label not changed, that would have been much more difficult, but we didn't want to let our teammates down."

Moreover, a corporate-level contingency plan offered substantial resources. "The company has been really solid with mental health support and other tools to get through really trying times," Lindsey says. "We set regular meetings and have check-ins as teams and individuals. Those kinds of things create synergy and trust, and they encourage creativity. That's really been key in a time when we've had to be incredibly innovative to keep up with the pace of change."

The intentionality of being people-forward goes back to 2015. "Randy takes leadership and being a CEO very seriously," Robold says. "We had an executive coach come in very early on as a means of establishing a culture. There were a couple of offsites with senior level folks, including one three-day retreat where we established our company values: Passion, creativity, dependability, respect and growth. They've stuck with us and paid dividends."

As has the music. "We signed amazing artists who didn't fit the mold," Atwood says. "We weren't afraid to take those risks, which was refreshing, because we now have artists paving the way. Great music and getting along with your coworkers are a terrific mix when you're fighting to have success."

CAC



**Cheers to a New Year
on the Horizon**

WARM WISHES

from all of us this holiday season



ERIC CHESSER

*Wishing you and yours
a wonderful new year ahead!*



**NEW MUSIC
COMING SOON**

BIGBIG
Records Nashville
ericchesser.com

IN 2020, MORE THAN EVER, COUNTRY RADIO KEPT MUSIC ALIVE.

The Academy salutes Country Radio and celebrates our
ACM RADIO AWARDS WINNERS!

ON-AIR PERSONALITY OF THE YEAR

RADIO STATION OF THE YEAR



MAJOR MARKET
KILT-FM
Houston, TX



NATIONAL
The Bobby Bones Show –
Bobby Bones, Amy, Lunchbox,
Eddie, Morgan, Ray



LARGE MARKET
WUBE-FM
Cincinnati, OH



MAJOR MARKET
The Rob & Holly Show –
Rob Stone, Holly Hutton
WYCD-FM | Detroit, MI



MEDIUM MARKET
WUSY-FM
Chattanooga, TN



LARGE MARKET
The Big Dave Show –
Big Dave, Chelsie, Statt,
Ashley
WUBE-FM | Cincinnati, OH



SMALL MARKET
WYCT-FM
Pensacola, FL



MEDIUM MARKET
Clay & Company
WYRK-FM | Buffalo, NY



SMALL MARKET
Steve & Jessica
Steve Waters, Jessica Cash
WFLS-FM | Fredericksburg, VA

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