



country music

industry overview

2003

Record Sales

- For the first time in history, Country Music had a record seven albums topping the Billboard Top 200 Albums chart in 2002.
- Country Music racked up 76.9 million units sold, up 8.4 million units from 2001. (2)
- Country Music accounted for 11.3% of the total albums sold in 2002. (1)
- Four Country albums were among the 10 biggest-selling albums of 2002 in all formats. According to Nielsen SoundScan, the Dixie Chicks' *Home* was No. 4; Alan Jackson's *Drive* came in at No. 8; *O Brother, Where Art Thou?* landed at No. 9; and after only six weeks of release, Shania Twain's *Up!* secured the No. 10 position.



Artists-Male year-end chart, including Garth Brooks (No. 4), Alan Jackson (No. 5), Toby Keith (No. 7) and Kenny Chesney (No. 10).

- Alan Jackson released his second holiday album *Let It Be Christmas* in 2002. Selling nearly 350,000 copies in six weeks, it was the top-selling seasonal album in any format.
- The Dixie Chicks reached Diamond status (10 million albums sold) in 2002 with their second album *Fly*.
- Four Country Music artists were included in the Top 10 of the Top Billboard 200

Books & Magazines

- Brenda Lee released her autobiography *Little Miss Dynamite* in March 2002. A month later Loretta Lynn published *Still Woman Enough*, a memoir that picks up where her classic *Coal Miner's Daughter* left off. Tim McGraw inked a two-book deal with Simon & Schuster; in November he released his first book, *Tim McGraw & The Dancehall Doctors: This Is Ours*, which detailed the making of his current album.
- Willie Nelson offered a comical and candid insight into his world with the January release of *The Facts of Life and Other Dirty Jokes*. Kenny Rogers teamed with Donald Davenport to author *Christmas in Canaan*, a story of interracial friendship that begins

in the turbulent 1960s, which was released in October. Nashville's famed Bluebird Café celebrated its 20th anniversary with the June release of *The Bluebird Café Scrapbook: Music & Memories from Nashville's Legendary Singer-Songwriter Showcase*.

- Country songs inspired several book projects in 2002. Rascal Flatts, George Strait and Lee Ann Womack all wrote introductions for books titled *I'm Movin' On*; *Love Without End, Amer*; and *Something Worth Leaving Behind* respectively. All three books were derived from songs made popular by the artists and came packaged with CD singles. Meanwhile, the *I Hope You Dance* book, written by the song's composers Mark D. Sanders

and Tia Sillers, became the first book to earn Nielsen SoundScan's Platinum status based on the enclosed single of the Womack hit.

- Kenny Chesney and Chely Wright each earned nods from *People* magazine. Wright was the only Country artist named one of *People's* "50 Most Beautiful" in its annual issue. Similarly, the magazine counted Chesney as one of its 10 "Sexiest Men Alive" in 2002. Meanwhile, Brad Paisley topped *Entertainment Weekly's* list of Country's Hottest Men, with Keith Urban, Kenny Chesney, Andy Griggs, Eric Heatherly and Trick Pony's Keith Burns and Ira Dean rounding out the top six.

Radio

- George Strait had something to smile about when "She'll Leave You With A Smile" became the 50th No. 1 single of his career in December — an accomplishment unmatched by any other solo artist in any music format.
- More radio stations continue to program Country Music than any other format. There are 2,123 Country radio stations, followed by 1,187 News/Talk and 1,120 Adult Contemporary. (4)
- 43.9 million adults are listening to Country radio each week, making it the highest cumulative audience of all formats. (6).

During 2002, Country Music's radio stations were rated No. 1 or No. 2 in 23 of America's Top 100 markets, including Akron, Albuquerque, Austin, Baltimore, Buffalo, Denver, Greenville/New Bern/Jacksonville, Indianapolis, Johnson City/Kingsport/Bristol, Las Vegas, Rochester, Seattle/Tacoma, Syracuse, Toledo, Tucson and Tulsa (5).

- The popularity of Country Music continues to soar. Jessica Andrews, "Who I Am;" Brooks & Dunn, "Ain't Nothin' Bout You;" Kenny Chesney, "The Good Stuff;" Diamond Rio, "One More Day;" Dixie

Chicks, "Landslide;" Faith Hill, "Cry;" Alan Jackson, "Where Were You (When The World Stopped Turning);" Lonestar, "I'm Already There;" LeAnn Rimes, "Can't Fight The Moonlight;" Travis Tritt, "It's A Great Day To Be Alive," and Shania Twain, "I'm Gonna Getcha Good" have all received extensive airplay in multiple formats exposing Country Music to a much broader listening audience.

Touring

Brad Paisley headlined the first "CMT Most Wanted Live Tour" in 2002. The tour visited numerous markets across the country with supporting acts Steve Azar, Chris Cagle, Tammy Cochran, Andy Griggs, Steve Holy, Shannon Lawson, Rascal Flatts, Tommy Shane Steiner and Darryl Worley. The 2003 30-city National tour, billed as the "Crest Night Effects Whitening Presents the CMT Most Wanted Live Tour Sponsored by Comfort Inn, by Choice Hotels," will feature Rascal Flatts, Chris Cagle and Brian McComas.

Country legend Dolly Parton embarked on her first tour in a decade in 2002 in support of her *Halos & Horns* album, which debuted at No. 4 on the Billboard Country Albums chart in July 2003. The highly anticipated tour hit 12 U.S. cities as well as the United Kingdom and Ireland.

The Dixie Chicks had the biggest one-day ticket sales in music history in 2003 with their "Lipton Presents Dixie Chicks Top of the World Tour," bringing in more than \$49 million. Selling more than 867,000 tickets, the Dixie Chicks surpassed Madonna, U2, Rolling Stones, Paul McCartney and 'N Sync in one-day ticket sales. The Dixie Chicks wrapped the Lipton summer tour in August, generating \$61 million in gross North American ticket sales, and playing to more than 1 million people over 57 sold-out dates.



Kenny Chesney

Martina McBride, Jo Dee Messina and Kenny Rogers performed or toured with holiday shows in 2002. McBride's "The Joy of Christmas" toured 17 cities; Jo Dee Messina's "Christmas Gift Concert" stopped in nine cities supporting her album *A Joyful Noise*; and Kenny Rogers' "Christmas From The Heart, Featuring The Toy Shoppe" stopped in 30 cities.

TOP 10 GROSSING COUNTRY TOURS

TOUR / ARTIST	OVERALL GROSS
Kenny Chesney	\$22.7 million
Toby Keith	\$21.4 million
George Strait	\$19.6 million
Brooks & Dunn	\$19.5 million
Alan Jackson	\$18.8 million
O' Brother, Where Art Thou? Tour	\$11.5 million
Lyle Lovett	\$ 9.4 million
Travis Tritt	\$ 8.3 million
Willie Nelson	\$ 5.0 million
Kenny Rogers	\$ 4.2 million ⁽³⁾

Accolades



Wynonna & Naomi Judd



Fan Fair® 2003 made an impressive return to Downtown Nashville, Thursday through Sunday, June 5-8, with an aggregate attendance of more than 124,300. A total of 42 artists participated in the star-studded nightly concerts at The Coliseum. The Greased Lightning Riverfront Park Stages showcased a broad range of musical influences and styles from classic to alternative Country, and solidified it as one of Fan Fair's favorite venues on the bank of the

Cumberland River. Kenny Chesney kicked off the excitement Thursday morning and by late Sunday, 82 artists had taken the stage to perform. A total of 552 artists appeared in the air-conditioned Wrangler Exhibit Hall at the Nashville Convention Center for the autograph and photo sessions. Fan Fair ended on a high note at The Coliseum with Naomi Judd joining daughter Wynonna during her set to reunite as The Judds for two songs. Tickets for went on sale for 2004 Fan Fair/CMA Music Festival the last two days of Fan Fair. Sales were impressive and they signified the largest number of four-day ticket packages sold in advance for the festival. Dates for 2004 Fan Fair/CMA Music Festival are June 10-13.

Bill Carlisle and Porter Wagoner became the newest members of the Country Music Hall of Fame. Their formal presentations were a highlight during the broadcast of the "36th Annual CMA Awards" on Nov. 6, 2002. The Class of 2003 consists of Floyd Cramer and Carl Smith, with their official induction presentations being made at the "37th Annual CMA Awards" on Nov. 5, 2003.



Bill Carlisle, Porter Wagoner



Wynonna Judd

Wynonna was the 2003 Grand Marshall for the Indianapolis 500. She also participated in the annual parade and performed during the pre-race festivities, televised live on ESPN/ABC. Her participation marked the first time a Country Music artist had been featured in the Indy 500's 68-year history.

Artists including Trace Adkins, Clint Black, Charlie Daniels, Faith Hill, George Jones, Toby Keith, Lonestar, Brad Martin, Neal McCoy, Tim McGraw, Craig Morgan, Jamie O'Neal, Lee Roy Parnell, Collin Raye, Aaron Tippin, Travis Tritt, Phil Vassar, Darryl Worley, Chely Wright, and more, all participated in various USO tours and concerts saluting U.S. military and veterans.



Neal McCoy



Chely Wright

Alabama was honored at the 30th annual American Music Awards in January 2003, by receiving the Award of Merit. Reba McEntire was on hand to make the presentation during the ABC-TV broadcast. Previous recipients include Bing Crosby, Irving Berlin, Johnny Cash, Ella Fitzgerald, Perry



Alabama

Como, Benny Goodman, Frank Sinatra, Elvis Presley, Garth Brooks and the Beach Boys.

Television



"The 36th Annual CMA Awards," attracted more than 38 million viewers, earning the CBS Television Network its first Wednesday night win of the season. This marked the second consecutive year the CMA Awards was broadcast during the competitive fall sweeps period. The three-hour broadcast featured 26 music performance segments, and noted gains in many key demographics, including a 5% increase in adults 25-54. Shania Twain opened the show with her first television performance in three years. "The 37th Annual CMA Awards" will air live from Nashville on Wednesday, Nov. 5 on CBS.

Lifetime Television teamed up with Motrin pain reliever to present a weeklong series of "Intimate Portraits" featuring celebrity moms, including Faith Hill and Martina McBride, in November 2002. Ratings for the week were 30,000 viewers higher than the week before or after.



Super Bowl XXXVII entertainment was full of Country Music entertainment. The Dixie Chicks led things off with their rendition of the national anthem, followed by a highly anticipated halftime show, featuring Shania Twain, with No Doubt and Sting. The 2003 Super Bowl had the second-most TV viewers in NFL title game history with 137.65 million.



Faith Hill



Tim McGraw



Dixie Chicks

Country Music heavy-hitters had high-profile television specials in 2002. "Faith Hill: When The Lights Go Down" drove viewers to NBC during Thanksgiving week. The event was the highest rated music special of 2002 with 11.2 million viewers. "An Evening With The Dixie Chicks" aired on NBC in December, and attracted an impressive 11.1 million viewers. These two Country concerts, plus the "Tim McGraw: Sing Me Home" special, which also aired on NBC during Thanksgiving week, trumped all other music specials of the season, including those featuring Paul McCartney and U2.

CMT can now be seen in approximately 66 million homes, making it the fastest growing cable network based on year-to-year new homes added.

In 2002, Reba McEntire's self titled sitcom continued its successful Friday night run, prompting the WB Network to order additional episodes of the show (25 total, up from the standard 22) during the 2002-03 season. Continental Airlines featured episodes of the show's first season during its in-flight service throughout October.

In January 2003, "Wheel of Fortune" taped a series of shows from the stage of the Grand Ole Opry House, during the game shows first taping in Nashville. The themes for each of the three weeks were "Nashville Week," "Sweethearts Week From Nashville," and "Country Music Stars Week." The shows aired in February and delivered an average of more than 15.6 million viewers each week. "WHEEL" outperformed 96% of all programs on TV over the three weeks, syndicated or network, and delivered more viewers than all of the networks' prime time averages.



Wheel of Fortune

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Willie Nelson celebrated his 70th birthday by hosting a live concert, which aired on Memorial Day weekend, on USA Network. The star studded event featured performances by Nelson and a cross section of top artists including Ray Charles, Sheryl Crow, Kenny Chesney, Norah Jones, Shania Twain and ZZ Top, among others.

Phil Vassar appeared as himself on the NBC Daytime drama "Days of our Lives." The segment aired in June 2003 and featured Vassar performing on the fictional "Jack and Jennifer Show." During the episode, Vassar performed two songs and talked about his career, including his appearance at CMA's Fan Fair. The appearance on the program demonstrated the continuing relationship between CMA and NBC Daytime, which has brought NBC Daytime's biggest stars to Fan Fair for three consecutive years.



Phil Vassar

Country Music artists continued to make guest appearances on some of network televisions top-rated programs, including:

Lee Ann Womack	"The District"
Tammy Cochran	"DOC"
Deana Carter	"Raising Dad" and "Strong Medicine"
Wynonna and Jo Dee Messina	"Touched By An Angel"
Shannon Lawson, Brad Martin and CMT's Katie Cook	"As The World Turns"
Brad Paisley	"According to Jim"
Trisha Yearwood	"JAG" and "The Chris Isaak Show"
Faith Hill and the Dixie Chicks	"Saturday Night Live"
Willie Nelson	USA Network original series "Monk"
Dixie Chicks	"Sesame Street"
Blake Shelton	"The Chris Isaak Show"
Phil Vassar	"Days of our Lives"



Brad Paisley



Buddy Jewell

USA Network and Sony Music teamed up to create "Nashville Star," a television series centered around the nationwide search for the next Country Music star. The competition began with more than 8,000 contestants and was narrowed down to 12 finalists, who were all featured on the televised segment. Beginning in March 2003, the series aired live for eight weeks and featured performances by all 12 finalists. Country artists Brad Paisley, Wynonna,

Trace Adkins, Jo Dee Messina and Clint Black served as celebrity guests during the broadcasts. Buddy Jewell was crowned the winner of "Nashville Star" with a grand prize recording contract with Sony Music Nashville. Black produced the debut album "Buddy Jewell." The album was released in July, debuting at No. 1 on *Billboard's* Country Album chart.

The American Music Awards, aired in February 2003 on ABC-TV, and featured some of Country Music's biggest stars. Tim McGraw and Elton John opened the show with their stellar performance of "Tiny Dancer." Other performers included Willie Nelson with Toby Keith, Shania Twain and Kenny Chesney.



Tim McGraw & Elton John

Hollywood & Broadway

- Kathy Mattea made her theatrical stage debut in the national tour of "The Vagina Monologues" when it made a stop in Nashville in May 2002.
- Collin Raye recorded "The Sound of Music" with the Boston Symphony Orchestra for an album tribute to longtime Broadway composer Richard Rodgers.
- Hollywood celebrities paired with Country Music artists in several music videos (partial list):

Steve Azar/Morgan Freeman	"Waitin' On Joe"
Jo Dee Messina/NASCAR driver Bobby Hamilton	"Dare To Dream"
Willie Nelson/Luke Wilson & Rob Thomas	"Maria (Shut Up and Kiss Me)"
Cyndi Thomson/"Trading Spaces" handyman Ty Pennington	"I'm Gone"
Travis Tritt/Billy Boy Thornton	"Modern Day Bonnie & Clyde"
Keith Urban/supermodel Niki Taylor	"Somebody Like You"
Brad Paisley/Jason Alexander, Jim Belushi, William Shatner, Trista Rehn (from "The Bachelorette")	"Celebrity"
Toby Keith/Willie Nelson/Corin Nemec	"Beer For My Horses"

Billy Bob Thornton,
Travis Tritt



Morgan Freeman,
Steve Azar



Brad Paisley
& Jason Alexander

- Country Music artists who have had songs recently appear in movie soundtracks (partial list):



Willie Nelson, Guy Clark, Steve Earle, and Allison Moorer	"The Rookie"
Billy Gilman	"Stuart Little 2"
Wynonna	Disney's "Lilo & Stitch"
Alison Krauss & Union Station	"Divine Secrets of the Ya-Ya Sisterhood" and "Eight Crazy Nights"
SHeDAISY	"Sweet Home Alabama"
Shannon Lawson	"Joshua"
Steve Holy	"Angel Eyes"
Keith Urban	"How To Lose A Guy In 10 Days"
Shania Twain	"Crossroads"



- AMC Theaters in 21 markets digitally broadcast a documentary on Tim McGraw in November 2002. The documentary, which profiled McGraw's life and the making of *Tim McGraw and The Dancehall Doctors*, coincided with the release of the album.



International

CMA Awards: "The 36th Annual CMA Awards" was licensed to be televised in several countries and regions including Australia, Canada, India, Indonesia, Ireland, Finland, Sweden, Switzerland and the United Kingdom.

BBC Radio 2 broadcast during Country Music week. Other countries that covered the CMA Awards by radio were Australia (Toyota Outback Club), France (RTL), Holland (Deventer Omroep), Indonesia (ACMindo-RRI), Japan (FMK-Kumamoto), Norway (Radio 1 Fredrikstad), and Switzerland (Radio Lac).

Fan Fair 2003: Seventy-nine International media attended Fan Fair 2003 in Nashville, representing 44 outlets from around the world including Australia, Canada, China, France, Germany, Ireland, Israel, Luxembourg, Norway, Spain, Switzerland, The Netherlands and the United Kingdom. The international media activity included CMT Canada, with 15-million viewers, "Classic Gold Country" on

the Classic Gold Network in the UK; phone reports were done back to The Nine Network in Australia; radio specials were broadcast direct to Radio 3 in Spain and a series of interviews by Nick Barraclough were conducted for the weekly BBC Radio 2 program "New Country."

Several Country Music stars toured internationally, including: Bellamy Brothers, Dixie Chicks, The Larkins, Jim Lauderdale, Danni Leigh, The Mavericks, Allison Moorer, Nickel Creek, Dolly Parton, Pinmonkey, Ricky Skaggs, Shania Twain, Gillian Welch and Lucinda Williams.

Dolly Parton



SOURCES:

(1) Nielsen SoundScan (2) RIAA (3) Amusement Business (4) M Street Corp, January, 2003 (5) Radio & Records Vol. 2, 2002 (6) MRI, Spring 2003

Country Artists have been used recently in a wide variety of national ads and corporate promotions including:

Trace Adkins	Nocona Boots, Wrangler
Jessica Andrews	Nabisco, LeBonheur Hospital Memphis
Clint Black	Got Milk!, Unbeatable Wheatables
Brooks & Dunn	Coors Light
Tracy Byrd	Miller Beer, BASF Forestry Products
Charlie Daniels Band	UPS
Kenny Chesney	The GM Card
Dixie Chicks	Lipton
Pat Green	Miller Beer
Eric Heatherly	Von Dutch Clothing
Faith Hill	Cover Girl
George Jones	Camping World, George Jones Country Sausage, George Jones Country Style Marinade
Toby Keith	Ford Trucks, MCI 10-10-220
Alison Krauss & Union Station	Allstate Insurance, McDonald's
Lonestar	Toyota, Sprint PCS, Mac Authority, Chic-Fil-A
Barbara Mandrell	Sunsweet Prunes
Martina McBride	Gillette
Neal McCoy	Greased Lightning
Reba McEntire	VERB, Frito Lay, Dr. Pepper, Red Lobster
Tim McGraw	Bud Light, Kraft
Jo Dee Messina	SlimFast, Jerzees, Dr. Pepper
Montgomery Gentry	Jim Beam
Willie Nelson	H&R Block
Oak Ridge Boys	BluBlocker Sunglasses
LeAnn Rimes	Red Lobster, Dr. Pepper
Trick Pony	Price Oil
Shania Twain	Revlon, BeneFit Cosmetics
Darryl Worley	Cranston Fabrics
Wynonna	Lawman Western, Asthma Action America, Got Milk!
Dwight Yoakam	Mercury Automobiles, Bakersfield Biscuits

