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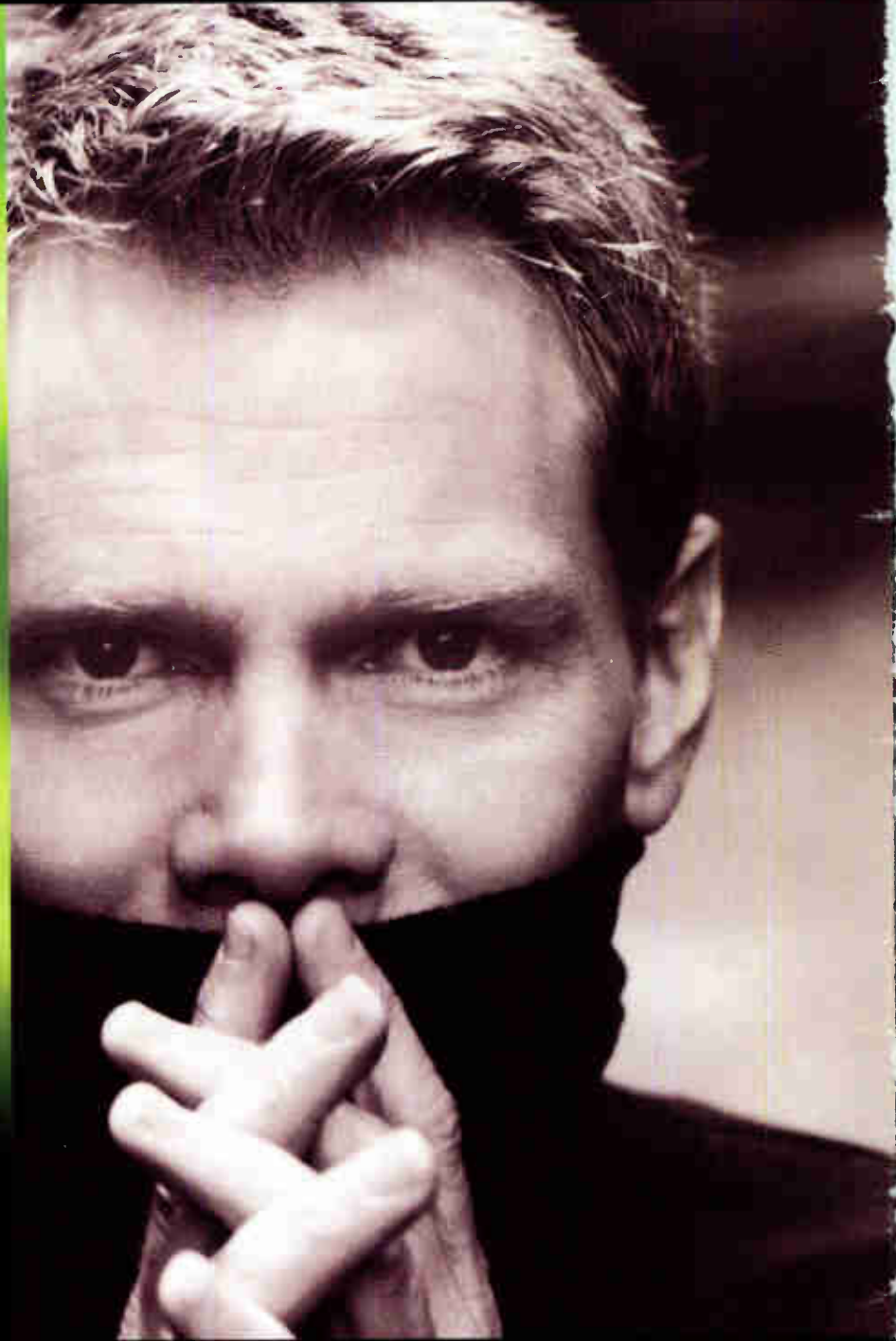
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On the Cover



Wynonna

Label: Mercury/Curb
Current Single: "Can't Nobody Love You (Like I Do)"
Current Album: *New Day Dawning*
Current Producers: Wynonna, James Strou, Tony Brown, Gary Nicholson
Birthplace: Ashland, KY
Management: The Judd House
Booking: William Morris
Recent Hits: "Come Some Rainy Day," "When Love Starts Talkin'"
Awards: 1992 *Billboard* Best New Country Artist, 1992 NARM Best Selling Female Artist, 1994 Academy of Country Music Top Female Artist
RIAA Certifications: *Wynonna* (5x), *Tell Me Why, Revelations* (platinum), *The Other Side* (gold)
Special TV/Film Appearances: Made her acting debut last year on "Touched By An Angel."
Interesting Facts: Wynonna is the mother of two and enjoys riding motorcycles.
Outside Interests: Animals, reading, shopping, nature
Musical Influences: Bonnie Raitt, Joni Mitchell

Wynonna made her mark on country music as one half of the successful duo The Judds, who sold over 20 million records and won more than 60 industry awards in the '80s. She released her first solo album in 1992 and has achieved success independently, garnering 13 top 10 hits.

Wy's sixth album, *New Day Dawning*, will be released by Mercury/Curb on February 1. The star is excited about the release and her upcoming opportunities. "As I started on the process of recording my new record," she says, "I felt the spark and energy of a new beginning. I'm in a place in my life where I'm so grateful to be in country music and to sing the music I love." She and her mother recently reunited, after an eight year hiatus, for a New Year's Eve concert in Phoenix, and will embark on a limited tour this spring called The Power to Change tour. They'll release an album later in the year.



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Grammy Nominations Show Diverse Music City

NEWS

Shania Twain and Mutt Lange got a nod in one of the "big" categories this year, Song of the Year, for "You've Got a Way." Dixie Chicks did us proud, too, with a nod in the overall best album category for *Fly*, plus four nominations for Best Country Vocal Performance, Collaboration, Song, and Album. Asleep at the Wheel garnered six noms for their *Ride With Bob* disc, and George Jones won nominations for Best Performance, Song and Album. Emmylou Harris is nominated in four categories.

A smattering of nominations in other-genre categories reproves the name Music City. Sixpence None The Richer is nominated in Best Pop Performance category for "Kiss Me." Willie Nelson is cited for "Night And Day" in Pop Instrumental Performance. Donna Summer got a nod for "I Will Go With You" (Con Te Partiró) from *VHI Presents Live & More Encore* in the Best Dance Recording category. Compass Records artist Victor Wooten is nominated in the Best Contemporary Jazz Performance category for *Yin Yang*. And in what is believed to be a first for Nashville, Jaci Velásquez gets a nod for *LLegar A Ti* in the Latin Pop Performance category.

DreamWorks' *Prince of Egypt* soundtrack won a nomination in the Best Pop/Contemporary Gospel Album category, as did Steven Curtis Chapman and Anointed for *Speechless* and *Anointed*, respectively.

The Contemporary Folk Album category yielded two Nashville nods; John Prine for *In Spite Of Ourselves* (Oh Boy) and Linda Ronstadt and Emmylou Harris for *Western Wall - The Tucson Sessions* (Asylum). June Carter Cash was nominated in the Traditional Folk Album category for *Press On, Meyer: Short Trip Home* by Joshua Bell, Sam Bush, Mike Marshall and Edgar Meyer (Sony Classical) is nominated in the Best Classical Crossover Album. Jimmy Sturr and His Orchestra got a nomination for, yes, Best Polka Album. That title: *Polkapalooza* (Rounder). Are we a diverse town, or what?

Nashvillians also got two nominations in the Best Spoken Word Album: Nanci Griffith for *The Chieftains - The Authorized Biography*, (writer John Glatt); and Merle Haggard for *Merle Haggard's My House of Memories - For The Record*, (writers Merle Haggard and Tom Carter). Tom Wopat (can we still claim him?) got a nod for Best Musical Show Album for his role in *Annie Get Your Gun*.

Two Nashville projects were nominated in the Best Album Notes category. Rick Bragg for *Hank Williams - Live at the Grand Ole Opry* (Mercury) and Daniel Cooper for *Ray Charles - The Complete Country and Western Recordings (1959-1986)*. The Ray Charles set was also nominated in the Best Historical Album Category.

And finally, we can be most proud of our technical experts. Dann Huff is nominated as Producer of the Year, having lent his talents to projects by Bryan White, Lonestar, Megadeth, Shane Minor and SheDAISY. And three of the five nominations in the Best Engineered Album, Non-Classical category are Nashville projects: *Owsley* (Giant), Jeff Balding, Tom Lord-Alge, J.R. McNeeley, Owsley, Millard Powers & Shane Wilson, engineers, Owsley, artist; *Forget About It* (Rounder), Gary Paczosa, engineer, Alison Krauss, artist; and *My Heart* (RCA/BNA), Joe Chiccarelli, Mick Guzauski & John Kelton, engineers, Lorrie Morgan, artist. Congratulations all!



Emmylou Harris

Best Female Country Vocal Performance

- "Ordinary Heart" - Emmylou Harris, from *Happy, Texas* soundtrack (Arista Nashville)
- "Let Me Let Go" - Faith Hill, from *Faith* (Warner Bros. Records)
- "Forget About It" - Alison Krauss, from *Forget About It* (Rounder Records)
- "I Love You" - Martina McBride, from *Emotion* and from *Runaway Bride* (RCA & Columbia/Sony Music Soundtrax)
- "Man! I Feel Like A Woman!" - Shania Twain, from *Come On Over* (Mercury Nashville)



Vince Gill

Best Male Country Vocal Performance

- "Don't Come Cryin' To Me" - Vince Gill, from *The Key* (MCA Nashville)
- "Choices" - George Jones, from *Cold Hard Truth* (Asylum Records)
- "That's Right (You're Not From Texas)" - Lyle Lovett, from *Live In Texas* (MCA/Curb Records)
- "Please Remember Me" - Tim McGraw, from *A Place In The Sun* (Curb Records)
- "Crazy Little Thing Called Love" - Dwight Yoakam, from *Last Chance For A Thousand Years* (Reprise Records)



Dixie Chicks

Best Country Performance By A Duo Or Group With Vocal

- "Honky Tonk Song" - BR-5-49, from *Happy, Texas* soundtrack (Arista Nashville)
- "Unbelievable" - Diamond Rio, from *Unbelievable* (Arista Nashville)
- "Ready To Run" - Dixie Chicks, from *Fly* and from *Runaway Bride* soundtrack (Monument Records and Columbia/Sony Music Soundtrax)
- "Amazed" - Lonestar, from *Lonely Grill* (BNA Records)
- "Little Good-Byes" - SheDAISY, from *The Whole SheBang* (Hollywood/Lyric Street Records)

Best Country Collaboration With Vocals

- "God Must Have Spent A Little More Time On You" - Alabama Featuring 'N Sync, from *Twentieth Century* (RCA Nashville)
- "Going Away Party" - Asleep At The Wheel Featuring The Manhattan Transfer & Willie Nelson, from *Ride With Bob* (DreamWorks Nashville)
- "Roly Poly" - Asleep At The Wheel Featuring The Dixie Chicks, from *Ride With Bob* (DreamWorks Nashville)
- "When I Said I Do" - Clint Black With Lisa Hartman Black, from *D'lectrified* (RCA Nashville)
- "After The Gold Rush" - Emmylou Harris, Linda Ronstadt & Dolly Parton from *Trio II* (Asylum Records)

Best Country Instrumental Performance

- "Bob's Breakdowns" - Asleep At The Wheel Featuring Tommy Allsup, Floyd Domino, Larry Franklin, Vince Gill & Steve Wariner, from *Ride With Bob* (DreamWorks Nashville)
- "Black Mountain Rag" - Del McCoury, Doc Watson & Mac Wiseman, from *Mac, Doc & Del* (Sugar Hill Records)
- "Mr. John Henry, Steel Driving Man" - Marty Stuart & Earl Scruggs, from *The Pilgrim* (MCA Nashville)



Asleep At The Wheel



Lonestar

- "The Greatest Love Of All Time (Reprise)" - Marty Stuart, from *The Pilgrim* (MCA Nashville)
- "The Harry Shuffle" - Steve Wariner, from *Two Teardrops* (Capitol Nashville)



Shania Twain

Best Country Song

- "Amazed" - Marv Green, Chris Lindsey & Aimee Mayo, songwriters (Lonestar); from *Lonely Grill* (BNA Records)
- "Choices" - Mike Curtis & Billy Yates, songwriters (George Jones); from *Cold Hard Truth* (Asylum Records)
- "Come On Over" - Robert John Lange & Shania Twain, songwriters (Shania Twain); from *Come On Over* (Mercury Nashville)
- "Ready To Run" - Marcus Hummon & Martie Seidel, songwriters (Dixie Chicks); from *Fly* and from *Runaway Bride* soundtrack (Monument Records and Columbia/Sony Music Soundtrax)
- "Two Teardrops" - Bill Anderson & Steve Wariner, songwriters (Steve Wariner); from *Two Teardrops* (Capitol Nashville)

Best Country Album

- *Ride With Bob* - Asleep At The Wheel, Ray Benson, producer; Ray Benson & Larry Seyer, engineers/mixers (DreamWorks Nashville)
- *Fly* - Dixie Chicks, Blake Chancey & Paul Worley, producers; John Guess & Billy Sherrill, engineers/mixers (Monument Records)
- *Trio II* - Emmylou Harris, Linda Ronstadt & Dolly Parton, George Massenburg, producer; Nathaniel Kunkel, George Massenburg & Linda Ronstadt, engineers/mixers (Asylum Records)
- *Cold Hard Truth* - George Jones; Keith Stegall, producer; John Kelton, engineer/mixer (Asylum Records)
- *Forget About It* - Alison Krauss; Alison Krauss, producer; Gary Paczosa, engineer/mixer (Rounder Records)



George Jones

Best Bluegrass Album

- *Bluegrass Mandolin Extravaganza* - Sam Bush, David Grisman, Ronnie McCoury, Jesse McReynolds, Bobby Osborne, Ricky Skaggs, Frank Wakefield, Buck White with Del McCoury (Acoustic Disc)
- *The Mountain* - Steve Earle & The Del McCoury Band (E-Squared Records)
- *The Bluegrass Sessions - Tales From The Acoustic Planet, Volume 2*, Béla Fleck (Warner Bros. Records)
- *I Feel Like Singing Today* - Jim Lauderdale, Ralph Stanley & The Clinch Mountain Boys (Rebel Records)
- *Ancient Tones* - Ricky Skaggs & Kentucky Thunder (Skaggs Family Records)

Best Southern, Country, or Bluegrass Gospel Album

- *A Glen Campbell Christmas* - Glen Campbell (Unison Music/TNN Classic Sessions)
- *Roy Clark Sings & Plays Gospel Greats* - Roy Clark (Finer Arts Records)
- *Kennedy Center Homecoming* - Bill & Gloria Gaither And Their Homecoming Friends (Spring House Music Group)
- *Winding Through Life* - Doyle Lawson & Quicksilver (Sugar Hill Records)
- *The Final Sessions* - J.D. Sumner & The Stamps Quartet (New Haven Records)

Final Numbers:

Country's Slippery Slope

Year-end SoundScan totals reveal a 4.5 percent drop in country album sales, to 69.3 million units from 72.5 in 1998. The news is even more grim on the road as Amusement Business reports a 16 percent drop in country touring grosses, to \$116 million, and a 28 percent drop in attendance.

Declines for country come in the face of continued overall growth in both touring and record sales. All-genre SoundScan totals rose six percent to 754.8 million units, contributing to country's marketshare dropping from 10.2 percent to 9.2 percent. Sales of country's top 100 albums accounted for 61 percent of the genre's total, in sharp contrast to hard-charging Christian music sales (see page 9).

Though genre-wide decline persisted, individual success stories were written in 1999. Shania Twain topped the album sales list for the second-consecutive year, while ascending the touring summit for the first time. The Chicks locked up spots two and three with

Artist	Album	Units
1. Shania Twain	Come On Over	5,618,134
2. Dixie Chicks	Wide Open Spaces	3,463,642
3. Dixie Chicks	Fly	2,672,649
4. Tim McGraw	Place In The Sun	2,043,983
5. Faith Hill	Breathe	1,433,520
6. Lonestar	Lonely Grill	1,103,863
7. Garth Brooks	Double Live	1,089,690
8. Garth Brooks	Magic Of Christmas	962,301
9. Faith Hill	Faith	920,717
10. George Strait	Always Never The Same	885,932

Artist	Gross	Attendance	Shows Sellouts
1. Shania Twain	\$36,570,237	1,007,087	64/48
2. George Strait Country Music Festival	\$32,377,406	793,564	17/17
3. Brooks & Dunn	\$10,046,869	456,962	66/10
4. Tim McGraw	\$5,541,528	213,112	16/7
5. Vince Gill	\$3,414,601	142,942	22/2
6. Alabama	\$3,215,073	145,456	23/4
7. Alan Jackson	\$2,879,532	120,894	16/0
8. Reba McEntire	\$2,872,188	92,502	11/0
9. Lyle Lovett	\$2,078,729	70,113	24/9
10. Dwight Yoakam	\$1,707,638	63,328	16/1

source: Amusement Business

their albums, and radio-powered Lonestar became a surprise entrant in the top 10 albums list. Still, industry-wide backsliding should have the Row hoping for a few more pleasant surprises in 2000.

—Chuck Aly



Singing Ranger Moves On

Hank Snow (1914-1999)



Photo courtesy of the Country Music Hall of Fame

Grand Ole Opry veteran Hank Snow passed away December 20 at his home in Nashville. He was 85 years old.

Snow recorded his first record in 1936 and in the same year signed with the Bluebird label. This contract, lasting 45 years, is considered the longest-standing record deal in the business. By 1945, Snow was touring across the country as The Singing Ranger. His song, "I'm Movin' On," became the biggest hit of 1950, and still holds the record for the longest stretch on top of the charts, staying at the No. 1 position for 21 weeks. Snow recorded over 80 albums and more than 2,000 songs, selling 70 million-plus records in his career. January 7 marks 50 years since his induction into the Grand Ole Opry.

In 1979 Snow was elected to the Country Music Hall Of Fame. He was also a member of the Songwriters Hall of Fame, the Canadian Country Music Hall of Fame and the Nova Scotia Music Hall of Fame.

Snow is survived by his wife Minnie and son Reverend Jimmy Snow.

—Emilie Marchbanks-Patton

Virtual Soundtracks

San Francisco's Licensemusic.com has recently established itself as the first complete one-stop for music licensing and purchasing over the internet. The site offers "pre-cleared" music for television, film, advertising, and other multimedia industries. The recording and publishing rights of these downloadable songs have been pre-negotiated, making them instantly available for use.



Licensemusic.com users are able to explore extensive original music catalogs in various genres using search criteria including style, key-word, tempo and language. The tracks are streamed to a user's computer in RealNetworks G2 audio. When music is found that suits the listener's qualifications, a license fee is calculated based on their project specifications, then distributed digitally in MP3 and PCM audio files, or shipped on CD.

The site is restricted to professional use only, though there is no charge for those who qualify. Currently, more than 100 music companies are associated with the site.

—Emilie Marchbanks-Patton

The Buzz

2000 Edition

Good news: Y2K bug didn't cause upheaval on the Row. Bad news: No upheaval on the Row.

Cookie Cutter—Phrase moved beyond cliché into "Never utter again unless referring to baked goods."

Christian Sales—Could surpass country within 10 years. Maybe sooner. A testament to innovation.

Country Sales—Could fall behind Christian within 10 years. A testament to stagnation.

Millennial Madness—Entire media universe sold out to celebrate an event that will happen in 11 months. Lame.

Not To Be Outdone—Now accepting ads for our "End Of The Millennium" special issue, due this December.

Last Verse For The Singing Cowboy

Rex Allen (1920-1999)

Rex Allen, the last of the singing cowboys, passed away December 17 of injuries sustained in an automobile accident. He was two weeks short of celebrating his 79th birthday.

Allen moved east from his hometown of Willcox, Arizona in the early '40s in search of an entertainment career. His break came in 1945 when he was given a job on the National Barn Dance radio show in Chicago. During that time, he signed a recording contract with Mercury Records and released his first hit, "Take It Back." Allen's film debut, *The Arizona Cowboy*, was released in 1950, with 18 more to follow. *The Phantom Stallion* (1954), Allen's final picture, marked the end of the singing cowboy era in American film and music. His career continued with radio programs, musical variety shows, and his own series, *Frontier Doctor*. Allen also founded the Western Music Association where he served as elder statesman for the genre.

Allen is survived by four children, Rex Jr., Curtis, Mark and Bonita.



Photo courtesy of the Country Music Hall of Fame

—Emilie Marchbanks-Patton

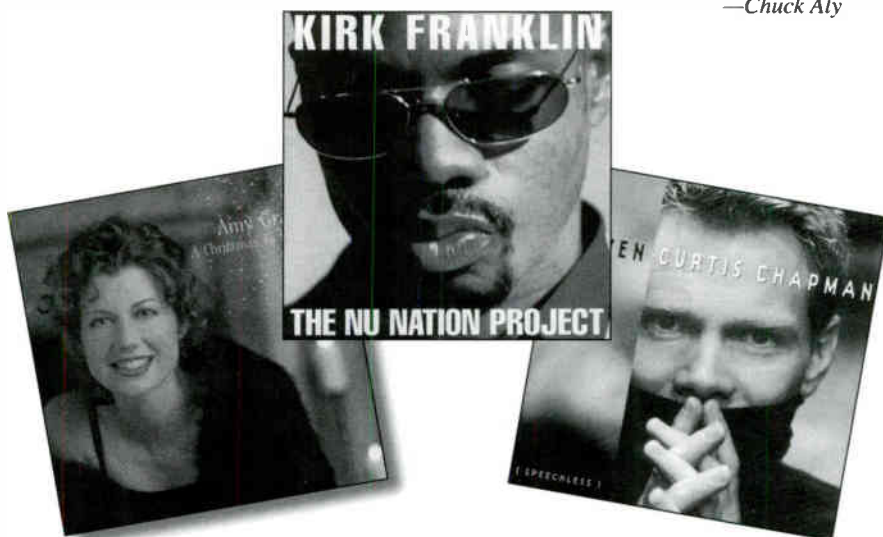
Christian Catching Country

Christian record sales, as measured by SoundScan, were up 11.5% percent in 1999, hitting 49.7 million units. Since 1996, the genre has grown by almost 75 percent, cementing its place as the fastest-growing segment of the recording industry. "The confidence I have is that our growth has been steady," says Gospel Music Association President Frank Breedon. "In not one of the last 10 years have we gone backwards."

While several Christian artists enjoy broad appeal, there is no singular phenomenon to explain this astounding expansion. "We take great comfort in the fact that our growth is not based on just a few hits," Breedon says. "It is roster deep. Our top 100 artists only account for 37 percent of our sales."

Those figures are in sharp contrast to Christian music's superstar-dominated neighbors in country music. "The diversity of our genres gives us the ability to collateralize both our growth and our liabilities across the cultural spectrum," Breedon explains. He says comparisons between the two are both inevitable and welcome, and that the GMA is working to better inform Middle Tennesseans about the Christian music industry's success. "For every 10 country albums sold, we sell seven. Our contribution to the title Music City is becoming stronger. And we've yet to hit our stride."

—Chuck Aly



bluewater

CRASHING FOREIGN SHORES

According to Bluewater Music, they have become the first Nashville publisher to directly affiliate with all major mechanical and performing rights societies in principal European territories, speeding bigger royalty payments by eliminating the sub-publisher.

"You have to question [that] role," says Dan Ekback, VP of Operations at Bluewater. "If they are not creative [the sub publisher's role] is like a collection agency and if that's the case, in this day and age of computers and technology, what's the point?" Ekback is pleased with the benefits his company and writers have received since starting this direct affiliation two years ago. "Our revenues have increased between 20 and 40 percent in each territory," he explains. Bluewater's European services are also available to other publishers and self-published writers.

More than just a name overseas, Bluewater reps personally visit the societies at least once a year to strengthen and maintain relationships, as well as to audit the societies' databases. "You need someone to be your extended arm in France, Germany, Japan, Sweden, wherever."

—Emilie Marchbanks-Patton

Biznik Resolve

Though Music City's workforce fled Nashville like cats from a gardenhose, *Music Row's* spies blanketed the country January 1 to compile this industry list of New Year's resolutions:

- "Find out about this internet thing."
- "More tribute albums and remakes."
- "Attend *all* my 12-step meetings."
- "Sign only pre-teens this year."
- "Find a line from *Toy Story 2* to steal and make into a country song."
- "Get the Lexus detailed once a month instead of once a week. You know, with the downturn and all."
- "Make a cover album of LeAnn Rimes' originals. Oh, wait..."
- "Fulfill even one-tenth of my Opry membership commitment."
- "Never utter the words 'uptempo positive.' Oops."
- "Tractors are not objects of desire." (Not technically a resolution, but needed to be said.)
- "Try that Milli Vanilli thing."



KNOWING THE EARLY REGISTRATION RATE WAS ABOUT TO EXPIRE AND REALIZING THE POTENTIAL BENEFIT TO ALL MUSIC PROFESSIONALS, MUSICGURU BROADCASTS THE NEWS TO ALL HIS FRIENDS IN THE INDUSTRY TO REGISTER IMMEDIATELY FOR THE COUNTRY RADIO SEMINAR BEFORE THE JANUARY 8, 2000 DEADLINE.

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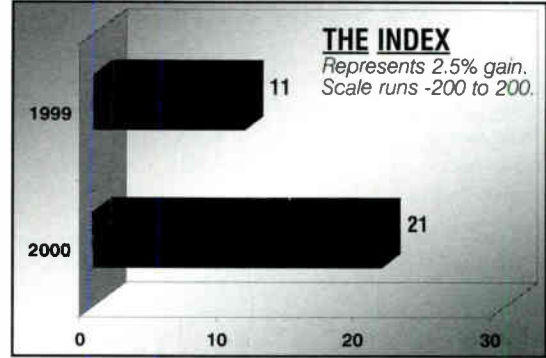
...AND HEAR MUSICGURU SAY,
"THANKS, CRS, FOR GIVING COUNTRY MUSIC
PROFESSIONALS THE OPPORTUNITY TO LEARN AND GROW!"

Industry Confidence Index 2000

Leaders Cautiously Optimistic

by Chuck Aly

(Weighted average of respondents' predictions for the year ahead)



For the second consecutive year, *Music Row* has polled *In Charge*-listed executives for their assessment of the year behind and the year ahead. Having stuck our proverbial toe in the water, we've found it to be lukewarm at best, but slightly more inviting than last year.

A questionnaire was mailed in early December seeking a quantitative report from the 480-plus professionals who populate our *In Charge* edition. From that list, 86 responses were received, compiled and analyzed to produce these three pages of charts and graphs. At its

most basic, the Industry Confidence Index for 2000 rests at 21 (see above), a 2.5 percent increase over last year's 11.

METHODOLOGY

The Industry Confidence questionnaire is built around eight questions. For the year ending, in this case 1999, we ask respondents for their assessment of the industry, their industry segment, their company, and the number of employees at their company. Response options include Significant Decline, Moderate Decline, Holding Fast, Moderate Growth and Significant Growth. We ask the same questions for the year ahead.

Response averages are recorded on page 12. From those questions, we also cull the Industry Future Forecast. Using only those pertaining to 2000, we combine responses from all four questions to determine an overall projection for the year ahead. It is from this data that we ascertain the final Industry Confidence Index number. A weighted average of the responses assigns -2 points for Significant Decline, -1 point for Moderate Decline, no points for Holding Fast, one for Moderate Growth and two for Significant

Growth. The average of those responses produces this year's number, 21, which considering our -200 to +200 scale, is not overwhelmingly positive.

Other data collected includes company size, type and a ranking of issues (below left).

RUT RUNNING

Almost 60 percent of respondents rated 1999 as a year of moderate decline for the Nashville music community. "I've been in this business almost 30 years and have been through several different administrations," says Almo/Irving Senior VP David Conrad. "In each case, the administration begins to wind down,



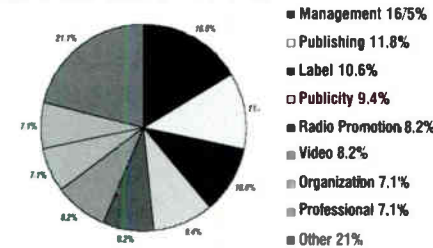
David Conrad

the trend becomes a rut and we run that rut until along comes a Ricky Skaggs, Randy Travis or Garth Brooks. Late 1998 and 1999 are the end of the trend and beginning of the rut. There is a sameness to the records, sounds and signings."

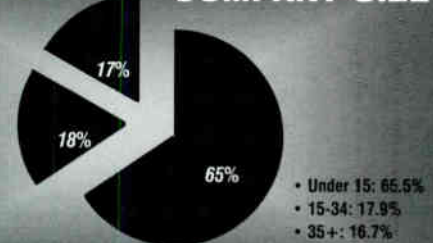
Moderate decline was also the order of

DEMOGRAPHICS

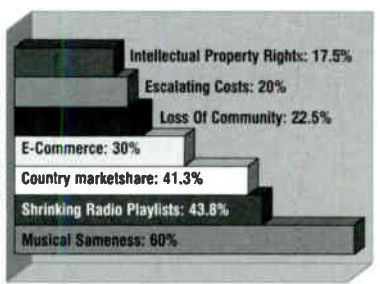
COMPANY TYPE



COMPANY SIZE

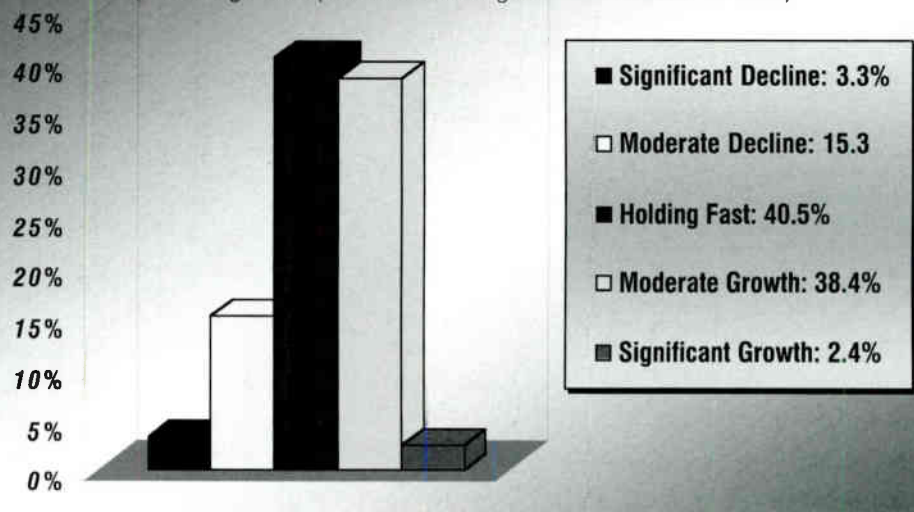


HOT BUTTON ISSUES



INDUSTRY FUTURE FORECAST 2000

(Percentage of respondents selecting indicated forecast for 2000)





Jessie Schmidt

to book non-A-list artists on national TV. And will continue to be."

the day (39.8%) when looking back at the various segments of the industry. Each feels it in a different way, of course. "From a media standpoint," says Schmidt Relations President Jessie Schmidt, "it is difficult



Stuart Dill

growth. Though many were likely unwilling to admit to down years, there are those for whom there is no rut. "I don't have the luxury of looking at the industry as a whole," says Refugee Management President Stuart Dill. "You couldn't tell Jo Dee Messina the country industry is in a downturn." DreamWorks Senior Promotion Executive Scott Borchetta says, "We do have phenomenal stories, but there is too much variance between the top level and the next one down."

And so, overall decline remains. Which begs the question, why? "Radio took more

control of our marketing than ever before," says Capitol Nashville President/CEO Pat



Scott Borchetta

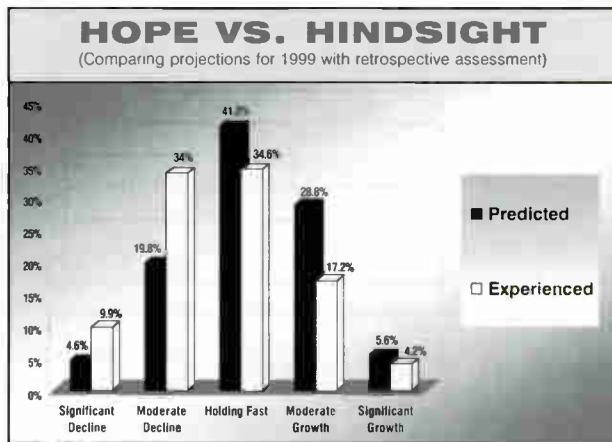
music radio will play." It is no coincidence that the most selected issues in our survey were Musical Sameness and Shrinking Radio Playlists.

"We're in a disco period," Quigley continues. "We didn't know what to do so we did that." Conrad agrees, "We've been through



Pat Quigley

two years of frightening sameness. We've been struggling with radio and what to furnish them." Unlike past downturns when declining interest in country music led to slower sales, lower ratings and decreasing



INDUSTRY CONFIDENCE INDEX RESULTS

(Percentage of repondents selecting indicated answer)

LOOKING BACK

1a. How would you characterize the market performance of the Nashville music community?

Significant Decline: 16.9%
Moderate Decline: 59%
Holding Fast: 19.3%
Moderate Growth: 4.8%
Significant Growth: 0%

1999

LOOKING AHEAD

1b. What do you project for the market performance of the Nashville music community?

Significant Decline: 6%
Moderate Decline: 25.3%
Holding Fast: 31.3%
Moderate Growth: 36.1%
Significant Growth: 0%

2000

2a. How would you characterize the market performance of your segment of the industry?

Significant Decline: 12%
Moderate Decline: 39.8%
Holding Fast: 31.3%
Moderate Growth: 12%
Significant Growth: 4.8%

2b. What do you project for the market performance of your segment of the industry?

Significant Decline: 4.8%
Moderate Decline: 20.2%
Holding Fast: 27.4%
Moderate Growth: 44%
Significant Growth: 3.6%

3a. How would you characterize the market performance of your company?

Significant Decline: 6.1%
Moderate Decline: 19.5%
Holding Fast: 28%
Moderate Growth: 35.4%
Significant Growth: 11%

3b. What do you project for the market performance of your company?

Significant Decline: 1.2%
Moderate Decline: 10.8%
Holding Fast: 28.9%
Moderate Growth: 54.2%
Significant Growth: 4.8%

4a. Has the number of employees at your company changed?

Significant Decline: 4.8%
Moderate Decline: 17.9%
Holding Fast: 59.5%
Moderate Growth: 16.7%
Significant Growth: 1.2%

4b. What changes do you foresee in the number of employees at your company?

Significant Decline: 1.2%
Moderate Decline: 4.8%
Holding Fast: 73.8%
Moderate Growth: 19%
Significant Growth: 1.2%



Bob Moody

station revenue, radio profits are, in many cases, rising despite sliding Arbitron numbers. "In general, radio did better than the labels," says McVay Media VP Bob Moody. "But we're starting to see new technology in the marketplace. This is the year it dawned on me what satellite radio could mean for the industry."

Technology also rears its head in the issues poll. E-commerce is the only new issue in the list, grabbing a 30 percent share of responses. "There are problems in the way we distribute our product," Borchetta argues. "The system is not serving country well in terms of the archaic way we deal with racks. We're a smaller niche competing for space against some much bigger players. There is a revolution coming. We're one year closer to turning the business upside down with digital delivery."

Distribution and marketing aside, many have serious doubts about Nashville's creative direction. "My question is, how far are we going to go with pop?" Quigley says. "If you get a country song on pop radio, I like that. But if you remixed it for pop radio you're a prostitute. You can't try to be all things to all people or you'll be nothing to nobody. There are still a lot of people who want to hear real, small town, country music."

"We're only about three to six minutes away from a turnaround," Borchetta suggests. "What I mean by that is a couple of male superstars." Moody adds, "We may finally see country music fragment along a male/female split. Someone will try a male-targeted approach. The problem you run into is that radio stations are so expensive, it's hard to get one to take a chance." "Radio needs new artists," Dill says. "They may play on the safer side, but they need innovation and creativity, too."

NEXT

While respondents were optimistic about their companies' chances in 2000, not a single person thought the industry as a whole would see significant growth. The atmosphere could be best be described as guarded. "We're in the process of purging and reinventing the industry," Conrad says. "We're at the tail end of that, but I don't think we'll necessarily be roaring back in January. We'll be occupied with reinventing for the next year or two." Dill submits, "We're used to waxing and waning. Downturns evolve into bursts of creativity. I'm more optimist than pessimist. I'm confident that quite a lot of Nashville music is innovative and will make it through the system."

Moody has some predictions for radio. "I foresee some fundamental changes," he says.

"You'll have fewer decision makers, some new faces. And pay for play is not dead, it's just sleeping. Consolidation has gotten so much attention it's not news anymore. But I think 2000 is the year you'll see the focus on accumulating stations shifting to operating them."

Whatever the year holds, Schmidt urges optimism. "The start of 2000 won't be a lot different, but we control our own destiny," she says. "It's important to maintain a positive attitude. If we don't we can't portray

Nashville as a vital music community. In terms of how we're viewed from other fields, it's important that we be united and strong." Borchetta is more direct when asked his prediction, "Big hits for DreamWorks."

Conrad sums, "Hopefully we can agree the worst has passed and now we can rebuild and open up. Unfortunately, one of us can't say that and have it happen. It needs to be a bunch of us. I'm hopeful that's where we're at." **MK**

SPEAKING OUT

Comments from Industry Confidence Index respondents

The "country" genre has lost its identity.

—Jeff Carlton, VP/GM Hamstein Music Publishing

We don't seem to realize that everything here is connected. Opryland, cruise boats, tours, hillbilly tour shops, country music.

—Denny Purcell, President Georgetown Masters

Feel a major lack of leadership with vision. Too many holding on to status quo which is being eroded.

—Cathy Gurley, President Gurley & Co.

As in all things, with few exceptions, reaching the buyer is critical. Flexibility and open-mindedness as to how to accomplish this is the key to survival.

—George Betts, GM Elite Post of Nashville

The sense of community which was a strong factor in the growth of Nashville music has eroded, giving way to a jealous fight for market share and a loss of innovation.

—Dick Frank, Partner Frank & Frank

We are producing product that is bland, not interesting and very AC.

—Tim Riley, President TRA, Inc.

I'm concerned that within 10 years country music may not exist as a viable musical genre. Will it be absorbed into the pop market place? Will it be "festivalized" as bluegrass music has?

—David J. Bennett, VP/GM The Filmworkers Club

Corporate America taking over the music industry concerns me. How can corporate people make creative decisions? Are they truly tied into the buying public or are they only concerned about the bottom line? You see very few unique ideas anymore.

—Sharon Corbitt, Studio Manager Ocean Way Nashville

As before, the current business climate is cyclical. Nashville will continue to grow in all areas and we will rebound through creativity and new technology.

—Randy Himes, Executive Director AFTRA/SAG

Politics, favoritism and playing it safe have held back many a great song.

—Tom Oteri, President OF Music, Inc.

This town has always played follow-the-leader, even if it's over a cliff! The future belongs to the risk-takers who have eyes and ears.

—Sue Patton, President New Clarion Music Group

CMA Town Meeting

Music & The Internet: The Future Is Now

More than 500 registrants attended the November 16 CMA Town Meeting—the first such event in over a decade. The gathering was split into two sessions, “Music & The Internet: The Future Is Now” and “Consolidation: Is Bigger Better For Me.” An edited transcription of opening remarks and the first panel follows.

Jeff Walker (AristoMedia President): Thank you all for coming today. I'm Jeff Walker, Chairman of this Town Meeting task force, and it looks like we've got a big success on our hands. I think you're going to learn a lot from our elite group of panelists. On behalf of the [CMA] Board of Directors, I'd like to thank the CMA staff for their hard work with this event. We'd also like to thank sponsors Bell South, Liquid Audio, E-Music, *Music Row* and American Airlines. I'd like to [now] introduce Wayne Halper, General Manager of DreamWorks. He's going to make some opening remarks and [discuss some of the] issues. As well as being a tireless worker for the CMA, he is also a good friend of the industry.

Wayne Halper: Thank you, Jeff, your check is in the mail. I've been asked to prepare you for the topics and issues to be discussed. In the case of today's two sessions, there are no definitive answers. Change is coming. With that, progress [and] evolution. And with that, some sense of revolution. So last night, while watching my seven-year-old search eBay for a Japanese Pokémon card, I put together a list of questions I'd like for you to keep in mind. Somehow they will be addressed today, either directly or, you know, on the side.

I wonder if during the 1950's, radio stations were reacting to the arrival of television the

same way certain entities with their own vested interests are reacting to the proliferation of the internet? Are we using the web properly to manage our businesses or are we missing opportunities out of fear? With Web sites offering new artists the ability to expose their talent without the need for the so-called traditional record deal, what happens to the current economic model? Will Web sites take the place of traditional A&R functions at a record label? What percentage of traditional retail will be displaced by downloading sales? Are these additional sales that might not be otherwise achieved, and how does SoundScan play into the picture? When is the right time to enter the Web game? Is it okay to sit on the sidelines and wait until the dust settles, or do you need a Web presence now, whatever that presence might be? What is driving the stock market? Will the public continue to believe in business models that continue to lose money and don't project profits for many years to come?

Is the Web the answer to our fears about being controlled by radio? Will the true benefits of the Web only be realized with broad bandwidth? Considering how long it takes to download music on the Web, who wants to do it right now—other than college students and record company employees, of course? Why is everyone so scared to give

their credit card over the Web? Your waiter from lunch has just as much access to your credit card information as [a Web site]. And what about piracy, counterfeiting and unauthorized duplication of copyrighted material? Are we truly capable of monitoring and protecting our assets properly? Will the Web increase or decrease our ability to safely exploit our repertoire? Given consolidation's bottom line need for success, do we have the luxury to experiment on the Web, or does the current sales slump force us to? What about customer satisfaction? Finally, when will an agreement on what is distribution or performance take place?

This is just the tip of the iceberg. Challenge the panelists, ask them questions, but most importantly, challenge yourself to learn about the new medium and the new rules for survival.

Jeff Green: The moderator is co-founder and President/CEO of Artist Direct, a total music entertainment company that develops artists globally by providing a direct connection between artists and consumers through a network system of concert touring, electronic marketing and distribution via the internet. He has an extensive background in the music industry, including concert promotion and A&R, and he is co-creator of Lollapalooza.
Mark Geiger.



Hilary Rosen



Mark Geiger



Phil Ramone



Moderator (Mark Geiger): What I'd like to ask is [that you] forget everything Wayne said, although he brought up a ton of great questions. But this panel should be about erasing fear and realizing opportunity. There are a lot of geeky computer terms: downloading, streaming, MP3. What does it all mean? I would ask everybody to forget computers. This is all about making more money. Every job in this room is safe unless you are doing a crappy job. The internet is allowing us to answer some of the questions that we were already dealing with, pre-internet. We all know that getting on the radio is harder, getting into retail with any real price and positioning is impossible, and it's the same with getting our videos on TV. It is getting harder and harder to market our music.

There [are] four-and-a-half money buckets, or revenue streams. Publishing advances and royalties, merchandising advances and royalties, record advances and royalties, touring, and a half—which I call soundtracks and sponsorship. The world is about to open up three or four new revenue streams, so imagine turning on three new hoses. And the focus isn't what is going to happen to existing revenue streams, because they will probably grow, but how to take advantage of the new ones. And, most importantly, how to develop a relationship with your customer. The internet is all about what they call relationship and direct marketing. That's the great enabling proposition it holds. Everything else is geek stuff. The airlines figured this out a long time ago. AmEx and Mastercard figured it out by giving you gold and platinum cards—different levels of service. The airlines built a pipeline into your house and every month they send you something which tells you how cool you are, how special you are to them, what your benefits are from being special—and by the way, they throw in a whole lot of other incentives for you to be more loyal to them and their partners.

The internet is about that. [It's] a relationship pipeline between the Nashville community—artists, labels, publishers—and the fans we never exactly knew. We've been in this business for a long time, but never knew who bought Vince Gill two records back or went to a Brooks & Dunn concert last year. Yet those are the people who are already your fans and consumers. Country music has always been about servicing fans—more than any other genre. Artists tour incessantly and play places a lot of people won't go. They sign autographs and work the community. The internet is about working the community, only you don't have to do it at a location or an in-store.

Don't worry about computers or whether I'm downloading, streaming or MP3. I'm here to tell you that downloading music may not be a big business for three years, and it may never be a big business. So there is, perhaps, much ado about nothing. The big business is all about knowing who your customers are. That is everything. If I'm ever right about anything, I guarantee it is transitioning our industry from dependence on other media filters we don't influence to directly superserving our fans.

If I bought every record by Garth Brooks and nobody knows who I am, I don't feel very good. It's not a positive experience, and other industries have smoked us in this regard.

Our sister industry could be called the film business. Ten, 20 years ago it was a \$6-8 billion business. You had limited choices on how to consume. Go to the theater or wait for the three networks. You could tape it off TV [so] there was some level of piracy. Then somebody figured out we aren't serving all the consumers—people with children maybe can't go out as easily. Maybe they would see this movie if we delivered it differently. Three new choices were introduced that added \$32 billion to the bottom line. VHS added \$18 billion. All that industry did was think about new choices, different pricing. Nobody made less money, they made more. And the industry [became] bigger and more robust.

Here we are, 20 years later, and you have two choices—go to a record store and buy, or listen to the radio for free. I don't know how many under-13-year-olds have access to a credit card and I don't know how many 35+ year-olds [hang out in] record stores. We are looking at a system that hasn't been set up to service all active music fans. People will spend \$200 to go to a Tom Petty concert, but can't be bothered going to a record store to spend \$13. Something is broken.

When it was fixed in the film industry, more money was added. Forget the technology—you don't care if VHS or Beta won—more money was added by offering consumers more choices. That's where we are headed. Whether

it is choices in buying tickets, collectibles, merchandise or music, it's about price points and serving a community. I'll bet our business goes from \$38 billion to \$100 billion. Everything I am going to speak about today is about serving your client—the virtual meet and greet. Use your media to promote your web sites and get them coming in.

[Editor's note: Panelists are Ed Pierson, Senior VP Legal & Business Affairs, Warner/Chappell Los Angeles; Phil Ramone, producer and founder of N2K Entertainment; Hilary Rosen, CEO, RIAA.]

Moderator: What's the main issue you see today?

Hilary Rosen: Online piracy in the US is clearly under control. Internationally it is still an issue because of inadequate infrastructure and laws—particularly in the Far East and Latin America. There are significant numbers of sites we need to deal with. Our biggest challenge now is finding a legitimate marketplace online, and matching consumer interest with what the artist can provide, and investment strategies.

For the next two years you will not see significant online business in terms of selling downloads or streams. What you will see is a lot of trial, error and marketing efforts to get people connected. It is fair to say that many of today's online users didn't start out looking for music. They are mostly interested in playing with the internet, and the computer experience. What they're looking for is simple, consumer-friendly ways to find their brands (artists) and get info about them in an easy way.

Moderator: Analyst Mark Hardy said the evolution of downloading digital music will take six years. Two years of piracy—and I think we are coming out of that now—two years of promotion and then the age of commerce. So what should people in this room focus on?

The people with an eye for investments salute the people with an ear for music.

Pat McGrew, Financial Advisor

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Rosen: I'm passionate about alternatives to radio. The rapid growth of Webcasting is a huge opportunity in country music and we have to find ways to better maximize that. The second thing which is more insular, but an important issue in Nashville, we have got to get our act together on licensing. We are not there yet and anyone who says we are lying. It is not easy to distinguish between a performance and a download. Are they forever and permanently muddled? In my view, yes. So we have to find ways to make sure that everyone gets paid, but worry less about the institutional way and create efficient global licensing systems. And thirdly, Nashville probably has better fan club lists than in any city in the world. Find ways to get out there immediately with your online consumers. The number one reason consumers don't buy more music is because they have no idea what to buy or don't know a record is out.

Ed Pierson: The old system of music publishing worked fine right up through the '90s based upon sheet music and vaudeville. Now we face this incredible challenge with the internet because the way we do business does not fit the way Web sites need to license material. If you want to license one song for a Web site, you need a handful of licenses.

We have these traditional forms of licensing—sync, print, performance, mechanical—so which right is it? We are going to have to transcend that. Publishers and songwriters are going to have to get tough with both themselves and their collecting organizations. A unique aspect of music publishing that creates some of this problem is that we haven't controlled our own destiny. We relied upon performing rights organizations and others such as Harry Fox to collect royalties. It worked in a traditional frame business—selling records and licensing radio stations—but it doesn't work on the internet. Enormous compromises need to occur so we can license for the internet. If we don't, we as publishers are going to lose. Thousands of Web sites would like to license music but don't feel

there is a means to do so. We are losing now. **Rosen:** We shouldn't be thinking about taking less money. What we should think about is finding legitimate payments. People will be willing to pay fairly, but not awkwardly.

“...the existing record business is going to be around in traditional form a lot longer than the optimists think.”

Moderator: A film rental is \$2.99. For four people it's about 80¢ a person. Yet if you go to the theater it becomes \$7.50 times four—a different equation. If you subscribe to HBO the price per unit is even less. Our industry tends to be very hung up on price per unit, but as we see in film, making units available at different price points grew the market. There are obviously big issues, but what we are starting to look at is what the customer wants. Some of the industry [wants] to force our pricing, technology and delivery systems on consumers. The interesting thing about the internet is consumers are saying that won't work. In fact, we've seen the industry moving in one direction and consumers all heading towards MP3. So how do we create a market that brings enough value to the consumer that they will sign up? I'm going to turn to Phil, who actually creates musical value and is involved in a startup called MyPlay that is another way for people to enjoy their music.

Phil Ramone: We all learned a lot in a short period of time. Six months in the internet business is equal to about two years of real life. We knew the limitations of radio were going to narrow. The other side was to produce music for new artists. And what about the valued veteran artists and their future? While we were at N2K, David Bowie put out a free downloadable single, 400,000 downloaded it and we knew every customer! None of us ever knew our customers before. The internet, in its simplest form is a bigger palate, a larger broadcast studio. The music industry has grown unbelievably in the last few years and in some ways has hit a roadblock because of fear. But this is not about losing your job, it's about expanding the very venue we believe in.

Moderator: Recent statistics say that 51 percent of record purchases happen through word of mouth. Community on the internet gives us a chance to reach people and perhaps attack that 51 percent.

Ramone: In the sense of how we communicate between ourselves, a lot of people would like to know what to listen to. We will move over towards membership that allows you to belong to something. It's hard to walk into a store with 20,000 selections and decide what to get.

Rosen: MyPlay is a free consumer service that gives you space to store downloaded music, but you can't trade it. But you can opt to let people see what you have in your locker—and allow a record company to send you something similar.

Moderator: When will the first artist break off the internet and have a hit?

Pierson: It's real. Perhaps in the next two to three years. I'm concerned what our participation as publishers will be in that. You said, “don't have fear,” but if you are a songwriter or publisher we do need to have some fear because there has already been an erosion of our rights. When we talk about launching something, the word “promotion” is often heard and that means no fee. At what point in time does promotion become a sale?

Moderator: I think it will happen in the next six months, but it won't be downloaded it will just start there, then sell more records using the payment system in place. Ed, how fast will internet buyers and adoption grow?

Pierson: It will be slower than anticipated. We have to operate on the basis that the existing record business is going to be around in traditional form a lot longer than the optimists think. Penetration will be slower because most buyers are not online and those who are don't have the patience to download.

Moderator: Phil, first web hit—when?

Ramone: Within six months. When they call it a mega hit it will probably be 50,000 in sales of one artist, which will be huge.

Moderator: When do you think a decent penetration of broadband is coming?

Ramone: From working closely with companies like IBM and Lucent, it's here—just a question of delivery. Your cable system is definitely offering high speed modems and those with a DSS dish will be thrilled. The telephone company is going crazy to become a real party member.

Moderator: What are three things you think the Nashville community can do in the next 12 months to either have a heightened level of awareness or involvement with the changes taking place?

Ramone: The Web is a place to inform. It's a



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place to stream both the video and the music. There's no reason the kind of music, singing and attitude that comes from Nashville isn't worthy of the world hearing it. And I'm not trying to blow smoke; I really mean that. You have the opportunity to encourage Web business. It's no different than when you first started TNN—that kind of introduction to people. The music marketed itself. The borders break down.

Moderator: The country music community, and perhaps the Christian music community, aren't finding enough avenues to promote their music. When faced with lack of choice on how to market your music you tend to find alternatives. At the end of the day we're really talking about a mind set. Ed, give me three perspectives the music community here should make part of their composition on a day to day basis.

Pierson: Begin that dialogue between societies, music publishers, Harry Fox and record labels to try to get past all the barriers to licensing a song for internet use. That's hard to do in New York, it's hard to do in London.

Moderator: That's one.

Pierson: Songwriters and publishers need to begin a dialogue about unauthorized use of music. The RIAA has done a terrific job of protecting [label] rights. Songwriters and publishers have not been protected the way they need to be. Part of that is because of the way the music publishing business has been set up. It's a low overhead business and we've all enjoyed the fruit of that. Songwriter and publishers are going to have to get used to the fact that it's more expensive with regards to the internet.

Moderator: Hilary, since you probably do the most research of all of us, what do you think the internet adoption rate is, and how do you see it affecting Nashville?

Rosen: Content on the internet is growing by 1 million pages a day. The other interesting stat is that geometric U.S. online growth is about 25 percent for the past four years. Internationally, the fastest-growing segment of the internet is non-English speaking. Thinking about this as a global community is incredibly important.

Two years ago, stats said if the internet never came, our business would be growing about five or six percent a year. Within three years we're going to see that be about 20 percent once online commerce really starts. Don't forget that includes some alternative revenue streams that Mark talked about earlier. For artists and record companies, those are streams of performances that we never had rights to before—things like webcasts. For writers and publishers, clearly, online use of music is going to provide a whole new revenue stream. When you look at the total, we are looking at some significant growth.

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Moderator: When is the first big hit? **Broadband?**

Rosen: Any day. The numbers call for it. You know, 27,000 physical albums are released in the U.S. every year. Does that number surprise people? It's huge. Probably 7,000 of those are distributed by the majors. When you think about the number of songs that get posted online you are looking at about 10,000 per week. These are sort of the nightclubs of the '90s. Somebody is going to be found this way—it's a matter of days, not years. In terms of broadband, if the cable and telephone companies don't offer widespread broadband

use, Congress and the FCC are looking at ways to force the issue.

Moderator: We need to get to know our customer—that is where all the new revenue streams come from, aside from soundtracks and licensing issues that may fall more into rights management and publishing. Artists, managers, labels and others are looking at new streams that could eclipse record sales. We as an industry spend a lot on marketing; we may be able to get a larger audience if we find out who our audience is. We will be able to attract a lot of ad revenues from the

Fortune 500. They are looking for ways to get to our audience in more effective manners, and they will pay a premium. A couple of statistics: Right now, when you buy a [mailing] list people have typically paid \$85 a thousand. Good, clean e-mail lists are \$300 and expected to move up to \$500 per thousand. That is by far the highest cpm ever in our world. The TV networks said there aren't enough people to watch each individual cable channel to make it work. What they didn't factor is the [networks] got one set of advertising rates because they were delivering a mass audience. Cable more finely defined who the folks were. With that targeting came a 300 percent rise in the dollars you could charge for advertising.

If anybody on this panel had a Garth Brooks, Brooks & Dunn or Clint Black database of 250,000 or 500,000 names, can you imagine if you took that down to Music Row and asked how much someone would pay to be able to get to those consumers with a song from a new artist? If you didn't have to worry about radio and making a video, I'll bet from a marketing perspective that list would bring a lot of money.

Rosen: It does beg the issue, Mark, of who receives the advertising revenue?

Moderator: Not even an issue.

Rosen: Huge issue. Everybody thinks the reason I'm not wild about MP3.com as a company is because they are an MP3 site, but that's not the reason at all. They're a billion-dollar company making a huge amount of money in advertising but is not doing anything to help the artists on their site. Advertising by itself doesn't necessarily benefit the creator.

Moderator: The bottom line is, you're right. They may fail based on not creating value in themselves. Arguing over new money is a good thing, and at the end of the day if there was a message we could send it is know your customers and it's all about new money. If you're only getting 10, 20 or 80 percent of it, that's more than anybody had before.

Things I would do? I'd get on the internet and start with searching for your interests. Get on and understand how deep and vast this thing is. Number two, how can you make your audience feel more special? If you're a concert promoter maybe you think about offering an umbrella if it's raining. If you're a record label maybe it's an insert in the record or a bonus track. How can you add more value? Can you treat them like American Express Platinum treats you? Focus on content and programming, not technology. The single biggest thing that will hold back anybody trying to figure out what's feasible is trying to keep up with technology. It's a nightmare. There are people who have to do it, leave it to those folks. Focus on feeding the people coming to your site to check on their favorite artist. ■

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E-mail Version Looks, Prints Like Fax

by David M. Ross

If, as a kid, you enjoyed watching the magician stick an empty fist into a tall black hat and miraculously emerge with a cute rabbit or a couple of doves in hand, then you're going to love using the Acrobat Reader™ program to read and archive your weekly @MusicRow and/or RowFax issues via e-mail. Acrobat™ is platform independent, which means that it works on both PC and Macintosh systems. Even better—it's free!

Music Row Publications began using Adobe Acrobat™ several years ago to give its RowFax subscribers a way to translate their weekly e-mails into the same graphical format as a fax or printed page. (The Internal Revenue Service also uses the Acrobat software for download of its various forms.)

Here's what it's really all about: In addition to 14 issues per year of the magazine, all current Music Row subscribers began receiving the new weekly @MusicRow on January 7 via first class mail, fax or e-mail. The mail takes days to arrive and not everyone has a dedicated, 24-hour-a-day fax machine. That leaves e-mail as the preferred format—it's fast, easy and gets delivered immediately. However, e-mails arrive in a plain text format. Therefore, you miss the graphics and column formatting which make @MusicRow more fun to read. The Acrobat file restores the "look and feel" right onto your computer screen—and allows you to print it, too.

If you are getting @MusicRow via e-mail or would like to switch to e-mail—even if you are not a confident computer geek—read on. This is easy, and as the saying goes...once you try it you'll be hooked.

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If your computer is less than 18 months old it very likely arrived with the Acrobat program (version 3 or 4) installed. Do a search using the word <Acrobat> and if the program is already on your machine, go directly to the next section of this article. If not, you need to download the program from the web, so read on.

Navigate your browser to <<http://www.adobe.com/products/acrobat/readstep.html>> and you will find yourself at the easy three-step Adobe Acrobat download page. Follow the site instructions and then click on the red <download> button.

The download file size varies depending upon your platform choice, but is approximately 5 MB. If you enjoy a speedy broadband connection downloading takes only minutes. For those with slower dialup modems, it could take over an hour, so you might want to download Acrobat later at night while you're doing something else. Downloading big files can be a nuisance, but this one-time-only imposition will be worth it. Once the download is complete, open the file and follow the automatic installation procedure.

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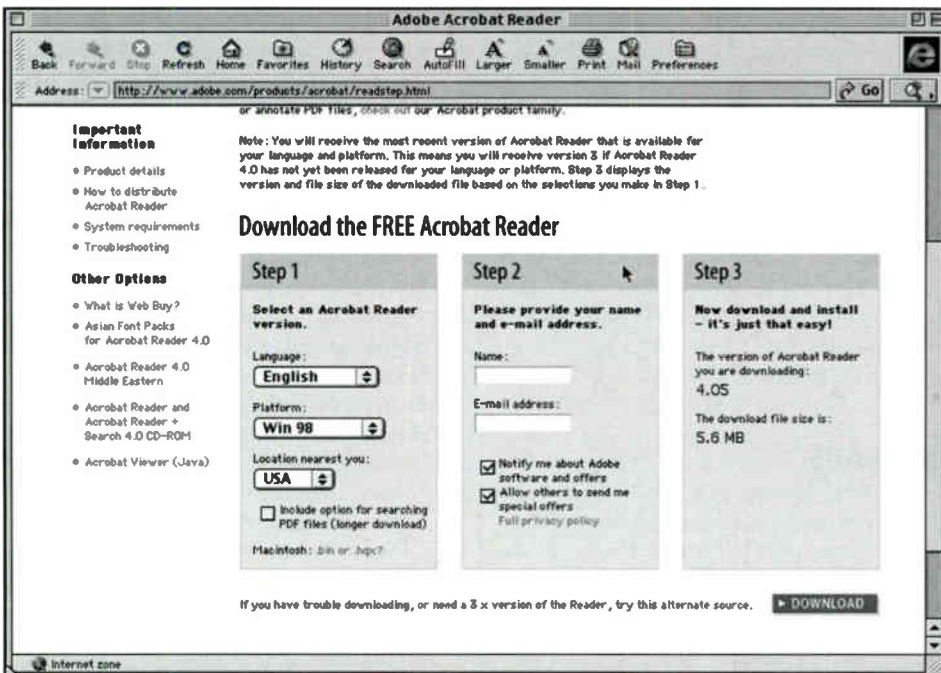
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The @MusicRow Acrobat file (it has a .pdf extension) is now on your machine, so you don't need to be online to read it. Simply open the .pdf file, or the Acrobat program first and then the file. You will see the entire five-page document complete with graphics, logos and formatting. You can even print the formatted document!

An added benefit is that you can store the compact weekly files in a folder on your machine thereby creating your own digital archive.

Closing Thoughts

This @MusicRow/Acrobat primer is intended to introduce you to the benefits of using a cool technology, and we hope you were successful in getting it to work on your machine. Downloading Acrobat™ from the Adobe site is relatively easy, and they offer tech support if you run into problems. Music Row, however, is not equipped to offer tech support. Acrobat™ is currently being used by hundreds of Music Row's RowFax subscribers and we trust you will find the experience user-friendly. If you are receiving @MusicRow via snail mail or fax and would like to switch to e-mail, send your name, street address and e-mail address to s.ross@musicrow.com—begin getting @MusicRow via the fast track. **MR**





SPECIAL INVESTIGATIVE REPORT:

ROCKING THE BOAT

Band's Internet Success Making Waves

by Chuck Aly

How a virtually unknown North Carolina band is changing the rules for internet music. And why the labels are looking over their shoulders.

Little in life prepares a turn-of-the-millennium music journalist for sitting in a grease-soaked diner in North Carolina, discussing the fine points of Molly Hatchet and Blackfoot with a 19-year old. "We played a few gigs—high school stuff," says Southern Cross lead singer, guitarist and principal songwriter Wade Freeman, "but mostly we were practicing a lot and pretending to be a band—posing. What really made us whole was Jingle's axe. He showed up for the audition and ripped into [Lynyrd Skynyrd's] 'I Know A Little.' I think the rest of us [soiled] ourselves right then and there."

Freeman's easy grin fails to break the surreal spell cast by this most incongruous of circumstances. Before me sits a young band—the oldest at 21—with a serious, issue-driven bent that, like Skynyrd before them, isn't quite reflected in the euphoric mania of their fans. Despite his attempts to divert my focus, Freeman can't hide the fact that in him, southern

rock has found an artist with a poetic and melodic flair not heard since Ronnie Van Zant's voice was silenced in a Mississippi swamp. And I can't shake the thought that I'm scarfing cornbread and beans with a band that has already pocketed its first million, without the benefit of any significant radio airplay, media exposure or touring. Perhaps, I muse, the soul of rock-n-roll is, through this band, being bought back from the corporate interests that co-opted it decades ago.

"Dude!" My reverie is broken by Vernon Little, the drummer. "You want the cobbler?"

THE FUGUE

My first exposure to Southern Cross came in an e-mail from my sister, a sophomore at East Carolina University. "Check out this song," she wrote, "and pass it along." An MP3 file, "The Fugue," and a text file, "Southern Cross," were attached—I opened the song first. Building from an organ arpeggio, "The Fugue" is a tremendous,



AMERICAN BAND—Southern Cross L-R: Dan Ruff, keys & bgvs; Bill Greene, bass & bgvs; Vernon Little, drums; Jingle (John Engle), guitar & bgvs; Wade Freeman, vocals & guitar.

layered crescendo of screaming dual guitar leads and booming rhythm section strut. The lyrics attack our culture's untethered consumerism, asking when we will emerge from our "fugue" of misplaced priorities. "While you're paying off that SUV," Freeman gleefully sings, "who's gonna raise my brother and me?"

Not just good, the song—even at five and-a-half minutes—is the stuff of which RIAA Diamond awards are made. With the tune playing for the second time, I opened the text file to discover a modest amount of information about the Mebane, NC band. "Copy the file and send this song to everyone you think might like it," it read. "If you like what you hear, visit our web site." I went immediately.

The Southern Cross web site is a technological lightweight: three pages in total with a marked absence of bells and whistles. What it lacks in Java applets, however, it more than makes up for in functionality. The homepage is dominated by a button for downloading "The

Fugue." It also features a few pictures and bio information. Clicking through leads to the heart of the site, a small store that offers only one product—their album. *Plastic Spoons* can be ordered two ways. For \$6.99 you can download the 11-song album in MP3 format, along with an album booklet file with liner notes that can be printed (in color), stapled and cut to fit a jewel box. Or, for \$12.99 (postage included), you can mail order the complete disc.

When it came three weeks later, I was struck by the quality of the music, if not the package. Still, there was an authentic character—a decidedly unpolished aspect that seemed to focus on the music. Digging deep in the CD booklet, I found a management contact, Mark Mosher at Field Spring Management, and called.

"Believe it or not," Mosher said, "you're the first national press person to call me." Though not particularly surprised that an unsigned, unknown band hadn't drawn media attention, I began to see his point when he told me they have grossed more than \$2 million through internet sales. Incredulous, I arranged to see for myself.

During an extended interview on December 11 at a small warehouse space leased by Southern Cross in Henderson, NC, Mosher and the band provided unrestricted access to their books, bank receipts and other materials detailing a phenomenal success story. In the nine months since the release of *Plastic Spoons*, the album has sold an amazing 217,600 copies—most of those coming in the last three months. More than 67,000 of those, or 31 percent, were downloads sold for \$6.99. With the remaining 150,000 sold for \$12.99, Southern Cross has grossed \$2,421,000 and change. Expenses including \$400,000 for manufacturing, \$500,000 for fulfillment and overhead and a mere \$32,000 in recording costs still leave more than a cool million in pure profit.

"It isn't quite that high, really," Mosher says. "They bought a house out in the sticks and a bunch of recording equipment to go with it." Plus, the band has been known to pass out four-figure bonus checks once a month to those in the extended organization. And then there are taxes.

LICKING STAMPS

The brother-in-law of bassist Bill Greene, Mosher had his own brush with stardom as the lead singer for a power trio briefly signed to Capitol in the late '80s. The experience left a bitter taste in his mouth. "Hey, I understand the need for labels," he says philosophically. "But rock'n'roll isn't anything close to what it started out as. Companies used to spring up around some happening band or singer. Now, guys with one eye on their stock portfolio are cherry-picking people to fill a roster slot for some huge corporation."

Disenchanted with the business of music, Mosher settled down in North Carolina and

opened a small carpet cleaning business in an industrial park warehouse. The machines and cleaning supplies have all been sold, however, replaced by stacks of envelopes, CDs, tape rolls and bubble wrap. A small army of the band's parents, siblings, friends and associates pitches in to process, package and mail the ever-increasing volume of orders.

"When Billy came to me, I was pretty skeptical," Mosher admits. "I mean, they're teenagers. Somehow, though, they've found a way to communicate a lot of the things facing their generation. They really say something... plus, they rock." Won over by the music, Mosher agreed to help the young band, even pitching some old label contacts. But no takers.

"Too different. How do you market a bunch of kids who grew up listening to an extinct genre?" Play the music, perhaps? "I said the same thing," Mosher laughs. "But it's much too risky a strategy for a record company." Somehow, Southern Cross stumbled across a different approach. "Dan [Ruff, keyboards] is a total computer geek," Mosher explains. "He'd been sending MP3 files of 'The Fugue' out to friends of his and, all of a sudden, he's getting 60, 70, 80 e-mails a week from people wanting more. Without even really trying."

Quickly registering and building a site, Southern Cross had their album available for download by April. It took months to catch up on mail orders, however, as they continually underestimated demand. Aside from targeting student e-mail addresses at a few local universities, the marketing took care of itself.

And Mosher is completely unfazed by the fact that he is encouraging rampant copying of Southern Cross's best song. "I disagree that it's the best song," he says, "but it's probably the best single. There are probably some people who only want the single, but you've seen our numbers. Would you be worried?"

Okay, but what's to stop people from copying the whole album for friends? "Nothing, but who cares?" Mosher asks. "Would you rather get an album you're dying to hear from your buddy who's got a slow connection and you have to call and bug to send it, or go to [our] site and pay seven bucks? People who are into the download thing aren't pirating major label albums because they're all crooks, they just can't get the stuff legitimately." And publishing for all those performances on dorm room computers? "We own the publishing," Mosher says, "but this is a new frontier. If we were all hung up on writing royalties this thing never would have flown in the first place. What you have here is the great democratization

that people have talked about for years. The internet has allowed us to become self-contained, and Southern Cross will be able to decide its own fate, without any pressure from a widget company to turn out another trinket."

Don't think the record labels haven't noticed, though. To date, artists who have gone the internet route have been aging superstars past their prime, or independents with limited commercial appeal. Southern Cross, teeming with youthful energy and enormous potential, has received offers that include high seven-figure signing bonuses, but has resisted. "And I'm telling every manager I meet to rethink their focus on getting a deal first," Mosher says. "If the music is there, and the target fan base is young and computer literate, this can work."

"A lot of people here are very concerned," says a Los Angeles-based A&R VP who wished to speak anonymously. "Obviously several labels, us included, have been working to sign them, and are frustrated by the lack of movement. More importantly, there are those who are worried about what this means for the big picture. It will not be well received when this story breaks in the trades and other media."

For their part, the members of Southern Cross do not view themselves as the catalyst for a coming internet music revolution. "We were lucky enough to stumble into a good situation," Freeman says. "What we've done is buy ourselves time to figure a few things out." Absent the pressure of a major label deal, the band is content to ponder their options, which include a possible opening slot on next summer's Chris Gaines tour. "It's all unbelievable," Mosher says, "almost as if it's not really happening."

PURE FICTION

That's because it isn't. Southern Cross is purely an editorial figment of this writer's imagination. But it may be a telling illustration of how close we could be to complete upheaval in the recording industry. What would happen if the next Alannis released "You Oughta Know" through the internet today?

There will be a flash-point. Some artist will break big through the internet, or an over-capitalized dot-com will buy a major and put the whole catalog on the internet. Instead of e-commerce being an appendage of major music companies, it will be major music companies. It could happen this month, or it could happen in three years. Who knows? Just don't be surprised by it. ■



Wrong-headed Thinking and Second-rate Kissy-face Pop



This is the first of *Music Row's* monthly editions. As you've probably already read in the last issue of 1999, we're starting the new millennium with a new schedule, but the same attitude you've grown to know and love (I hope).

From here on out, you'll see my pushy opinions between the covers of a mag only once every four weeks. However, I am going to be in your faces each and every single week via @MusicRow, our new multi-page electronic companion publication. Fear not, @MusicRow will be delivered to all current subscribers. New ones, too, for that matter.

The weekly will be the place to read instant reviews of the products of Nashville's hottest stars. In the monthly, you'll get some of that as well as coverage of emerging acts and the multiple genres that make Music City so vital and interesting.

Please continue to keep that product coming, the more diverse the better.

Well, we're entering the '000's." What does the first decade of the new century hold for Nashville? Until someone finds a way to make innovation a permanent part of the radio and record label landscape in country music, I don't hold out much hope for improvement there. Without continuing injections of fresh sounds there is simply no way we can move forward, artistically or commercially.

The notion that you can "manufacture" viable artists is utterly wrong-headed. The acts that detonated the explosion of popularity for country music in the '90s were almost all writer/artists with distinctive points of view. Clint, Alan, Vince, Garth, Chapin, Tritt, Brooks & Dunn and even Shania were individuals who put a special stamp on everything they did. You cannot manufacture that. Even those who weren't songwriters were at least audio personalities that you could recognize instantly—The Chicks, McGraw, Yearwood, Jo Dee, Martina and the like. You can't manufacture that, either.

The notion that someone with a hit record is a "star" is wrong-headed, too. There are dozens of country acts who are huge radio favorites who are not now, nor will they ever be, "stars." Johnny Cash is a star. Dolly Parton is a star. Waylon Jennings is a star. And stars are what we should be in the business of creating. Whether or not their records are embraced by radio, people like Marty Stuart, Trace Adkins, Faith Hill, Billy Ray Cyrus, K.T. Oslin, Dwight Yoakam, Trini Triggs and Montgomery Gentry have the kind of personality, magnetism and charisma that bring mass attention to the entire country genre. That's what stars are.

Finally, this continued insulting of the intelligence of the country consumer has got to stop. There is no way we are ever going to attract

mainstream music fans by releasing stupid songs and second-rate pop productions. There is an entire group of artists who are presently disenfranchised by the "country" radio format. These people—Lyle Lovett, Steve Earle, Bruce Robison, Jim Lauderdale, The Mavericks, BR5-49, Alison Krauss, Junior Brown, Hank Williams III, Kevin Welch, Buddy Miller and their ilk—have the talent, power and ability to give the entire genre artistic respectability, as well as to inspire consumers. Instead, we "manufacture" music for radio that we wouldn't even play in our own homes. And we do it by committee, rather than with vision.

Given the above analysis of country, I look for the pop/rock, Christian, folk and alternative music communities in Nashville to provide us with many of our commercial breakthroughs in the early 2000's. But hope springs eternal. Every time a Brad Paisley appears, my heart sings.

In today's column you'll find very good news in the New Artist department. I am dividing the DISCOVERY Award between Sonya Isaacs (country), Fair Verona (rock) and Bebo Norman (Christian). All of them are just the ticket to see us into a new decade.

The Disc of the Day belongs to jazzman Denny Jiosa, whom I have long admired. And the year 2000's first Label of the Day award goes to Rounder/Philo, who greets the new century with a lineup that can't be beat—troubadour Slaid Cleaves, bluegrass diva Rhonda Vincent and fiddler Dirk Powell.

COUNTRY

MARTY RAYBON "Cracker Jack Diamond"

Writer: Ronny Scaife/Neil Thrasher; Producer: Rick Hall; Publisher: Universal/Songs of PolyGram/Virgin Timber/Rio Bravo, BMI; Tri Chord CDX (www.martyraybon.com)

One of country's finest voices, shining anew on a sweet little romance story song. I'm still all ears.

SONYA ISAACS "I've Forgotten How You Feel"

Writer: Sonya Isaacs/Keith Sewell; Producer: Vince Gill; Publisher: Miss Surrett/Coburn/Keith Sewell, BMI; Lyric Street CDX.

This is everything contemporary country music ought to be. She's a killer hillbilly wailer. The fiddle, mandolin and steel ride on top of a whiplash backbeat. It's by-gawd country and it totally kicks ass better than any of the kissy-face pop crap that Music Row's been trying to palm off on us lately.

JENNIFER DAY "The Fun of Your Love"

Writer: Annie Roboff/Beth Nielsen Chapman/Jennifer Day; Producer: Robert Byrne; Publisher: Almo/Anwa/BNC Songs/Lillaly, ASCAP; BNA CDX.

Speaking of kissy-face pop...Isn't it about time to give up on the idea that 13-year-old consumers are going to save this format? It ain't gonna happen, folks. They're simply not gonna come over here.

ANDY GRIGGS "She's More"

Writer: Liz Hengber/Rob Crosby; Producer: David Malloy/J. Gary Smith; Publisher: Starstruck Writers/Glen Nikki/Warner-Tamerlane/Crutchfield, ASCAP/BMI; RCA CDX.

He sings it splendidly, but the song leaves me cold.

JESSICA ANDREWS "Unbreakable Heart"

Writer: Benmont Tench; Producer: Byron Gallimore; Publisher: Blue Gator/Maverick/WB Music, ASCAP; DreamWorks CDX.

Her vocal is poignant and affecting. The song's a dandy. And the pristine production is completely to swoon for.

MIKE YOUNGER "If By Chance We Meet Again"

Writer: Mike Younger; Producer: Rodney Crowell; Publisher: Markea, BMI; Beyond

I get a vibe of an old soul in a young guy's body. It starts out slow but builds to something special: He has raspy conviction and a certain urgent charm that are well worth your ears.

JOHANNE HUSSEY "Hard to Forget"

Writer: Robin Earl/Gary Earl; Producer: Mike Bush/Johanne Hussey; Publisher: none listed; Brazen (track) (615-882-8380)

The song's got more hooks than a tuna boat and she's got a spunky vocal attitude. The production, however, is strictly from Amateurlville.

POP/ROCK

FAIR VERONA "Peak"

Writer: none listed; Producer: Chris Parker/Steve Keller; Publisher: none listed; i.v. Records EP 2001 (track)

Rock on, girls. This is kinda snarky, kinda feisty, kinda snarly and a whole lotta fun. Thrashy and sassy. Love the manic energy and the overall kick-out-the-jams vibe. Nashville teen spirit with loads of attitude. Les femmes qui rock, indeed.

JAZZ

DENNY JIOSA "Among Friends"

Writer: Denny Jiosa; Producer: Denny Jiosa/Michael Moryc; Publisher: That's That, SESAC; 1201 Music 5013 (track) (www.dennyjiosa.com) (256-892-0611)

Nashville jazz guitarist Jiosa is back with a simply dreamy disc. As kicked-back as this title tune implies, it sways you on zephyrs of melody. On funkier sides, the master of the strings is

joined by such stellar names as drummer Chester Thompson (Genesis/Weather Report) and sax man Kirk Whalum (Whitney Houston), both of whom are also part of Music City's jazz community.

CHRISTIAN

BEBO NORMAN "Walk Down This Mountain"

Writer: none listed; Producer: Ed Cash/Bebo Norman; Publisher: none listed; Watershed 0519 (track) (www.bebonorman.com)

He has an earnest tenor in the manner of Dan Fogelberg, which is fine with me. The spare, percussion-and-Dobro production is also quite ear-catching. The gentle melody and just-right backup harmonies complete the splendid audio package. Bebo is touring with Caedmon's Call, whom I'm also rather fond of, as I recall.

CHONDA PIERCE "God Loves You"

Writer: Tanya Leah/Stephanie Lewis; Producer: Mark Bright; Publisher: Songs of Note/Ensign/Zomba/Shalante, BMI/ASCAP; Myrrh (track)

Cutesy-poo soprano wimp with a dreary piano accompanist and a lyric to match.

AMERICANA

GUY CLARK "Fort Worth Blues"

Writer: Steve Earle; Producer: Guy Clark/Verlon Thompson/Darrell Scott/Chris Latham; Publisher: WB Music/South Nashville, ASCAP; Sugar Hill 1063 (track)

Wistful and folkie, somewhat like the dying end of a midnight cigarette. Gentle harmony by Emmylou Harris and rippling strings by Darrell Scott and Verlon Thompson.

ROYAL WADE KIMES "Saddle On the Wall"

Writer: R.W. Kimes/Shaye Smith/Tyle Perin; Producer: Royal Wade Kimes/Karen Angela Moore/Mike Noble; Publisher: Blue Whistler/Mama's Blessing/One More Hit, no performance rights listed; Wonderment Records 1001 (track) (1-888-580-8472) (www.royalwadekimes.com)

One of Nashville's best story tellers is back with a CD of cowboy/western songs called *Hangin' Around the Moon*. This track calls to mind the wide open spaces as effectively as any classic cowboy movie ever did.

SLAID CLEAVES "Broke Down"

Writer: Slaid Cleaves/Rod Picott; Producer: Gurf Morlix; Publisher: Happy Valley/Welding Rod, BMI; Philo 1225 (track) (www.slaid.com)

If I remember correctly, I was quite fond of Slaid's debut disc. This one's even better. He's solidly in that troubadour tradition, a hearty voice with a story to tell, in this case a string of cracked-and-shattered souls who endure nonetheless. And, yes, despite the folkie tone, there's something unmistakably "country" in this boy. Listen and believe.

BLUEGRASS

ALDRIDGE, BENNETT, GAUDREAU**"This Old Town"**

Writer: Brad Apple; Producer: none listed; Publisher: Brad Apple, BMI; Rebel 1758 (track) (www.rebelrecords.com)

The instrumentation shimmers all over the place. The lyric is a marvelous evocation of loss and regret. The vocals, however, are curiously dispassionate.

RHONDA VINCENT "When I Close My Eyes"

Writer: Carol Annette Musick/Mark Alan Springer; Producer: Rhonda Vincent/Ronny Light; Publisher: Murrah/Tom Collins, BMI; Rounder 0460 (track)

The word "angelic" comes to mind. Rhonda's soul-piercing version of this lyric almost erases Kenny Chesney's 1997 hit with the tune. I remain head-over-heels in love with this performer. The aptly titled *Back Home Again* is Rhonda's welcome return to pure bluegrass.

HONORABLE MENTION

Terry Mike Jeffrey/Anything Is Possible/Shadow Nathan Tinkham/The Loom/Rhythm Range Five O'Clock People/Lunar/Pamplin Chuck Prophet/Rise/Hightone Dirk Powell/Ride With the Devil/Rounder Select

ROW TIME

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In a relatively short time, Whitney Williams has amassed a wealth of experience in entertainment. It's what she always wanted to pursue, though her degree from the University of South Carolina—"the other USC," she laughs—in International Studies, Media and Writing, may indicate otherwise.

"Film is my first passion," she says, "but the University didn't have a film department." So, Williams made the appropriate move: go to where the movies are. "Two days after graduation, I flew out to Los Angeles," she recalls. "It was the typical story—didn't know anyone, didn't have a job waiting for me. A week later, I went on a cross-country adventure,

kind of like *Thelma and Louise*, only without the murders."

Unlike that film's heroines, Williams survived and flourished, landing a position with E! Entertainment Television, coordinating film and music acquisitions. "I think they were impressed with my cover letter," Williams says in a tongue-in-cheek tone. "I told them I wasn't asking for a million dollars." Before moving to Nashville in 1994, Williams worked with Columbia Pictures executive Dawn Steel, the first female president of a film studio.

After three years in southern California, Williams felt the call of the South and decided that Nashville offered what she needed—movies and music. She joined

the staff of Patrick Joseph Music, working the company catalog and securing cuts by Faith Hill, Reba McEntire, Ty Herndon and several other artists. But she was also able to use her background to launch the firm's television and film department. "It was pretty hard to get that going," she says. "The West Coast can be a little narrow-minded as to what Nashville can offer, although that is certainly changing now. We were able to land some songs for *Twister*, *Hope Floats* and some other movies, along with *ER* and *Touched By An Angel*, which was really exciting."

Now, she wears that additional hat full-time for Universal Music, where she's been since April of 1999. "Basically, I do some song plugging for our writers and coordinate our film and TV efforts," she says. Currently, the company, formed by the unification of MCA and PolyGram publishing houses, boasts around 35 writers including Gary Burr, Bob McDill, Matraca Berg and Kostas, plus artist-writers such as Shania Twain. She is essentially her own department, in

what Williams describes as the "true democracy" of Universal.

"Everyone on the creative team is equal," Williams says. "There are no lines drawn and no agendas, which helps everyone get along. This is a fairly large publisher, so I feel like I'm still learning. It all seems so new, but we're all having fun."

Williams feels Nashville will become a greater source for future film and television music. "It's happening already, with a lot of the films that have already come out," she says. "People in New York and LA are starting to notice that the roots of real songwriting are here. I think you'll see soundtracks becoming a big part of a publisher's strategy and focus."

The coast might claim more glamor, but Williams says Nashville is a more comfortable fit all around. "It was kind of scary coming here," she concedes, "but I knew this is where I wanted to be. I'm glad I made the change, because there is so much opportunity here. I feel like there are no barriers—we'll try anything."

—Bob Paxman



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Back To Basics

1999 brought many changes in the record business—some of them fundamental. R&R moved from projected spins to a monitored methodology provided by MediaBase (Gavin also enlisted MediaBase services), and the consolidation begun in 1997 escalated to a buying frenzy that left us with only a few megagroups owning most of the major- and large-market radio signals.

On the local level, CBS/TNN canned most of its country music variety shows and news programming—a move that left publicists and label marketers holding their heads in their hands. Branding new artists just got a *whole* lot harder.

Then, whether a result of chart methodology, as some believe, or a planned process, country's charts slowed down, presenting both opportunities and challenges for our ranks. Some see the charts' languor as the "scariest" aspect of the year's changes. As Arista's Senior VP of Marketing Fletcher Foster put it, "It's a very positive thing if you're on the right single. If you're on the wrong single, you could have easily wasted four to six months of an artist's career and not sold any albums."

With year end sales figures showing country's numbers dipping 4.5% while overall music industry sales increased by 5.9%, the pudding tells us we've got work to do. With that in mind, we asked Foster and Virgin Executive VP/GM Van Fletcher about the challenges we'll face this year.

Supply And The Man

"I think our biggest challenge in the past is probably going to continue to be our biggest challenge in the future," says Foster, "and that is finding alternative ways—in addition to and beyond country radio—to reach the masses." While some believe the internet holds the key to our future, the consensus is, "not yet."

"The internet is a challenge in itself," says Van Fletcher. "We are looking at that to see if we can use it to reach more consumers, for each release and each aspect for each release. It's still ineffective for most of our needs, but as millions of people continue to discover the internet, it gives us another avenue to try and brand our artist. It's intriguing, but right now it's more talk than substance." Foster agrees. "The internet is

eventually going to be [a way to reach the masses], but today it still holds such a small percentage of our sales."

Film At Eleven, Video At Noon

Of course, branding that artist means exposure, just the same as for records. The aforementioned closing of local cable shows has coincided with a national trend: country isn't as "cool" as it was in the early- and mid-nineties. While major stars are still welcome guests on all the national talk shows, it's the new artists and the developing artists—the ones who need it most—who are having a tougher time getting booked.

"That does hurt," says Fletcher, "and won't be easy to overcome. But I'm excited about CMT and GAC expanding. Those video channels are beginning to work closer with us to brand and develop artists. It's in their best interest to grow the country format."

Foster agrees, and foresees perhaps even greater video opportunities. "As we look at technology, videos are going to play a bigger part in it, when we can start streaming videos to the internet. Numerous cable networks are going to be popping up in the next few years. Hopefully that will increase outlets so we can get some videos played, too. Plus, it's going to be interesting to see how this CBS/Viacom merger unfolds...that could be a wonderful thing for this industry."

Radio Wars

And of course, the more things change, the more they remain the same. Presenting radio with product they want to get behind is an ever-present goal. All the while, the symbiotic relationship between radio and records seems to be changing as each defines their needs, and their goals become clearer and increasingly divergent. Both Foster and Fletcher acknowledge the disparity, and that continued change is the only sure bet.

"Consolidation really has changed the way we do business," says Foster. "And with the chart changes, methodology wise, from predicted airplay to actual airplay, that also changes the way we do business. It's probably going to change a lot more drastically over the next year. When I look at the new artists we were able to break as

compared to the year before, it was like... (laughs) heaven! It still wasn't great, but it was much better."

"Radio has become more and more of a bottom line business," reminds Fletcher. "Radio's task is to sell their time for as much as possible. Their task is not music first. It's what happens between the music that's important to them. That makes it that much harder for artists, in particular newer ones, to be embraced by radio."

Which brings to light a particular challenge for Virgin.

"Scott Hendricks has started Virgin as a label for the future, with brand new artists—unknown artists, not the been-there-done-that-artists—and that is a huge challenge," says Fletcher. "The odds are stacked against us. But, if you pick your artists well, you hold great promise for the future. It's exciting, frankly. It's very, very challenging to go at it this way. You have one way to go, and that's up. You hope the artists that you've signed and are making records for are the right ones."

"It's our job to find the best singers," vows Fletcher, "the best artists, and present them to radio. That's not getting easier. So everything we take to radio, we have to make sure it's the right artist, the right song, the right timing. It's not easy, because music is not a science."

The Tangled Web

Nor is marketing, it seems, even though some on the Row would wish it to be so. The marriage of art and commerce requires a different business model than one selling, say, soap. Right-brain activity—creativity—is by all accounts the layer of effort that takes such a traditional left-brain process from perfunctory to successful.

So, such a time of fluctuation in marketing pathways might indicate the need to go back to ground zero and re-define, or re-connect with, our product. What are we selling? Music. What makes someone want to buy music? Emotion. And while underestimating someone's intelligence (of which we are accused daily) is a dangerous and arrogant path, underestimating humanity's emotional realism and radar for authenticity, from a purely left-brain perspective, is merely a road to ruin. ■

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Catalog Valuation

Created songs are known (among accounting types) as intangible assets; unlike cars and guitars, they have no purchase cost or raw materials on which to base their value. Instead, procedures for placing a value on copyrights have evolved over time as catalogs have been purchased by publishing companies. A prospective buyer would consider the price he might pay for a catalog by assessing the expected future cash flows from the songs, often utilizing a calculation called Net Publisher's Share (or NPS.)

Net Publisher's Share

The first step in this analysis is to list the total income from owned copyrights for the past three to five years; five is best but the three or four most recent years would be used if income during the first year or two is not representative, for example if the catalog is new or has had recent major successes. All types of income are included; mechanical, performance, synchronization, print, and license. This income might be termed Gross Publisher's Share.

Next, all royalty payments to third parties are subtracted. For a publishing company this is comprised mainly of mechanical payments paid to the company's writers and, in some cases, payments to co-publishers. (Note that NPS is not the same as profit. Normal business expenses such as demo costs, payroll and office expenses are not deducted, only royalty payments to third parties.) At this point the NPS is known for

each of the 3-5 years and an average annual NPS can be calculated.

The Multiple

The purchase price (and thus the value) of the catalog is computed as the average NPS times a "multiple." The multiple approximately represents the number of years in which a buyer expects to recover the purchase price, and historically has ranged from four to twelve, with 5-10 being the numbers most often used. The multiple is negotiated by the seller and purchaser and in many respects is a measure of the quality of the catalog. For example, some of the factors that would tend to produce a higher multiple would be:

- an upward trend in earnings over the 3-5 years
- diversity of earnings among a large number of songs and/or songwriters
- the presence of currently "hot" writers or writer/artists
- a contractual commitment of top writers to submit additional songs
- the potential for additional exploitation of previously recorded titles

Thus the value of a catalog, as measured by the price a prospective buyer could be expected to pay, is equal to the average NPS times the negotiated multiple. It should be noted, however, that in the case of an actual purchase, the procedure is a bit more involved than adding, subtracting, dividing, and multiplying as described above. The purchaser will retain an attorney to perform legal "due diligence," verifying the ownership and proper registration of the copyrights, assessing the validity of writer, co-publisher, and other contracts, and addressing any

other pertinent legal questions. An accountant will also be retained to verify income, deductions, and writer advance balances, and to perform other analyses which assist the purchaser in understanding the nature of the earnings and trends over the NPS period. The accountant may also recommend adjustments to NPS to remove certain income considered "unusual" in that it is not expected to recur and thus is inappropriate for estimating future earnings.

Every business has as one of its primary goals the building of increased net worth over time. Even if a sale is not contemplated, the publisher or the professional songwriter who retains an ownership interest in his or her songs should know that the process of building a song catalog is one of creating a true asset that contributes to net worth, and that there are techniques for assigning a value to this asset. Whether it is to measure progress in building wealth, or to determine the proper time to sell, an understanding of Net Publisher's Share provides important information about the growth and current state of your intangible asset. ■



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TOBY KEITH

How Do You Like Me Now?

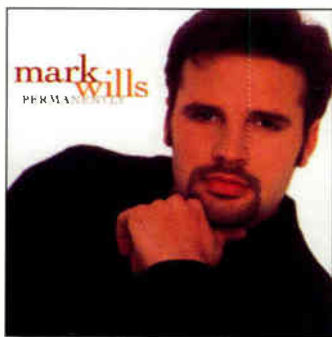
(DreamWorks 0044-50209-2)

Producers: James Stroud, Toby Keith

Prime Cuts: "How Do You Like Me Now," "When Love Fades," "Die With Your Boots On"

Critique: What you notice first, especially after the initial run-through, is that no two songs sound the same, which is definitely saying something in these much-too-bland of times. That strategy is established right from the get-go in the title cut, which does get the album going in a flurry of searing guitars. Essentially, the song is about giving the old Bronx cheer to a former lover, but one could also interpret the song as a slap to the naysayers in Keith's life. He sings it with just the right mix of assertiveness and wistfulness, which basically sums up the complete work here. The rockers, "Die With Your Boots On," the closest to a Waylon feel you've heard in some time, and "I Know A Wall When I See One," crank with arrogance and even, in the second case, a touch of been-there humor ("Where's a door when you need one," it asks). But even the softer stuff piques your interest, mainly by not dragging along. "Blue Bedroom," an oddly romantic number, is done to a snappy tempo, and the sweet mandolins on "She Only Gets That Way With Me," lend a different flavor to the standard love ballad. Toby's songwriting (he wrote or co-wrote nine of the dozen) is also including richer detail and more involving wordplay. The production and the mix, which keeps his voice distinctly up front, work together to create a consistent sound and style. Even with a couple of falterings ("Do I Know You," "Heart To Heart"), Keith's first album for DreamWorks is a solid steel effort. **Grade: A**

—Bob Paxman



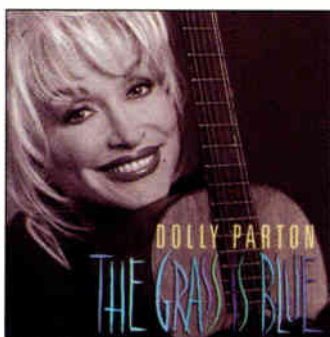
MARK WILLS/Permanently

(Mercury 314-556296-2) Producer: Carson Chamberlain

Prime Cuts: "Rich Man," "Perfect Conversation," "Right Here," "Almost Doesn't Count"

Critique: Mark Wills sure knows how to pick 'em. Hit songs, that is. His previous project offered exceptional tunes including "Wish You Were Here" and "Don't Laugh At Me." This project follows suit with 13 dandy tunes, each the perfect showcase for Wills' rich, emotive baritone. He takes a chance by covering "Back At One," a pop hit for Brian McKnight. The gamble paid off, as the single has been well-received at radio. "This Can't Be Love" is a toe-tapping love song, accented by a rockin' lead guitar. Perhaps he's so convincing on this and other upbeat love songs because that's where he's at in his personal life. The same thing can be said of "Rich Man," a lovely ballad that extols the virtues of home and family. Wills' growth as a stylist is evidenced on "Perfect Conversation," a magnificently produced song where the nuances of his voice are subtle and perfectly placed. Plus, there's just enough fiddle and steel to remind you that he's a fairly accomplished country singer. If there's one flaw with this set it's that Chamberlain's impeccable arrangements have the potential to overpower Wills. Fortunately, he's developed the confidence and maturity to rise to the level of the production. Throughout, deft touches of r&b and pop accent Wills' trademark blend of traditional/contemporary country. Dramatic lyrics are complemented by simple yet potent musical beds; Wills' prowess as a vocalist (best heard on "Right Here") adds the finishing touch. It's rare to find an album on which there are no clunkers. If Wills keeps this up, he'll be a country music treasure well into the new millennium. **Grade: A**

—Janet E. Williams



DOLLY PARTON

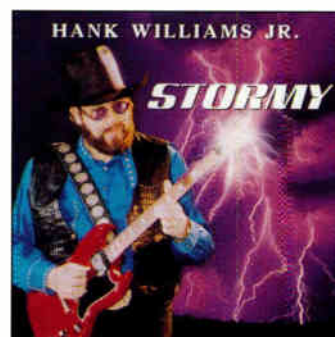
The Grass Is Blue

(Sugar Hill 3900) Producer: Steve Buckingham

Prime Cuts: Every single one

Critique: In press materials for this project, Dolly has called the making of this album a "spiritual experience." Producer Buckingham calls it "inspired." I say, it's about time. But, *The Grass Is Blue* was well worth the wait. Mountain music, of course, is a part of the fundamental fabric of all that is Dolly. She and producer Buckingham assembled what is no less than a bluegrass supergroup: Jerry Douglas on Weissenborn resophonic, Sam Bush on mandolin, Stuart Duncan on fiddle, guitarist Bryan Sutton, banjo great Jim Mills and bassist Barry Bales. Parton enlists harmony help from greats singers including Claire Lynch, Patty Loveless, Rhonda Vincent and Alison Krauss. The result is simply spectacular. Parton covers bluegrass classics including the Louvin Brothers' fun "Cash On The Barrelhead" and Lester Flatt's "I'm Gonna Sleep With One Eye Open." She's put a bluegrass spin on Billy Joel's "Travelin' Prayer"—odd in concept, but one of the finer cuts on a really fine project. We also get some Dolly originals, the best of which are "Endless Stream of Tears" and the title track. She covers Johnny Cash's "I Still Miss Someone"—technically not a bluegrass song—but Dolly's treatment with her soft vibrato and old-time arrangement is a heartfelt ballad worthy of both writer and singer. Covering Blackfoot's "Train Train" raised eyebrows, but it also sounds so natural you'd never know it was born a southern rocker. But it's the startling version of the Appalachian ballad "Silver Dagger," an intricate mountain music symphony, that makes you agree with Buckingham. This is indeed an inspired and inspiring offering. **Grade: A**

—Charlene Blevins



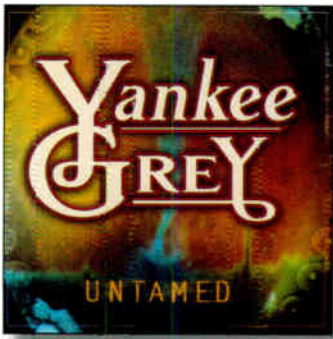
HANK WILLIAMS, JR./Stormy

(Curb-77953) Producer: Chuck Howard, Hank Williams, Jr.

Prime Cuts: "They All Want To Go Wild (And I Just Want To Go Home)," "I Like It When It's Stormy," "Sometimes I Feel Like Joe Montana"

Critique: Nope, he's still not politically correct. Yep, he's still a redneck with a capital 'R,' a boor with a capital 'B,' but a personality with a capital 'P.' And the latter element is what's missing from too many of today's cookie-cutter country crooners. That said, it's been two years since Bocephus' last outing and he's responsible for all of the songs, most of which are merely empty slogans. Added to his canon are such trailer trash anthems for the new millennium as "I'd Love To Knock The Hell Out Of You," "Where Would We Be Without Yankees" and "Naked Women And Beer." Bookends for this collection are "They All Want To Go Wild (And I Just Want To Go Home),"—the flip side of his "All My Rowdy Friends Are Coming Over Tonight"—and "Sometimes I Feel Like Joe Montana" which has Hank longing for one more shot at the top. Both are signs that ol' Hank is living life in the slow lane these days. But no Hank Jr. album would be complete without a self-aggrandizing number about his Southern roots pedigree. Here it's the Lynyrd Skynyrd-like title track. And would you believe a tenderly-sung (for him anyway) waltz-tempo love song called "All Jokes Aside?" As if there wasn't already enough novelty, there's even an ode to the star of the cartoon TV sit-com "King Of The Hill" with "Hank Hill Is The King." A cartoon-ish character singing about a cartoon æ hero? No, I don't think Hank Sr. would have done it this a-way. **Grade: C**

—Ron Young



YANKEE GREY/Untamed

(Monument NK 69085) Producers: Robert Ellis Orrall, Josh Leo

Prime Cuts: "I Should've Listened To Me," "This Ain't It," "Tell Me Something I Don't Know"

Critique: With a name like Yankee Grey, you might think this is a band that straddles the political fence. But the issue here is strictly music, influenced no doubt by their Cincinnati raising and listening to a whole lot of Southern rock. So what you have is a mix of north and south, hard-driving, steel-mill country rock but with softer harmonies and barely a hint of twang. "All Things Considered" is already a bona fide hit, and, as the album's opener, fairly portends of what's to come—a sound heavy on guitar and fiddle, but not trashy or in your face. Actually, a little bit of smudge might not prove such a bad idea, particularly on, of all things, the title cut. For a tune called "Untamed," it's surprisingly timid and overly clean, even on the solos; it's like watching a film that's been too well done, where you can spot the editing. "This Ain't It," however, seems more attuned to the theme, a bluesy rocker with a twist on the clichés of love. Smoldering slide work by Josh Leo caps off the final entry, "Tell Me Something I Don't Know." Generally speaking, bands that rock often throw in ballads only for balance, but the ones here don't seem like throwaways. "This Time Around" and "That Would Be Me" feature solid lyrics and tender harmonies. It was certainly refreshing to note that all six bandmembers played on every song with only a minimum of additional musicians. With such a package, this has the potential to be another Monument-al breakthrough. **Grade: B**

—Bob Paxman



CHARLIE MAJOR/444

(Dead Reckoning DEAR0015)

Producers: Harry Stinson, Charlie Major

Prime Cuts: "Thinking 'Bout You," "One of the Lost and Lonely"

Critique: The only thing remotely cryptic about this album is the title itself (no song with that name, and no explanation given). Otherwise, Charlie Major (not to be confused with Shane Minor), one of Canada's more popular artists, is a pretty straight-ahead guy who attacks his subjects directly. His songs are short on subtlety and clever wordplay, but certainly full of everyday life slices. Overall, that's a workable formula, except that it took four songs to get to the good stuff and uncover anything memorable. "Right Here, Right Now" serves as the typical rocking lead-off cut, but a somewhat fuzzy vocal quality drove this downhill quickly, and didn't have the same slash as the Van Halen tune of the same name (and it's not often that one yearns for a Sammy Hagar vocal). The next three deal with true love and single parenthood—enough said, we think. But "Wouldn't It Be Nice" (he really needs to concoct more original titles) and "Thinking 'Bout You" follow with interesting rhythmic structures, brought home by outstanding instrumental work and Major's solid delivery. "One of the Lost and Lonely" has the most country feel and, not surprisingly, is the disc's true poignant moment. In an album heavy on relationship songs, "Like Our Love" draws the most vivid analogies, with a beautiful bit of assistance by Cowboy Junkies' Margo Timmins, a voice deserving of more earshot. 444 ends with a nice version of Bob Dylan's "Oh, Sister," the lone non-original. This is alt-country at its purest—no frills, no bubble gum. If only the material had been more consistent. **Grade: C+**

—Bob Paxman



**VICTORIA SHAW
Old Friends, New Memories**

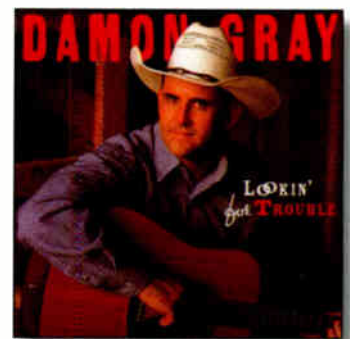
(Taffeta Records 98261-52922)

Producer: Jon Vezner

Prime Cuts: "The Other Woman," "She's Every Woman," "Crying Time," "Too Busy Being In Love"

Critique: If you have a radio, you have heard the power of Victoria Shaw's pen. She has given numerous artists including Garth Brooks, John Michael Montgomery, and Doug Stone great cuts as well as career songs. Previously on the Warner Bros. roster Shaw released two albums before starting her own label, Taffeta Records. She kicks off *Old Friends, New Memories* with "That's How Much I Love You," a song with clever lyrics and tons of personality. "I learned your favorite football cheers/At every tailgate barbecue/I gave up Chardonay for beer/That's how much I love you." It's a charismatic tune that will make you laugh and remember the often silly and sometimes unpleasant things we do for our loved ones. Shaw's vocal performance is outstanding on "The Other Woman." The song, which she co-wrote with Skip Ewing, is as warm as it is deep with lyrics that stir vivid images—definitely one of my favorites on the project. "The Other Woman" is an absolute smash that will reach both male and female listeners alike. "Crying Time" is a fantastic tune for us girls—an anthem about a well deserved night at home listening to sad songs, calling Mom and burning love letters. Shaw's delivery mirrors every frustrated feeling and self pitying action ever taken after being jilted. This release is solid and expressive; powerful and, at the same time, soft. *Old Friends New Memories* is a refreshing taste of honesty and substance. www.victoriashaw.net **Grade: B-**

—Emilie Marchbanks-Patton



**DAMON GRAY
Lookin' For Trouble**

(Broken Bow Records-0001)

Producer: Benny Brown

Prime Cuts: "Yes," "Who Do You Think You Are," "I Wouldn't Know," "Take What We've Got And Run"

Critique: As a neo-traditionalist, Damon Gray, a new hat act from New Mexico, shows a lot of promise. For his debut on a new independent label the former demo singer has chosen top-drawer material from some of Music Row's finest veteran songwriters such as Whitey Shafer, Doodle Owens, Frank Dycus, Dean Dillon, Aaron Barker and David Chamberlain, all of whom helped propel George Strait's career. As a vocalist, Gray's got a warm, sincere, if not-so-original delivery that lies somewhere between Tracy Lawrence and Kenny Chesney. But while most male country acts have a mild-mannered Clark Kent persona on love ballads that can turn into a honk-tonk Superman at the drop of a quarter in the jukebox, Gray tends to remain in the mellow mode to unconvincingly sing such rowdy fare as the title track or "Terrible Two's." Part of the problem is that there aren't too many mid-tempo and ballads in this 13-song collection and the uptempos such as "There's Gotta Be A Better Way" sound like re-treads. Still, there is a lot to like about Gray's first effort, including the clever, fast-paced ditty "Yes," the Dillon/Dycus-penned ballad "Who Do You Think You Are" and Freddy Weller's haunting "Your Memory Walks Through Walls." Finally, "I Wouldn't Know," a wonderfully-writ and oft-covered heartache tune is a mega-hit waiting to happen that just may have finally found the right singer. Hats off to executive producer Benny Brown and his team at Broken Bow for a fine debut disc and to Damon Gray for a commendable first effort. **Grade: B-**

—Ron Young

Handsprings and Back Flips

Pretty Darn Amazing PDAs, part one

Until about two years ago, I used to carry an organizer that I referred to as my brain. It was an ungainly, analog (i.e., pen and paper) affair about the size of the *Real Nashville Yellow Pages* which I inadvertently misplaced countless times. Whenever I misplaced my brain, my body would stumble around for hours in a state of shock and disbelief. Once it was located, normalcy would return until the entire scene repeated a few days later. After years of this abusive practice, I soon reached the conclusion that if I was ever going to get organized, I was going to have to get rid of my organizer and move into the digital realm with a Personal Digital Assistant (PDA).

The definition of a PDA is somewhat open for debate, but for the sake of this discussion we are speaking of handheld devices operating without a built-in keyboard. PDAs come in two varieties—Palm OS and Windows CE. The Palm OS—or Palm Operating System—is by far the most popular operating platform, with literally *thousands* of applications available. Palm OS devices are the focus of this installment, and two major companies currently manufacture devices that use the Palm OS: 3Com and Handspring. In the next installment we will evaluate some of the competing Windows CE devices.

Gene Splicing

Before we discuss what is different about the eight different Palm OS models, let's take a look at their similarities. All Palm OS devices feature the same applications: Address Book, Calculator, Date Book, Memo Pad, E-Mail, Expense, and Find. An infrared (IR) port is also standard, so Palm OS device owners can wirelessly transfer data and applications to other Palm OS device owners. In order to interface the PDA with a home computer, all 3Com Palm OS devices come with a serial port connected HotSync cradle. Handspring Palm OS devices differs slightly in this aspect by syncing through a significantly speedier USB connection.

In addition, all Palm OS devices utilize Graffiti, a proprietary handwriting recognition program. Recognition is used in the loosest sense of the word, here. In order to enter text using the text pad and stylus, the operator must learn specific pen strokes. For example, to enter the character a, the pen stroke looks like an enlarged accent mark (^). Palm OS fanatics are sharply divided over Graffiti. While it is not difficult to learn, it is fairly

particular over what it will recognize. If you are one of those people who either write small or write fast, Graffiti will render your text into indecipherable hieroglyphics. Third party software manufacturers offer several more intuitive handwriting recognition programs that can replace Graffiti on any Palm OS device. Graffiti is not the only method of entering data, however. Data can also be entered via a software-based pop-up keyboard on the device or entered on a PC and synced back to the device. If all else fails, LandWare makes a full-size, portable keyboard that allows users to enter data using the more conventional method.



<u>Model</u>	<u>RAM</u>	<u>Expandable</u>	<u>Price</u>
Palm IIIe	2MB	No	\$179.00
Palm IIIx	4MB	Yes	\$299.00
Palm V	2MB	No	\$399.00
Palm Vx	8MB	No	\$449.00
Palm VII	2MB	Yes	\$499.00

3Com

The Palm IIIx is the latest incarnation of the venerable Palm III platform. This is the same platform that the original Palm Pilot was based on, and 3Com knows a good thing when they sell millions of them. The Palm IIIe is 3Com's economy car model, but liken it more to a Honda Civic than to a Yugo. However, unlike other Palm devices, the operating system (Palm OS 3.1) cannot be upgraded. The Palm V series has a much thinner, aluminum case...the word svelte comes immediately to mind. The Palm V series are also the only PDAs to use rechargeable batteries.

3Com is banking on the fact that wireless technology is the future of handheld computing. To that end, the Palm VII received a much-ballyhooed release earlier

this year. The Palm VII incorporates an integrated wireless modem into its design, making the case just slightly larger than the Palm III series. A small antenna unfolds to access Palm.Net, an Internet service that allows you to send/receive special e-mail messages and access specialized content from ABCNews.com, ESPN.com, and e*trade. The unit can even receive driving directions from MapQuest. Although the Palm VII comes with a slew of internet applications not found on other 3Com models, it cannot browse the Internet in the traditional sense of the word. The Palm VII can only access content from providers who have tailored a portion of their site data for use by the Palm.Net service.

All this connectivity doesn't come cheap, however. In order to access all these wonders, the user must pay \$9.99 per month to Palm.Net to receive a maximum of 50K of data. Since 50K of data isn't very much (a couple of e-mails per day and a view of the specialized content every few weeks), Palm.Net also offers a \$24.99 per month plan that lets the user access up to 150K of data. Web addicts may still find themselves paying the additional \$.30 per kilobyte if they run over their limit. Finally, Palm.Net service is currently spotty at best. According to 3Com's coverage map, Nashville is covered only within a few miles of the major interstates.



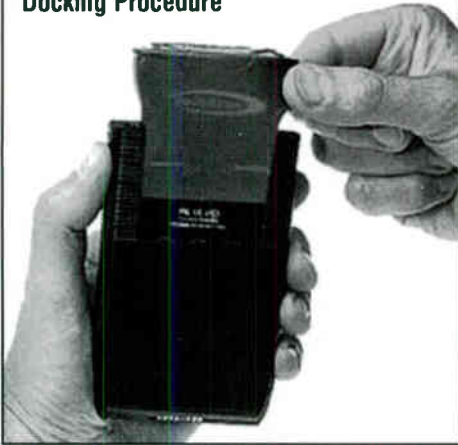
<u>Model</u>	<u>RAM</u>	<u>Expandable</u>	<u>Price</u>
Visor Solo	2MB	Yes	\$149.00
Visor	2MB	Yes	\$179.00
Visor Deluxe	8MB	Yes	\$249.00

Handspring

Handspring was founded in July of 1998 by the original developers of the PalmPilot

platform. As a result, it also uses the Palm OS platform. The company was gracious enough to provide us with a Handspring Visor Deluxe for this review. All models come in black, blue, green, ice, and orange. Other than the color, all three Visor models look very similar to the Palm III series. The Visor Solo differentiates itself from the Visor and the Visor Deluxe in that it does not come standard with docking cradle.

Docking Procedure



The niftiest feature of the Visor is its Springboard expansion slot, which allows for the addition of a plethora of expansion modules: MP3 player, modem, pager, GPS, video games, and reference books. Since all of the Springboard modules are ROM-based applications, they don't require any special software installation. Simply plug a module into the Springboard (even while other applications are running), and it is available for use. Numerous manufacturers have pledged support for the Springboard, including Diamond Multimedia (who you may remember as developers of the Diamond Rio MP3 player). Currently available Springboard expansion modules include a modem, additional memory, an 8MB backup module, and an EA Sports Tiger Woods PGA Tour Golf video game.



Innogear MP3/Digital Media encoder & decoder module

Because the Visor runs the Palm OS, it comes bundled with the same applications as its 3Com competitor. But Handspring does 3Com one better by also including expanded versions of Calculator and Date Book, as well as a World Clock.

Used Organizer For Sale

Each of these devices offers the user a little something different. The Palm VII is a veritable showcase of wireless technology, but the steep price and monthly access fees are difficult expenses to justify. While the Palm V is wrapped up in a visually stunning package,

the Palm III offers the same features and more expandability at about half the cost. But its the significantly less expensive Handspring Visor that gets my nod as the best buy in this bunch. The design and functionality of the Visor are top-notch, and 3Com devices can only dream of having the Visor's expandability. The Handspring Visor may ultimately be the device that replaces my revered PalmPilot Professional. Now if I can just get someone to take this old organizer off my hands... **NR**

*s***ongs.com**



KEY PERSONNEL:
YEAR FOUNDED:
TRAFFIC:
PURPOSE:
HISTORY:

Paul Schatzkin, President/CEO
 1995
 10,000 hits per day
 To use new media to build audiences for independent recording artists
 Nashville-based songs.com was one of the first e-commerce sites to focus strictly on music. Unlike many of its competitors, songs.com does not automatically market the material it receives. Submitted material must pass a review process that examines several factors before deciding if it is of a substantial enough quality to warrant investment. Currently, songs.com represents more than 400 artists from nearly every genre. Stacey Earle, Jana Stanfield, Gary Nicholson, and Steve Seskin are just a few of the writer/artists represented. Still operating on the original \$850 of venture capital, songs.com was recently acquired by Gaylord Entertainment's internet division GET digitalmedia.

BIGGEST CHALLENGE:

The marketing and publicity of our artists, because they fall outside the realm of traditional radio. To that end, we are working hard to construct a logical database, so we know who are customers are and what type of music they enjoy.

INTERNET ISSUES:

The industry is going to have to learn to alter its way of thinking in relation to economies of scale. The \$500,000-\$1,000,000 that is typically spent to break an artist needs to be reduced by a factor of ten or more. By using the internet, record companies can make a profit without spending ungodly sums of money...but it is going to take a commitment to quality artists and more work on the grassroots level.

Bobby Karl...

"Should old acquaintance be forgot and never brought to mind..."

Fuhgettaboutit. New Year's Eve is for amateurs. The Music Row fabulons party all year long.

A case in point being the Kenny Chesney Platinum bash at RCA's chapel (12/7). Excuse me, they call that the "BMG Complex Multi-Media Room" nowadays. Can't Nipper's best brains come up with a better name than that? The Elvis Room? Mother Maybelle's Parlor? Something.

Anyway, Joe Galante, Butch Waugh, Kevin Anderson, Wade Jessen, Lisa Young, Ed Benson and the regulars were all there to fete Kenny on his twin platinum CDs. "We have fooled America, there's no doubt!" exclaimed the East Tennessee quipster.

A case in point also being the ASCAP media luncheon a week later (12/14). Chet Flippo, Jay Orr, Marion Williams, Brad Schmitt, Beverly Keel, Harry Chapman and others gathered for fellowship and fried chicken in the conference room. Connie Bradley expressed her gratitude for all the hard work the journalists do all year long, then we settled in for the laughs and the gossip.

Beverly was wondering what on earth she was going to do with a bright yellow windbreaker vest Xmas gift. "It's for when you're picking up trash along the highway," I suggested helpfully. "I told you to stop talking about my love life!" she sassed back. We kidded Marion mightily about her zipper escapades and kidded Brad just on principle.

The music merriment continues no matter what music capital you are in. The Recording Academy's year-end bash in Santa Monica (12/11) was attended by Garth Fundis, Joel Katz, Phil Ramone, Tony Visconti, Norman Winter, Ellen Aaron, Diane Theriot, Dana Tamarkin, Omega Medina, Rob Senn, Mike Greene and the

rest of the NARAS gang. "Is Bobby Karl working the room?" inquired tunesmith Jerry Fuller. But of course. Jerry, let me add, is still dashingly handsome as well as enduringly gifted and was celebrating his 33rd wedding anniversary at the party.

I've always loved him, but never more so than when he introduced me to attendee Evie Sands, on whom I have had a crush for 30 years or more. Evie is a beautiful white soul singer who should have been a major star with discs like "Any Way That You Want Me" (1969) and "Take Me for a Little While" (1965). But she never quite got the breaks. She originated "I Can't Let Go," but The Hollies got the hit. She originated "Angel of the Morning," but Merrilee Rush, Juice Newton and Melba Montgomery had the hits. Anyhoo, I told Evie how much I cherished her 1970 A&M album and how

...Works The Room

much I like her new one, *Women In Prison* (Train Wreck Records), which includes a duet with Lucinda Williams. After I gushed all over her, I hit the buffet table with Memphians David Porter and Sid Selvidge.

Walter Miller was there, telling bad jokes as usual. Classical maven David Hall was recognized for his long service to the organization. So was Pierre Cossette, who got up and sang, to everyone's horror. Poor Mike Melvoin tried to hold it together on the keyboards while Pierre changed key every three bars.

Back in Nashville, much more tuneful sounds were on hand at the Ryman's fourth annual Angel Monday/Salvation Army benefit concert (12/6). Phil Sweetland was there to chronicle the heavenly notes of Steve Wariner, Larry Carlton, Michele Pillar, Michael McDonald, Richard Marx,



RESERVATION FOR A MILLION AT LONELY GRILL—Lonestar recently celebrated their first platinum album *Lonely Grill* at Gaylord Entertainment Center's Arena Club. Pictured L-R: Keech Rainwater, Dean Sams, Richie McDonald and Michael Britt. Photo: Kay Williams



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Matt Rollings, Eric Darken, Tim Akers, Chris Kent, Shannon Forrest and Josh Henson.

Also in the spirit of the season were Riders In the Sky (12/15) and Charlie Daniels (12/15), both of whom hosted holiday open houses at their offices.



SOMETHING LIKE FIVE WEEKS—A party was held recently to commemorate the success of "Something Like That." Written by Keith Follese (center) and recorded by Tim McGraw, (L) the song stayed on top of the charts for five weeks. ASCAP Senior VP Connie Bradley was on hand to congratulate the two on their accomplishments. Photo: Alan L. Mayor

Over at the Wildhorse (12/7) SheDAISY taped their concert portion of *Two Hour Tour*, a new TV show on the Disney Channel with Greg McCarn, Steve Wax, Lisa Gladfelter Bell and others in attendance. Gail Davies taped a live album at The Station Inn (12/16). The other clubs

have been busy hosting showcases for Nancy Castele (12/15, Douglas Corner), Wall of Jules (12/13, Caffe Milano), Adrian Longoria (12/7, 12th & Porter) and April Barrows (12/12 F. Scotts).

I look forward to many more of the same in 2000. Don't you? **MR**



CELEBRATING SHEDAISY'S SOUNDSCAN SCORE—*The Whole Shebang*, SheDAISY's debut release from Lyric Street was recently certified gold by the R.I.A.A. Pictured L-R: Doug Howard, Dann Huff, Kristyn Osborn, Randy Goodman, Cassidy Osborn, Kelsi Osborn and Carson Schreiber. Photo: Alan L. Mayor

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Welcome to the Year 2000 and Welcome Back, Woodland



We want to take this opportunity to say hello to an old friend who's been out of pocket for awhile. After being heavily damaged by the tornado last year, Woodland Studio went through an extensive rebuilding period, but has finally re-opened with new gear, a new staff, and new ideas as well. Sheila D. Barnard is the new Administrative Director, with Andrea Pizzano acting as her assistant and the studio's receptionist. According to last month's sessions report, they are definitely back in full swing and we send a big "Welcome Back!" Among projects last month was a track session produced by Radney Foster for Sony Epic's The Kinleys, with Niko Bolas and Greg Parker on the boards...Sony Music artist Bobby Eakes, best known for her 10-year stint on CBS' soap opera *The Bold & The Beautiful*, has been recording in Nashville at the Soundshop. Don Cook and Phil Barnhart are co-producing, with Mike Bradley and Capps on engineer duty...Producer Keith Thomas and engineer Bill Whittington did some programming at the Bennett House for one of the greatest voices of all time, Gladys Knight, for a future MCA project...

For a third week in a row, Santana's single "Smooth," featuring Rob Thomas, topped *Billboard's* Hot 100 chart. Nashville's own David Thoener recorded and mixed the project in LA. Thoener, who moved from New York in '95, has been working the East and West coasts with such notables as Celine Dion, Billy Joel, Rod Stewart and on the Woodstock '99 soundtrack. Locally, he's recently worked on projects for Brooks & Dunn, Mindy McCready, Matt King and Phil Vassar... **Backstage Studio**, a newly renovated studio co-owned by producer/engineer Chuck Ainlay and Ron Kerr, owner of **Sound Stage**, recently installed a Solid State Logic Axiom-MT digital multi-track console which gives the studio the power to mix in 5.1 surround. Additionally, the sonic accuracy of the MT allows for the creative enhancement of digital or analogue sessions. "We have seen the demand for 5.1 mixes grow to where we now believe mixing in surround will be the standard way to do records," says Ainlay, "especially with the rise of DVD-A."...NAPRS held its annual Christmas Party on December 2 at Jody's Bar Car, entertained by Sheldon Belmont and the Blues Alliance. Happy Y2K to all, (assuming the world hasn't ended), and hopefully we'll see ya next month!

Artist	Producer	Engineer	Label	Project
BAYOU				
Morgan Rhoads	Morgan Rhoads	George Clinton	Poco Hide	demos
Con Hunley	Norro Wilson	"	-	vocs
Todd Taylor	Thornton Cline	"	Circuit Rider	trax
TNN Jingle	Billy Adair	"	-	jingle
Devilyn Delatelle	Sue Patton	"	-	trax
Kelly Spinks	Bill Graham	"	Krista	"
Brian O'Neal	Eddie Kilroy	"	Secretariat/WB	"
Debbie Myers	Rod Nicholson	"	-	"
The Winters Bros.	Donnie&Dennis Winters	"	South Star	"
Dennis Wilson	Terry Choate	Barry Senter	-	demo
BENNETT HOUSE				
Charlie Leblanc	Joey Canaday	Gary Hedden	J.M.M.	trax
Soloman's Wish	Brad O'Donnell	Paul Salvesson	Pamplin Music	"
Fleshpaint	Fleshpaint/R.Williams	"	"	"
Phoenix Stone	Keith Thomas	Shawn McLean	Spongebath	trax/voc/od's
Gladys Knight	"	Bill Whittington	Universal	voc/od's
		"	MCA	prog

Artist	Producer	Engineer	Label	Project
THE CASTLE				
Nate Sallie	Mark Heimermann	Todd Robbins	Gravity	mix
Ilse DeLange	Barry Beckett	PGreene/D.Boyer	WB	trax/od's
Pierce Sisters	Monroe Jones	S.Wilson/S.Short	Idea Pub.	mix
The Elms	Brent Milligan	Shane Wilson	Sparrow	"
Silage	Silage	Dan Shike	Essential	transfers
Bruce Hubbard	Bruce Hubbard	David Boyer	-	od's
DARK HORSE				
Cindy Morgan	Brent Bourgeois	Dave Schober	Word	mix
Michael English	Brown Bannister	Dave Dilbeck	-	od's
Jennifer Knapp	Mark Stewart	Erin Swihart	Gotee	"
Renewal 3	Blair Masters	Ronnie Brookshire	Integrity	trax
Keith Urban	Matt Rollings	Clark Schleicher	Capitol	mix
Peanuts Whalum	Kirk Whalum	Ed Simonton	Candied Yam	trax

Artist	Producer	Engineer	Label	Project
EMERALD				
The Quartet	Wally Wilson	Rickey Cobble	-	voc/od's/mix
Craig Morgan	Cannon/Wilson	B.Sherrill/J.Piske	Atlantic	trax/od's
Clay Davidson	Scott Hendricks	Balding/Hagen/Bickell	"	"
Collin Raye	Dann Huff	Mark Hagen	Virgin	mix
River Road	Justin Niebank	Justin Niebank	Sony	od's
Mark Knopfler	Ainlay/Knopfler	Ainlay/Lewis	Virgin	mix
			Chariscourt	trax

Artist	Producer	Engineer	Label	Project
FLATWOOD				
Aaron Tippin	Ricky Scruggs	Tabby Crabb	-	xfers
Lori Lawton	Brett McGuire	"	-	od's
Clinton Gregory	Clinton Gregory	"	Cow Bird	vid
Cyndi Lynne	Cyndi Lynne	"	-	demo
Jennifer Pearson	Jennifer Pearson	"	-	"
Dead Kalm	Wes Ivey	C. Wayne Turner	Def	vid
Hillbilly Highway	Tabby Crabb	Aaron Wiles	Raptor	od's

Artist	Producer	Engineer	Label	Project
GREY HOUSE				
Stephany Delray	Stephany Delray	Wendy Mazur	High Seas	demos
Ashley Goodson	-	"	-	"
Kirki Mertz	-	Billy Herzig	P51	voc/remix
James Hinds	Billy Herzig	B.Herzig/W.Mazur	-	demos



MERCURY MOM—Wynonna was recently in Backstage Studio working on her latest Mercury release with James Stroud. Pictured L-R: Chuck Ainlay, Stroud, Wynonna's daughter Grace, and Wynonna.

Artist	Producer	Engineer	Label	Project	Artist	Producer	Engineer	Label	Project
ISLAND BOUND					SEVENTEEN GRAND				
Rebecca McCabe	-	Adam Hatley	-	sides	Allison Moorer	Kenny Greenberg	Don Smith	MCA	mix
Roger Cook	-	"	-	demos	Alison Krauss/YoYo Ma	-	-	-	-
Rob Robinson	-	"	-	sides	➔	Steve Epstein	Sandy Jenkins	Sony Classical	"
Dave Hunt	-	"	-	master	George Strait	-	Steve Tillisch	MCA	5.1 mix/DVD
NEM	-	Mike Poole	-	demos	Osmond Bros.	Jerry Crutchfield	Jake Niceley	Polydor UK	mix
Bobby Carmichael	-	"	-	"	Karen Rhodes	Jake Niceley	Travis Salsig	-	demos
➔	-	B. Busch/M. Poole	-	"	SOUNDSHOP				
Dean Miller	-	"	-	"	Bobbie Eakes	Cook/Barnhart	Bradley/Capps	Sony	trax/od's
LOUD					Alabama	D. Cook/R. Owen	"	RCA	trax
Wade Hayes	Dunn/McBride	Julian King	Sony	voc	Bloom	Dodd/Baldrige	Dodd/Baldrige	-	"
Wynonna Judd	James Stroud	"	Mercury	guitar od's	Matt Morris	Matt Morris	John Dickson	In-House	Russian proj.
Rick Ferrell	"	Rich Hanson	DreamWorks	voc	Song demos	Lonnie Wilson	Mark Capps	Sony/ATV	trax
Lorrie Morgan	"	"	BNA	bgv's	Cindi Thompson	Waters/James	Bradley/Dickson	Tree Prod.	trax/od's
RECORDING ARTS					SOUND STAGE				
O.J. Hanssen	Tommy Barns	J. Jaszcz/G. Greene	RTA	mix	Warren Bros.	Chris Farren	Marcantonio/Green	BNA	od's/mix
Tony McFadden	Tony McFadden	"	Da Funkk	"	Wade Hayes	Dunn/McBride	"	Sony	mix
Kimber Clayton	Keller/Hicks	"	Thumper	"	Peter Frampton	Peter Frampton	Ainlay/Delong	-	"
Jimmy Buffett	Mike Utley	J. Demain/G. Greene	Margaritaville	"	Wynonna	Tony Brown	"	Mercury	"
Alan Jackson	Stegall/Reeves	M. Poole/G. Greene	Arista	"	George Strait	"	Ainlay/Green	MCA	"
John Rich	J. Rich/Vaughn	S. Wilson/G. Greene	BNA	"	Trisha Yearwood	Garth Fundis	Ainlay/Ralston	"	"Wilkinsons
Tony Catlin	Preston Sullivan	M. Janas/Z. Cochran	-	"	➔	-	Seay/Simpson	Giant	od's/mix
SCRUGGS SOUND					Wynonna	Gary Nicholson	Bason/Monterossa	Mercury	od's
Dolly Parton/Johnny Russell	-	-	-	-	Kincaid	Kincaid	B. Willis/M. Rovey	WB	"
➔	H. Moore/B. Troy	Richard Barrow	OMS	album	STARSTRUCK				
Josh Graves/Marty Stuart	"	"	"	"	Millennium Chorus	-	-	-	-
➔	"	"	"	"	➔	Greg Nelson	McConkey/Chan	-	mix
Cook Sound	Jeff Cook	"	-	demos	Faith Hill	Gallimore	Shiple/Rodriguez	WB	"
Starstruck	Mark Narmore	"	-	"	Ricochet	David Malloy	Bason/Rodriguez	Columbia	trax
Starstruck	Jason Sellers	Jim DeMain	-	"	Ricochet	"	Beamish/Kresco	Sony	mix
Starstruck	Carrie Stone	Richard Barrow	-	"					



KILLER DUET—Alan Jackson joined George Strait in the studio recently where they recorded a duet of "Murder On Music Row" for Strait's upcoming *Greatest Hits* project due out in March. Pictured L-R: Erv Woolsey, The Erv Woolsey Company; Bruce Hinton, Chairman, MCA Nashville; Strait, Jackson and Tony Brown, President, MCA Nashville.

STUDIO REPORT

Artist	Producer	Engineer	Label	Project
Alecia Elliott	-	-	MCA	video shoot
Rustic Overtones	David Leonard	Leonard/Chan/Rodriguez/McConkey	Arista	trax/od's
Jolie Edwards	Dan Huff	Balding/Haugen/Chan	DreamWorks	trax
Lee Ann Womack	Frank Liddell	McCarthy/Kresco	MCA	mix

STUDIO 23

Gene Smith	Smith/Cumming	Cumming	ind	final mix
Jim Whatley	Whatley/Cumming	"	-	song demos
Laura Powers	Powers/Cumming	"	-	CD
Shari Taylor-Hyde	Sparks/Cumming	"	-	trax
Les Kerr	Kerr/Cumming	"	ONU	"
Holly Hefner	Billy Galvin	"	-	demo

WHISTLER'S

Wes Cunningham	Wes Cunningham	Joe Costa	i.v.	trax
Mark Schultz	Monroe Jones	Shane Wilson	Myrrh	mix
Kimber	Keller/Hicks	Keller/Poole	-	trax
Fair Verona	Parker/Keller	Joe Costa	i.v.	"

WOODLAND DIGITAL

The Kinleys	Radney Foster	Bolas/Parker	Sony/Epic	trax
John Hiatt	Jay Joyce	"	Capitol	trax/od's
Thompson Bros.	Daryl Brown	"	-	trax
Ricky & Randy	Brown/Matcosky	"	-	"
Nashville Predators	Bil VornDick	Rocky Schnaars	-	theme song
Walter Ego	Tocket/Shoenfeld	Stone/Parker	-	trax/od's
Pat Daley	Shannon Bare	Chris Stone	-	trax
Danni Leigh	Bennett/Gordy, Jr.	Schnaars/Frigo	Sony/Monument	"
Jimmy Buffett	Mike Utley	Jim Demain	-	jingle
JoJo Hammond	Justin Tocket	Wood/Blood	-	od's
Allison Moorer	Kenny Greenberg	Smith/Parker	Uni/MCA	trax
Lee Ann Womack	Frank Liddell	Mike McCarthy	"	-
Dave Pardue	Dave Pardue	Russ Long	-	trax/od's/mix



FINISHING TOUCHES—Michelle Tumes (L) is currently wrapping up her new recording *Center Of My Universe*, which she is co-producing with David Leonard. (R) Joining the two in the studio is The Nashville String Machine which contributed to several songs on the project. *Photo: Stephen Kohl*

Writer's Notes

Sharon Vaughn



BIRTHPLACE: Orlando, FL

YEARS IN NASHVILLE: 30

PUBLISHER: DreamWorks Music

HITS/CUTS/CHART ACTION: "Powerful Thing," Trisha Yearwood; "Out Of My Bones," Randy Travis; "Lonely Too Long," Patty Loveless; "My Heroes Have Always

Been Cowboys," Willie Nelson; "Til A Tear Becomes

A Rose," Keith Whitley, Lorrie Morgan; "Broken Promise Land," Mark Chesnutt; "Y'all Come Back Saloon," Oak Ridge Boys

FAVORITE SONG YOU WROTE: "My Heroes Have Always Been Cowboys"

FAVORITE SONG YOU DIDN'T WRITE: "I Can't Make You Love Me" by Allen Shamblin & Mike Reid

ON WHAT INSTRUMENT DO YOU WRITE? Voice

INFLUENCES: Connie Smith, Bob Dylan, Frank Sinatra

ADVICE TO WRITERS: Don't underestimate the intelligence of the radio audience. Don't "write down" to try and reach people, just "touch" them with honest emotions.

LITTLE KNOWN BIOGRAPHICAL FACT: After being an artist, background singer and publisher, I've just embarked upon a new facet of my career: production of John Rich's (formerly of Lonestar) project for BNA Records. A producer! And it's great fun!

ISSUES FACING SONGWRITERS TODAY: The challenge is to ignore the "flap" about what's country and what's not. This is the perfect time for growth toward a higher level of excellence whatever the genre. There's more room for great songs and creativity in this market than there ever has been.

Sharon Vaughn came to Music City in 1969 to be an artist and writer, and succeeded at both. The first song she ever got cut was "Y'all Come Back Saloon," a No. 1 for the Oak Ridge Boys, and the second song cut was "My Heroes Have Always Been Cowboys," which she wrote for Bobby Bare but got cut instead by Waylon Jennings, and eventually, Willie Nelson. She is one of a very few women to produce a project not her own for a major label. We asked her about being in the exclusive ranks of women producers. The truth is, it never occurred to me that it was unusual to be doing this until someone brought it to my attention. You're just doing your job, your head is down in the trenches; it's a task-to-task mentality. You don't see the overview. But if someone else can see that and get something beneficial from it, that's great. You advised writers to not underestimate the intelligence of the audience. How do we do that? And who's responsible for this, anyway!? Being a capitalist society, this is a business. Regrettably, the path of least resistance is to get the writers to write what is currently working on the charts. That does not however, encourage uniqueness and it certainly doesn't encourage brilliance. It also doesn't encourage trend-making material. Everybody's doing the best they can, but if anybody's at fault, I think publishers tend to take the easy route. Because they say, "if we write 'blah blah,' radio won't play it." Well how do they know? Something that touches people, that they can understand and hits them sonically in a different way...will be recorded. What three people from any time in history would you have over to dinner? Thomas Jefferson, because he had a passion for almost everything I have a passion for—gardening, human rights, cooking, farming; and he had such a thirst for learning. Eleanor of Aquitaine—she was the Queen of France, then the Queen of England because she was married to Henry II. She owned in her name almost all of France and the greater part of England. At that time there were about four educated women in the world, and she was one of them. And third: any woman who crossed the US on the Oregon Trail and pioneered the west. Those women had to be so much more than we can even conceive of being. If they didn't have it they had to make it, and if they couldn't make it they had to make do.



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Buddy Lee Attractions, Inc.
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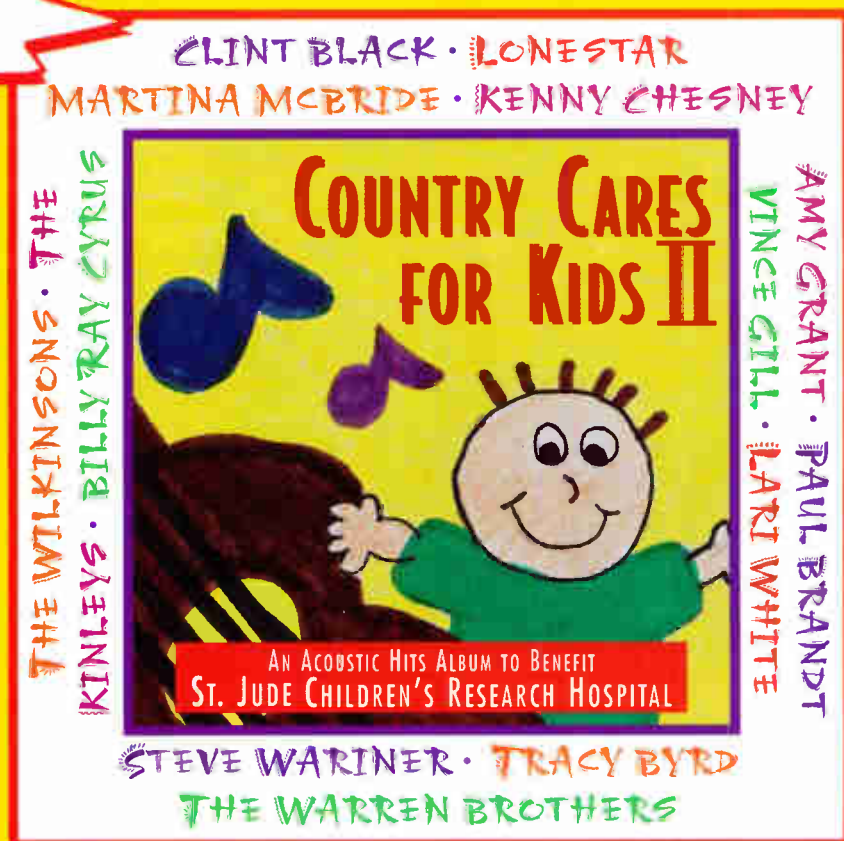
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READY FOR THE SHOW

As the mainstream country music business struggles to find its identity, alternative country has begun to come into its own, gaining fans and radio signals nationwide. While in search of that identity, the Row puts forth manufactured acts who lean more to the pop side than the country side, and has to bear the squawking of country fans—me included—and suffer the slide in sales that results from trying to sell consumers a bill of goods that doesn't touch them enough to make them part with \$15. Meanwhile, Americana and

alt.country artists travel the country in suspect vehicles, wowing audiences, gaining fans and selling enough CDs from the side of the stage to make the mortgage. And creating a ground swell of support that warrants sold-out national music conferences (SXSW), and generates enough hits online for a major music company to buy it (songs.com—see below). It's become clear that, to quote Dylan (where would *he* get airplay today?), the times they are a changin'.

Change, we must remind ourselves, is perhaps

the only constant in the format's history. Country music has evolved from Jimmie Rodgers to Hank Williams to Eddy Arnold to Ricky Skaggs and Randy Travis to Garth and the Dixie Chicks. It's my new year's resolution to not resist change.

And of course, we can't blame the bean counters for trying to grow the format and capture a greater share of the record buying public. Aren't we all trying to get bigger and better? New and exciting is what brings in the young buyers, even if most of them don't stick around, as Mac McAnally once sang, after the new wears off.

The point here, is that in listening to this month's batch of "fringe" artists, I'm reminded that all the new, exciting, authentic talent we need to take country music into the next millennium is right here. Most of them have been around for a while, quietly working their craft, developing their voices and coming into their own as artists with personal musical visions and writers with something to say. And with enough edgy rock and pop influences to titillate that youth market. Remember what a heretic that ol' Hank was considered when he first told the old garde to "Move It On Over"?

Herewith, are some contenders.

The Walt Wilkins Band/Fire, Honey & Angels (GrooveTone)

Wilkins has been a popular figure around Nashville clubs for a number of years, and this release will tell you why. He's the whole package:



a marvelous singer, a thoughtful, talented writer and a fine looking fellow to boot. Plus, he's assembled a group of players who can only be called alt-country allstars. *Fire, Honey & Angels* shows us an artist

who has the power to move us, in all different directions. All songs are Wilkins compositions, some with co-writers, except for "Mechanicsville," written by Noaise Sheridan. As cut one, it started the disc off in good stead, and struck me at once as something that wouldn't seem out of place on country radio or Triple-A. Wilkins turns tender on "Our Lady Of The Avenue" a love song for a bartender, so beautifully arranged with a poignant acoustic guitar, a moaning steel and bittersweet fiddle. It's sublime. He takes it up several notches with "Moan and Whine," a country rocker glorifying the sound of a big city highway. Probably the most fun song on the disc is "Don't Make Me Do It," co-written with the late great Walter Hyatt. It's country blues at its best. "Sandy Loam," also written with Hyatt, is a bluesy old time spiritual that's as comforting as it is chilling. "Big Hopes" is a solo-penned and simply gorgeous song about falling in love. I'd wager that many a girl out there looking for her

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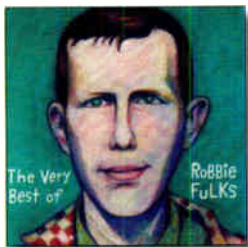
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Robbie Fulks/The Very Best of Robbie Fulks (Bloodshot)

God Bless Robbie Fulks. This man's sense of humor alone should make him a star. I haven't heard as real a sounding album full of biting humor since Harry Nilsson's *Duit On Mon Dei*. With tunes like "Sleeping On The Job Of Love," a honky tonker á la Buck Owens, with a subject matter I can't really detail here, and "Roots Rock Weirdoes," which pokes fun at the neo-honky-tonk hangers on, you get a sense of the shadowy alleys his clever and often dark humor travels down. And while Fulks unashamedly touts his novelty numbers, he's about much more. Mostly on his other discs, however. Here, there's nothing but fun. "Parallel Bars," a duet with Kelly Willis, is a classic-style duet that will take you back to a time when it was fashionable in country music to sing about drinking your blues away. "I Just Want To Meet The Man," could be a real tear jerker, with Fulks's otherwise rocking tenor crooning and sad, but by this time in the record you're suspicious of anything that sounds so serious. And you'd be right. Other titles here, (all previously unreleased, regardless of the title), include "You Break It You Pay," "That Bangle Girl" and "Jello Goodbye." Don't know if we'll ever hear any of these on the radio, but I can dream, can't I?



Mulehead/The Gospel Accordion II (HTS)

Somewhere between Fulks's humor and energy and Wilkins's realism and emotion lies Mulehead. This Arkansas quartet also straddles roots rock and neo-alt.country, and, bottom line, they're exciting as all getout. They have a sense of fun about them, without even getting close to novelty, although they do dance wildly on the grave of reverence. They also have a greasy, fuzzy guitar sound that serves as an emotional thread throughout. The whole thing has a grit and honesty that hasn't yet been scrubbed out by a big label. Many of the tunes, true to the title, are about religious subjects, ("Pilate," "Get Thee Behind Me Satan") but others are more earthly ("Cheap Red Wine," "Out Here In The Pines"). *The Gospel Accordion II* has an energy reminiscent of early Todd Snider, and well, it makes you feel something. And that's the gospel truth.



OVERTONES

•Songs.com, Nashville's leading independent music e-commerce site, has been purchased by Gaylord Entertainment's GETdigitalmedia. Songs.com, founded in 1995, showcases more than 400 independent music artists across most contemporary genres. Randy McCabe, Senior VP/GM of GETdigitalmedia said, "Songs.com has done a wonderful job of laying the foundation of a new kind of music company, and it will be a key component of our internet music strategy." According to Paul Schatzkin, co-founder and chief executive officer of Songs.com, the independent music site outperforms sites such as mp3.com by 20-to-1 when comparing hits to purchases. Terms of the transaction were not disclosed.

•The Alternative Distribution Alliance (ADA) has won the Independent Distributor of the Year award as nominated by retailers reporting to the the Album Network. ADA, which also won this award in 1998, has launched a new web site www.ada-music.com.

•Ramblin' Jack Elliott is the subject of a documentary premiered at the Sundance Film Festival, held in Park City, Utah January 20-30. The film, *The Ballad of Ramblin' Jack*, was directed by Elliott's daughter, Aiyana Elliott, and produced by Plantain Films and Crawford Entertainment.

•Audrey Strahl has joined Rounder Records Group as VP of National Publicity & Artist Development.

•Music Resource Group (MRG) has just released an expanded edition of *The Musician's Atlas 2000*, a comprehensive networking resource created for the independent music community. The 352-page Atlas delivers over 15,000 essential music industry contacts for anyone involved in artist development, performance, promotion, management, production and other areas of the music business. Preview the book at www.MusiciansAtlas.com or call MRG at 973-509-9898. With the publication of *The Musician's Atlas 2000*, MRG has launched the Independent Music Awards (IMAs) to recognize excellence among musicians who record and release music on their own or through independent labels and distributors. Awards will be presented to top-ranking artists in 12 music categories: pop, rock, jazz, country/ bluegrass, folk/singer-songwriter, blues/R&B, reggae/ska, rap/hip-hop, latin, world, electronica and new age. Producers, publishers and music journalists will review the preliminary round of entries to determine which recordings will advance to the finals. Artists who want to enter any of the IMA music categories must submit materials by April 30, 2000. Entries must include a completed application, a CD or cassette and a \$15 processing fee. Entry forms are available in the 2000 edition of *The Musician's Atlas* and online at www.MusiciansAtlas.com. ■

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DO YOU SPI?

Deep inside Fortress Radio, a hardy band of patriots dares to reveal radio's plans for new singles. If you haven't been attuned to SongPower Index dispatches, here's what our SPIes have been saying:

NEW research confirms our SPIes deliver more than great quotes—they also pick the hits with better than 80% accuracy.



"Should do very well—at AC."

"Don't tell me it's *too* country."

"Yeah, yeah. It's practically a Barry Manilow record."

"He never went away, we just got stupid at radio."

"Ordinary, formulaic, Nashville writing machine drivel."

"You blame radio? That's like feeding the pirahna raw steak and being upset when they strip the flesh off your arm."

"I'm still trying to figure out which Partridge Family song was the model for the guitar and organ lines."

"I shaved my back just to feel the chills go up and down my spine."

"You've got to be kidding. Don't talk in the songs—no talking!"

"Should I be looking for her to flip me off in a trade ad?"

"It'll debut in the top 10 and stay at No. 1 forever."

"I'm dancing like a little leprechaun."

"Somebody *please* give me some tempo."

"Jello wrestling? Referee? Count me in!"

"Lock the consultant out and plug this in."

"Toby is a man among sheep."

"Anyone seen my coat?"

SPI ACCURACY RESEARCH

Billboard Singles Chart Reach

SPI Peak	Top 40	Top 20	Top 10	Top 5
8.5+	100%	100%	100%	90.9%
8-8.4	100%	83.3%	59.5%	54.8%
7.5-7.9	91.7%	64.6%	41.7%	35.4%
7-7.4	51.2%	29.3%	26.8%	19.5%
6.5-6.9	19.6%	13%	8.7%	6.5%

(Research sample: 314 songs, Jan. 98 through Jan. 99)

Every major label, hundreds of radio stations and scores of Music Row decision makers SPI. Do you?

Join
SONGPOWER INDEX
and say...

I SPI



“Over-consulted, over-researched, over-consolidated and over-produced”

With *Music Row's* switch to a monthly format, *Broadcast Facts* will heretofore focus on the past month's *SongPower Index* charts. Due to the accelerated schedule for our January issue, however, we only have two weeks' worth of numbers to look at. Thankfully, our reporters wrote in with their take on 1999 to fill the void.

Sammy Kershaw's "Me And Maxine" dipped slightly (0.14) in SPI No. 312, but remained solidly in the upper-seven range. WYNR's Joe Willie says, "Glad he put down the syrup and pulled out a can of whupass! This song kicks."

Appropriately enough, the 1999 chapter of SPI (No. 313) ends where it began. On January 11, 1999, George Strait's "Meanwhile" was the top SPI song. For our last chart, Strait's "The Best Day" led the field with an 8.55. "Playing George Strait singing the phone book is a no-brainer," says WSTH's Ted Turner. "Now add in a song to touch every man who has a son (like me). How big could this be? I'm playing and watching."

Top O' The Year To You

Speaking of best things to come out of Nashville, the top five SPI scores of 1999 are also listed. Two of them, "Cowboy Take Me Away" and "Something Like That" are actually the top scoring SPI songs of all time. All five exceeded the magical 9 mark, and all but one cracked the top 5 on *Billboard*. Two went all the way to No. 1, and "Cowboy" may get there yet.

It was another great year for SPI, and so we must thank all those who had a hand in making it happen. First and foremost, thanks to all our reporters. Record labels don't heap free goods or fly-aways on those who report to SPI, which means our MDs and PDs listen to the music, fill out the form and send in comments because they love what they do and have a sincere commitment to country music that goes beyond their wallets. It is an attitude that's all too rare in this business, and I commend them for it. The SPI team also greatly appreciates the support of Nashville's record labels and the other advertisers who support this endeavor. And speaking of SPI team, I applaud the great job done by Eileen Shannon, Emilie Marchbanks-Patton and Christie Duke in putting together the chart's various components. Thank you all. Now, on with the show:

Conservative Agenda

To get our reporters talking about the state of affairs, we posed this question to them for our last chart of the year: *Has radio conservatism (playing it safe) led to label conservatism (stale formulas), ultimately contributing to the ongoing decline in country music's popularity?* Response are below.

"Yes!" Vickie Gentry, KZUA

"Everything goes in cycles, and the cycle



Sammy Kershaw



George Strait



Dixie Chicks

isn't country right now. Sometimes you're the dog and sometimes you're the hydrant. If we work smart we'll get to those dog days again."

Boomer Kingston, KGEZ

"We are over-consulted, over-researched, over-consolidated and over-produced. We've made country music into rocket science, which it ain't." Debby Turpin, KSOP

"The past year saw many labels focus too heavily on superstars and new acts. Many mid-level acts seem to have been tossed aside in favor of pop-sounding female acts." Mark Phillips, WFMB

"What I've discovered this year is that our success locally has nothing to do with the national charts or sales trends. I've learned to focus on listening to P1s." Brian Jennings, KZKX

"While labels may be more conservative, I believe tighter playlists are forcing labels to be more selective about what gets shipped. Radio has finally sent the message that some of us won't throw everything at the wall just to see what sticks." Jay McCarthy, WWYZ

"True honest to goodness country radio is not going stale or playing it safe. The problem is 'true' country radio is being all but ignored by the

industry while consultant driven conglomerates force feed cookie cutter country to the listener. It's amazing how you drop off the face of the earth once you are no longer reporting to one of the major trades. Thank goodness for *Music Row* and other up and coming trades that care about input from all levels of radio—big city or country, rated or not." Mike Thomas, KFAV

"If we have to place the blame, look in the mirror. How could we even question playing George Jones? And we all did, you know." Jimmy Rabbitt, KZKS

"I disagree that there is an 'ongoing decline in country music's popularity.' Radio stations are finally realizing the benefit of playing the hits longer and labels are finally starting to understand that doing so is a good thing." Scott Michaels, WKKG

And finally, this from a reporter who asked that his name be withheld: "I'm not so sure the labels are playing it safe—there is lots of good stuff out there. Trouble is, I'm having to play it safe due to my new owner's rules concerning adding new material. I can't add anything until it's hit top 40 in a major trade. Hell, I don't even get to decide what to add. Thus, I no longer get any pleasure out of listening to new tunes." **WY**

THE SONGPOWER INDEX

predicting new single success

MONDAY • DECEMBER 13, 1999 • #312					
SPI	THIS WEEK	LAST WEEK	ARTIST/TITLE/LABEL (# of reports)	ADD FACTOR	PASSION
7.77	7.91		SAMMY KERSHAW/Me And Maxine/Mercury (35)	4.03	3.74
7.35	7.19		JESSICA ANDREWS/Unbreakable Heart/DreamWorks (34)	3.82	3.53
6.97	7.64		DOUG STONE/Take A Letter Maria/Atlantic (34)	3.56	3.41
6.58	6.04		JENNIFER DAY/The Fun Of Your Love/RCA (29)	3.41	3.17
6.50	7.04		ALABAMA/Twentieth Century/RCA (30)	3.47	3.03
6.43			CHALEE TENNISON/Just Because She Lives There/Asylum (28)	3.14	3.29
HOLIDAY SINGLES					
7.44	6.30		PAUL BRANDT/Six Tons of Toys/Warner Bros. (30)	3.87	3.57
7.22	6.94		SHEDAISY/Deck The Halls/Lyric Street (32)	3.78	3.44
6.29	6.17		KEITH HARLING/Santa's Got A Semi/Giant (28)	3.36	2.93

SPI = Add Factor + Passion. Songs ranked by SPI points. Ties ranked according to highest Add Factor Average.

MONDAY • DECEMBER 20, 1999 • #313					
SPI	THIS WEEK	LAST WEEK	ARTIST/TITLE/LABEL (# of reports)	ADD FACTOR	PASSION
8.55			GEORGE STRAIT/The Best Day/MCA (22)	4.32	4.23
8.12			ANDY GRIGGS/She's More/RCA (26)	4.08	4.04
7.45	7.35		JESSICA ANDREWS/Unbreakable Heart/DreamWorks (27)	3.78	3.67
6.68	6.43		CHALEE TENNISON/Just Because She Lives There/Asylum (25)	3.28	3.40
6.58			JERRY KILGORE/The Look/Virgin (19)	3.21	3.37

MONDAY • DECEMBER 20, 1999		
SPI High Score	TOP SPI SONGS OF 1999	Billboard Peak Position
9.49	DIXIE CHICKS/Cowboy Take Me Away/Monument	5*
9.43	TIM MCGRAW/Something Like That/Curb	1
9.29	DIXIE CHICKS/Tonight The Heartache's On Me/Monument	6
9.15	GEORGE STRAIT/Write This Down/MCA	1
9.00	ALAN JACKSON/Little Man/Arista	3

(*still climbing)



Thoughts For A New Millennium

Does a new millennium commence when the right year comes up, or when the general population of a planet feels that it has arrived?

If the latter is the case, for us in the music business the new millennium has surely arrived ahead of calendar. The last five years have brought an aggressive, phenomenal rate of change in our industry. As a result, the doomsayers have declared the end of the business as we know it. Brick and mortar retail is dead, artists don't need labels anymore, MP3 will have the public lusting for free music.

History has seen this movie before. Several sea changes have left business generations tired and puzzled. All modern industries have been under the fire of change at one time or another. With each New Age comes challenges that seem terminal, but truly are not.

In our lifetime, the dominant sea change has been dubbed the Information Age, a time driven by the value of knowledge, where many products are assembled from bytes, not atoms. How fortunate the music industry is to have a product that is exquisitely adaptable to this new age of which we are standing on the edge.

The Information Age has already brought great change to the business landscape. Every segment of society, from educators to car salesman to booksellers to physicians to governments to financial analysts to auctioneers is scratching its collective head, dizzy from the business ballet that is the internet. Do you .com-prehend?

And increasingly, we in the music industry feel the cold wind of change on the backs of our necks. Can the industry sustain itself against attacks from the New World? Can it find solutions to problems resulting from great change? Well, of course it can. We can.

A couple of truths strike me as we music marketers thrust our attention, businesses and futures into, well, the future.

First, our product is enduring. Music has been a part of the human experience for thousands of years. It is an entity as unique as those who create it, an essential component of existence. Without music, every aspect of life would be poorer.

Second, our product is new-economy friendly. We have invested our lives and livelihoods in a product that has always been Y2K compliant. Our joyful noise is proving itself to be very much at home in the digital, that is bits and bytes, dimension.

If you accept these two statements as true, the only thing left to do is apply every ounce of your creative and economic capital to developing applications for music in this New World. The technologies we reflexively view as threats are opportunities. The tools are changing, the methodology is evolving, even the dreaded paradigm is shifting. But these have done so in the past and will continue to do so in the future.

Music is a durable, robust and essential element. It is a survivor and the business of it will emerge more vital and resilient than ever in the new age. Let's put our minds toward transforming this business of music in the new Millennium.

Recognize opportunity, embrace technology, empower people.

Happy New Year!

David Gales
The/Gales.Net/work

industry calendar EVENTS

January

- 6 Winter Arbitron Period Begins
- 17 American Music Awards, Los Angeles, ABC, 7 p.m.
- 22 Jammin To Beat The Blues, Mental Health Association Benefit, 328 Performance Hall, Nashville
- 24 Christian Booksellers Association Expo 2000 (24-28), Opryland Hotel, Nashville
- 24 SGA Hit Song Analysis, Kelley Loveless, Nashville, 5:30 p.m.

February

- 3 February TV Ratings Sweeps Begin
- 5 Austin City Limits, Garth Brooks, PBS
- 7 SGA Song Critique, Billy Lynn, Nashville, 5 p.m., 329-1782
- 9 Country In The Rockies (9-12), Crested Butte, CO, 401-2771
- 9 SGA Songmania, 3rd & Lindsley Bar & Grill, Nashville, 6 p.m.
- 10 Next Music Festival (10-12), Nashville, 877-267-4246
- 14 SGA Ask A Pro, Pat Quigley, Nashville, 12 p.m.
- 19 Austin City Limits, Clint Black, PBS
- 23 42nd Grammy Awards, Staples Center, Los Angeles, CBS, 7 p.m.
- 25 Building A Songwriting Career Memphis Style (25-27), Elvis Presley's Heartbreak Hotel, Memphis, 329-1782
- 26 Austin City Limits, Willie Nelson, PBS

March

- 1 CRS 2000 (1-4), Nashville Convention Center, 327-4487
- 1 February TV Ratings Sweeps End
- 6 SGA Song Critique, Michael Martin, Nashville, 5 p.m., 329-1782
- 7 Townesfest Benefit for W.O. Smith Music School in honor of Townes Van Zandt, Nashville
- 13 SGA Ask A Pro, Byron Gallimore, Nashville, 12 p.m.
- 15 SGA Songmania, 3rd & Lindsley Bar & Grill, Nashville, 6 p.m.
- 15 South By Southwest (15-19), Austin, TX, 512-467-7979
- 19 NSAI Song Camp (19-21), www.nashvillesongwriters.com
- 27 SGA Demo Discussion, Chris Dodson and Tyler Bell, Nashville, 5:30 p.m.
- 29 7th Annual Cowboy Poetry & Music Festival (29-2), Santa Claris, CA, 661-255-4314

- 29 Winter Arbitron Period Ends
- 30 Spring Arbitron Period Begins

April

- 3 Tin Pan South 2000 (3-8), Nashville, tinpansouth@nashvillesongwriters.com
- 7 NSAI Music Row 2000 Songwriters Symposium (7-8), Castle Door, Nashville, www.nashvillesongwriters.com
- 9 NAB 2000 (Conferences 8-13, Exhibits 10-13) Las Vegas, NV
- 15 Gospel Music Association Week (15-19), Nashville
- 20 31st Annual Dove Awards, Opryhouse, Nashville
- 27 George Lindsey/UNA TV & Film Festival (27-29), Florence, AL, 256-765-4247
- 27 May TV Ratings Sweeps Begin
- 29 Country Music Marathon, Nashville, 310-348-5721

May

- 1 3rd Annual City of Hope Music & Entertainment Industry Golf Tournament, Tarzana, CA 800-544-3541 ext. 6540
- 3 35th ACM Awards, Los Angeles, CBS, 7 p.m.
- 24 May TV Ratings Sweeps End

June

- 1 Spring Arbitron Period Ends (3/30)
- 7 Nashville Independent Film Festival
- 12 Fan Fair 2000 (12-16), Tennessee State Fairgrounds, Nashville
- 29 Summer Arbitron Period Begins

July

- 6 July TV Ratings Sweeps Begin

August

- 2 July TV Ratings Sweeps End

September

- 21 Fall Arbitron Period Begins

October

- 1-4 CMA Rehearsals, Opryhouse, Nashville
- 4 34th CMA Awards, Opryhouse, Nashville, CBS, 7 p.m.

December

- 13 Fall Arbitron Period Ends

Events are listed free of charge. Please send e-mail or fax listing to e.patton@musicrow.com/615-329-0852.

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