



**THE YEAR
IN MUSIC**

*The
Year's
★ Top ★
Stories*

**LAURIE
DEYOUNG**
THE INTERVIEW

**SONY FLIPS
THE SCRIPT**



**COUNTRY
AIRCHECK**

DECEMBER 2020



LABEL OF THE YEAR



THANK YOU COUNTRY RADIO
for a Fresh Dozen Years!

WHILE IT'S BEEN A TOUGH YEAR FOR ALL,
IT'S BEEN EVEN MORE SO FOR SOME OF OUR
CLOSE FRIENDS IN RADIO.



PLEASE KEEP THESE
**EXCEPTIONAL
PROFESSIONALS**
IN YOUR THOUGHTS & PRAYERS
THIS HOLIDAY SEASON.



The People v. Pandemic

Business dynamics are probably the most expected topics for a trade publication's year-end roundup, but hurricanes, fires, floods, a market crash and a mass shooting have also made these pages over Country Aircheck's 15 years. Adding global pandemic to the list? Katy, bar the door.

Coupled with economic upheaval, a divisive political climate and civil unrest around police brutality, summer wasn't over before 2020 was dubbed the year from hell. But there may be other perspectives worth considering, too. Country is, after all, an intersection of music and community without parallel ... and that showed through.

March's sudden and worldwide shutdown forced air personalities into bedroom-closet studios, songwriters into being home-school teachers and promotion reps into flying their friendly dining room tables. Canceled concerts and promotions spawned an entirely new event category as artists, their teams, radio and other media adapted platforms to reach audiences. Even as screen fatigue set in over months of lockdown, WFH and interminable sweat-panted video calls, old truths remained.

"We've learned more about our listeners and been reminded we are their friend," says WUSJ/Jackson, MS PD **Traci Lee**. "They've needed us and, if I'm being honest, we needed them. We remembered names and had longer conversations on the phones and through text. We were in this together, and it felt good. I hate it took a pandemic to remind us how important personal connection is, but here we are."

Ironically, years of declining physical sales and slow streaming adoption may now be regarded as a key factor insulating record companies from a pandemic-induced downturn. "If all that pain we went through hadn't happened, we might have been decimated as well," says UMG/Nashville EVP/Promotion **Royce Risser**. "We've made adjustments and saved on a lot of costs this year, but imagine what could have happened if we'd still been reliant on consumers purchasing physical CDs in stores."

Deep drops in radio listenership and ad revenue led to widespread furloughs and layoffs (see accompanying stories), but by far the greatest impact was felt in the live music space. There, too, the country industry raced to adapt ... and led the way for music overall. In June, Eli Young Band kicked off the nation's first series of paid drive-in concerts at the Texas Rangers' new ballpark in Arlington. "Others who came after our shows may have already been thinking about it, but maybe they were emboldened when we had a hundred major press hits and didn't get slapped for being reckless in any of them," says organizer and Triple 8 Management's **George Couri**. "The shows were safe and 3,200 tickets sold out in one day."

Meanwhile, Nashville – a city with music and healthcare as industrial pillars – was also leading in live performance solutions. "We partnered with Vanderbilt Medical Center, the local department of health and the Nashville mayor's office to begin putting plans in place so that as the phasing got to appropriate points, we'd be ready to entertain patrons," explains Opry Entertainment Group President **Scott Bailey**. "We're fortunate to have world class talent in a 20-mile radius. Coupled with the history and importance of the *Grand Ole Opry* and the Ryman Auditorium, a lot of eyes were on how we navigated this. We listened, pushed where we needed to, were responsive and handled the safety side of it strongly. We didn't just check the box, we enforced it."

Limited capacity audiences and a multi-camera production propelled the hybrid in-person and pay-per-view *Live At The Ryman* series, which may have post-COVID legs. "We've had people in 25 different countries signing up for the pay-per-views," Bailey says. "Given the right venue and production quality, it's appealing to consumers – particularly those who may not be geographically close."

Despite the rush to innovate, thousands of musicians, crew, venue staff, agency workers, promoters and similar professionals faced a future with no work in sight. Assistance included the CMA's COVID-19 Resources platform, connecting members with mental health, financial, education and legal services, and more. The organization donated \$1 million to MusiCares' all-genre COVID-19 Relief Fund, as well as \$100,000 to Music Health Alliance. In December, ACM Lifting Lives began distributing \$2 million to hard-hit country professionals following an April distribution of \$1.5 million. These and other music organizations and unions also jumped into advocacy for legislative relief.

Victories included the March CARES Act, which for the first time made independent contractors – including gig workers and freelancers like musicians, songwriters and production staff – eligible for unemployment benefits. Though election inertia hampered progress, a proposal from moderates in both parties had Recording Academy Chief Advocacy Officer **Daryl Friedman** optimistic at press time about further assistance.

Among the provisions sought: An extension of unemployment benefits for contractors; the Save Our Stages Act offering loans for struggling venues; the return of federal pandemic unemployment assistance, which provided \$600 additional per week until it expired at the end of July; and the HITS (Help Independent Tracks Succeed) Act allowing the full cost of recordings to be deductible in the current tax year. "We're hoping most of these will be included in a final bill before the end of the year," Friedman says.

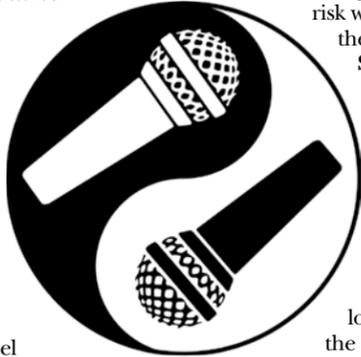
None of that minimizes the distress of those who've been sick, lost loved ones or experienced life-changing financial hardship. Sadly, many who once found employment in this industry may never return to it. And so, the work of the broader country community remains, offering support, salve and escape through the music and personal connections upon which it has always rested. Onward.

THE YEAR'S TOP STORIES

A Tale Of Two Radios

“It was the best of times; it was the worst of times.” While those are likely the only words anyone remembers from their college book report about *A Tale Of Two Cities*, for many in radio, 2020 fell sharply on one side or the other of that famous opening line. As the pandemic lockdown shuttered businesses nationwide, radio saw unprecedented revenue declines accompanied by furloughs, layoffs and downsizing. Meanwhile, innovation and adaptation accelerated to unprecedented levels at companies big and small. Increasing centralization and nationalization at top groups got the headlines, even as live and local radio continued to prove itself with relevance and revenue.

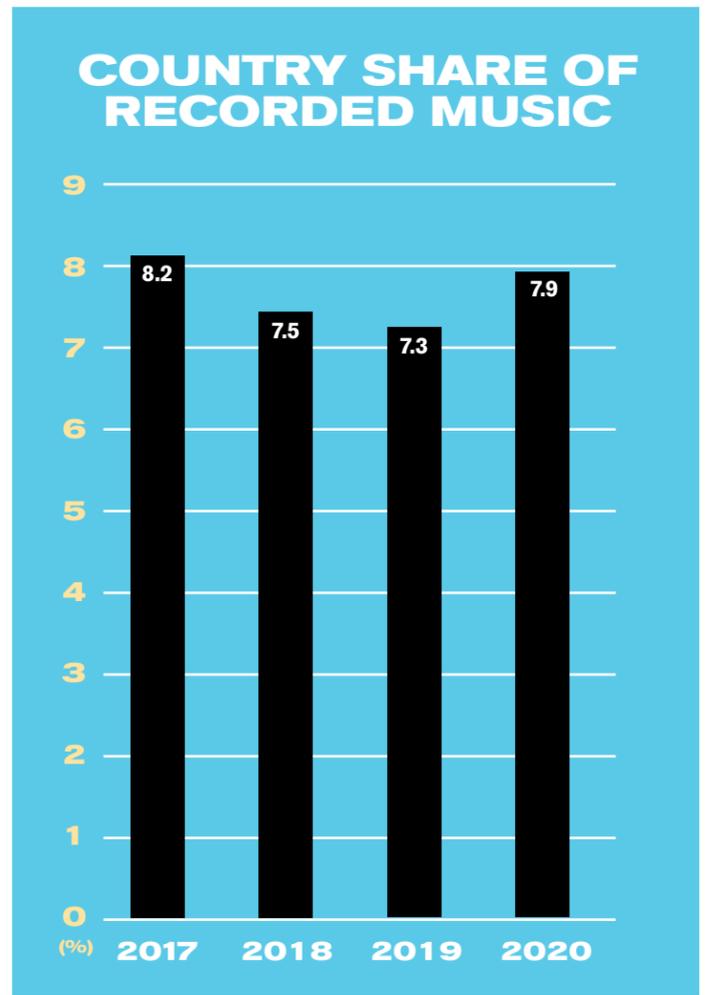
Among those shedding personnel were iHeartMedia and Entercom, each of which initiated multiple rounds of cutbacks resulting in the restructuring of on-air and programming teams. iHeartMedia bulked up their National Programming Team and thinned out local staffs while Entercom moved to a regional structure with programmers and personalities alike handling multiple stations. “From the earliest days of the pandemic, we have made it clear that we



are committed to emerging as a vibrant, healthy and growing company positioned for a bright and successful future,” explained Entercom Pres./CEO **David Field** in an internal memo circulated in June. In a follow-up memo in September amid the restructuring, Field added, “As the media world continues to experience rapid changes in technology, consumer preferences and the competitive landscape, so must we continue to reimagine and enhance our programming and sales strategies to ensure that we are meeting evolving listener and consumer expectations. We are, of course, not alone.”

But, not everyone elected to go the route of downsizing, with 2020 serving as a springboard for change in an environment where risk was inevitable on either side of the coin. Adams Pres./CEO **Ron Stone** launched the Independent Broadcasters Association (IBA). As Stone told Country Aircheck in August, the collective approach to shared services, employee benefits, HR, digital services and ad sales “can elevate each independent brand at a station level while also strengthening the base of locally owned radio.” Others saw the opportunity for broadening syndication platforms, as *Shawn Parr’s Across The Country*, *Bud & Broadway* and *Backstage Country* came to the table with new offerings. Apple Music Country also launched a personality-driven station and Country-specific programming team that included many terrestrial radio veterans. Yes, it was the best and worst of times, giving the industry much to consider about its future. Not even Charles Dickens could have fictionalized such circumstances ... and 2021 remains to be written.

THE YEAR'S TOP STORIES



MILESTONES

JAN. 14 iHeartMedia Restructures	JAN. 21 CMT Equal Play Launches	FEB. 19 CRS 2021	MARCH 3 Nashville Tornado	MARCH 12 Live Nation Cancels Shows	MARCH 13 Quarantine Begins	MARCH 13 Opry Aired With No Audience	MARCH 16 ACM Awards Postponed	MARCH 31 CMA 75th Anniversary	APRIL 2 Entercom Cuts	APRIL 5 ACM Presents: Our Country	APRIL 23 Monument Adds Promo Team	APRIL 27 ACM Awards Move To Nashville	MAY 25 Death of George Floyd Sparks Protests	JUNE 4 First Paid Country Drive-In Concert with Eli Young Band	JUNE 30 MCC/Curb Records Launches	JULY 13 CMA Best of Fest
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WFH WTF?

Lessons Learned In 2020

WIRK/West Palm Beach morning host Tim Leary: I actually had to say the sentence, “You have to at least wear underwear during the show” to our pro-nudist producer Garrett. Follow up: I learned I will never go to Garrett’s condo and sit on *anything* ever!

WUSJ/Jackson, MS PD/Morning Host Traci Lee: COVID helped us appreciate each other’s time and position more ... and reminded us why we all hated that one person in the building ... all in Christian love, of course. #GodBless

Big Loud VP/Promotion Stacy Blythe: While working from home, I still have to plan time for my commute! I swear, some days it takes me longer to actually get to my desk chair in my home office than it did to get to my office on Music Row. I’ve gotten to know the FedEx guy pretty well and 182 packages is a busy day for him when he usually has less than 150.

WIRK/West Palm Beach PD Bruce Logan: I learned I *hate* Zoom calls. I just can’t bear them. Hate them with a passion. It’s no way to check out new music or a new artist.

WQYK/Tampa OM/PD Travis Daily: I started attending all Zoom meetings on my phone, and I changed the



name of my phone to “Reconnecting” so I wouldn’t have to participate on the calls that were tedious. I also learned Luke Bryan concert tickets used to be the biggest form of currency to get ratings on the air, then at some point during the pandemic, that changed to toilet paper.

KWJJ/Portland OM/PD Scott Roddy: I found that my dogs have *no* idea what a Zoom call is. They can’t understand who the hell I’m talking to and why I’m so

animated. They bark, jump and spin in circles.

KNIX/Phoenix on-air personality Barrel Boy: You have to be even more detail-oriented and make tons of lists when you don’t have the luxury of walking over to someone’s desk or studio to ask the question/thing you forgot. When you have someone’s attention on a Teams meeting/video call, you need to maximize it.

Monument VP/Promotion Drew Bland: The need for recognition is more important now than ever before, and it’s always been important. Take time to celebrate the accomplishments big or small. It makes a difference. Also, buy a \$300 Costco stationary bike and get the Peloton app for \$12/month. Saving that much money helps you not feel bad when it ends up holding clothes.

MCA SVP/Promotion Katie Dean: Life is incredibly uncertain. But no matter how scary things are, you can make your own pillow fort and feel better.

Triple Tigers Dir./National Promotion Raffaella Braun: In an office setting, I can usually schedule my meals and refill my water/get my steps in while on the phone. But,

I’ve now officially learned that I have no will power and can snack from sunrise to sunset, no problem. I also don’t like any of the food options we have. Like clockwork, I get up for a quick break, open every one of the cabinets and fridge then close all doors unceremoniously, grabbing a tea and sitting back down.



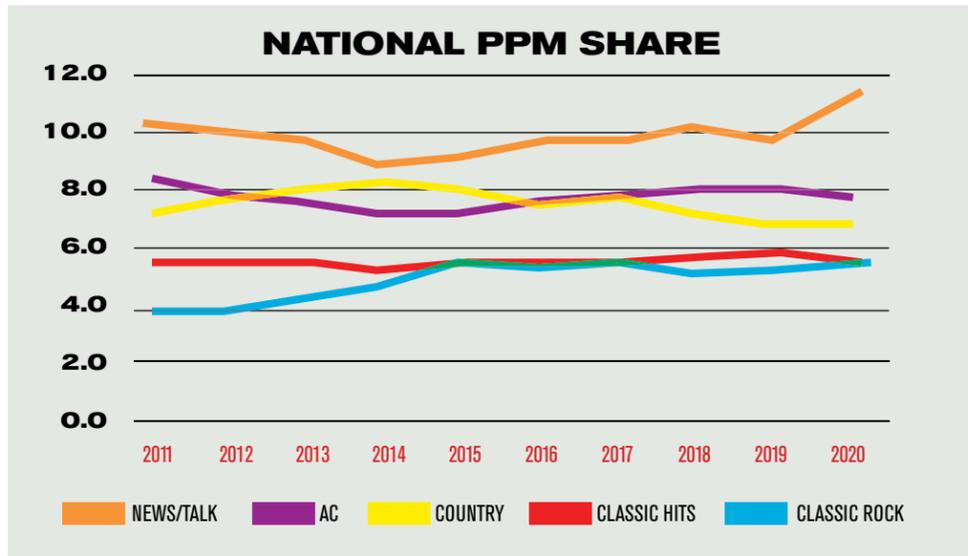
NUMBERS WON

Considering the year's many challenges – led by dramatic changes in consumer behavior – country music increased market share as Country radio held its own despite deep cuts in overall audience.

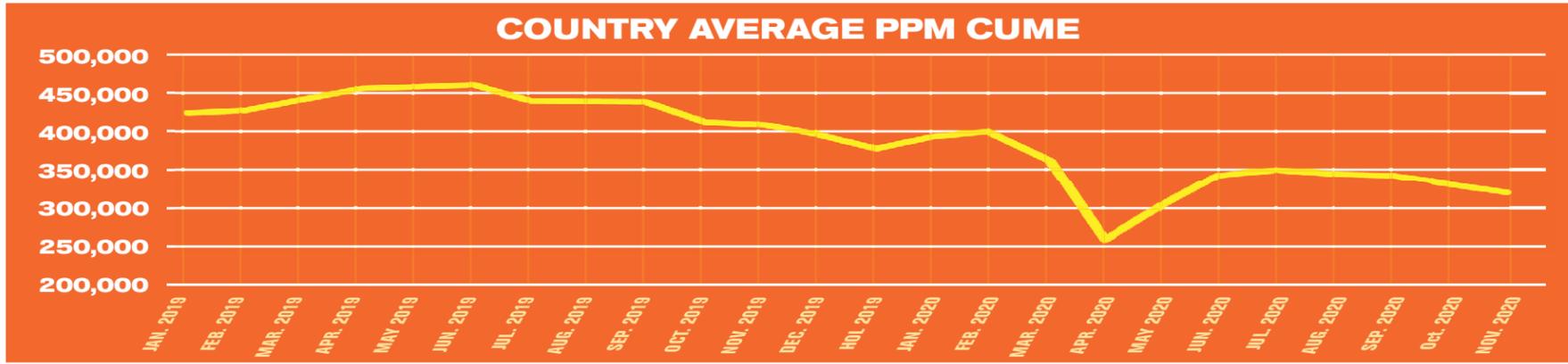
Country radio managed to slow its recent decline, with Persons 6+ PPM share off only 0.1% from 2019; however, the format's 6.6 is its lowest PPM share in a decade. Nielsen Audio's **Jon Miller** adds, "The 25-54 share in PPM markets is also at its lowest point ever. The 18-34 number ticked up slightly in 2020, which is a bright spot, but the share was down in the broad demos." Meanwhile, News/Talk saw a massive surge in an election year, and Classic Rock also rose – both scoring their largest PPM shares ever.

Of course, share only tells part of the story. Country cume remains dramatically reduced from pre-COVID levels. Year-to-year cume – Nov. 2019 to Nov. 2020 – is down 20.9%. The average cume among PPM Country stations one year ago was just over 365,000. Now that average stands at 288,990.

If radio's challenges were – arguably – fueled by a shift from in-car listening to at-home listening, a significant increase in streaming consumption would bear out the theory. Country's share of total music consumption increased from 7.3% to 7.9%, its largest share in three years. Clear evidence of the pandemic's effect on consumer behavior is the fact that this growth was driven entirely by streaming. Year-to-year, country album and track sales were down 18% and 17% respectively, while streaming increased more than 20%.



Sources: Nielsen Audio & Sony/Nashville.



Live at the Ryman Begins	WEBG/Chicago Flips Rock	Entercom Restructuring Continues	Records/Nashville Launches	Quartz Hill Sets Staff	WE WON'T STOP!	BIG NIGHT	iHeartMedia Initiates Deep Cutbacks										
JULY 23	AUG. 12	AUG. 14	AUG. 18	SEPT. 4	SEPT. 4	SEPT. 10	SEPT. 16	SEPT. 21	OCT. 3	OCT. 12	OCT. 15	OCT. 21	OCT. 26	OCT. 28	NOV. 3	NOV. 6	NOV. 11
IBA	CMHoF Adds Three	Apple Music Country Radio Launches	The Ryman Adds Limited Audience	ACM Awards	Opry Welcomes Limited Audience	Virtual St. Jude Country Cares Seminar	CMT MUSIC AWARDS	CRS Chooses Virtual For 2021	Presidential Election	iHeart RADIO	CMA Awards						

I N M E M O R I A M

- Dan Anderson (radio)
- Tom Annastas
- Darrin Arriens
- "Johnny Randolph" Aspenleiter
- Bob Bartolomeo
- Reggie Bates
- Augustus "Big Mac" Beauchat
- Dave "Big Daddy" Beck
- Ken Berryhill
- John Blassingame
- Scott Boomer
- Johnny Bush
- Stan Byrd
- Jimmy Capps
- "Slim Jim" Clemens
- JT Corenflos
- Kenny Dale (Kenneth Dale Eoff)
- Kelli D'Angelo
- Charlie Daniels
- Mac Davis
- Abbe DeMontbreun-Stroud
- John E. Denny
- Joe Diffie
- Justin Townes Earle
- Paul English
- Dick Fontana
- Jim Fox (Allen Duaine Pruett)
- Sonny Fox (James Warren Rowley)
- Barry Freeman
- Bryan Wayne Galentine
- Benny Garcia

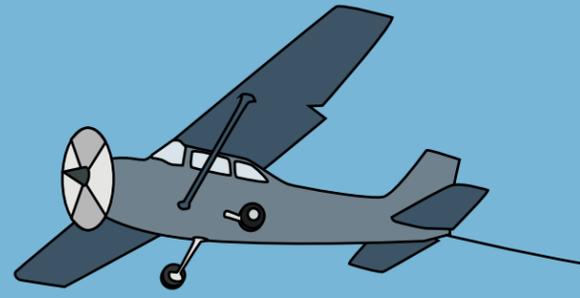


- Lawrence W. "Larry" Grogan
- Stephen Gudis
- Don Hall
- Alex Harvey
- Stu Haskell
- W.S. "Fluke" Holland
- Dave Holmes
- Jan Howard
- Charles Lawton Jiles
- Larry W. Johnson
- Troy Jones
- Philip R. Jonsson
- Hal Ketchum
- Bob Kieve
- Buddy King
- "Mr. Ed" Lambert
- Brett Lucht
- Bill Mack
- Craig J. Martin
- Robert "Bob" Mather
- Carley McCord
- Bob McCurdy
- William E. "Bill" McEuen
- Amy McGovern
- Bob McKay
- Jamie McKibbin
- Gary McSpadden
- Edward "Felix" McTeigue
- Walter C. Miller
- Tom Miller
- Bob Mitchell (Walter Detweiler)



- Courtney Nelson (Dave Brooks)
- Andy "O" Oatman
- Jamie Oldaker
- David Olney
- Ray Pennington
- Dale Pon
- John Prine
- William "Bill" Pursell
- Robbie Raggs (Bob White)
- Jim Raimo
- Zachary Ray (Zachary Taylor)
- Harold Reid
- Jack "Uncle Don" Rhea
- Dusty Rhodes (Bob Long)
- John Roberts
- Kenny Rogers
- Alan Rowe
- Angelo Joseph Salvi
- Norm Schrutt
- Alan Schulman
- Edward F. Setser
- Billy Joe Shaver
- Carrigan Chet Shields
- Scott Smith
- Jimmy Stewart (Kerry Alford)
- Doug Supernaw
- Gary Walker
- Jerry Jeff Walker
- Dick Whitehouse
- J. Douglas "J. Doug" Williams





BIG LOUD
RECORDS **5**
YEARS

**2020 COUNTRY AIRCHECK
YEAR END**

**5 SONGS IN THE COUNTRY AIRCHECK
TOP 100 SONGS OF 2020**

MORGAN WALLEN - CHASIN' YOU

JAKE OWEN - HOMEMADE

HARDY (FEAT. LAUREN ALAINA AND DEVIN DAWSON) - ONE BEER

CHRIS LANE - BIG, BIG PLANS

MORGAN WALLEN - MORE THAN MY HOMETOWN

#5 COUNTRY AIRCHECK LABEL OF THE YEAR

#5 OVERALL - MORGAN WALLEN

#5 MALE ARTIST - MORGAN WALLEN

5.5 BILLION
ON-DEMAND STREAMS (US)

Morgan Wallen **DANGEROUS** the double album
1/08/21

9 #1 SINGLES

FIX
CHRIS LANE

UP DOWN
MORGAN WALLEN
FEAT. FLORIDA GEORGIA LINE

I WAS JACK (YOU WERE DIANE)
JAKE OWEN

WHISKEY GLASSES
MORGAN WALLEN

I DON'T KNOW ABOUT YOU
CHRIS LANE

HOMEMADE
JAKE OWEN

CHASIN' YOU
MORGAN WALLEN

MORE THAN MY HOMETOWN
MORGAN WALLEN

ONE BEER
HARDY
FEAT. LAUREN ALAINA AND DEVIN DAWSON

24 TOTAL
SONG APPEARANCES ON
BILLBOARD'S HOT
COUNTRY SONGS CHART

18 TOTAL
RIAA CERTIFICATIONS