

A Guide to Filmmaking for a More Diverse and Universal Audience

This guide provides preliminary concepts and evidence-based guidelines for filmmaking capable of reaching a more diverse and universal audience.

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01

Introduction

Adding audiovisual treatment (AVT) to films — in movie theaters, online, and on TV — helps ensure equitable access for all members of society, including people with disabilities. This step not only facilitates self-directed learning for people with disabilities, but also serves as a valuable resource for language acquisition. Moreover, it presents an avenue for filmmakers and production companies to expand the reach of their works to a more diverse audience.

Transcribing intertitles or transition shots between scenes in silent films was the first form of AVT and was often carried out during the post-production process. As the film industry developed and “talkies” emerged in the 1920s, and as movies started being released with multilingual subtitles, a new challenge emerged: movies were not equally accessible to all members of society, including to people with disabilities.

As a result, research started to be conducted in the mid-1900s on AVT for filmmaking, with a focus on this field. By the 1990s, research on AVT was expanding, covering additional questions. With the boom in global livestreaming services, platforms such as Netflix and Apple TV+ now offer their original productions with AVT so as to reach a diverse, universal and inclusive audience.

1.1 Importance of A Guide to Filmmaking for a More Diverse and Universal Audience

The global film industry has contributed to perpetuating the stereotypical perceptions that societies share regarding people with disabilities. Since its inception, it has established specific patterns for the public via cultural cognitive transformations that define one normative type of human being. By treating hearing and sight as solely biological functions, it has reinforced an established culture that marginalizes individuals with disabilities, furthering their isolation from society.

This policy of isolating people with disabilities has led to their stereotypical representation in films as burdens on their families and social environments. They are portrayed as always relying on “normative” people to meet their needs and as avoiding making appearances on social occasions, which sometimes births in them psychological disorders that may push them to end their lives — this is one among many stereotypical perceptions. Often, in good faith, these stereotypes are seen as realistically representative of people living with disabilities.

Most research shows that these stereotypical perceptions are one of the reasons why people with disabilities are underrepresented in the film industry, in all aspects, including audiovisual treatment (audio description, captions, universal

translation, sign language). Despite increasing research on AVT, it is still undervalued in the realm of filmmaking. The research is being done in classical schools, which need to focus more on the conceptual angle of the notion of isolating people with disabilities so as to bridge the gap that exists in the field.

In recent years, however, the local and international film industries have witnessed gradual development towards a more positive conception of people with disabilities, as well as an attempt to integrate them into the global film industry. This shift has been mainly driven by individual initiatives from independent directors who consider AVT to be a major component that needs to be present when their films are shown on television screens or in movie theaters. Notable examples include the Oscar-winning American movie ‘CODA’ (directed by Sian Heder), which incorporates both audio description and captions, and the Lebanese documentary ‘From the Other Shore’ (directed by Maher Abi Samra), which features audio description and sign language interpreting.

1.2 International Law and Universal Design

Understanding the culture of people who are hearing- and visually-impaired is essential for crafting a film founded on unbiased and healthy principles, devoid of prejudice or discrimination, and embracing diversity and inclusivity in the film industry. The United Nations Convention on the Rights of Persons with Disabilities (CRPD) and the principles of universal design developed by a group of architects, product designers, and environmental design researchers provide reliable guidelines for producing films that cater to a more diverse and universal audience.

A. International Law

Accessibility, as defined more broadly in Article 9 of the CRPD, is about ensuring to individuals with disabilities access, on an equal basis with others, to the surrounding physical environment by eliminating obstacles and barriers to accessibility, while also granting them their civil, political, economic, social, and cultural rights.

The CRPD defines people with disabilities as “those who have long-term physical, mental, intellectual, or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an

equal basis with others.” The Convention clarifies that it does not only address people with disabilities but also identifies the barriers and obstacles to accessing an environment in which people live and interact on an equal basis with others.

Article 21 of the CRPD also ensures that individuals with disabilities can exercise the “freedom to seek, receive and impart information and ideas on an equal basis with others.” It urges private entities that provide general services to the public, including through the Internet, to provide information and services in accessible and usable formats for people with disabilities, and it also encourages the mass media, including providers of information through the Internet, to make their services accessible to people with disabilities. In addition, it demands the recognition and promotion of the use of sign languages.

Article 30 promotes the participation of people with disabilities in cultural life and in recreational, leisure, and sporting activities and ensures that they enjoy access to television programs, films, theater, and other cultural activities, in accessible formats. It emphasizes that people with disabilities should be entitled, on an equal basis with others, to recognition and support of their specific cultural and linguistic identity. This right extends to technology and virtual spaces.

Although there are no clear laws in the Middle East and North Africa that force production companies to provide content to all members of society on an equal basis, many countries, including the United States of America, Canada, and Member States of the European Union, as well as other countries have forced production companies and livestreaming platforms to provide closed captioning for all of their original productions, in addition to including audio descriptions in the film's original language via official platforms or providing cinema halls with digital projectors that provide audio descriptions upon request to audiences who will benefit from them.

B. Universal Design

The Center for Universal Design at North Carolina State University defines universal design as “the design of products and environments to be usable by all people, to the greatest extent possible, without adaptation or specialized design.” The principles of universal design, which originated in Europe and North America during the 1980s, focus on providing a suitable environment for people with disabilities. Over time, they have evolved to include the diverse characteristics of all humans across age, height, ability, and linguistic skill.

The principles of universal design consist of seven guiding principles, summarized as follows:

- Equitable use
- Flexibility in use
- Simple and intuitive use
- Perceptible information
- Tolerance for error
- Low physical effort
- Size and space for approach and use

These principles provide tools that can be compared with audiovisual treatment for people who are deaf and partially sighted in global cinema if the goal is to make a film for a broader audience. They also explain how to make a film that is marketable to a more diverse and universal audience, that preserves user safety and privacy, and that does not stigmatize or isolate any user.

Incorporating AVT into filmmaking provides people who are deaf and partially sighted with independent and easy access to educational, cultural, and entertainment content that would otherwise be inaccessible without the help of others. AVT is also a useful tool for people learning new language, enhancing their reading skills and providing them with equal opportunities for learning alongside others. Additionally, it is an opportunity for filmmakers to examine how each aspect of the production might impact the enjoyment of a diverse audience.

02

Technical Guide to Filmmaking for Diverse Audiences

Modern technology, along with the development of equality policies and equitable access — whether to educational, cultural, or entertainment content — has produced a variety of modern audiovisual treatment tools and methods that combine modern linguistic and cinematic diversities. This includes dubbing, subtitling, audio subtitling, audio description, voice-over, talk-back, captions, universal translation, simultaneous interpretation, and sign language, most of which are used in film festivals and events dedicated to people with disabilities, or in modern television productions.

“A Guide to Filmmaking for a More Diverse and Universal Audience” aims to provide a framework of concepts and guidelines for creating films that incorporate audiovisual treatment. Recognizing the diverse perspectives and approaches within this field, this guide presents a series of suggestions and initial steps recommended by recent research and studies as a starting point for filmmakers.

2.1 Audio Description

Although there are no specific laws requiring filmmakers to include audio description files in their films, incorporating such a feature breaks the isolation imposed in cinema on people who are blind and partially sighted. It allows movies to reach a wider range of audiences.

Audio description in films is the process of converting the visual image into words that describe the details of the setting of the scene in the film, the identity of the speaker, and their physical appearance — including costume, facial expressions, body language, gestures, etc. This process takes place under the supervision of a team specialized in this field, upon the director's and producer's request, taking the following guidelines into consideration:

- The audio description reader must adhere to what the director wants to say in the audio description, and the audio description must be identical to what they want to say. It is on this basis that the audio description can be shortened or condensed.
- Basic audio description steps must be followed to allow the audience to understand the film's story on an equal footing with others. Recent research has summarized these steps as follows:

- Audio description focuses on main, supporting, and relevant characters and describes visual aspects of their identity, personality, and traits (what they look like, how they move, what they are wearing, their facial expressions, etc.).
- The audio description must be realistic in expression and give priority to character traits (age, physical disability, gender identity, etc.).
- The audio description must be balanced among all characters, such that no one character is described more than another.
 - If time is short or if there is a lot of information to be presented, the characters are described in a gradual manner.
- The audio description must include the social-emotional relationships among characters as they are revealed.
- The characters must remain without names until their names come up in the dialogue or story, or when necessary.
- Characters who are supposed to remain unknown on purpose, to serve the plot, must not be described.
- When referring to people for the first time before dialogue begins, the audio description can include information about the character (for example: a man with a long beard, Jack).
- The audio description must convey facial expressions, body language, reactions, etc. However, these elements can be omitted from the audio description if they are completely covered in the dialogue accompanying the scene.

- The audio description must be as specific and brief as possible and must avoid generic terms/brand names, mentioning colors, and so on, unless they are relevant to the story.
- As languages develop, attention must be paid to the words that are chosen and their historical context. Research advises against using words with negative or biased connotations or words that are considered outdated or no longer acceptable.
- In the use of verbs, the most appropriate, liveliest, and quickest verbs must be chosen for descriptions, and common terms must be used over longer descriptions (for example: using “limping” instead of “walking with difficulty”).
- Any censorship of information must be avoided, and the audio description must be clear when addressing nudity, sexual acts, violence, etc.

● The style of audio description must be chosen for each movie so as to be appropriate to the genre. Research has identified three such styles:

- Reporting/informative audio description: audio description traditionally objectively describes what appears on screen. This style is usually used in documentaries.
- Cinematic audio description: this style is expressive and balances between describing the language/story of the film and a guiding description. It also explains cinematic techniques when necessary. It is usually used in realistic films.
- Expressive audio description: this style is a narrative one that focuses on explaining the story and message of the film and integrates visual information to form a cohesive narrative. It is usually used in experimental films.

● The audio description must use explanations and vocabulary that is compatible with the age group of the target audience.

● The audio description must avoid concealing/obfuscating the dialogue among characters or the sound effects that might affect the narration or the development of events.

● The time period between characters’ dialogue and the audio description must not be too short, as this may impact the audience’s ability to follow and understand the events unfolding in the scene.

● The audio description must take into account intentional pauses, dramatic silences, and musical pieces to allow the audience to experience moments of dramatic suspense.

● The audio description must identify the character speaking for the audience to know who it is. However, this can be avoided when characters introduce themselves or when they are identified by another character.

● The audio description reader must be given enough time to describe and identify recognizable sites in the scene without having this interfere with character dialogue or scene events.

- Some research advises against describing sound effects that are obvious to the audience, such as a doorbell, a phone ringing, and gunshots, to name a few. But other studies have shown that audiences prefer these additions to audio description.

- Describing technical matters must be avoided. These matters include but are not limited to camera movements, transition shots, etc. But some research has shown that audiences prefer these additions to audio description.

- The audio description for films shown on television or in movie theaters must be synchronized with the original soundtrack so that it does not affect the nature of the scene and events.

- The audio description text should be selective in its verbal conveying of complex visual details: the audio description reader needs to be able to describe as many of the visual elements as possible within the allotted time period, and the language used in the description must be appropriate and easily accessible to the audience.

- If the audio description is translated into another language, the description must be understandable to the audience and be free of cultural complications. It must take cultural differences into account, such as dialect, slang, terminology, humor and sarcasm (jokes), etc., such that it does not deprive the film of its general concept.

- The audio description reader often faces special challenges when it comes to sarcasm (jokes) which may require more time to be explained. Research suggests choosing linguistic expressions that convey sarcasm or terms close to the word used in the source language. The accuracy and quality of the translation mostly depends on the translator's creativity.

- One of the most important benefits of adding audio description to films is that it can improve accessibility for people who are blind and partially sighted and a wider spectrum of audiences by allowing them to understand the scenes and characters without having to see them. This gives them the opportunity to enjoy cinematic films, an initiative that encourages them to participate in cultural and artistic life.

- Audio description offers the opportunity to enjoy watching movies not only to people who are blind and partially sighted but to people with autism spectrum disorders as well, as it helps them understand and learn signs. It is also helpful to people with Alzheimer's disease, the elderly who have difficulty learning, or people who want to learn new languages.

- Audio description can be recorded and/or integrated with the other film elements in post-production, such that it becomes accessible to audiences via an AD icon for movies being watched at home. It is an optional addition that does not affect the viewing preferences of others.

- For films being watched in movie theaters, the audio description can be provided via an audio file that audience members ask to have downloaded on their personal phones or that they can access via specialized digital devices. Audience members could also ask for specific headphones that include the audio description before they walk into the movie. In both cases, the audio description is an optional feature that does not affect the viewing preferences of others.

- The audio description can be recorded and/or integrated with the other film elements in post-production, or it can be written to be read directly by specialized people in cinema halls. In both cases, the audio description does not affect other audience categories.

- To give the audience more information, an audio description could be independently offered before the film or announced on social media platforms. It could include detailed information about the genre of the film, visual effects, etc., as well as descriptions of the characters, cast, and production crew. The introduction and end of the film must also include an audio description which includes the names of the cast, production crew, and producers.

- Audio description is usually worked on in the final post-editing stage. When it is fully added to the film, it must be reviewed by professionals who are blind and partially sighted to evaluate the experience before the official showing.

2.2 Closed Captioning

Closed captioning (hereafter referred to as captions) falls within the broader field of audiovisual treatment for people who are deaf and hard of hearing. It consists of converting verbal and non-verbal elements of dialogue among characters into written text at the bottom of the screen, in addition to translating/describing relevant sound effects, music, and other paralinguistic features, taking into account the concepts and guidelines recommended by recent studies.

- Full access to audiovisual media for people who are deaf and hard of hearing is crucial, which is why subtitles should be at the bottom of the screen.
- The translated language must be conveyed to the audience in two modes:
 - Speech-to-writing and/or original script spoken among characters and characters' personal emotions
 - Soundtracks and sound effects come up in the dialogue or story, or when necessary.
- Unlike standard film subtitling, this kind of translation includes non-verbal (non-spoken) audio information that helps to better understand the story, which research guidelines define as:

- Identifying the speaker — one of the main priorities for the audience — is done by using colors or name tags.
 - Focusing on the importance of paralinguistic information and synchronizing it with the audience such that the captions reflect the pace of the dialogue, allowing the audience to grasp the complete idea of the film, including irony, surprise, suspense, excitement, etc.
 - Describing the tone and mood of the character's dialogue, including emotional outbursts, anger, sadness, disapproval, surprise, etc.
 - Describing sound effects, including explosions, slaps, punches, ringing phones, slamming doors, etc.
 - Identifying song titles and translating lyrics, provided that they adhere to the rhythm of the song so they can be easy to read
- Research recommends highlighting paralinguistic information in captions, as shown in images (1, 2, 3, 4, 5) on the following pages.



Image 1: Still from the film 'Argylle' — Apple TV+



Image 2: Still from the film 'CODA' — Apple TV+



Image 3: Still from the film 'CODA' — Apple TV+



Image 4: Still from the film 'CODA' — Apple TV+



Image 5: Still from the film 'Argyle' — Apple TV+

● To reach these results, the caption translator must follow the instructions set out by the director and take the following into account:

- The speed at which the audience reads the captions
- The speed at which the dialogue is spoken by the characters as there is no specific pattern — each character has their own specific rhythm
- The speed/rhythm of the translation

● Captions must have an accuracy of at least 99%, which means there is a 1% chance of error or a leniency rate of 15 errors per 1,500 words.

● Subtitles are usually placed at the bottom-center of the screen. But they can be placed elsewhere in one case, when they need to be synched with the captions. In such cases, they can be placed above the captions or moved to the top of the screen, provided that the following standards for moving the captions are respected:

- One- or two-line captions are placed directly above or below the primary visual element.
- Captions are moved to the top or bottom of the screen if there is no primary visual element there.
- Captions can be moved anywhere on the screen, using three lines if necessary. The three lines must be placed at the center or to the left of the screen, not on the right side.

• If the shot is a close-up of a character in the film, the captions must not cover the character's mouth because most audience members also read lip movement along with the captions.

● The types and size of font used in the captions must be easy to read, taking the size of the screen into account. The space they fill up must not be less than 20% of the screen area. Research recommends that the following guidelines be followed:

• Committing to the limited number of lines suggested for subtitles so as not to leave room for lengthy explanations. The number of lines usually ranges from one to two lines, given the difficulty of reading three lines in a short time. Still, requests and instructions of the director, producer and production companies must be taken into consideration.

• The number of characters per line should be 35 to 40 at the most, with the number of words in a two-line sentence ranging from 14 to 16 words.

• The text must be displayed on the screen for a period that is long enough for the audience to read and understand it easily, given that the average speed of reading one line is 3.5 seconds, in contrast to the average speed of reading two lines, which should not exceed 6 seconds. According to recent research, the half-second was added to the one line because studies have shown that audiences tend to read two-line subtitles faster than one-line subtitles.

- Research recommends choosing simple, clear fonts that are easy to read, and the majority of these studies recommends using fonts such as “Arial” because it helps save space.
 - Subtitle font size must be at least 18 points, and there must be a clear contrast in colors between the text and the background.
 - A black background behind words is the most common format recommended by Captioning Guidelines, which are the standards commonly used for movie subtitles in cinemas and on television.
-
- Subtitling for cinema adheres to the same grammar and punctuation rules as literary translation, and these grammar and punctuation rules must be applied in captions. Otherwise, they may confuse the audience rather than help them understand the story of the film.
-
- Common and simple words must be chosen over more unusual words: the more common and simpler the word is, the more easily and quickly it will be read by the audience.
-
- When editing the film, the director should consider reviewing, timing, and synchronizing captions with characters, sound effects, songs, etc.
-
- Captions are usually added in the final post-edit, so when they are added, they must be reviewed by specialized people who are deaf and hard of hearing, so that they may evaluate the experience prior to official showing.

2.3 Sign Language

In audiovisual treatment, the spoken language in the film is typically interpreted into sign language, tailored to the linguistic preferences of the target audience and taking into account the cultural nuances inherent in their sign language. This applies to various sign languages, including Arabic, French, and American Sign Languages, as well as other country-specific sign languages.

Research guidelines regarding the use of sign language in films suggest the following:

- The sign language interpreter should be positioned either within a distinct frame or outside the main frame, ensuring that the primary image remains unobstructed. The frame in which the interpreter appears is usually placed at the bottom right corner of the screen, or any other placement specified by the director, ensuring that the image remains stable and relatively unmoving.
- The interpreter's image can be displayed continuously or intermittently. For the film interpreter, in cases of continuous display, the interpreter remains in the image even during segments that do not require interpretation, but does not move.
- Managing sign language data is very similar to managing spoken language data, whereby all textual data and metadata must be handled in the written form of the target audience's language.
- The interpreter must wear monochromatic clothing, as different as possible from their skin color.
- The background must also be monochromatic, as different as possible from the color of the interpreter's clothing.
- The interpreter must avoid wearing jewelry, accessories, or nail polish to ensure not to distract audiences from the main idea of the film.
- Sign language can include some creative additions such as visual effects, blurring the interpreter to evoke distant sounds or unintelligible vocalizations, for instance.
- Sign language is usually added in the final post-editing stage, so when it is added to the film, it must be reviewed by sign language specialists trained in the sign language specific to the target audience, ensuring the experience is optimal before the official screening.

2.4 Universal Design Guidelines

The guidelines stress the importance of granting users the freedom to choose how they access and easily use AVT, considering them as two intertwined choices. This is accomplished by adjusting various user-friendly features to meet their needs, ensuring logistical obstacles are minimized in movie theaters and on TV.

Even though the general approach to audio description and captions is remarkably similar, universal design research recommends following the below guidelines for the best outcome and optimal audience enjoyment of the cinematic experience:

- The main elements thereof must contain the basic criteria of studying the impact of audio description and captions on the audience.
- The guidelines emphasize the importance of identifying the primary information that must be conveyed to the audience in audio description and captions, and the importance that all information be conveyed easily, objectively, and transparently.
- Users must be given freedom of choice when it comes to how they access audio description and captions.
- Users must be given ease of access and use of audio description and captions to suit their specific needs, and this includes the ability to work at their own pace and not needing any additional modifications to be able to access both services.
- The director and/or production companies must intervene directly, provide feedback, and guide the caption writer as well as the audio description reader. Universal design guidelines recommend delegating the audio description and captioning tasks to the film production team.
- Audio description and captions must match audience expectations in terms of arranging information according to their importance and accommodating individuals with low literacy and language skills.

(continued >)

● The cognitive effort expended for easy access to audio description and captions with minimal effort is an added advantage. This includes watching out for misspellings, missing words, synchronization errors, inaccurate or incorrect information, incomplete information, etc. Not removing such errors would lead to increased cognitive effort by the audience and thus negatively impact their enjoyment of cinematic content. The more reliable the information, the less cognitive effort is ultimately expended.

● Considering that audio description and captions are among the various creative elements in the field of film direction, the director must determine the best way to use these two services to ensure an enjoyable experience for the audience.

● The director's notes must not be relied on only after having finished adding audio description and captions to the film. A specialized team must carry out a quality assessment and control process to avoid errors.

List of Arabic-English Terms

Audio Description | AD

الوصف الصوتي

Audio Description Extended

الوصف الصوتي الموسع

Audio Description of the Image

الوصف الصوتي للصورة

Audio Description Standard

الوصف الصوتي القياسي

Audiovisual Treatment | AVT

الترجمة السمعية - البصرية

Caption

التسميات التوضيحية

Closed Captioning | CC

التسميات التوضيحية المغلقة

Cutaways

لقطة اعتراضية أو لقطة فاصلة

Sign Language | SL

لغة الإشارة

Subtitles for the Deaf and Hard Hearing | SDH

الترجمة للصم وضعاف السمع

Transition Shots

اللقطات الانتقالية

Translation for the Blind and Partially Sighted

لترجمة للمكفوفين وضعاف النظر

Universal Design

التصميم الشامل و/أو التصميم العالمي

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