

EUR(O)VISION

OPERATED BY EBU



ACCESS SERVICES PAN EUROPEAN SURVEY 2016

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ABOUT THIS SURVEY

Public service broadcasters have a particular duty to provide services to the whole community. People from minorities and those with sensory disabilities are an important part of our audience.

The demand for access services is growing, especially since they are increasingly required by national/regional legislation and regulation. It must be stressed, however, that access services do not solely depend on broadcasters. Broadcasters seeking to provide these services face questions about their costs, as well as the technological choices for production and delivery.

This survey provides a pan-European overview by sharing Members' current situations and experiences, covering issues currently being faced with Access Services processes and implementations.

METHODOLOGY

SURVEY CONTACTS

The survey was completed by the person responsible for Access Services within each participating EBU Member organizations.

SURVEY TIMING

Responses were collected between May and September 2016.

Covering 4 key areas of accessibility services

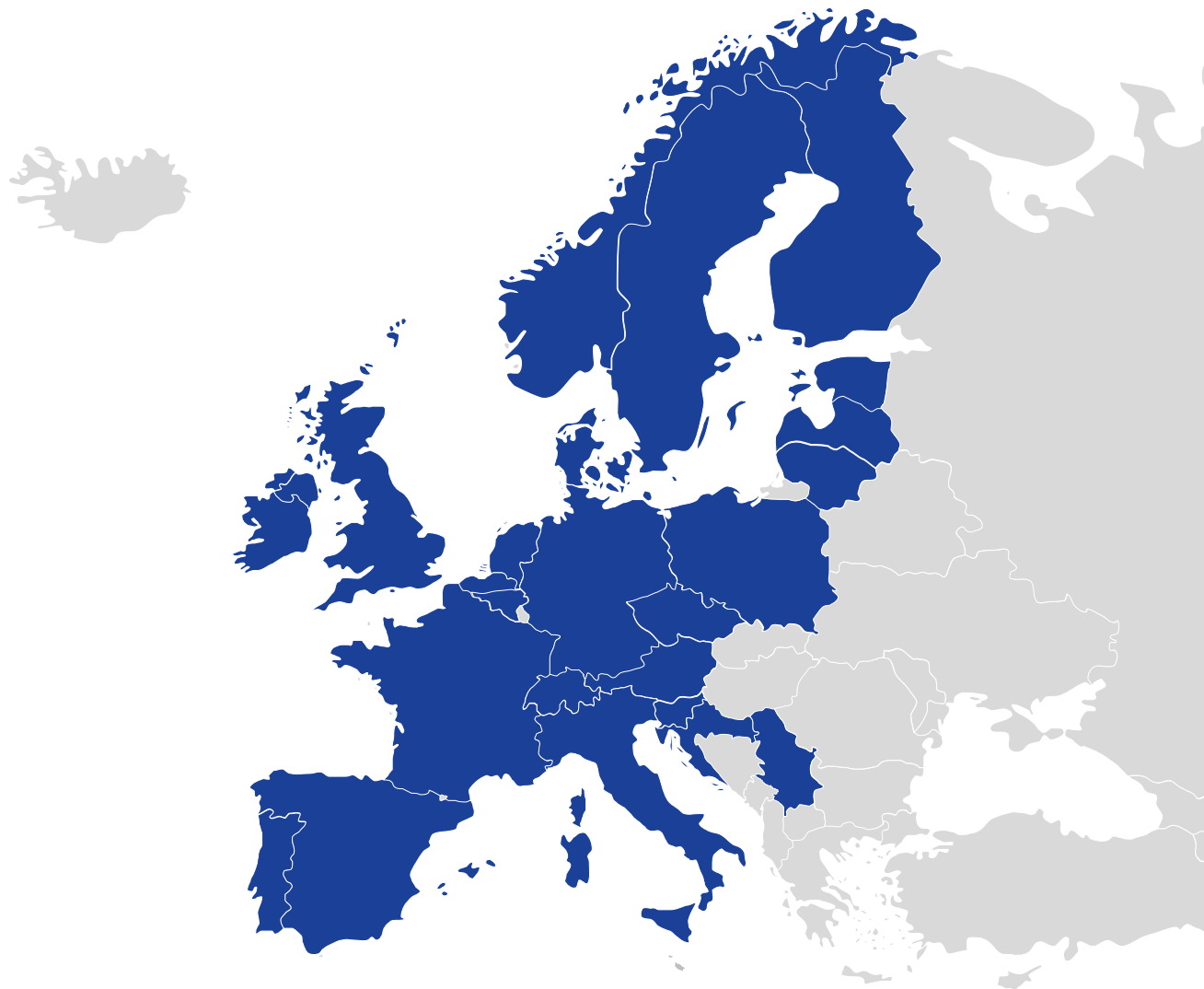
- Subtitling
- Audio subtitling
- Audio description
- Signed programmes

DATA SHARING POLICY

Results are for EBU Members only, and to specific organizations upon decision of the Access Services bureau in the interest of EBU Members.

Participating Broadcasters

Austria ORF	Germany ARD ARD BR ARD HR ARD MDR ARD NDR ARD RBB ARD SR ARD SWR ARD WDR KIKA	Norway NRK
Belgium French RTBF		Poland TVP
Belgium Flemish VRT		Portugal RTP
Croatia HRT		Serbia RTS
Czech Republic CT	Ireland RTE TG4	Slovenia RTVSLO
Denmark DR	Italy RAI	Spain CCMA RTVE
Estonia ERR	Latvia LTV	Sweden SVT
Finland Yle	Lithuania LRT	Switzerland SRG SSR
France FTV MFP	Netherlands NPO	United Kingdom BBC ITV



36 broadcasters in 24 markets

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OVERVIEW

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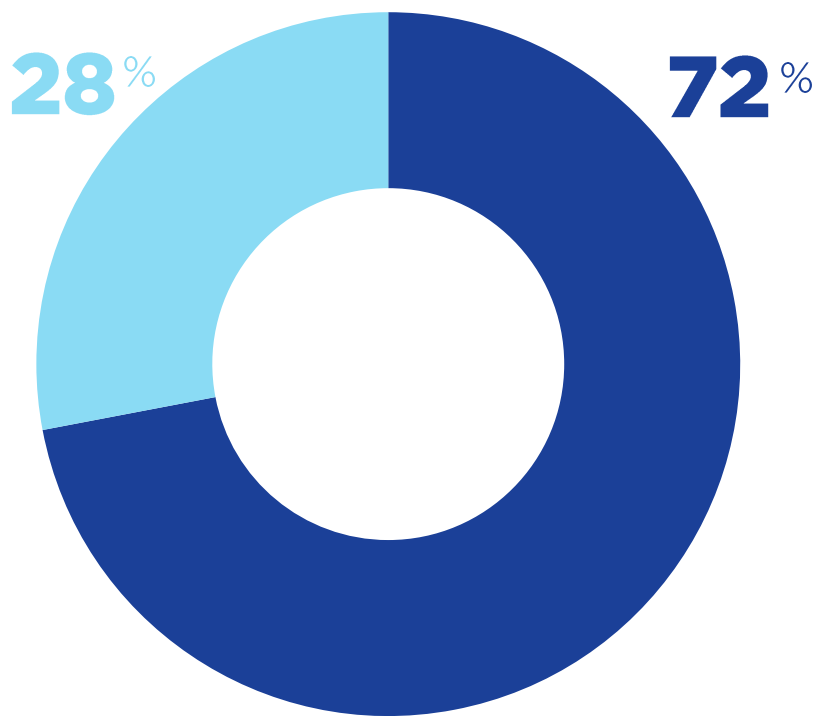
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Do you outsource your access services?

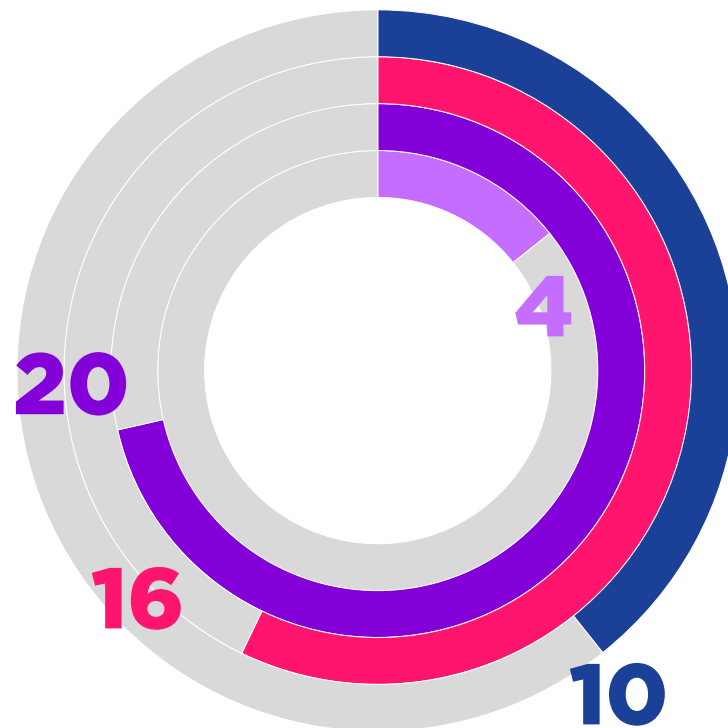
% of broadcasters outsourcing access services



- Yes
- No, everything is produced in-house

Based on 36 broadcasters.

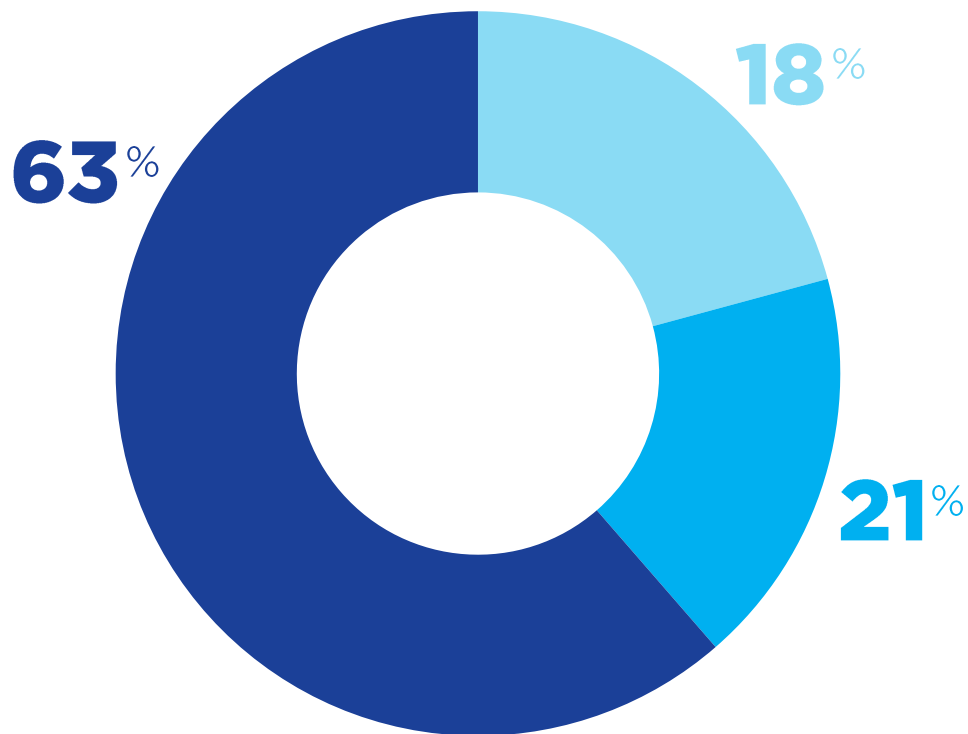
Most outsourced services
Number of broadcasters



- Subtitling
- Live Subtitling
- Signing
- Audio Description

Based on 26 broadcasters.

Composition of the access services team



- More than 5 people
- 3 to 5 people
- 1 to 2 people

Based on 35 broadcasters.

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OVERVIEW

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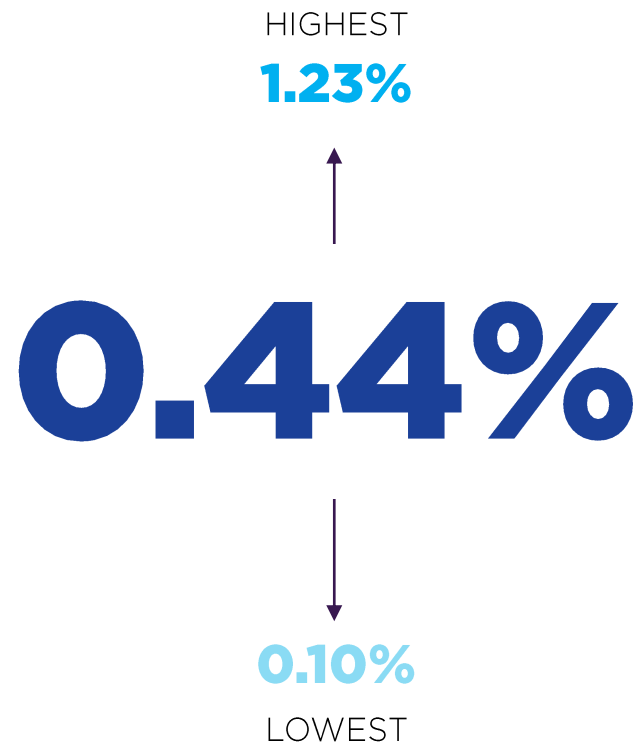
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On average almost half a percent of PSM organizations annual budget goes to fund access services

Annual budget for access services as a % of organizations total annual budget



Based on 24 broadcasters with available data.

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OVERVIEW

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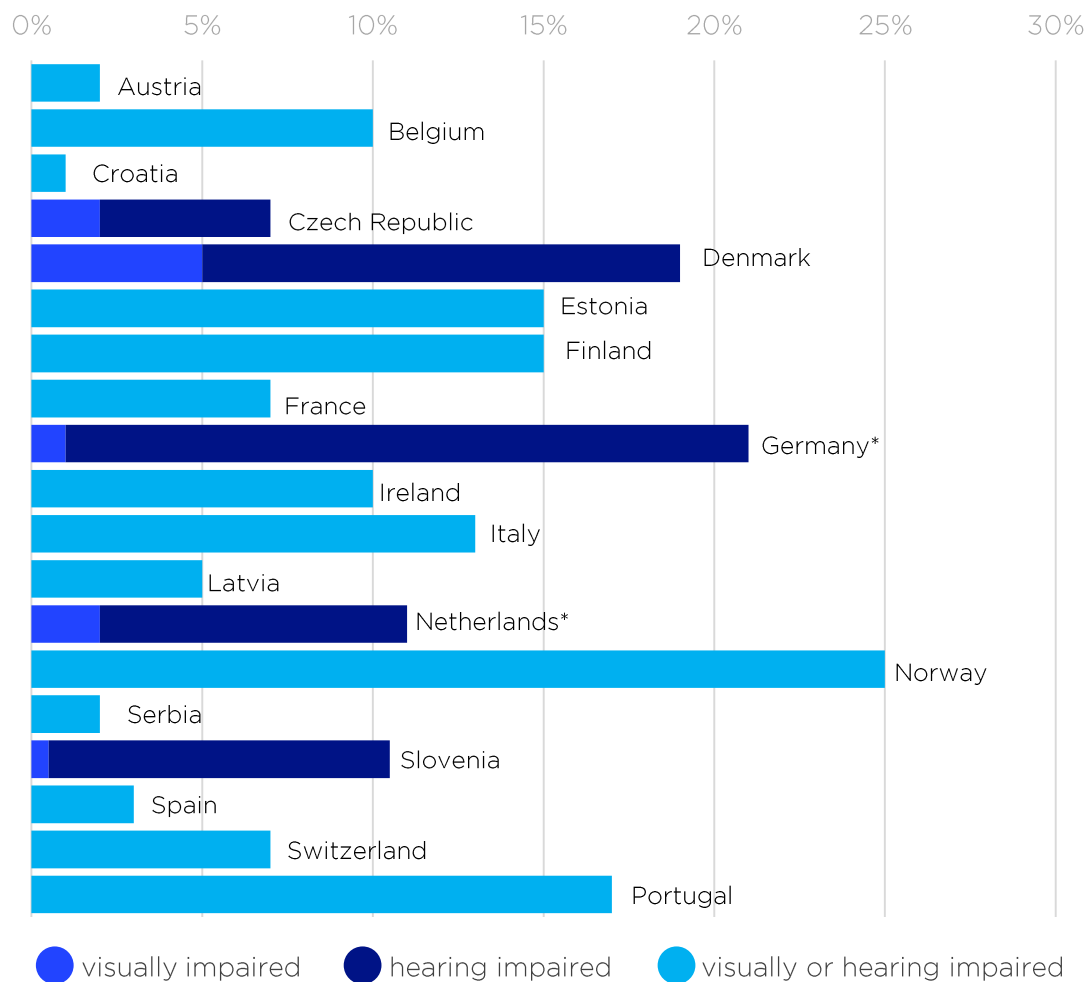
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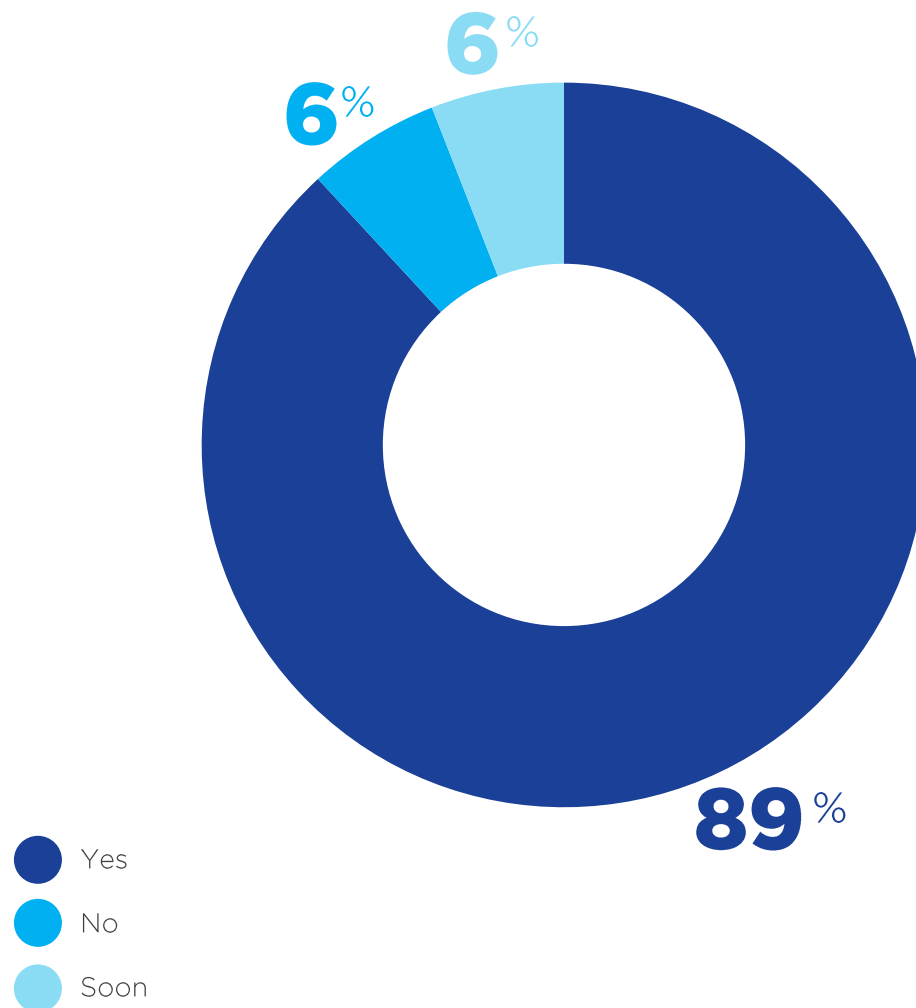
**On average
10%
of people per
country
have sensorial
disabilities
which is
approximately
40 million
people across
18 countries**

Percentage of people with sensorial disabilities by market



*Germany and Netherlands % calculated by EBU based on data provided in number of people with sensorial disabilities. Based on 19 countries with available data.

% of broadcasters offering part of their programming as VOD



Based on 36 broadcasters.

1

OVERVIEW

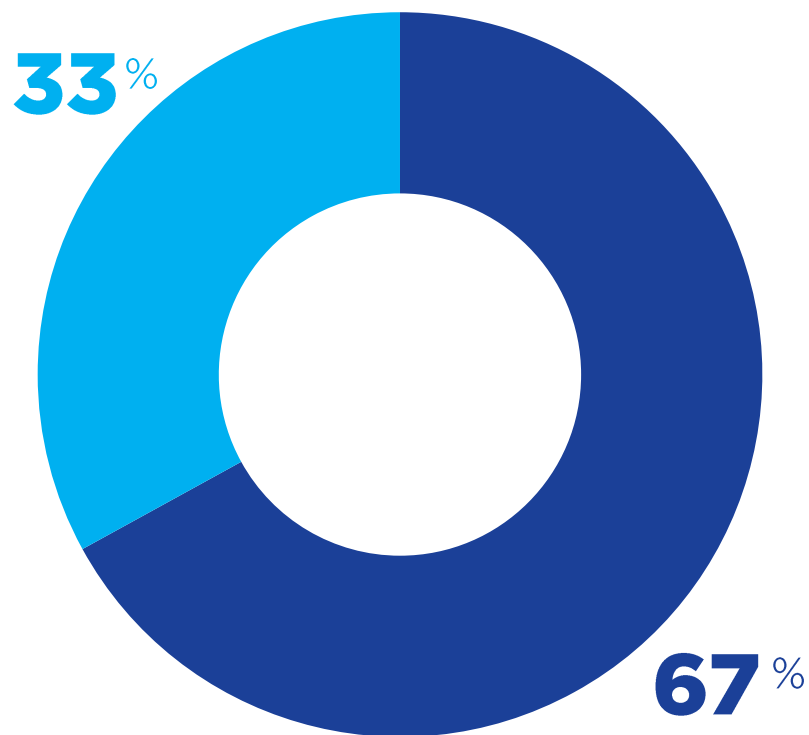
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**% of
broadcasters
having an
HbbTV (or
connected
TV) app and
offer part of
this
programming
as VOD**

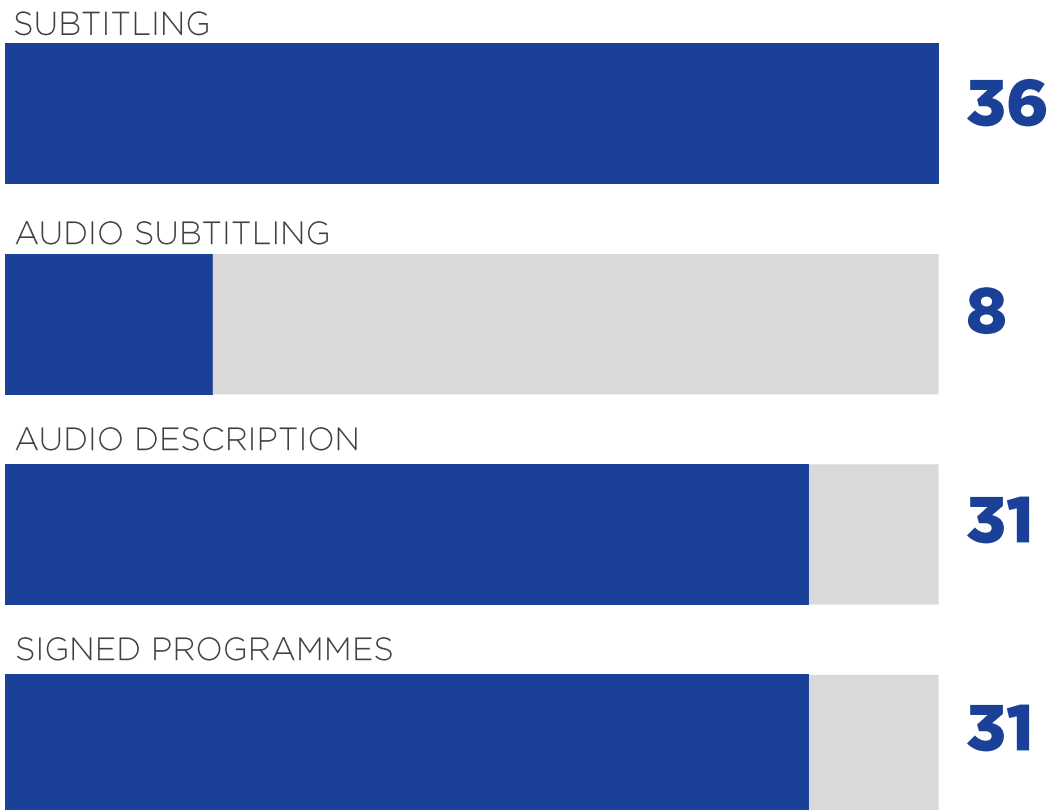


- Yes
- No

Based on 36 broadcasters.

All organizations surveyed provide access services on at least their main national channels

Number of broadcasters providing each type of access service



Based on 36 broadcasters.

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OVERVIEW

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SUBTITLING

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SUBTITLING

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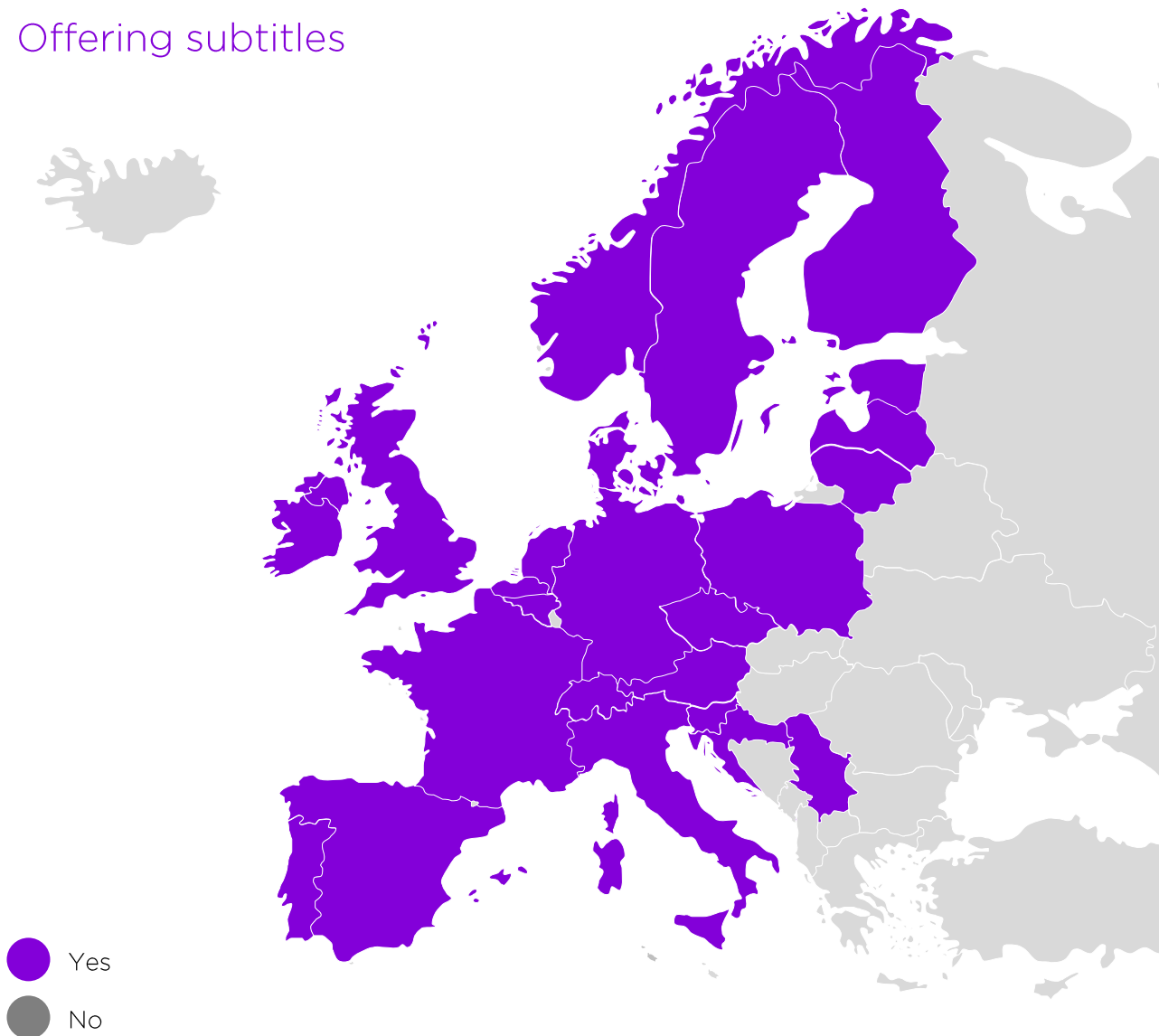
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SUBTITLING

All
broadcasters
taking part in
the survey
deliver
subtitled
programmes

Offering subtitles



Based on 36 broadcasters.

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SUBTITLING

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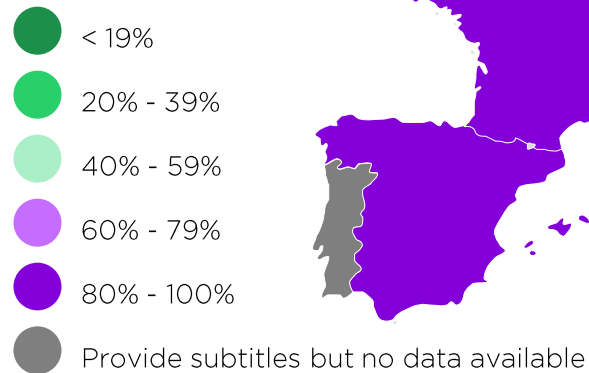
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On average public broadcasters deliver subtitles on over 66% of programmes

Half the broadcasters deliver over 80% of programmes with subtitles.

With some committed to subtitling 100% of all content, while other broadcasters have more limited resources.

Percentage of total programmes with subtitles



Based on 35 broadcasters.

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SUBTITLING

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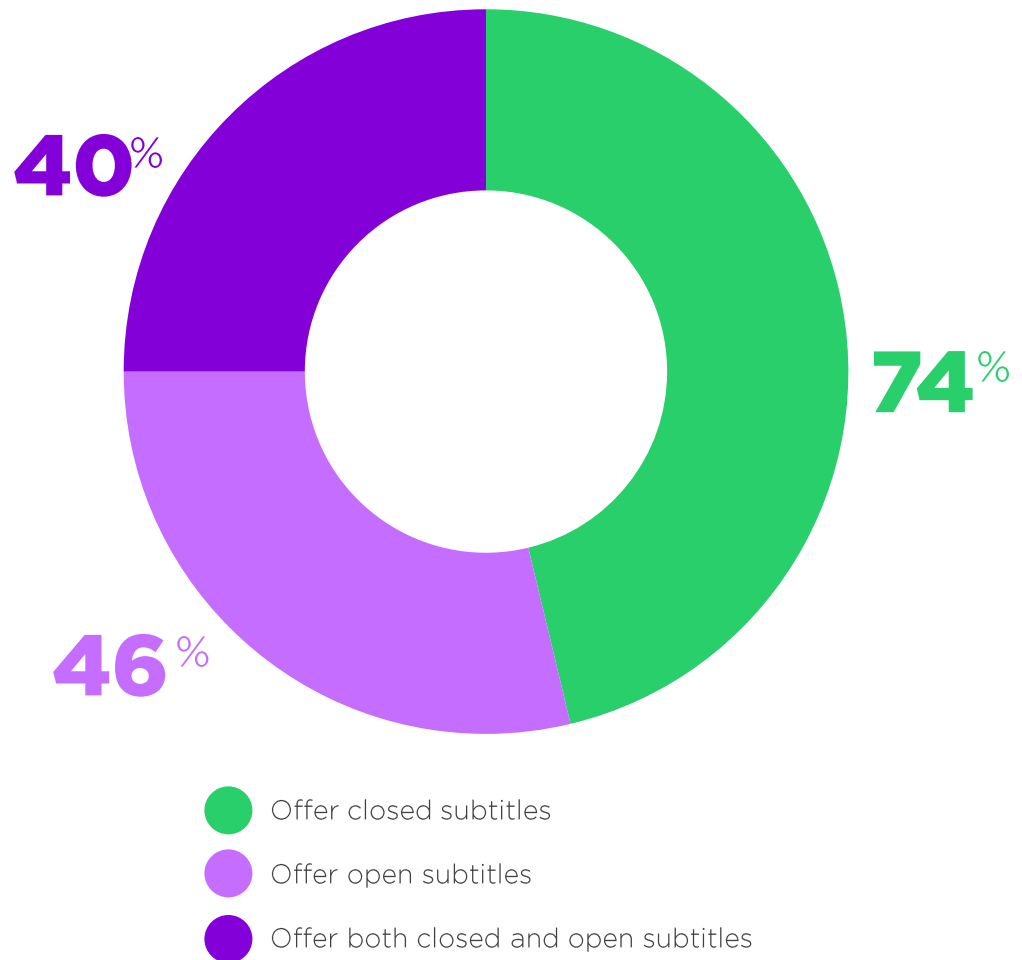
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26
broadcasters
offer closed
subtitles

16
broadcasters
offer open
subtitles on
television

In addition 13 broadcasters offer closed and open captions on some online delivery platforms

Type of subtitling services on television



Based on 35 broadcasters.

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SUBTITLING

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All PSM organizations make subtitles available on their own websites

When it comes to external platforms (HbbTV and VOD) this drops to around half of the broadcasters surveyed

Around a quarter of broadcasters make subtitles available on social networks.

Subtitling services availability by platform

OWN WEBSITE



SOCIAL NETWORKS



CONNECTED TV SERVICES (HbbTV)



MOBILE DEVICES



VOD OPERATORS



Based on 34 broadcasters.

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SUBTITLING

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Although subtitling is the most common access service, technological choices among EBU Members vary widely

75% of broadcasters surveyed use more than one technology/standard for subtitling

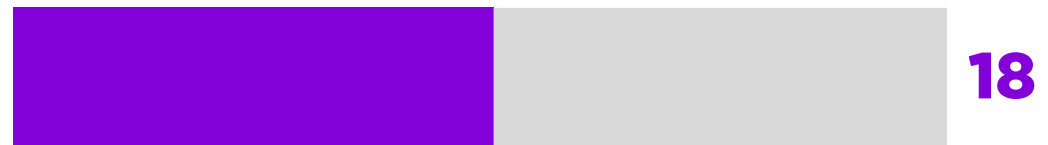
As such each type of subtitling technology/standard is used by around half of the broadcasters surveyed

Technology/standard used for subtitling Number of broadcasters

ANALOGUE TELETEXT



DVB TELETEXT



DVB SUBTITLING



WEB STREAMING



Based on 35 broadcasters.

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SUBTITLING

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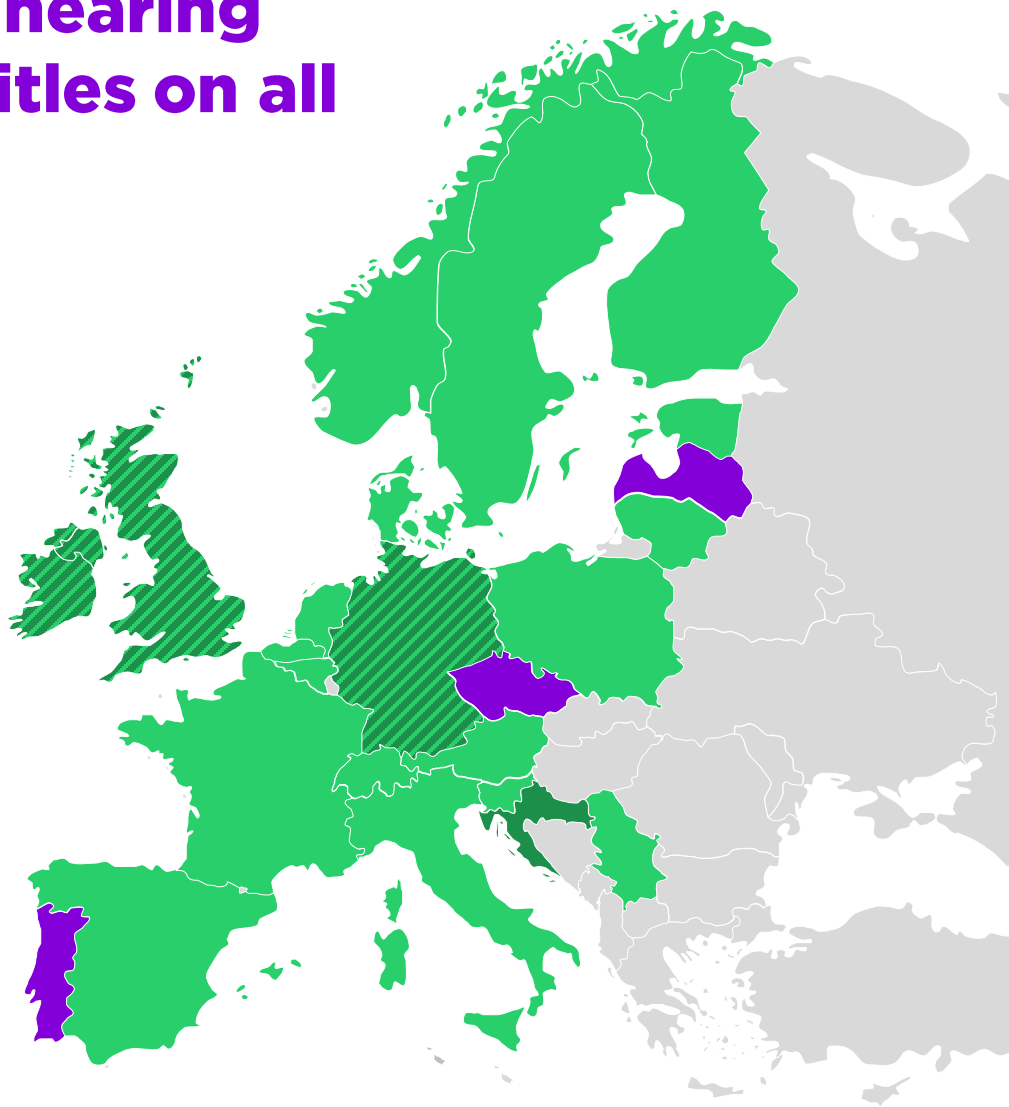
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Have associations of the hearing impaired requested subtitles on all devices?

In 87% of countries surveyed associations of the hearing impaired have requested or demanded subtitles on all devices

- Yes
- No
- Only individual deaf and hard-of-hearing viewers



Based on 24 countries

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SUBTITLING

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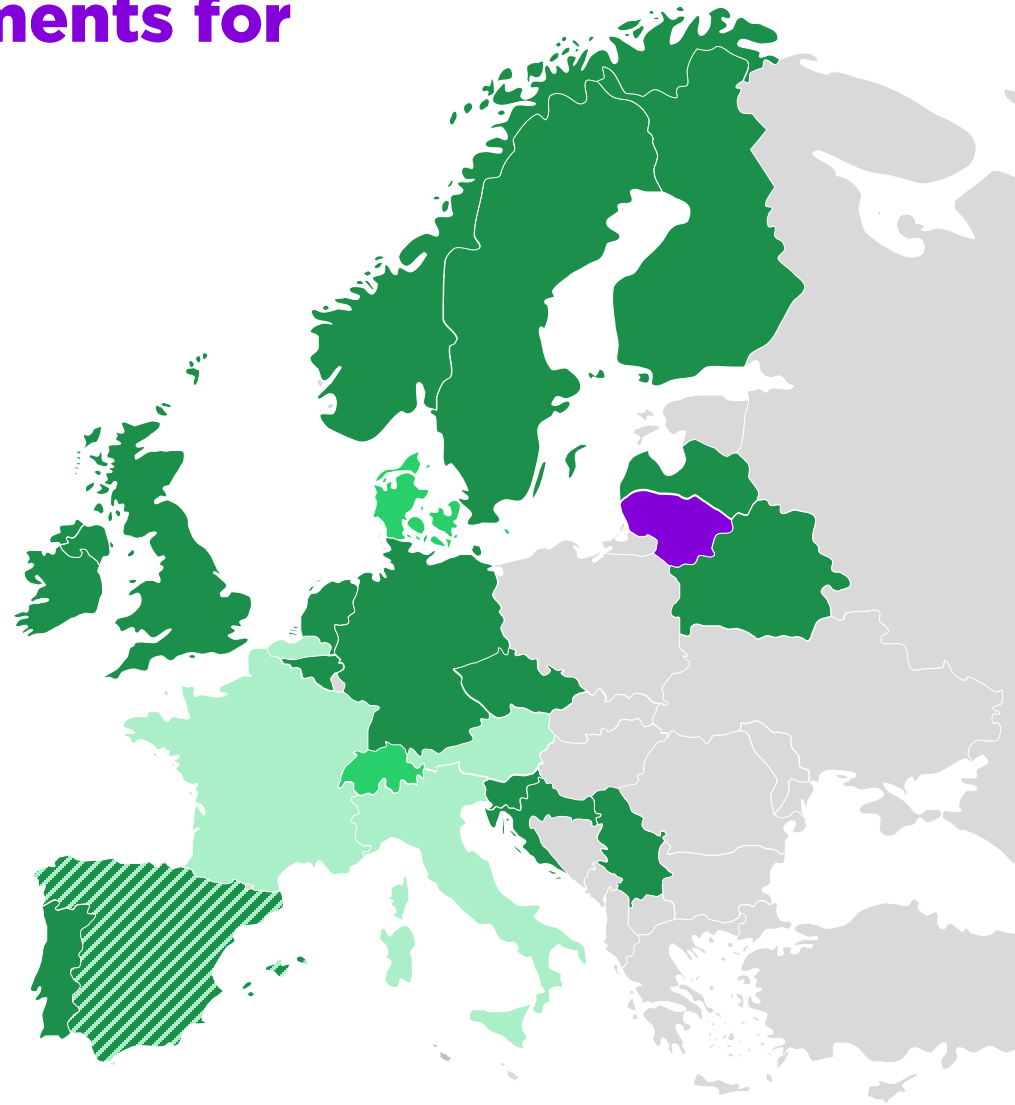
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Media authority requirements for subtitling online content

71% of surveyed public broadcasters subtitle online content even though there is no official requirement

- Required to subtitle on all devices
- Voluntary agreement to subtitle on all devices
- No requirement but subtitles offered
- No requirement and non offered



Based on 23 countries

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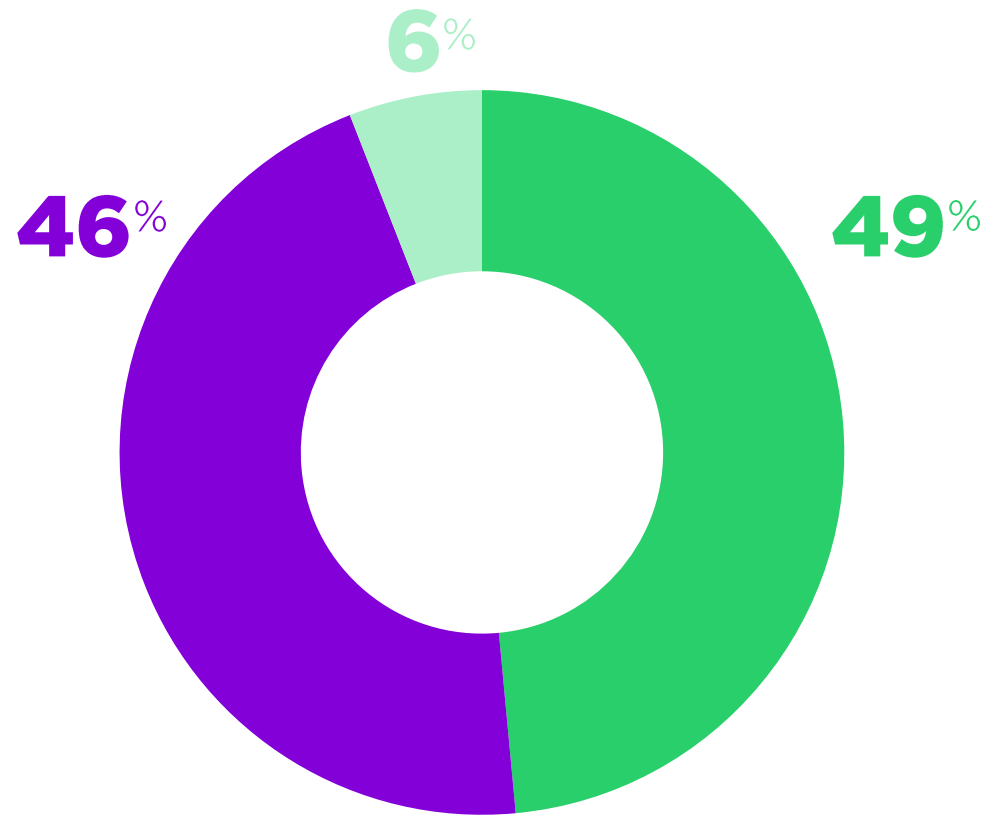
SUBTITLING

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Do you perform additional editing of subtitles to prepare content for online delivery?



- Yes, we sometimes correct them before putting them online
- Yes, we sometimes subtitle online content that is not broadcast
- No, we put them online as they were broadcast

Based on 34 broadcasters.

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SUBTITLING

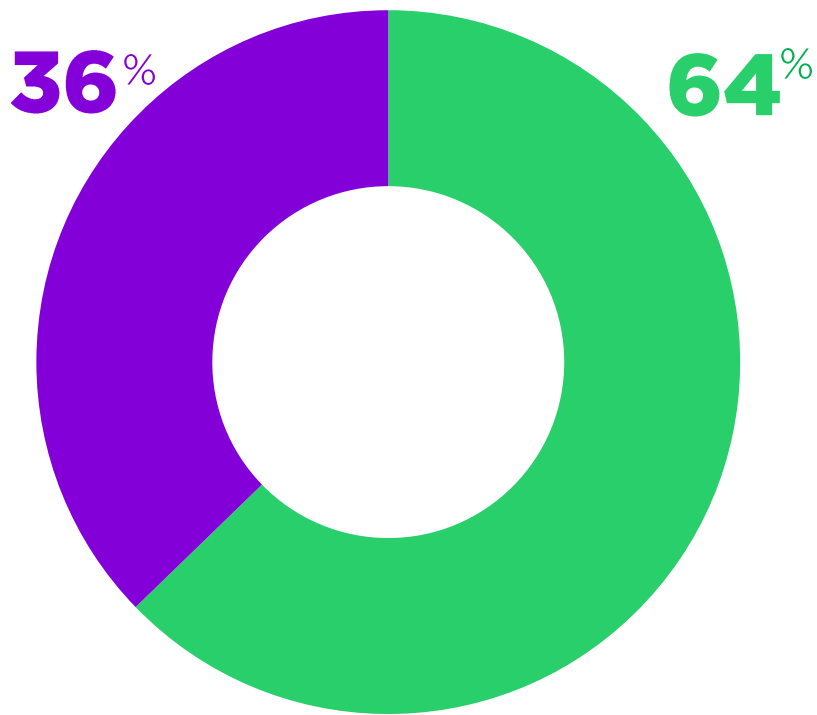
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Is your organization facing obstacles to subtitling?

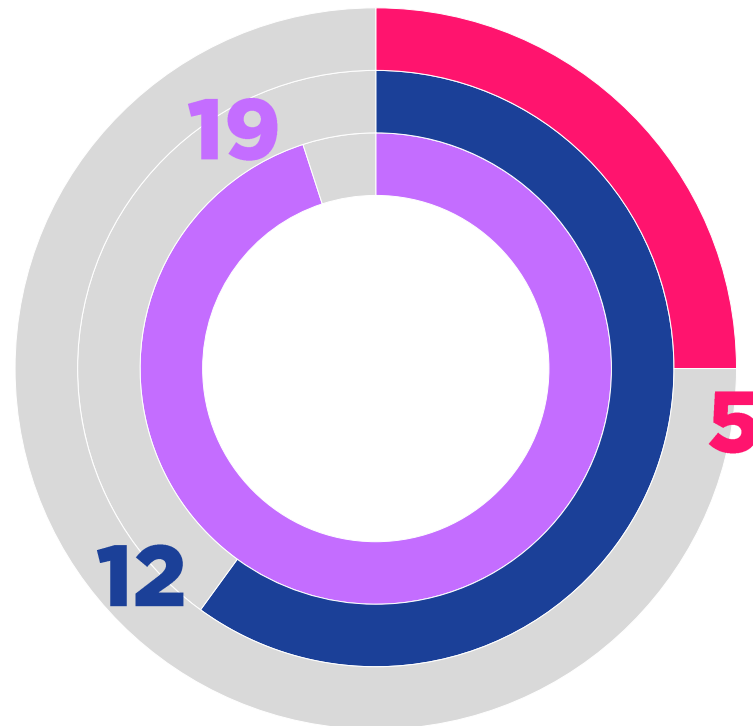
% of broadcasters facing obstacles



- Yes
- Not particularly

Based on 33 broadcasters.

Most mentioned issues
Number of broadcasters



- Cost
- Technical
- Quality

Based on 21 broadcasters.

AUDIO SUBTITLING

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AUDIO SUBTITLING

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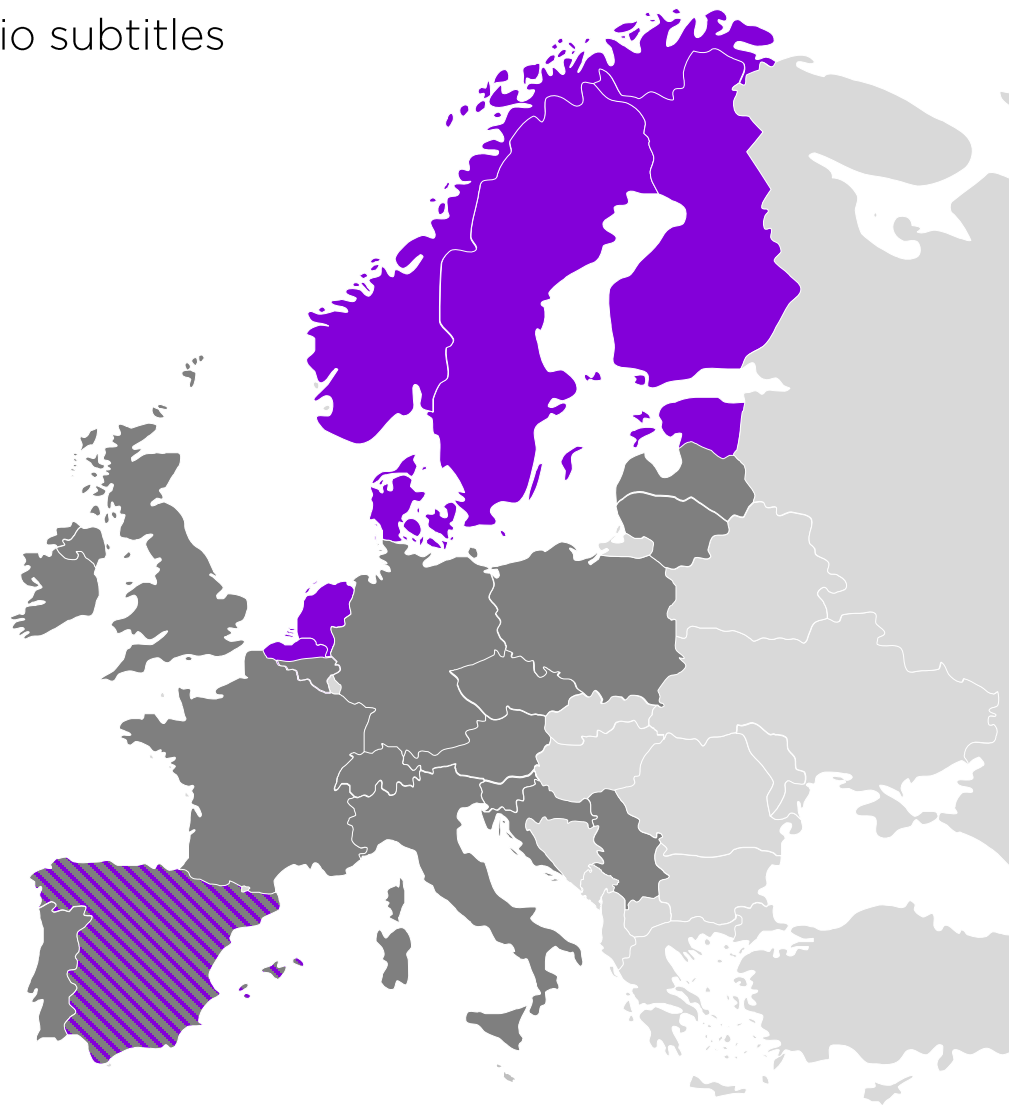
Audio subtitling

8 out of 36
broadcasters
taking part in
the survey
offer audio
subtitling

In Spain CCMA offers Audio
subtitling, RTVE does not

Offering audio subtitles

- Yes
- No



Based on 36 broadcasters

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AUDIO SUBTITLING

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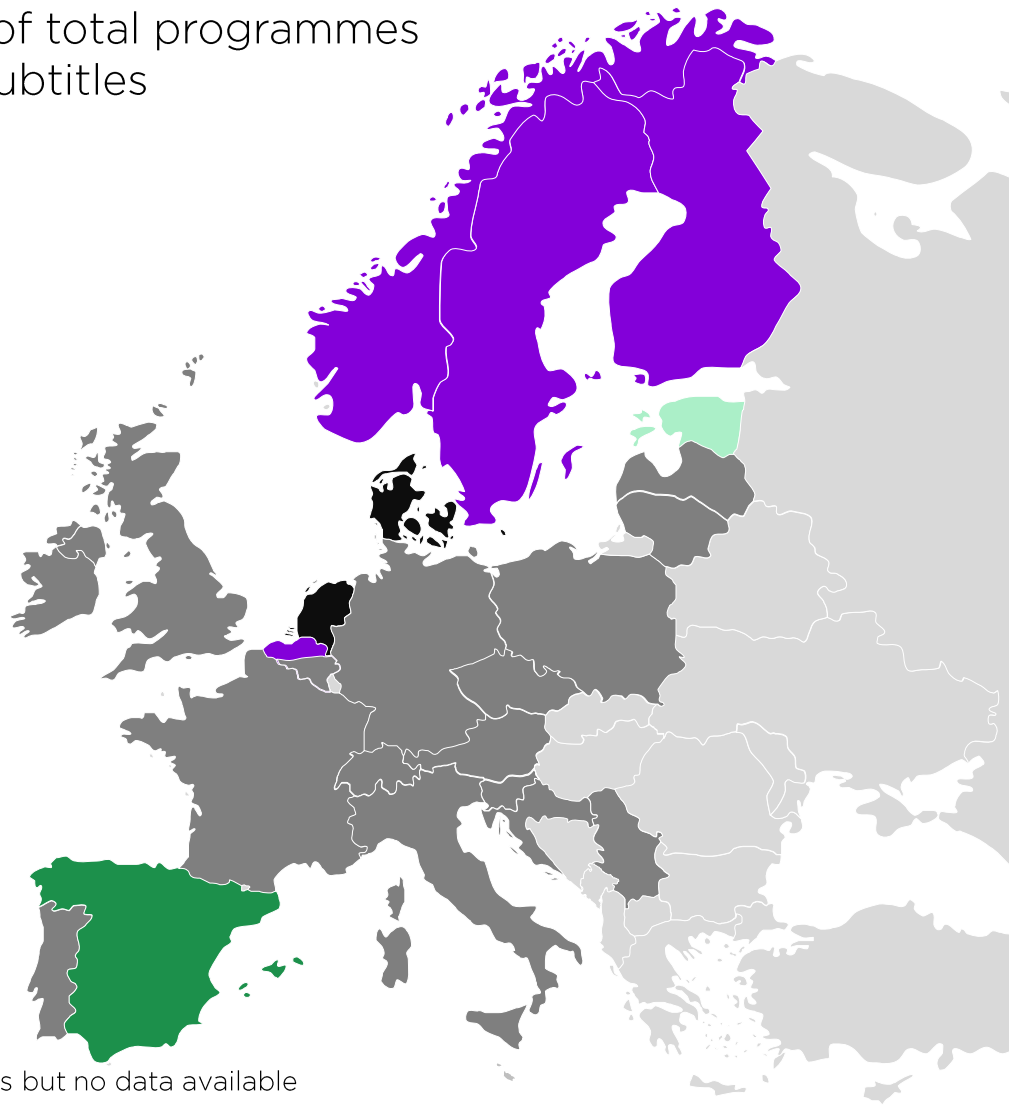
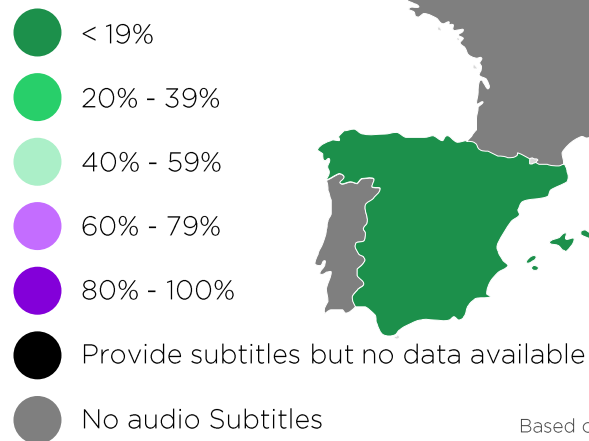
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Amount of audio subtitling differs notably between broadcasters

Nordic and Belgium Flemish broadcasters offer all or almost all programmes with audio subtitles

In contrast to CCMA in Spain which offers just 2% of programmes with audio subtitles

Percentage of total programmes with audio subtitles



Based on 6 broadcasters.

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AUDIO SUBTITLING

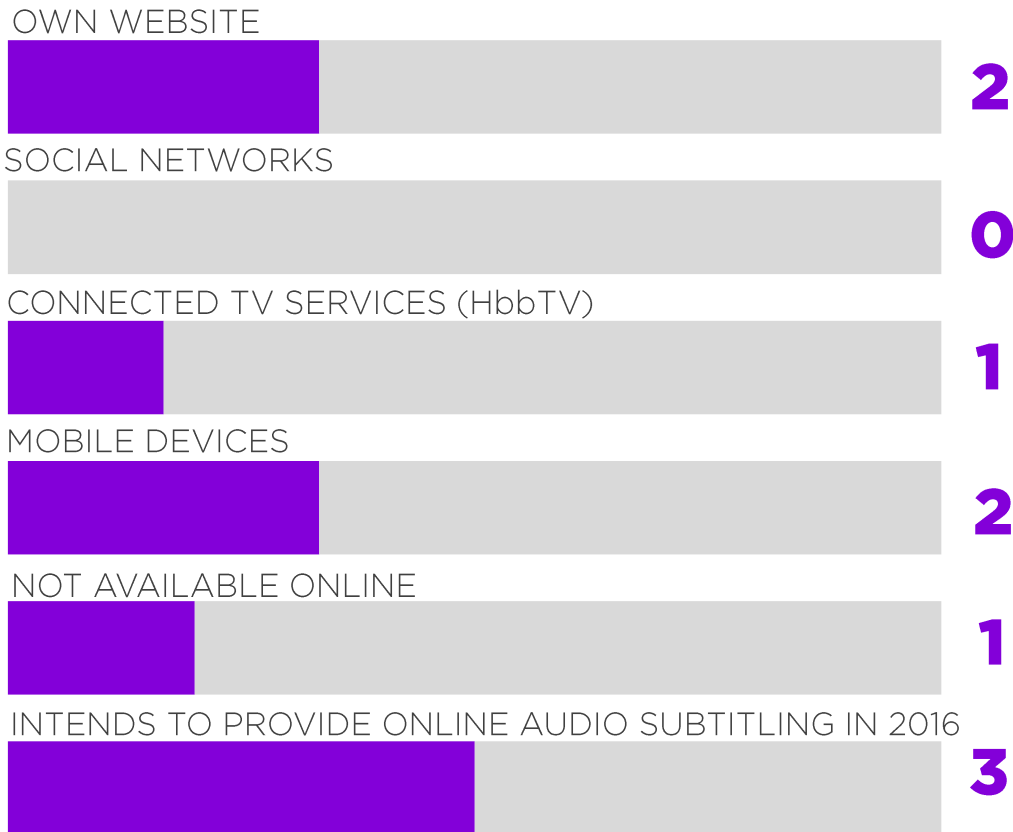
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2 broadcasters have made audio subtitles available via an online platform.

3 broadcasters are working on providing this in 2016.

Audio subtitling services availability by platform



Based on 6 broadcasters.

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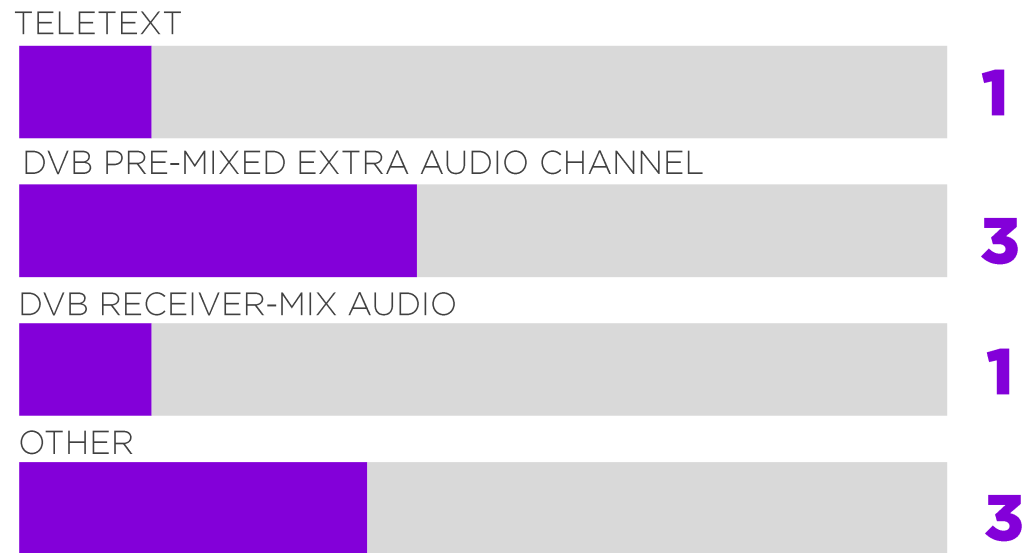
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AUDIO SUBTITLING

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How do you deliver audio subtitling?



Based on 7 broadcasters.

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AUDIO SUBTITLING

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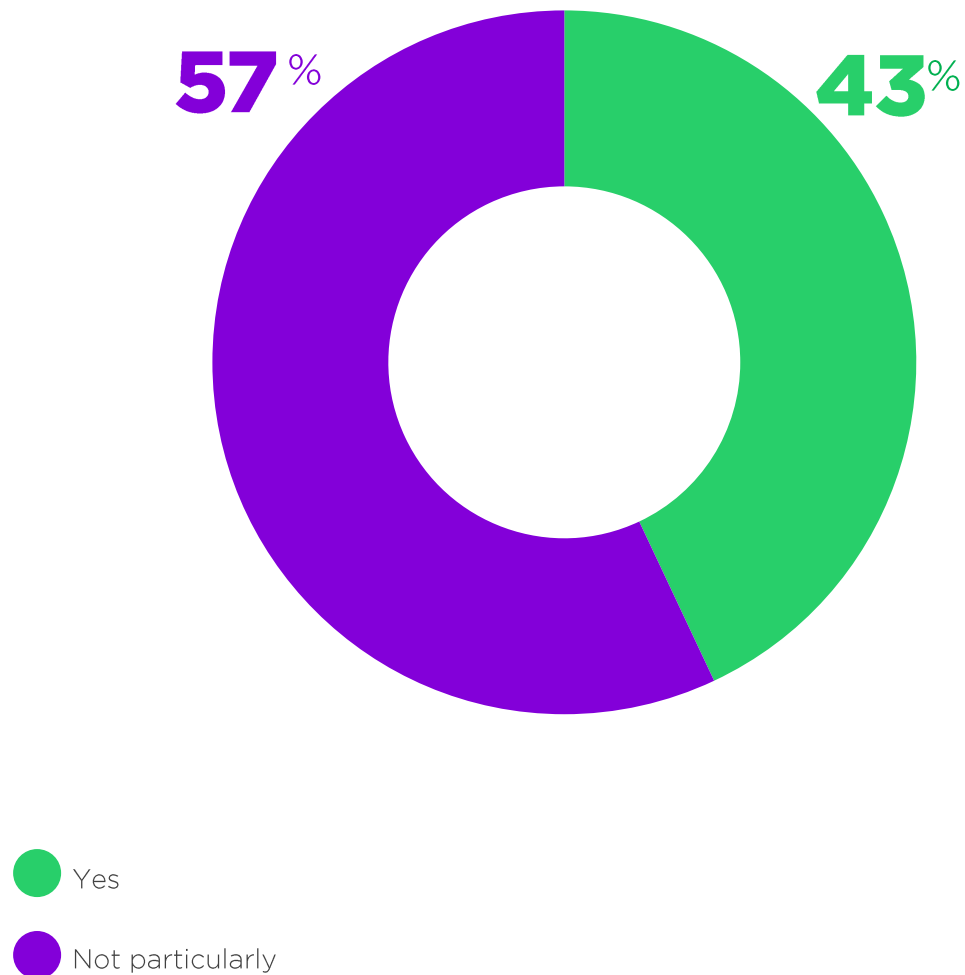
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Most mentioned issues are:

- Technical
- Quality

5 out of 8 broadcasters say they are not facing any particular obstacles

% of broadcasters facing obstacles with audio subtitling



Based on 7 broadcasters.

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AUDIO SUBTITLING

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AUDIO DESCRIPTION

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AUDIO DESCRIPTION

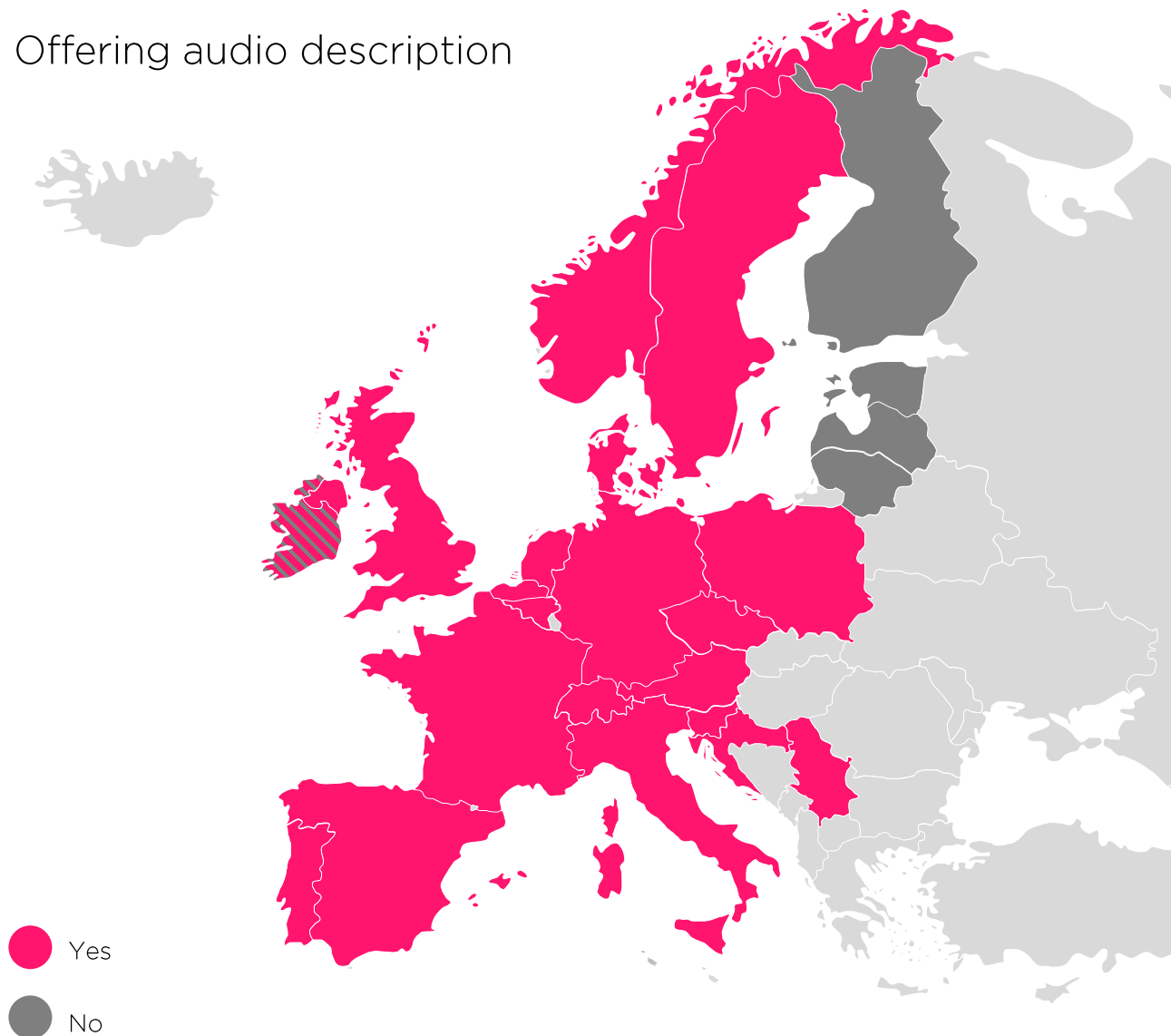
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Audio description

**30 out of 36
broadcasters
taking part in
the survey
offer audio
description**

In Ireland RTE offers Audio Subtitling, TG4 does not

Offering audio description



● Yes
● No

Based on 36 broadcasters.

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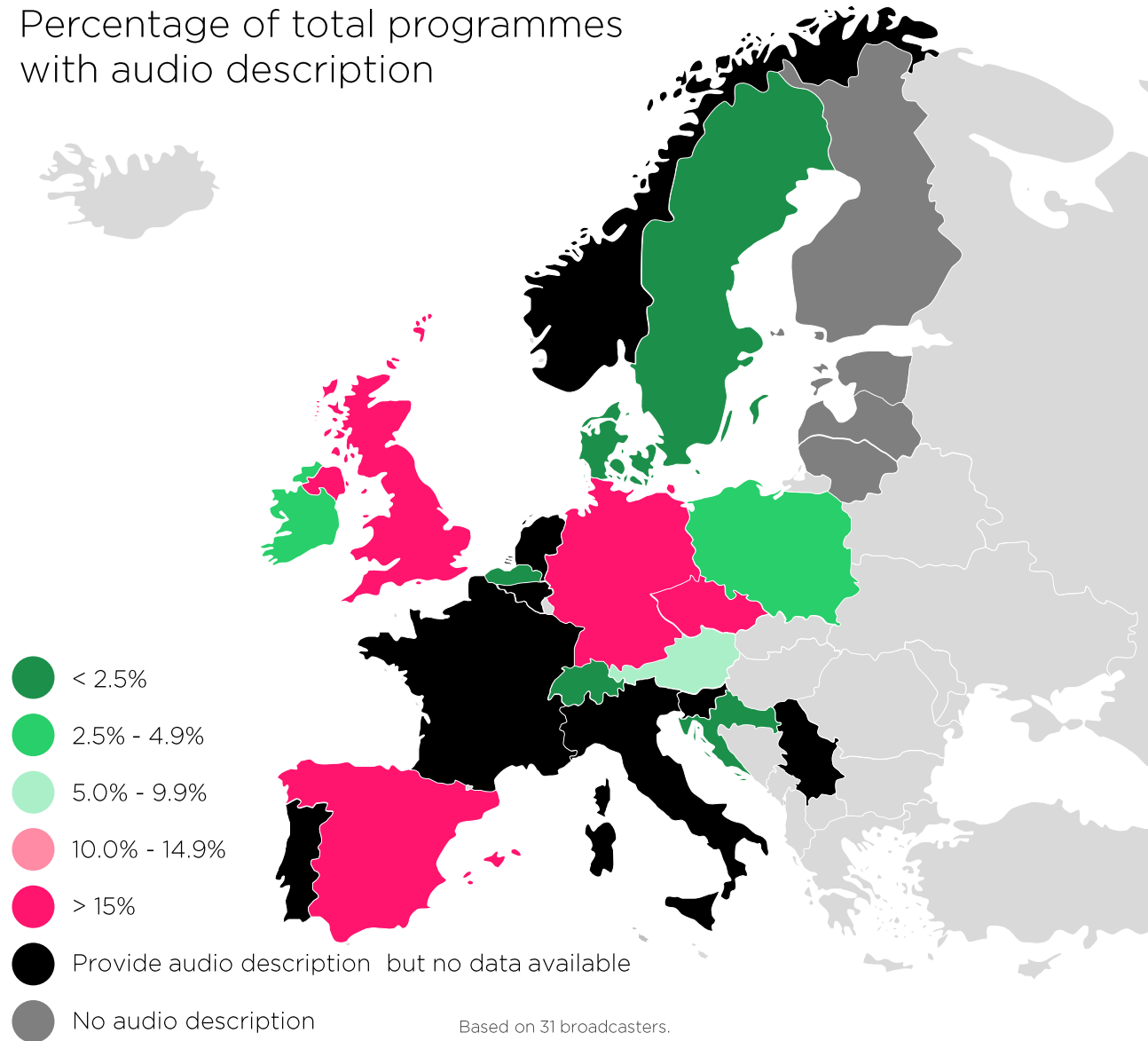
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AUDIO DESCRIPTION

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On average public broadcasters deliver audio description on 13% of their total number of programmes

Percentage of total programmes with audio description



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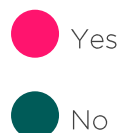
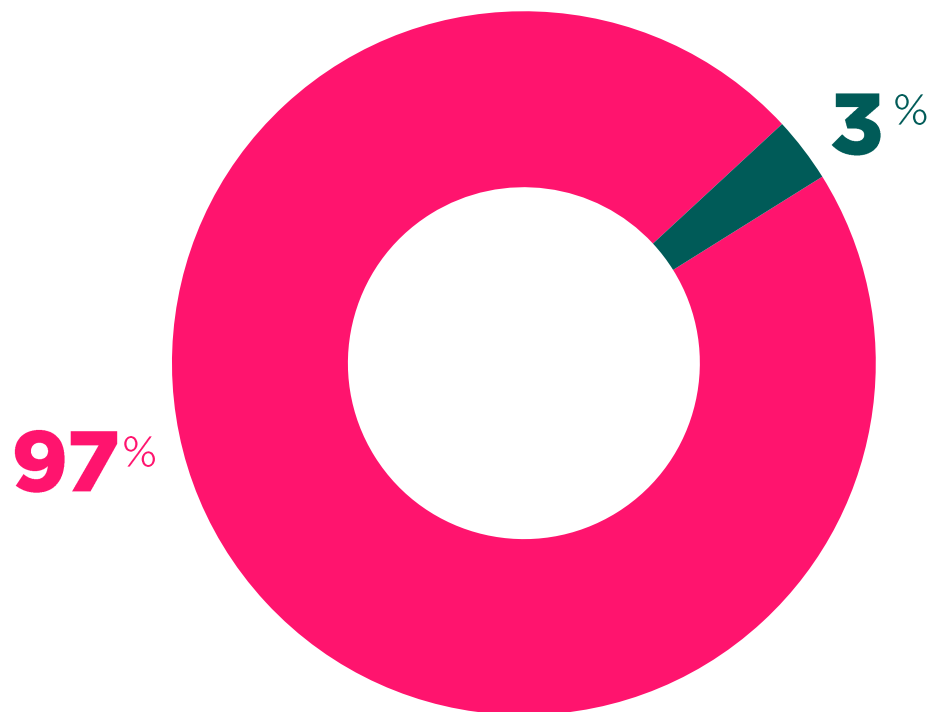
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AUDIO DESCRIPTION

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Broadcasters in majority make audio description available on their TV channels

% of broadcasters offering programmes with audio description on broadcast television



Based on 31 broadcasters.

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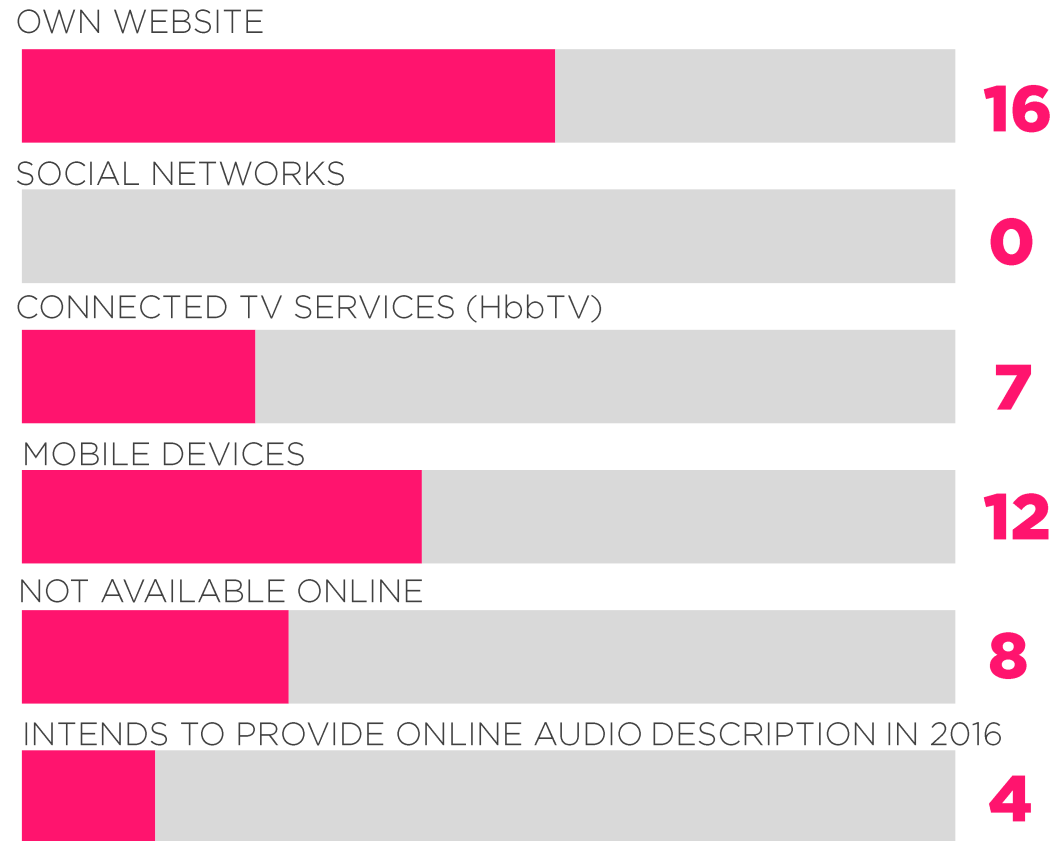
AUDIO DESCRIPTION

5

Broadcaster own website and mobile devices are the most used platforms for offering audio description

A quarter of broadcasters do not yet have audio description available online, and none are using audio description on social networks so far.

Audio description services availability by platform



Based on 28 broadcasters.

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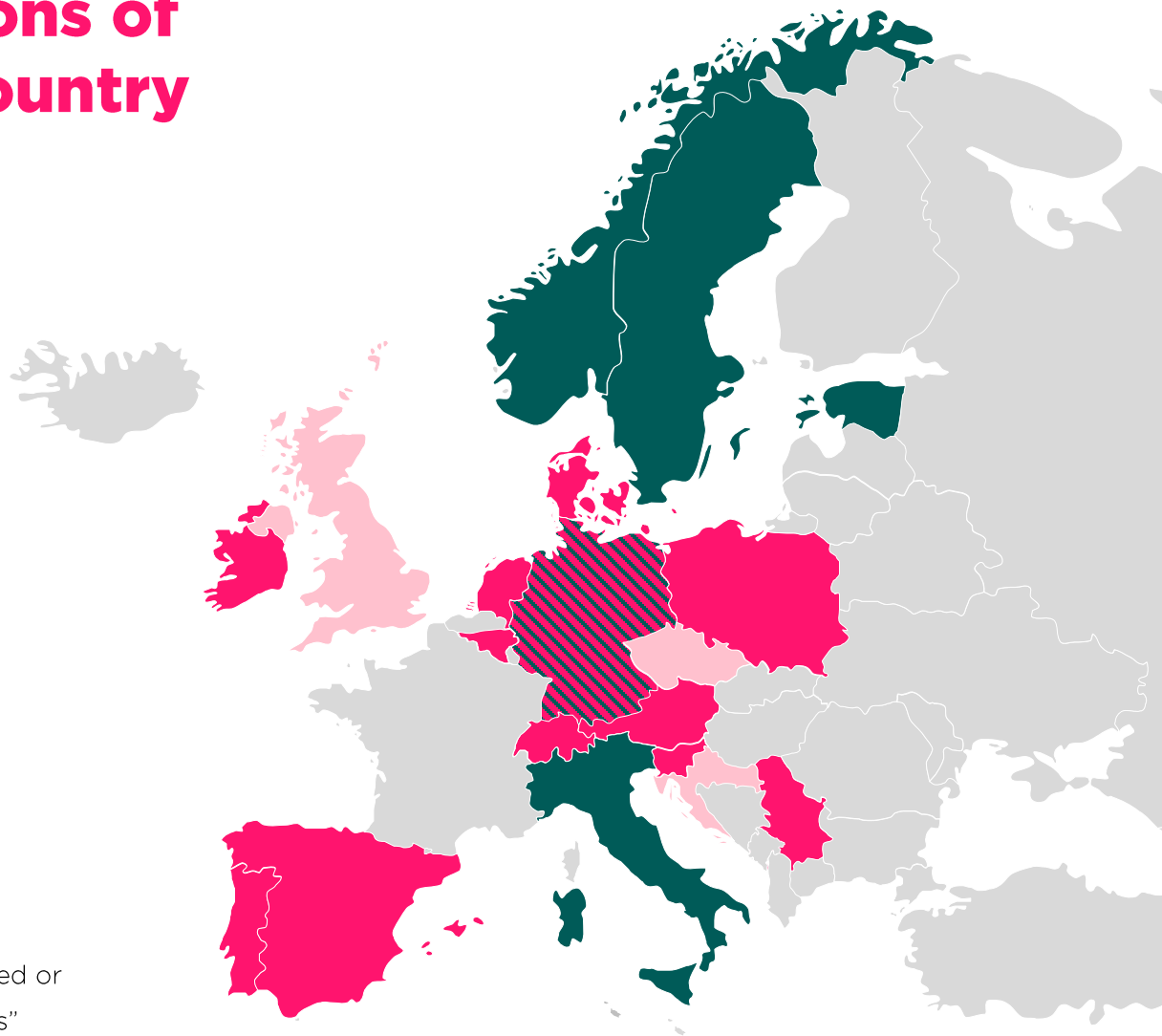
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AUDIO DESCRIPTION

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Have the associations of the blind in your country ever requested or demanded "audio description on all devices"?



- Yes
- No
- Only individual blind listeners have requested or demanded "audio-description on all devices"

Based on 27 broadcasters

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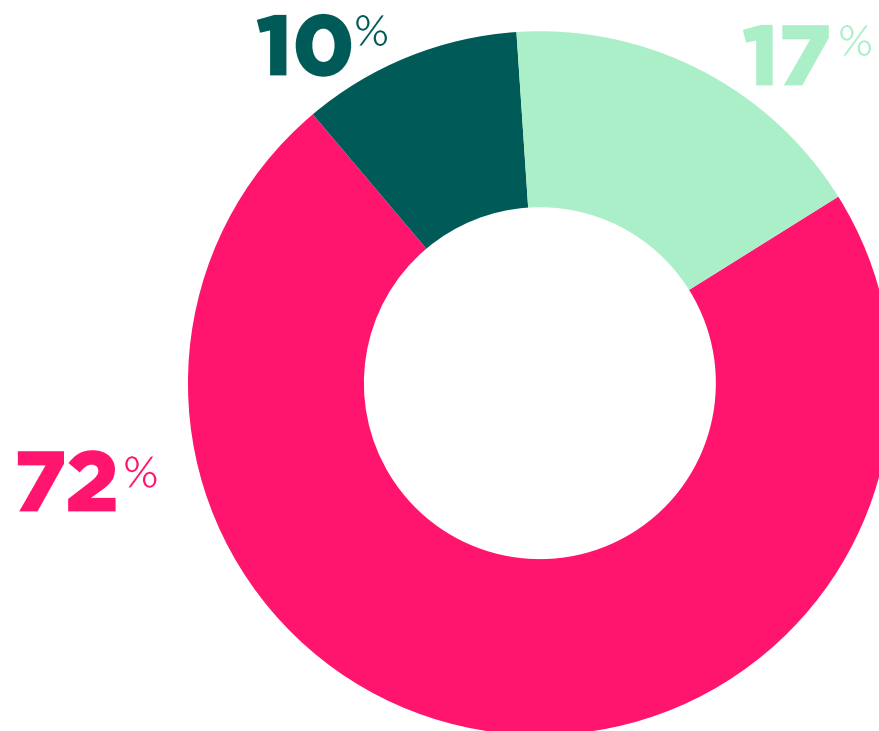
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AUDIO DESCRIPTION

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**72% of
broadcasters
believe its
relevant to
deliver audio
description on
HbbTV and
other
connected TV
services**

Do you think that audio description on HbbTV or on other connected TV services makes sense?



- Yes
- No, it's useless as there are no devices on the market that enable blind people to use this service
- No opinion, I have never thought about this

Based on 29 broadcasters.

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AUDIO DESCRIPTION

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Pre-mixed is by far the most common method used to deliver audio description

How do you deliver audio description?

PRE-MIXED



RECEIVER-MIX



OTHER



Based on 27 broadcasters.

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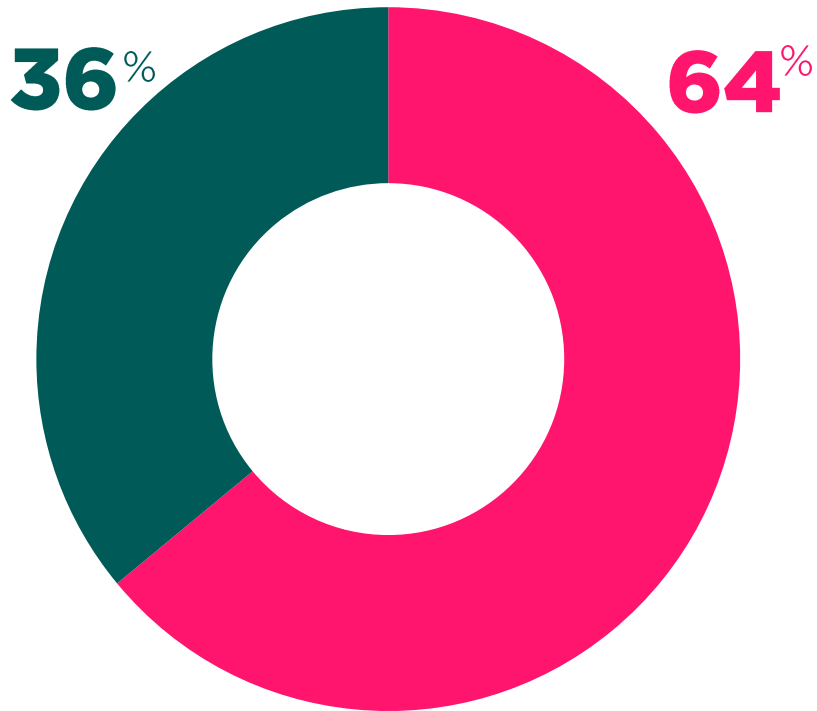
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AUDIO DESCRIPTION

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Is your organization facing any obstacles with audio description?

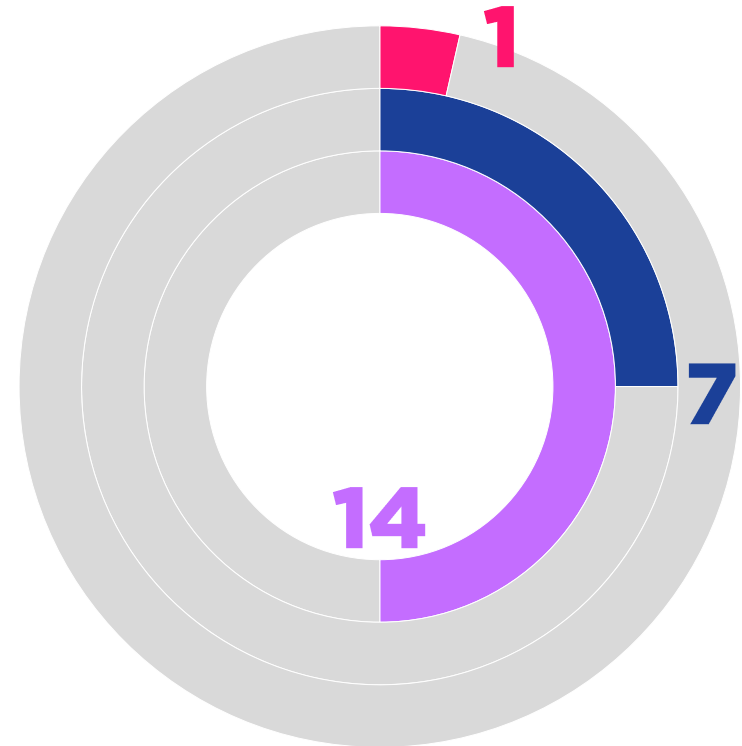
% of broadcasters facing obstacles



- Yes
- Not particularly

Based on 28 broadcasters.

Most mentioned issues
Number of broadcasters



- Cost
- Technical
- Quality

Based on 17 broadcasters.

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AUDIO DESCRIPTION

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SIGNED PROGRAMMES

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SIGNED PROGRAMMES

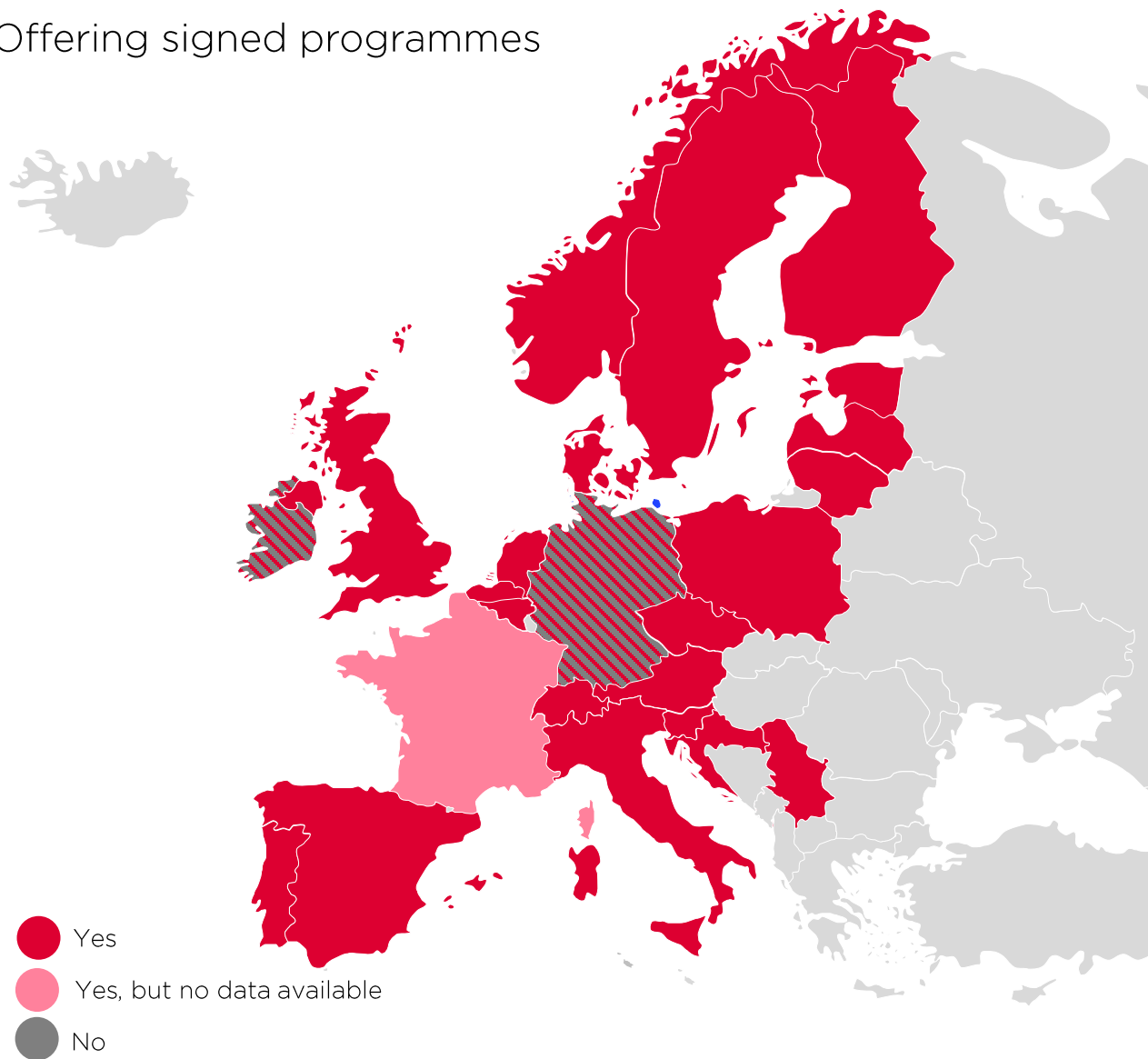
Signed programmes

32 out of 36 broadcasters taking part in the survey offer signed programmes

In Ireland RTE offers Signed programmes, TG4 does not

In Germany ARD offers Signed Programmes but not from all regional broadcasters, those not offering signed programmes are: HR, SR and KiKa

Offering signed programmes



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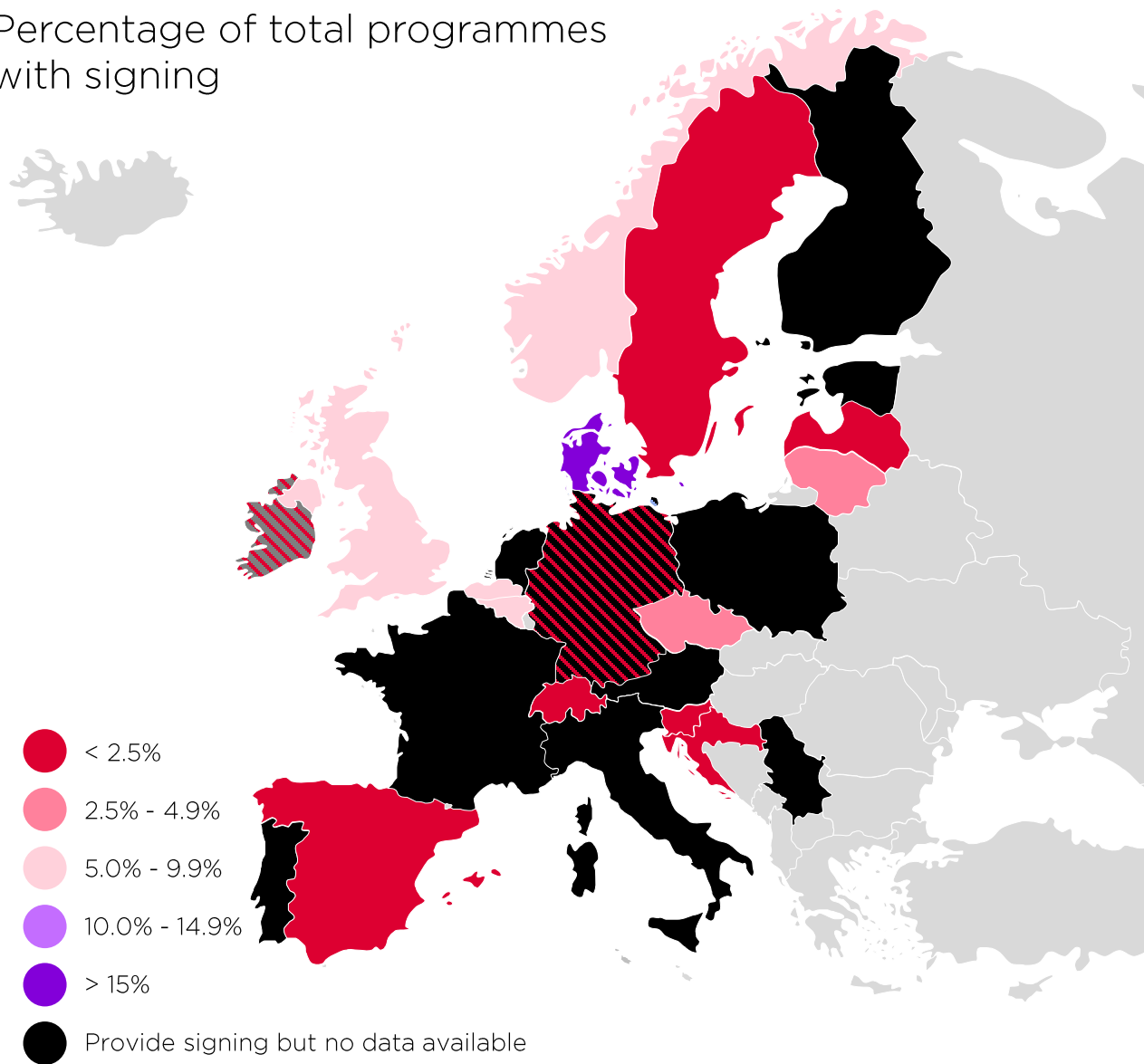
SIGNED PROGRAMMES

On average public broadcasters deliver sign language on 4% of programmes

In over half of broadcasters less than 4% of programmes are signed.

All others are still below 10% of programmes except DR in Denmark with the highest at 18% of programmes with sign language

Percentage of total programmes with signing



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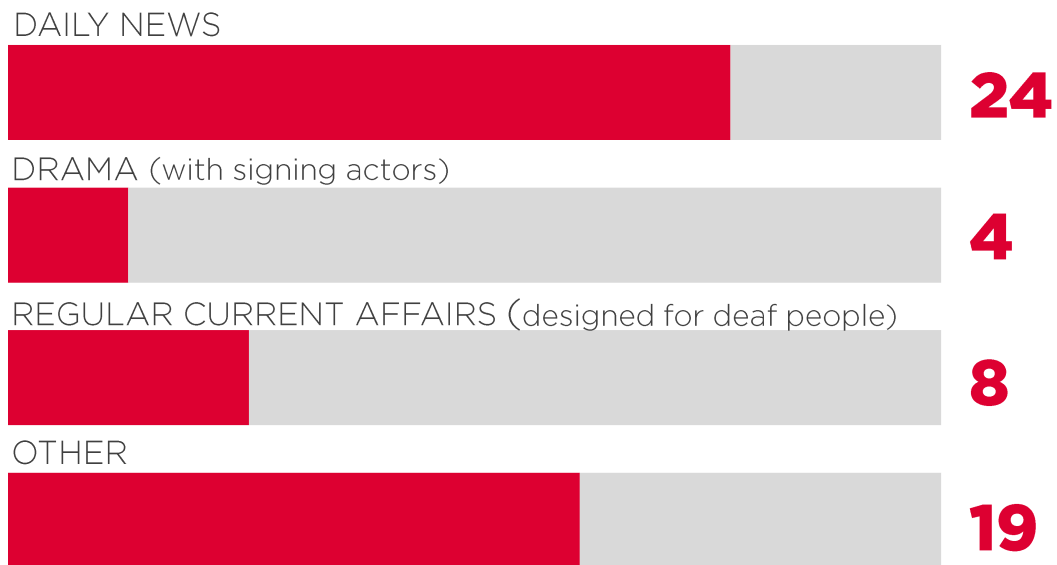
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SIGNED PROGRAMMES

**In all markets
the main public
broadcaster
makes a signed
daily news
programme
available**

Does your broadcaster offer any of the following kinds of television programmes with signing:



Based on 31 broadcasters.

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SIGNED PROGRAMMES

What other programmes do you offer with sign language ?

SPECIAL PROGRAMMES (Political Debates, special ceremonies, magazines...)



CHILDREN'S PROGRAMMES



DOCUMENTARIES



MUSIC & ENTERTAINMENT PROGRAMMES



SPORTS PROGRAMMES



Based on 19 broadcasters.

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SIGNED PROGRAMMES

**90% of
broadcasters
make signed
programmes
available on
their own
website**

Signed programmes availability by platform

OWN WEBSITE



SOCIAL NETWORKS



CONNECTED TV SERVICES (HbbTV)



MOBILE DEVICES



INTENDS TO OFFER SIGNED PROGRAMMES IN 2016



Based on 31 broadcasters.

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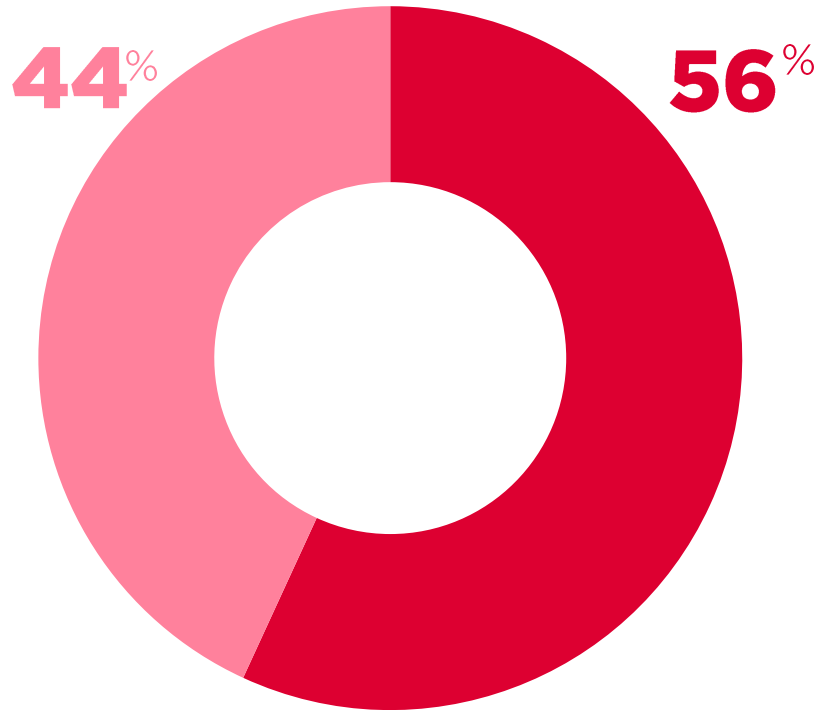
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SIGNED PROGRAMMES

Is your organization facing any obstacles with signed programmes?

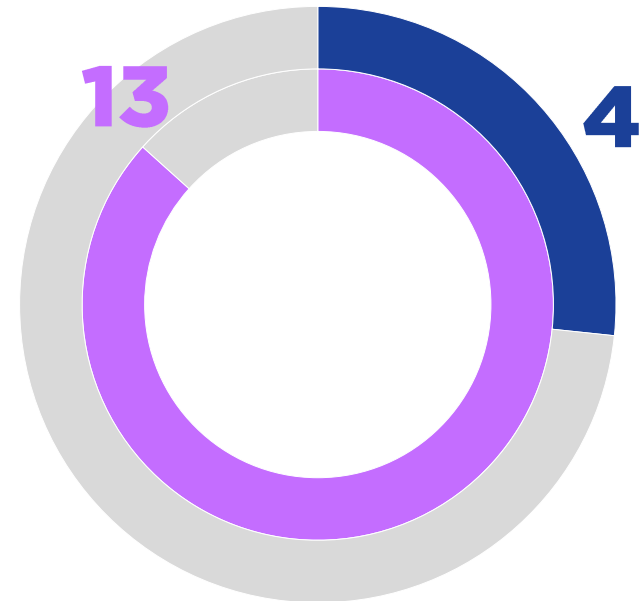
% of broadcasters facing obstacles



- Yes
- Not particularly

Based on 27 broadcasters

Most mentioned issues
Number of broadcasters



- Cost
- Technical

Based on 15 broadcasters.

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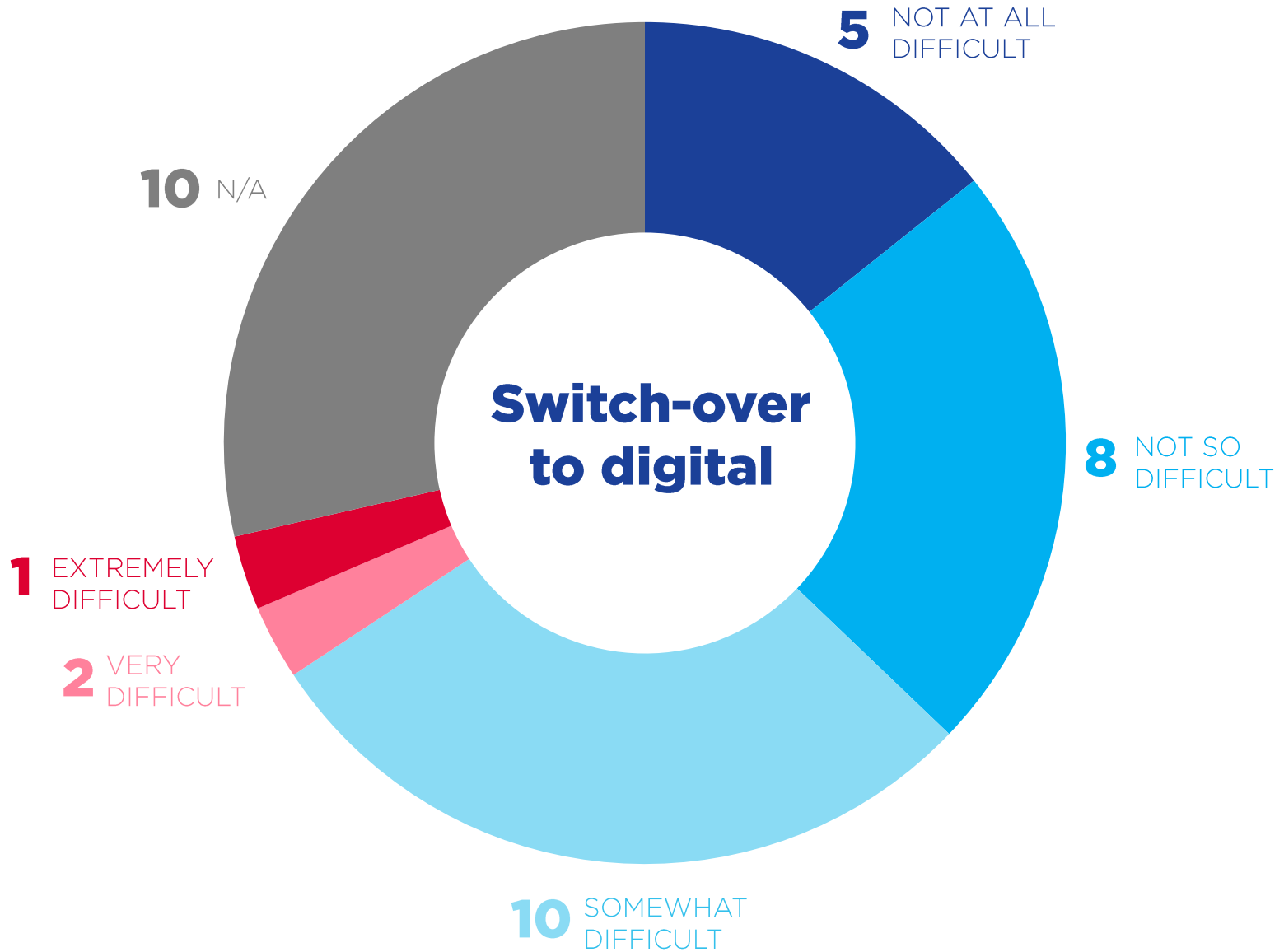
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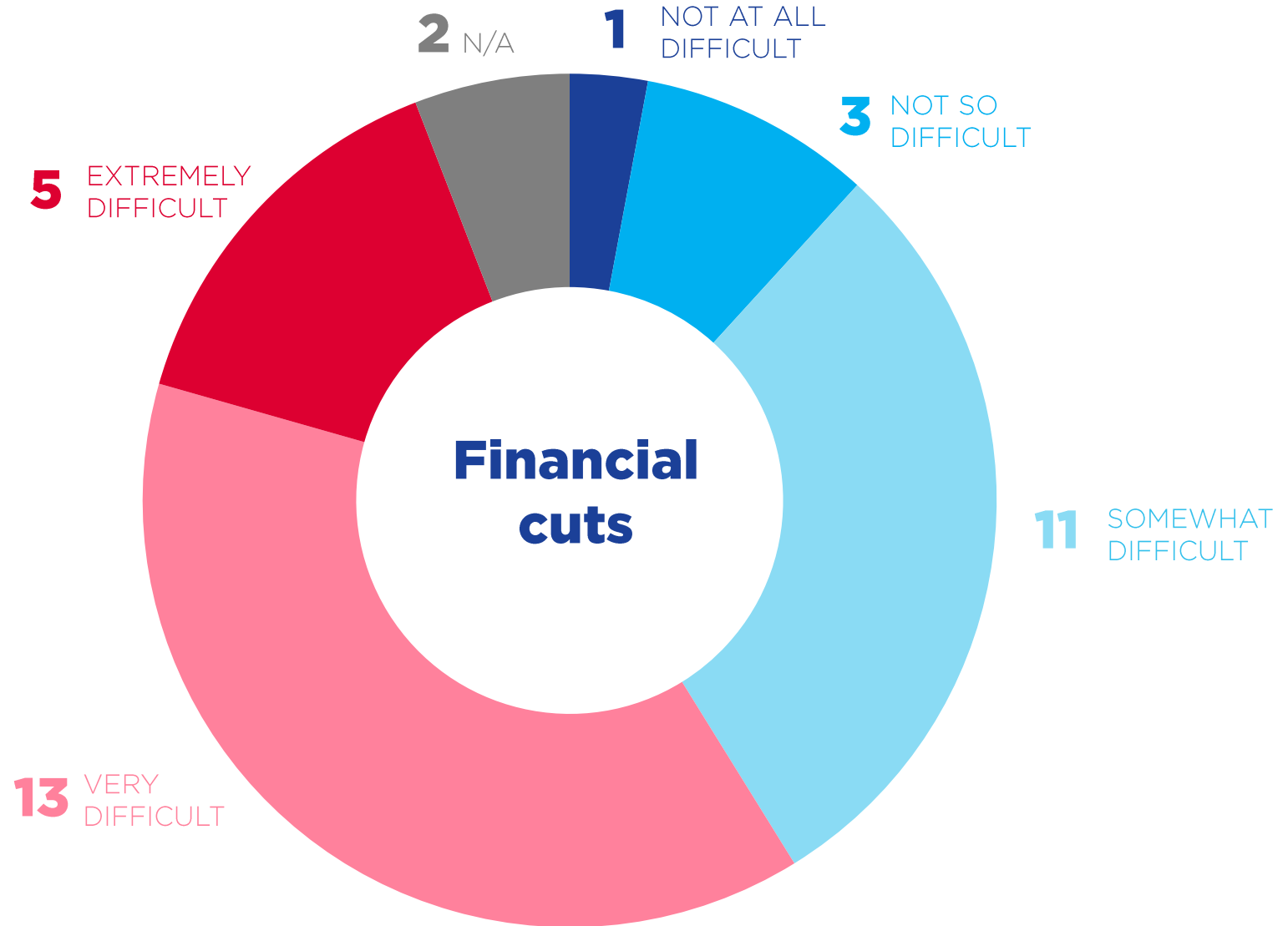
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SIGNED PROGRAMMES

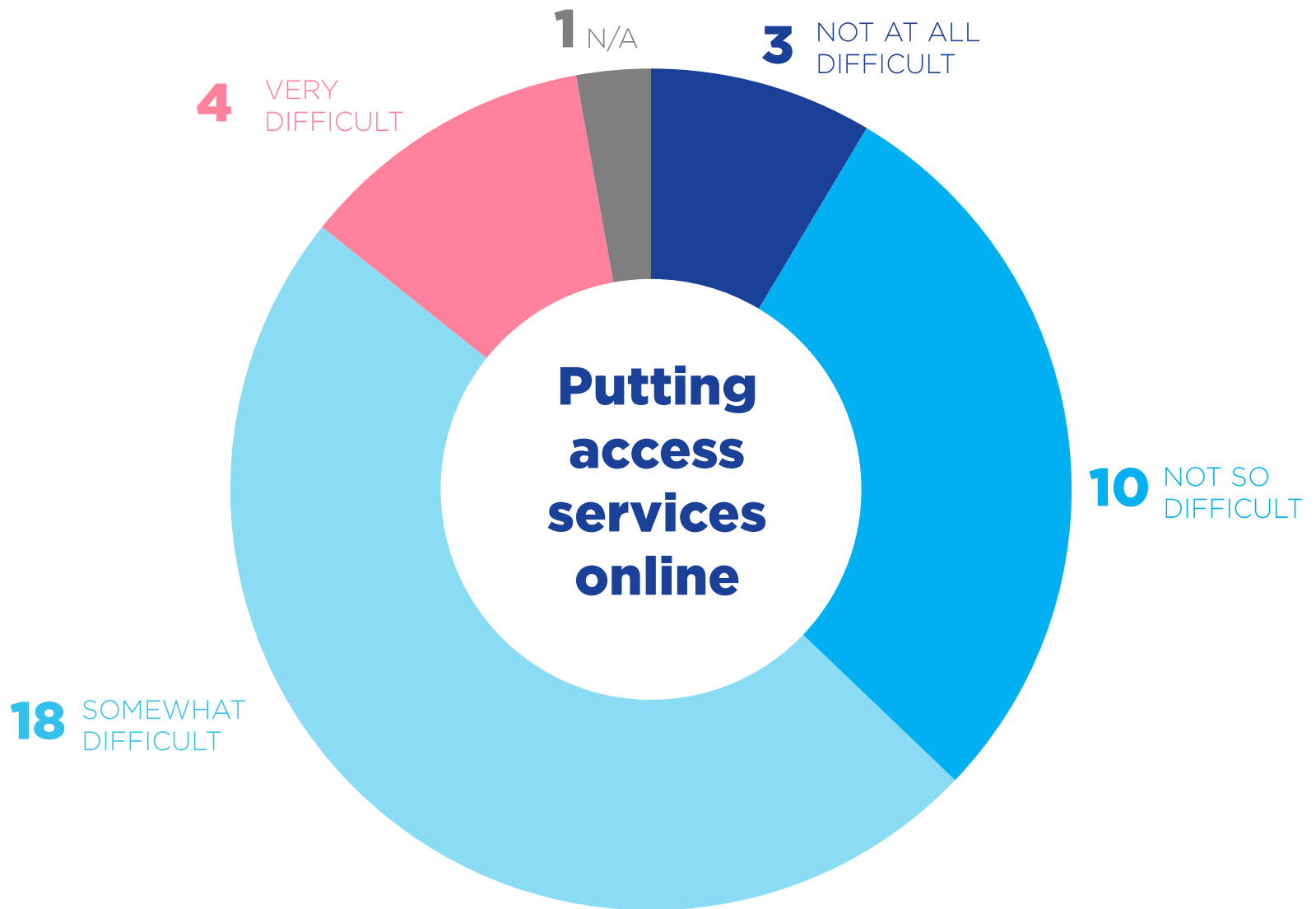
In your opinion, what will be the most difficult challenges for access services within the next years?



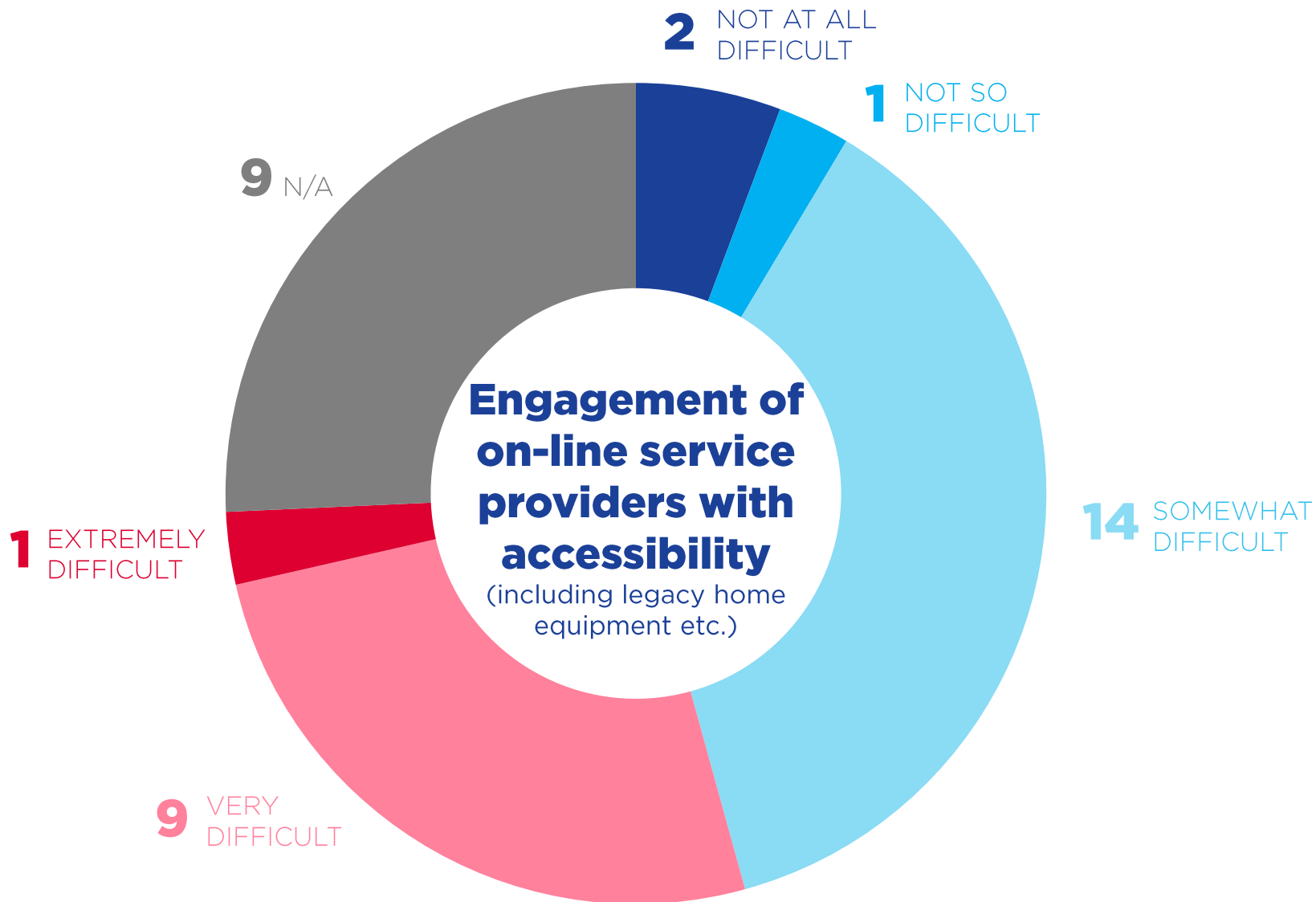
Based on 36 broadcasters.



Based on 35 broadcasters.



Based on 36 broadcasters.



Based on 36 broadcasters.

The major challenges foreseen are:

- 1 Cost
- 2 Engagement of on-line service providers with accessibility
- 3 Putting access services online
- 4 Switch-over to digital

Difficulties for delivering access services in the next years are foreseen to come from financial cuts with 17 broadcasters (55%) indicating it will be very or extremely difficult.

Other Members' concerns are:

- Enhance awareness in their organisation
- Maintain and/or improve quality of access services offers
- Anticipate the impact of an ageing population
- Beware of the constant change of technology and the lack of media technician experts in the field of access services
- The increase of quotas and regulations

Other developments within Members organisations :

- Read me-button on websites
- Easy-to-read content
- Font size option for web browsers and apps
- Slowly and clearly spoken language
- Emphasize an easy accessibility for some relevant web-content
- App with inclusive access to blind, visually impaired and fully sighted users
- Personalized subtitling on HbbTV