Annual Report

2024 State of Captioning

3PLAYMEDIA

Contents

INTRODUCTION

Before we begin:

Welcome to the State of Captioning!

Thanks for reading the 8th annual edition of this report. Here, you'll be presented with fresh data focused on current and upcoming trends in captioning and media accessibility.

Why does this report matter?

The information we gather in the State of Captioning offers a valuable understanding of how organizations and businesses are making their digital media and video content accessible. By learning about current behaviors and preferences, we can make predictions about what to expect from the future of media accessibility.

Ready to advocate for accessibility?

This report serves as a fantastic place to start. Equip yourself with fresh data and insights to drive accessibility initiatives forward at your organization and work toward a more inclusive environment for everyone.

INTRODUCTION

Who we surveyed:

In the 2024 State of Captioning, we surveyed 450+ respondents across as many industries as we could find. Here's the breakdown:

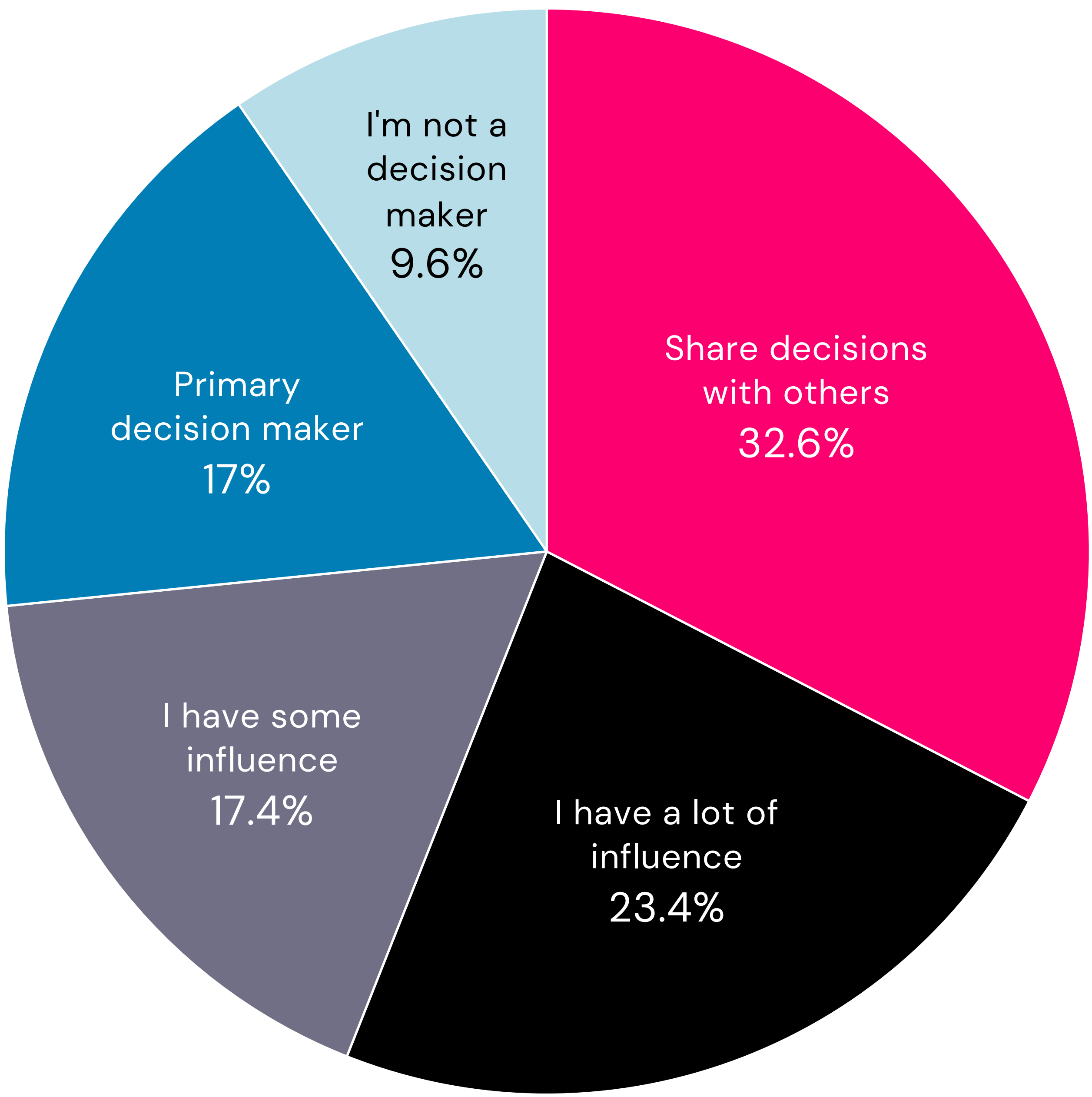
30%	Higher Education
12.6%	Associations
9.6%	Technology
9.4%	Cinematic
8.9%	Consumer Goods/Services
7.5%	eLearning
5.2%	News/Networks
2.1%	Publishing
2.1%	Sports
12.6%	Other

Write-in responses included:

- Government
- Disability Rights/Support
- Marketing/Advertising
- Public Libraries
- Healthcare
- Museums/Galleries
- Nonprofits
- Accessibility Consulting

Almost all respondents are influential during decision making.

When it comes to accessibility-related decision making, **the majority of people share the responsibility** with others – while **17% are the primary decision maker.**



Media accessibility habits

Almost half of respondents reported budget increases.

28%

increased moderately.

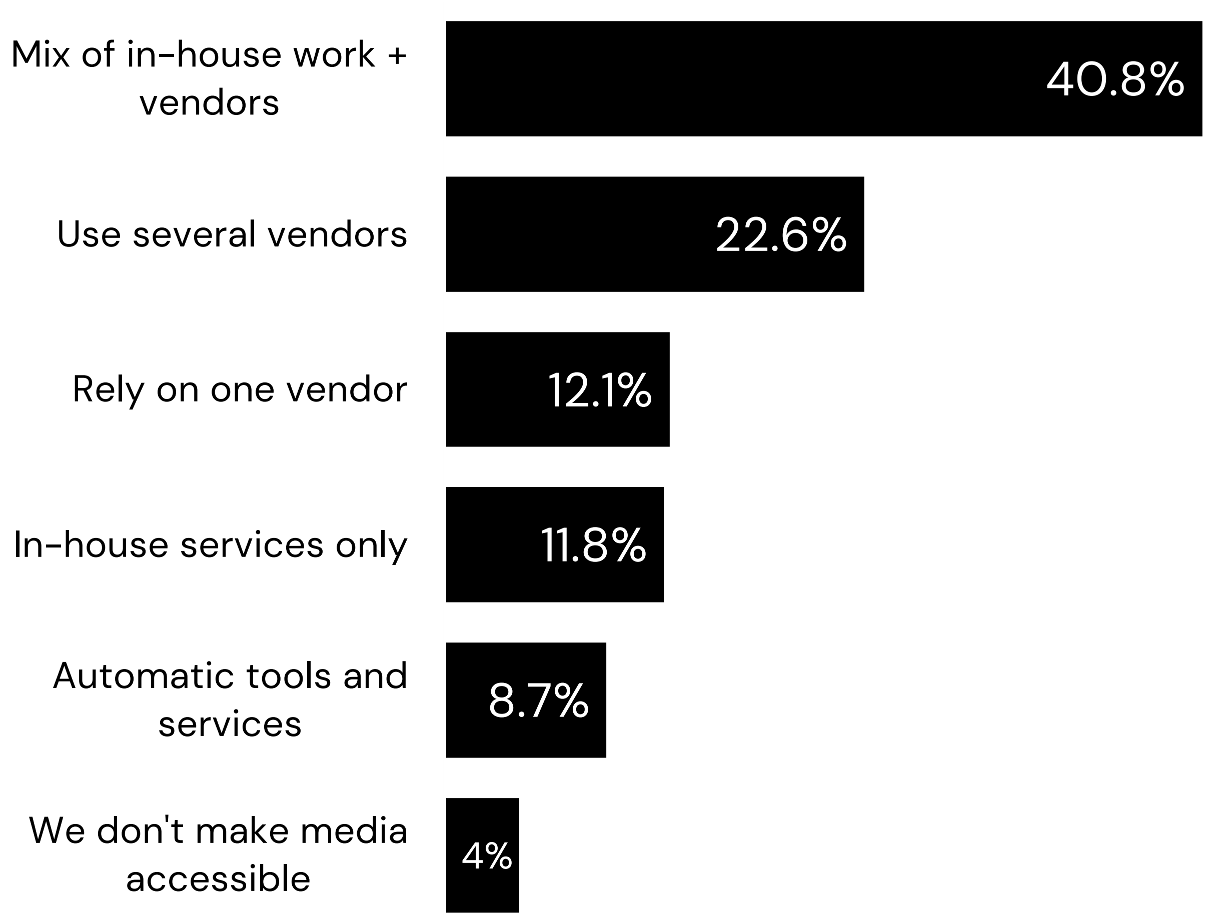
20%

increased significantly.

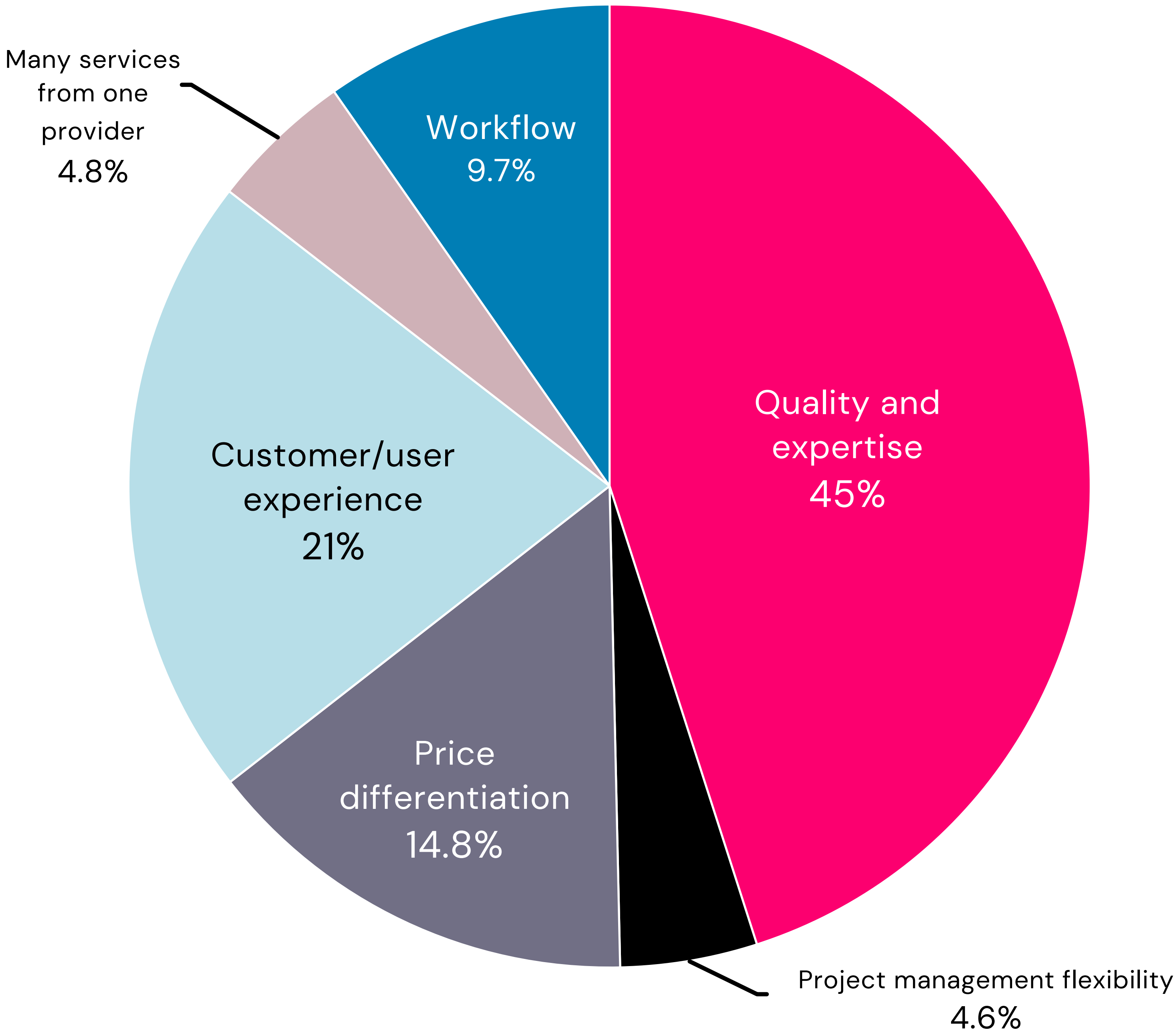
Budget is a major factor when organizations are deciding which media accessibility services they need and how they procure those services – especially when it comes to choosing between a professional vendor or completing the work in-house.

It's popular practice to combine vendors with in-house efforts.

Despite remaining the most popular method of satisfying media accessibility needs, this combination has declined in use by 15% since last year.



Conversely, the number of **respondents who report using several vendors has increased** by almost the same percentage. When employing a variety of vendors, top-reported considerations include the selection of services offered (32%), accuracy/output quality (30%), and overall cost-effectiveness (22%).



Quality and expertise are the main reasons to work with a vendor.

We all want the most bang for our buck. When choosing to work with a vendor, respondents are looking to ensure a return on their investment by choosing a partner that offers top-quality solutions and industry expertise.

Policy & compliance

Accessibility compliance is a crucial consideration.

41%

have centralized procedures and processes.

49%

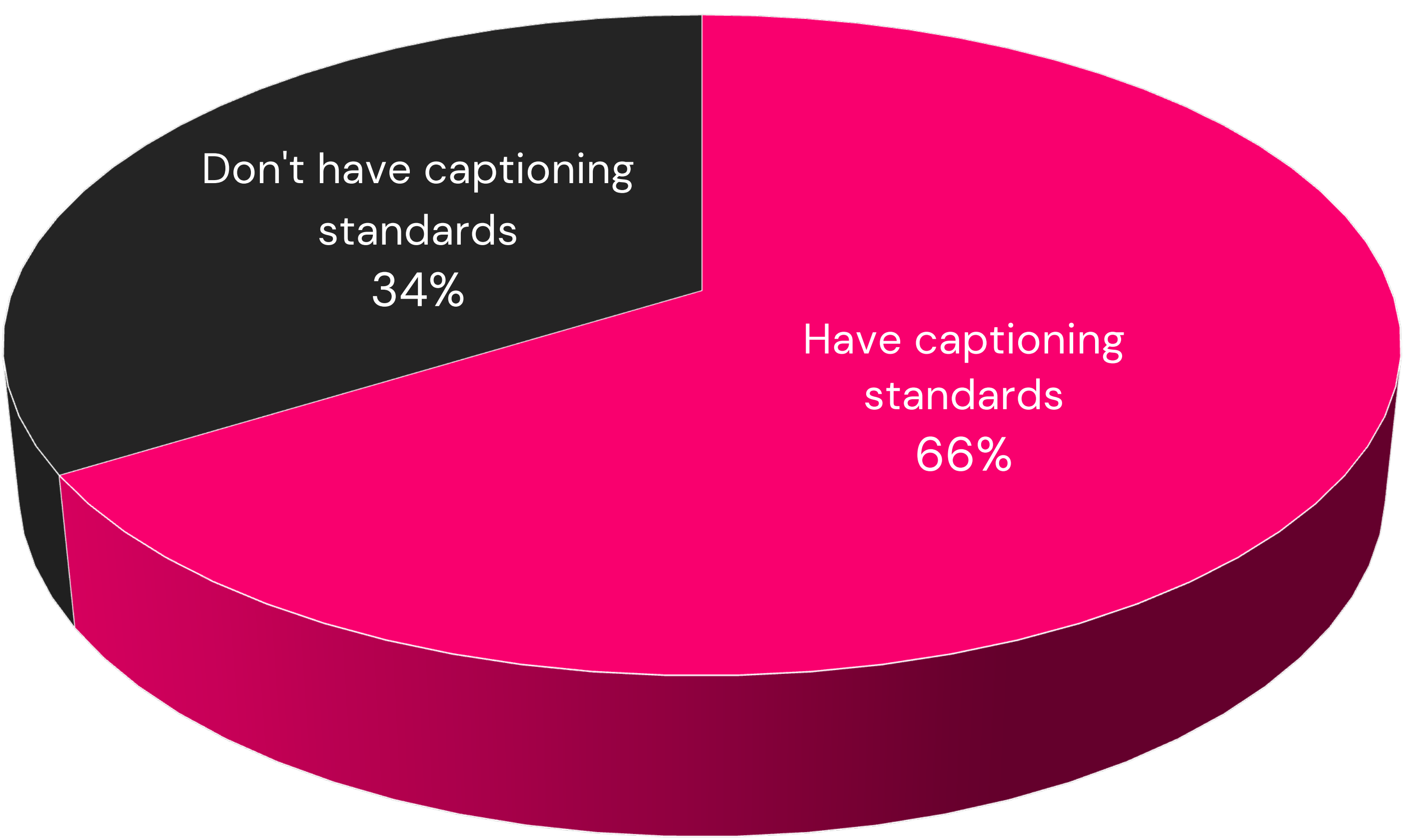
have clear policies for accessibility compliance.

As digital accessibility lawsuits continue to change the landscape of what it means to offer an accessible online experience, the best way to stay ahead of litigation is proactive policy focused on accessibility – all the way from procurement to product design.

66%

of organizations have standards for captioning accuracy.

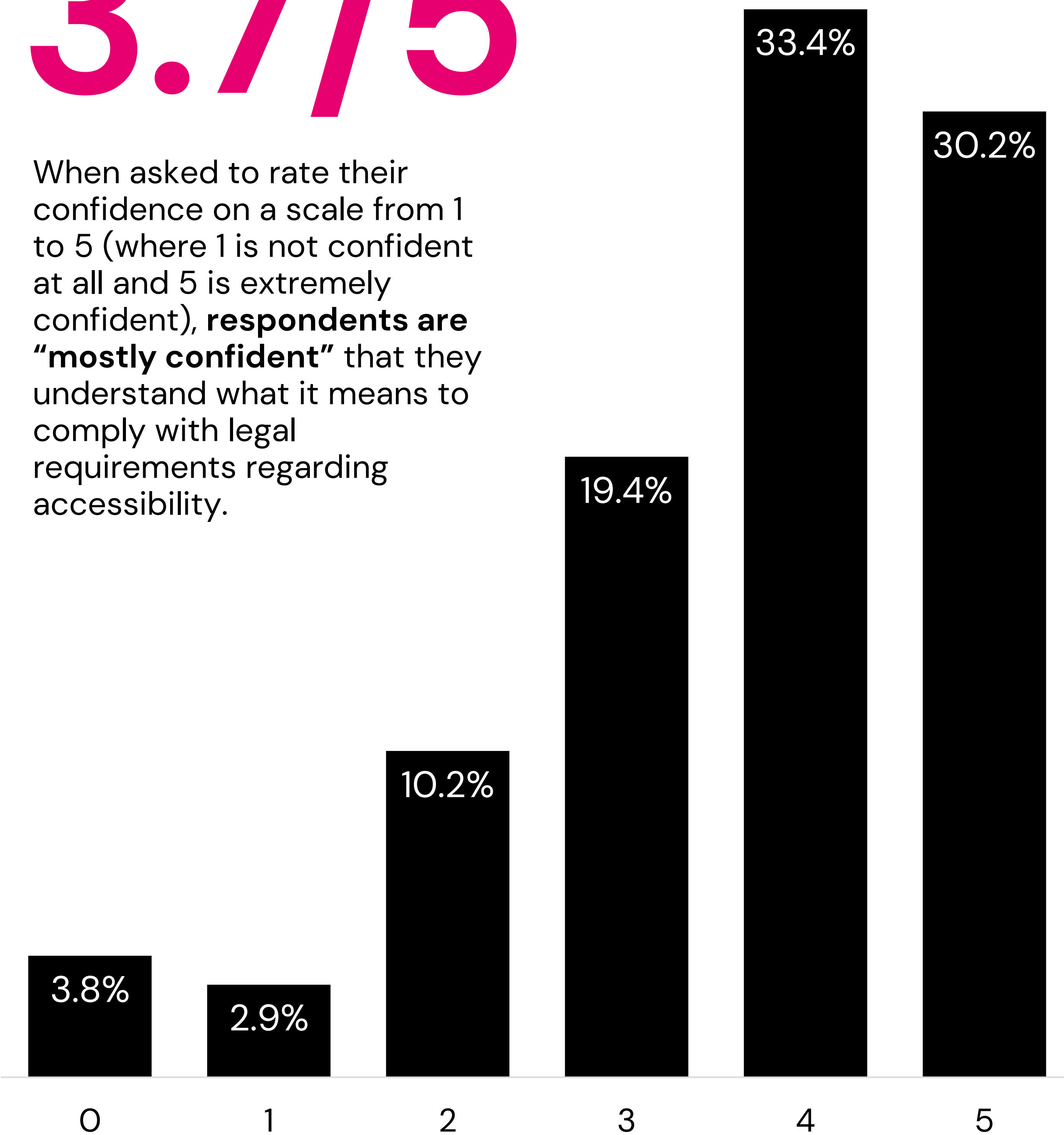
These standards are often based on existing recommendations for digital accessibility, including state/federal compliance requirements and the Web Content Accessibility Guidelines.



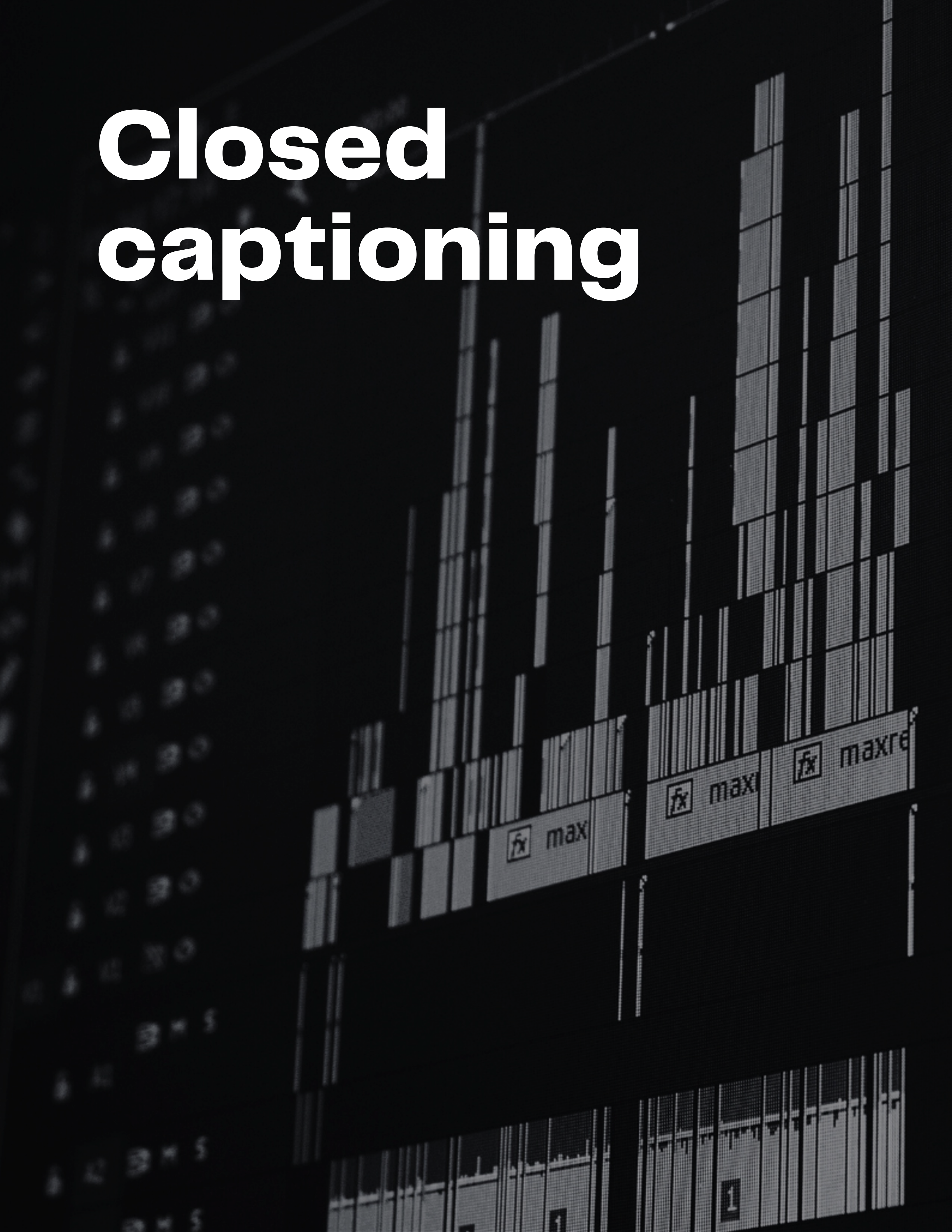
Respondents rated their average understanding of accessibility compliance:

3.7/5

When asked to rate their confidence on a scale from 1 to 5 (where 1 is not confident at all and 5 is extremely confident), **respondents are “mostly confident”** that they understand what it means to comply with legal requirements regarding accessibility.



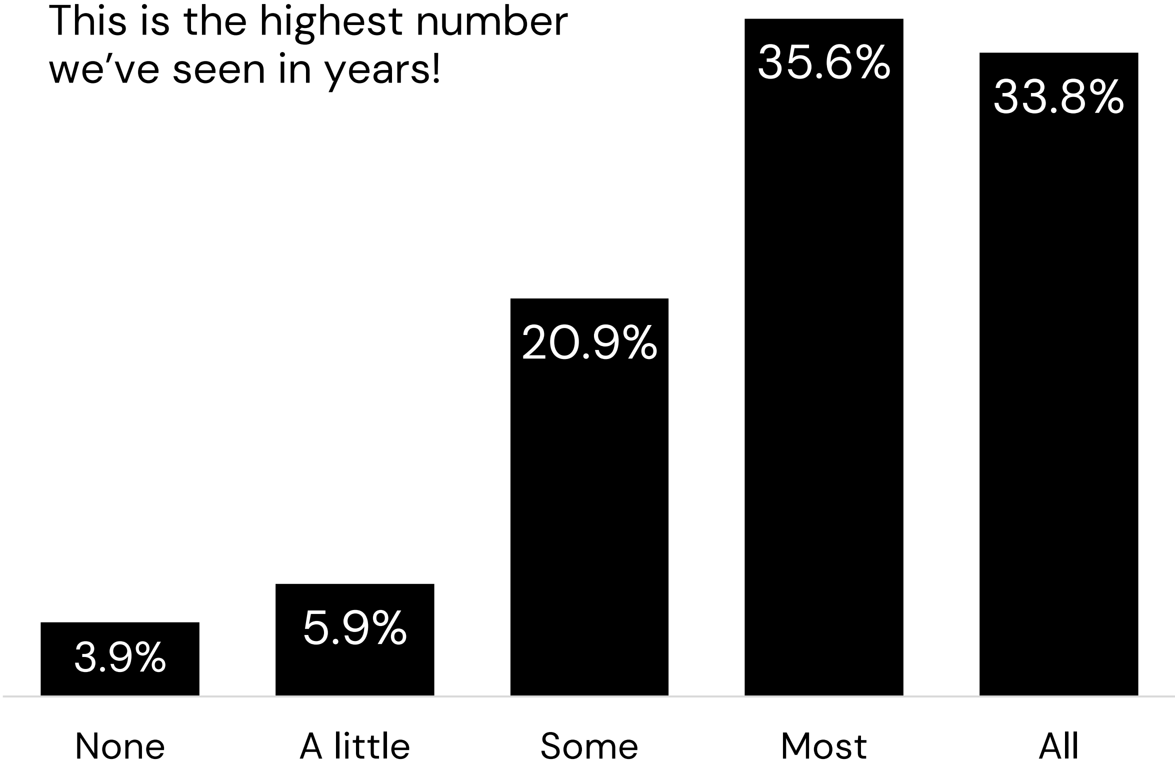
Closed captioning



90%

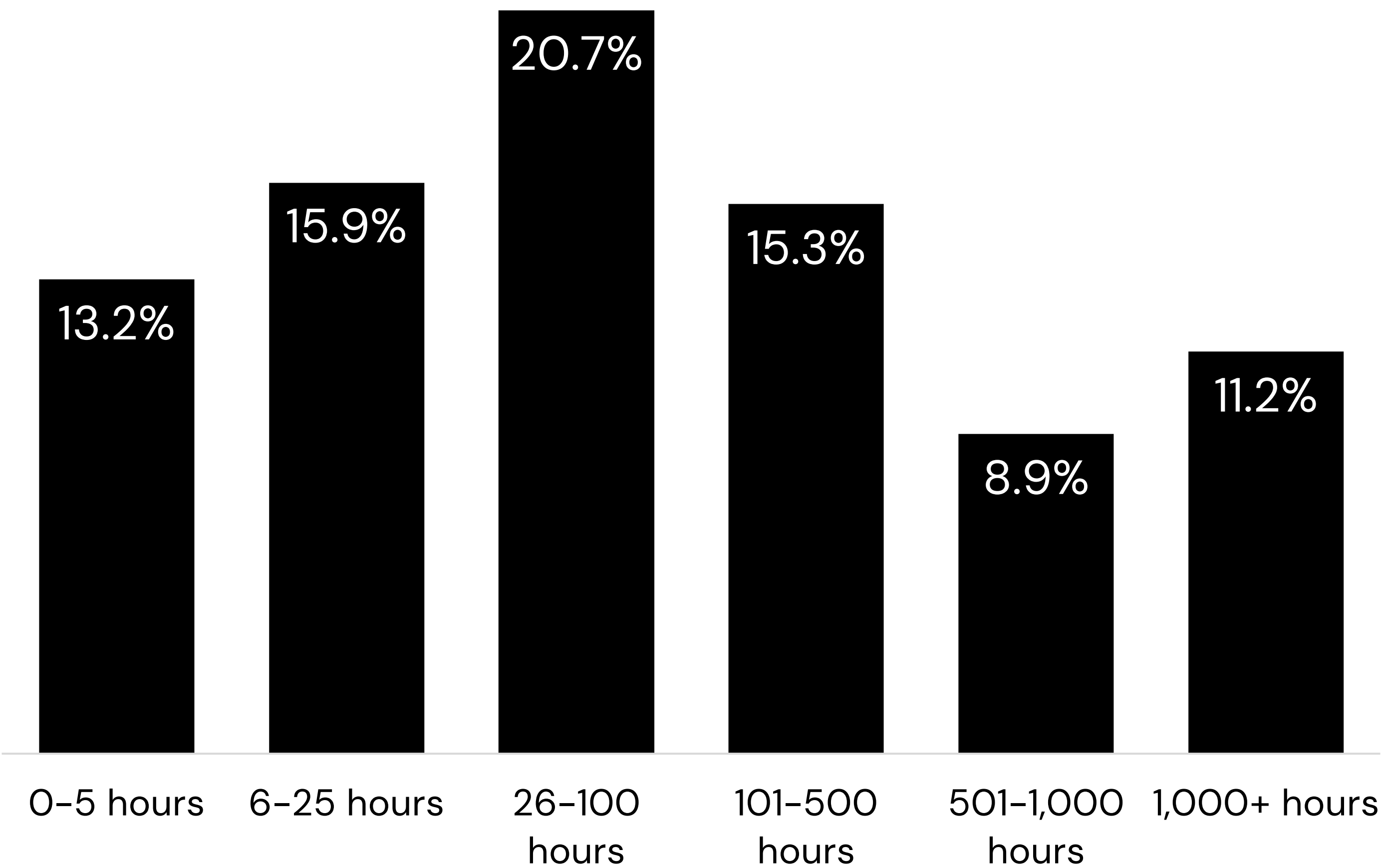
of respondents are captioning at least some of their content.

This is the highest number we've seen in years!



More video is being produced than ever before.

35% of respondents are producing 500+ hours of video content annually – the most we've seen in the history of our report.

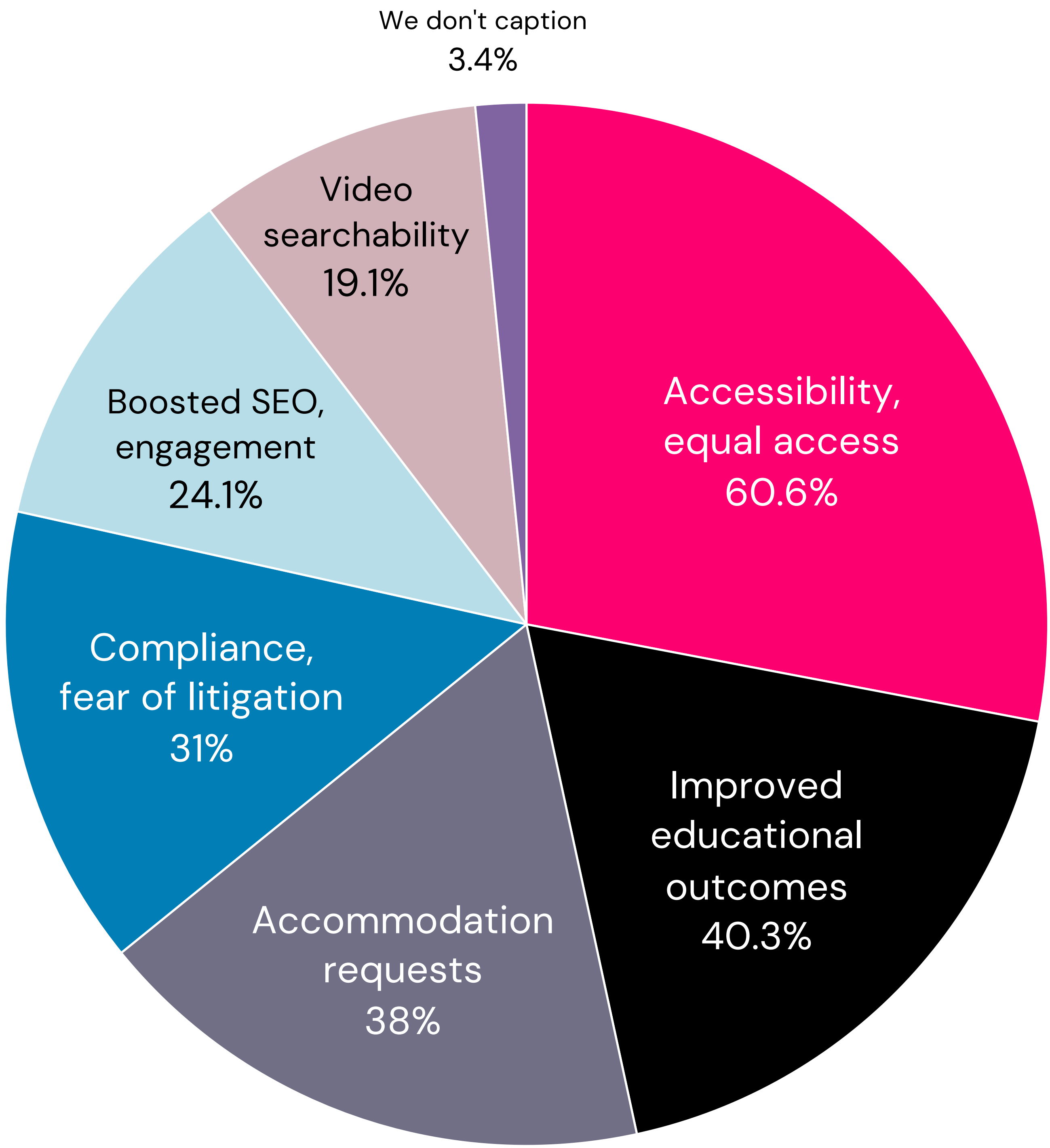


When asked how they prioritize when/what content gets captioned, **39% report that they simply caption everything.**

Other factors for prioritization included legal requirements, accommodation requests, and the popularity or visibility of media content.

Accessibility is still the primary motivator.

Continuing a strong trend in State of Captioning history, **equal access is still the main driver behind captioning efforts** at most organizations.



Budget is still the biggest barrier.

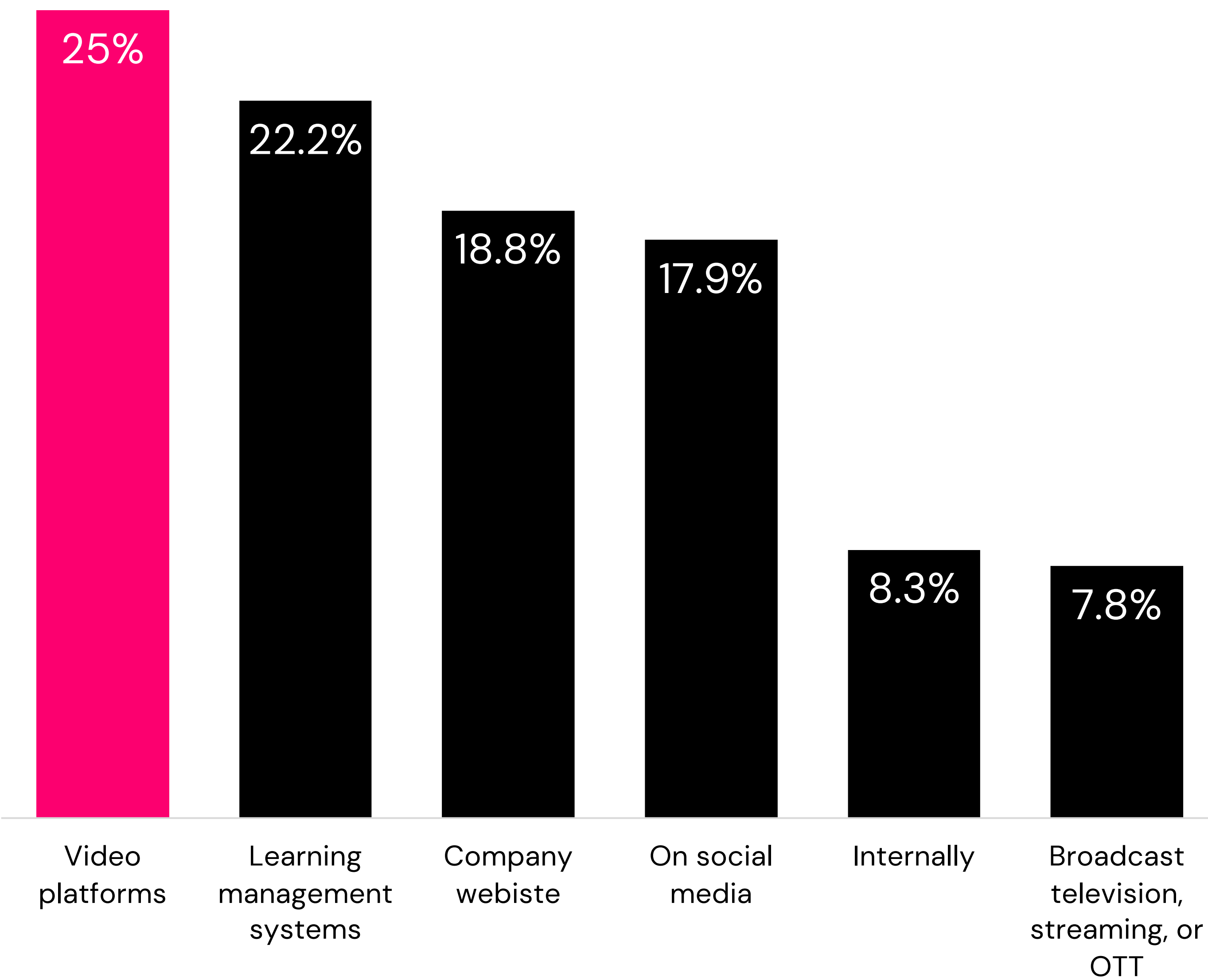
Consistent with previous years, **30% of organizations report that budget is the biggest hurdle** preventing them from closed captioning.

The next most frequently mentioned blockers were a lack of resources/time (26%), technical challenges (12%), and uncertainty of organizational needs (11%).

Most content is published via video platforms.

There remains a clear continuing favorite, as **52.6% of respondents point to YouTube as their platform of choice.**

Learning management systems were a close runner up for preferred distribution platform, followed by company websites.



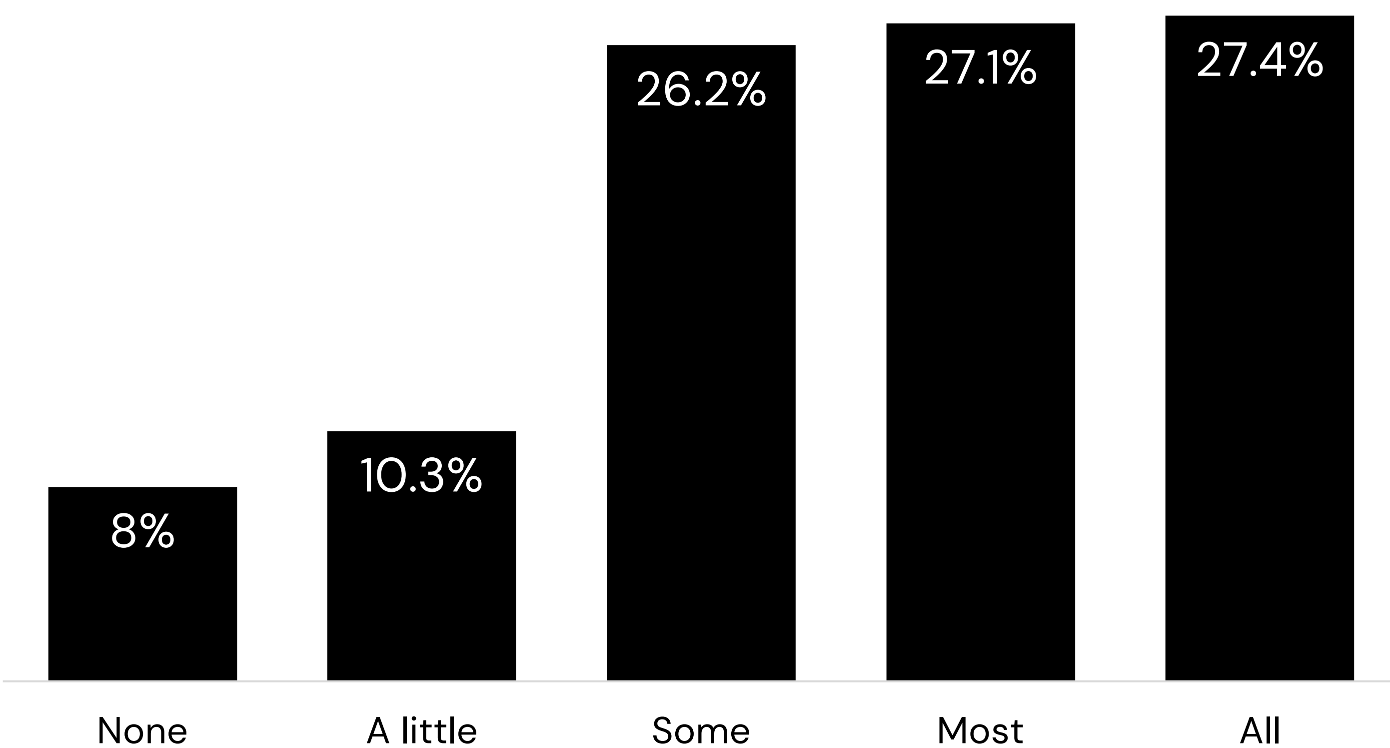
Social media

81%

are captioning at least some social media content.

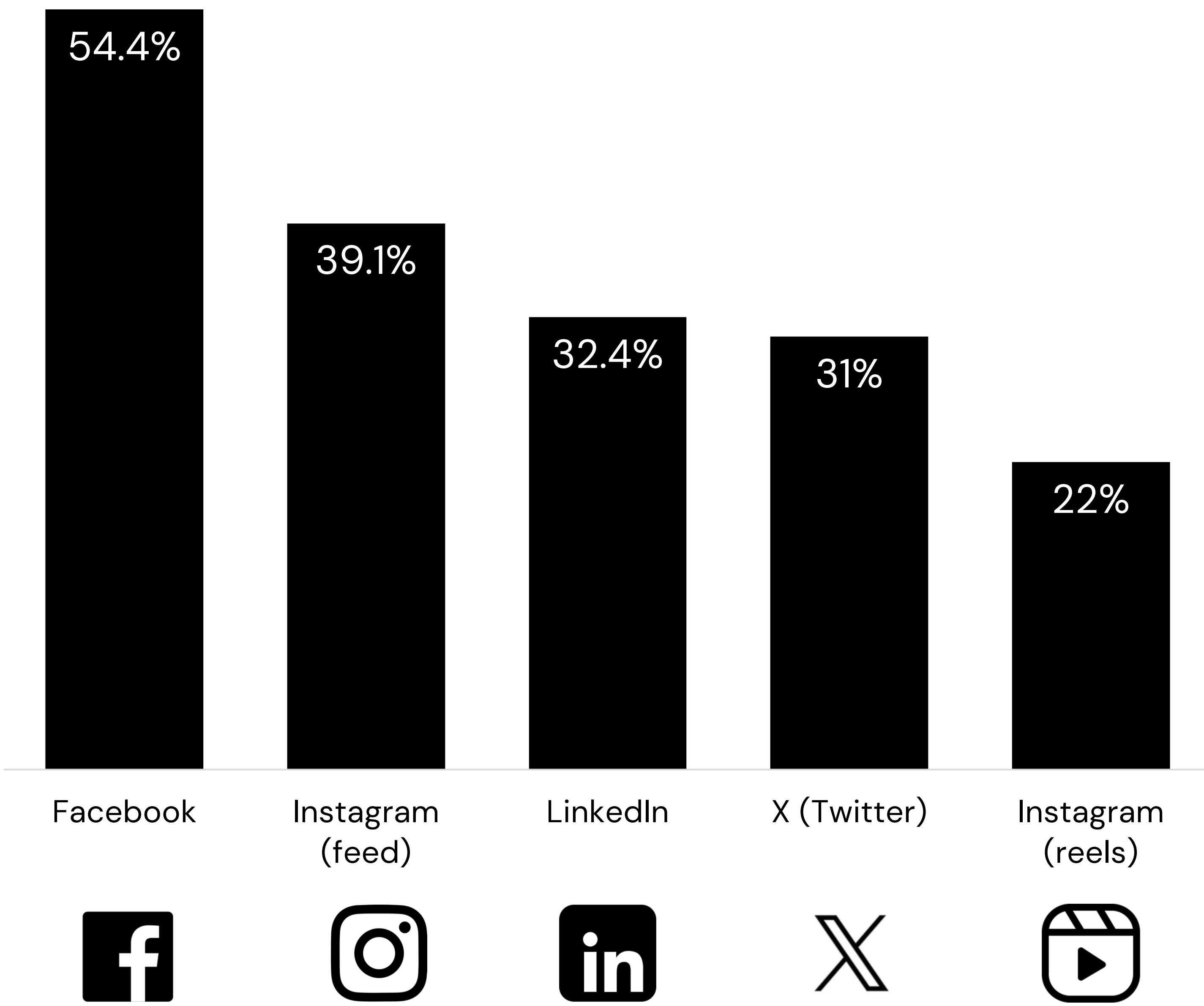
67% of respondents report that **content accessibility continues to be their primary motivator** in captioning social media content.

Other motivating factors include increased views/engagement, legal compliance or lawsuit avoidance, and audience expectations.



These platforms make media social:

When it comes to publishing video content, the most popular social media platforms are Facebook, Instagram feed posts, LinkedIn, X (formerly Twitter), and Instagram reels.

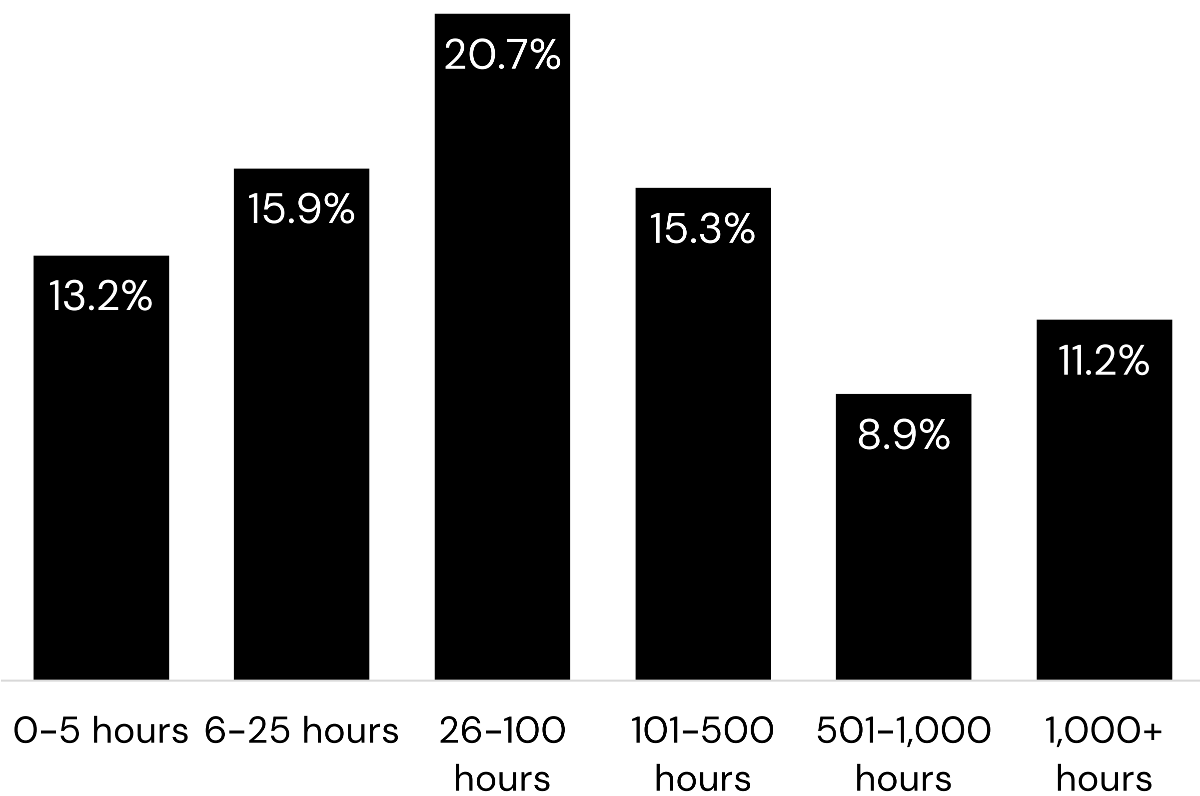


Live captions & streaming

78%

are streaming live video content.

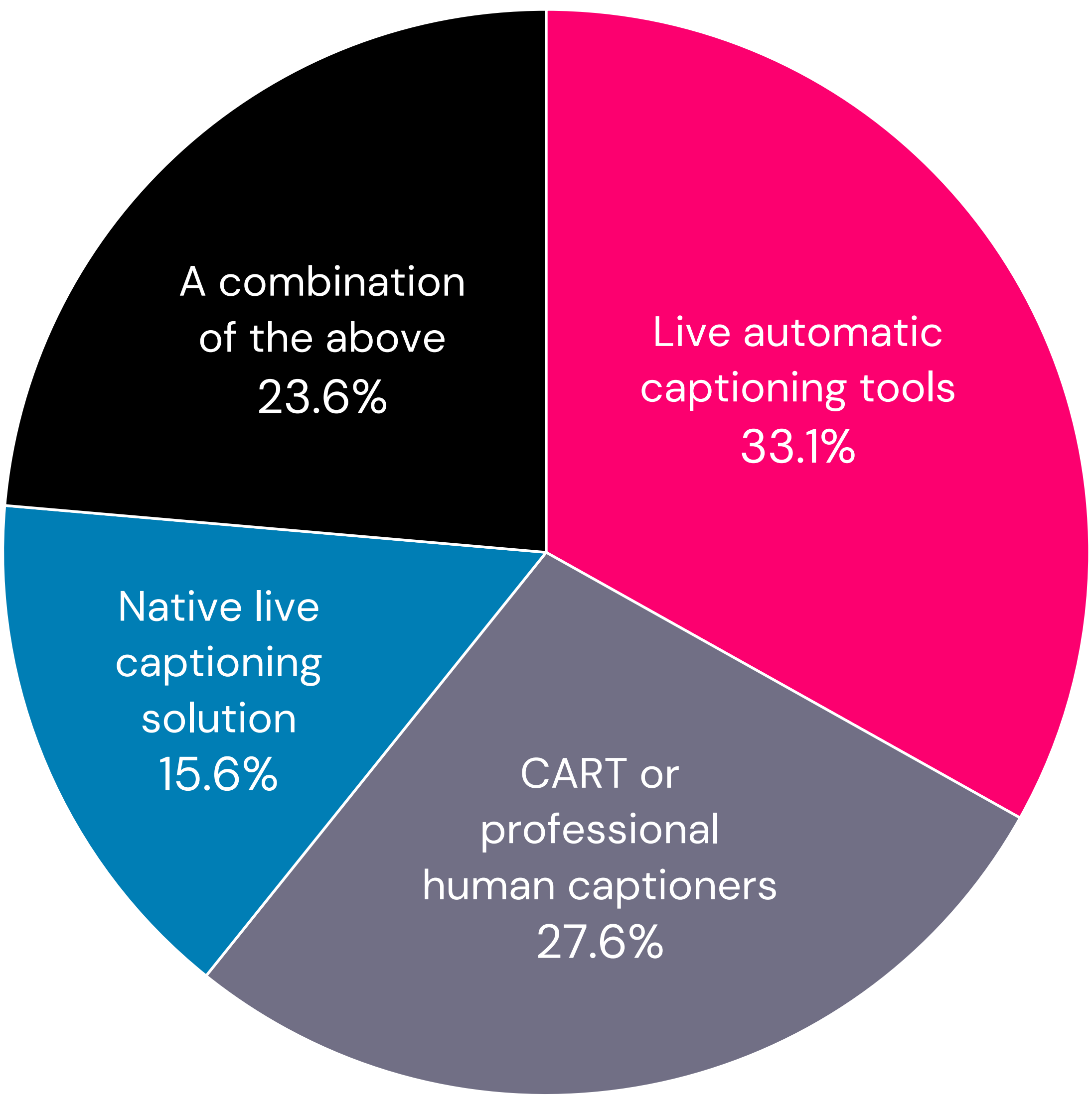
In terms of live video platforms, **Zoom remains as top-preferred,** with YouTube and Facebook closely rounding out the top three.



Respondents have a love/hate relationship with live automatic captioning solutions.

In terms of the tools/services used to satisfy live captioning needs, automatic solutions are the most popular – but popularity doesn't equal perfection.

Among those who use them, **55% report inaccuracy and errors as their biggest challenge.**



The majority of live video is live captioned.

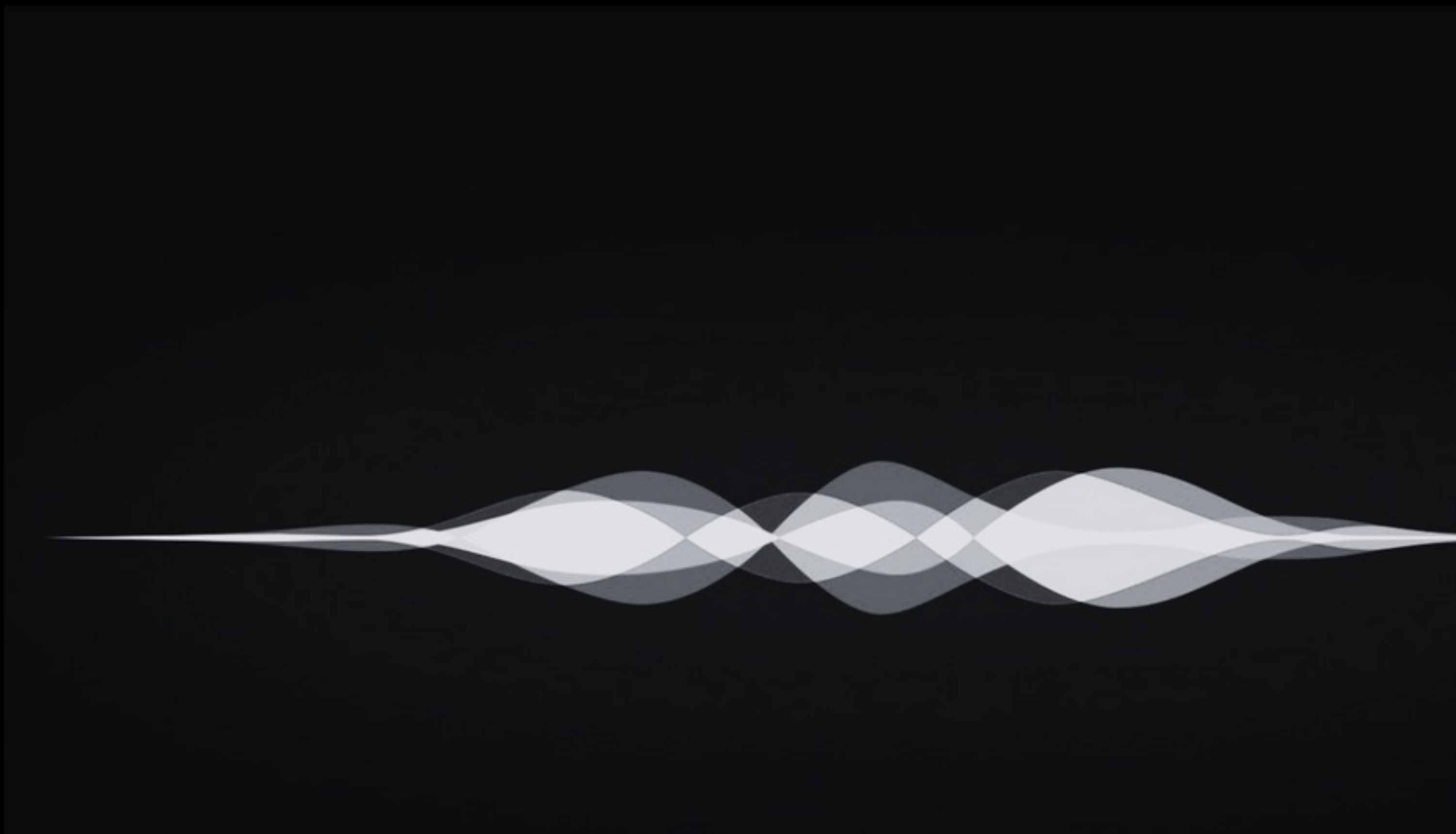
33%
live caption all the time.

46%
live caption sometimes.

Among respondents who are not currently providing live captions, **32% reported budget as their biggest barrier.**

Other top-reported barriers included uncertainty of accessibility needs, technical challenges, or a lack of resources and time.

Automatic captions



AUTOMATIC CAPTIONS

Let's talk access:

Automatically generated captions are appealing to organizations just starting their accessibility journey, or anyone working within a tight budget. They're a good first step toward making content accessible, but they're exactly that – a first step, not a final solution.

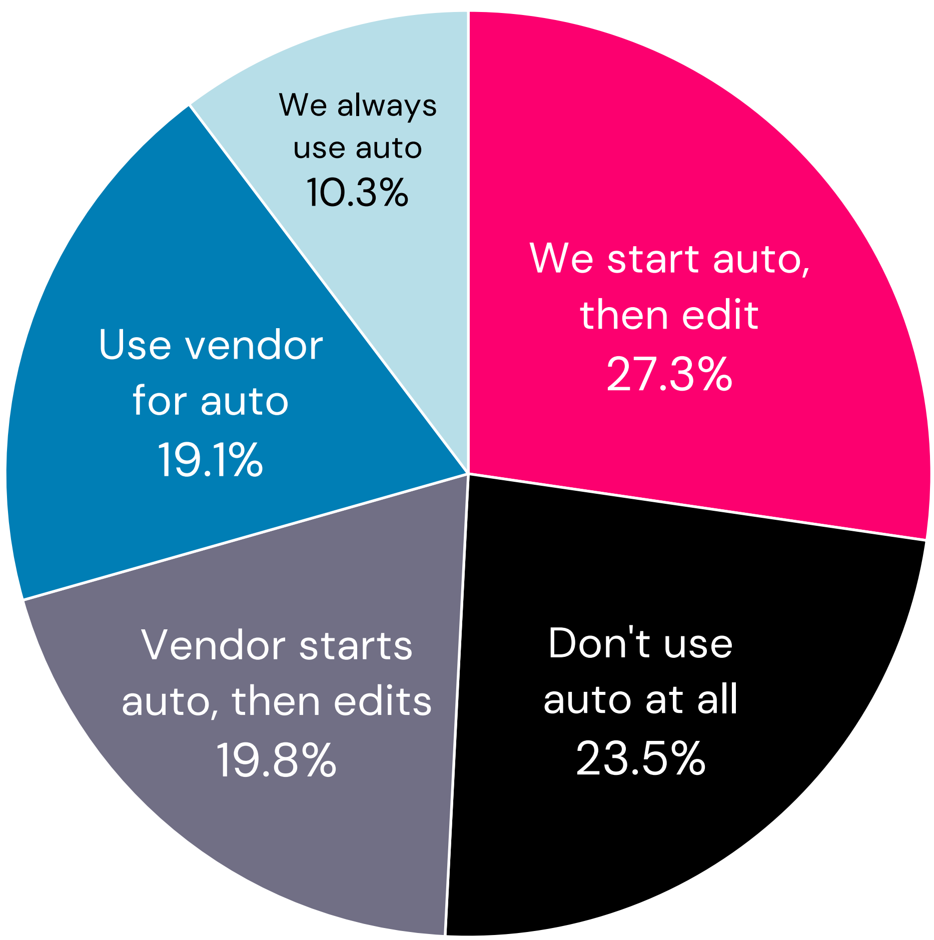
Automatic speech recognition (ASR) software is one of many ways to generate captions on pre-recorded and live content. At 3Play, our patented process combines professional human editors with best-in-class ASR technology to provide low-touch, high-quality media accessibility solutions.

ASR and other automatic solutions are ultimately insufficient as a stand-alone approach to captioning. They are significantly more likely to produce errors than human-generated captions, and accuracy is paramount for captions to be considered truly accessible. Despite significant technological advancement, our annual State of ASR Report continues to prove that **humans are a critical component** in reaching true accuracy in captioning and transcription.

Auto captions should be leveraged alongside human expertise.

The most effective way to use automatically generated captions is in combination with human oversight – and it's catching on!

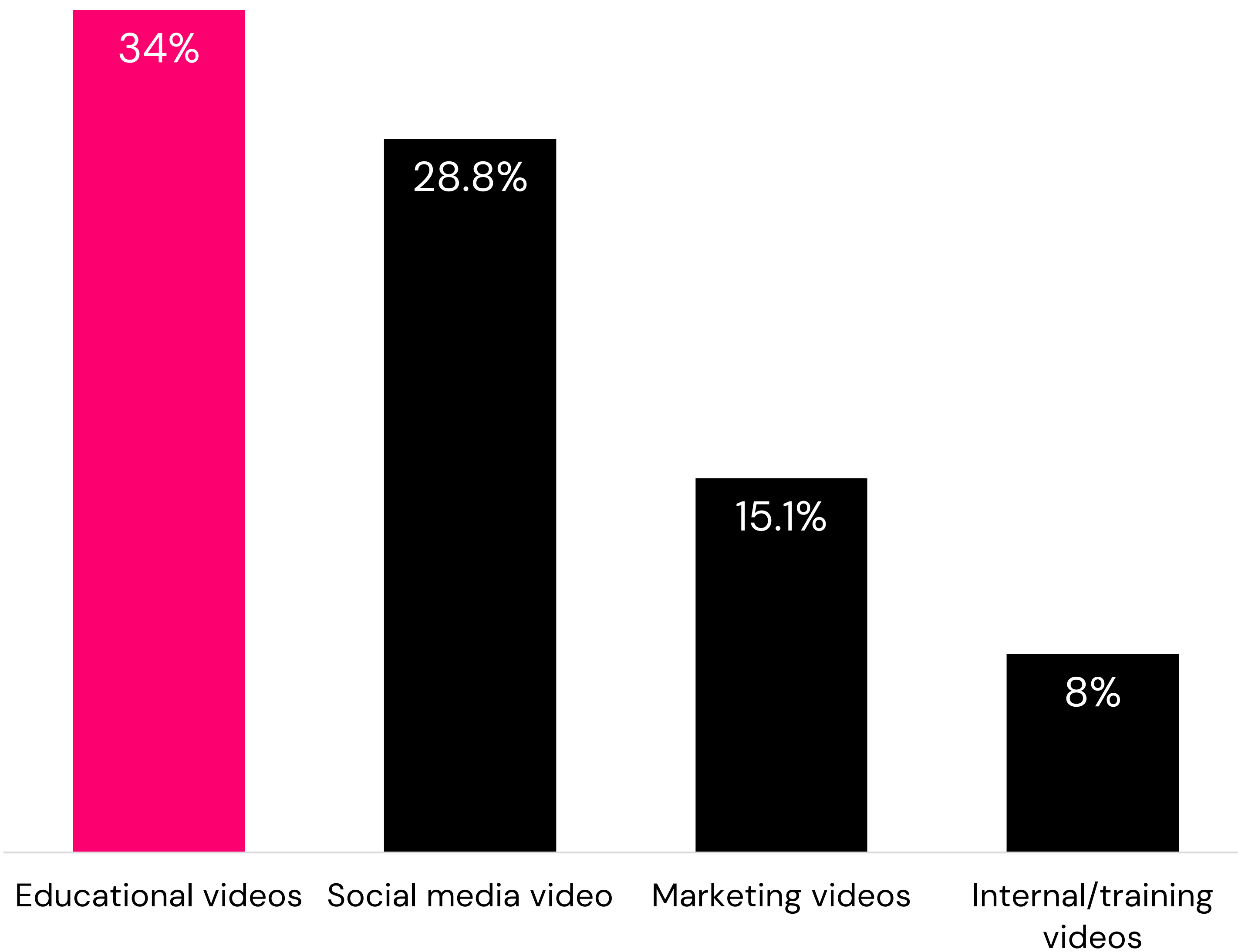
Whether employing a vendor or relying on in-house talent, auto captions can generate a foundational transcript that should then be edited by a real human. Here's how our respondents do it:



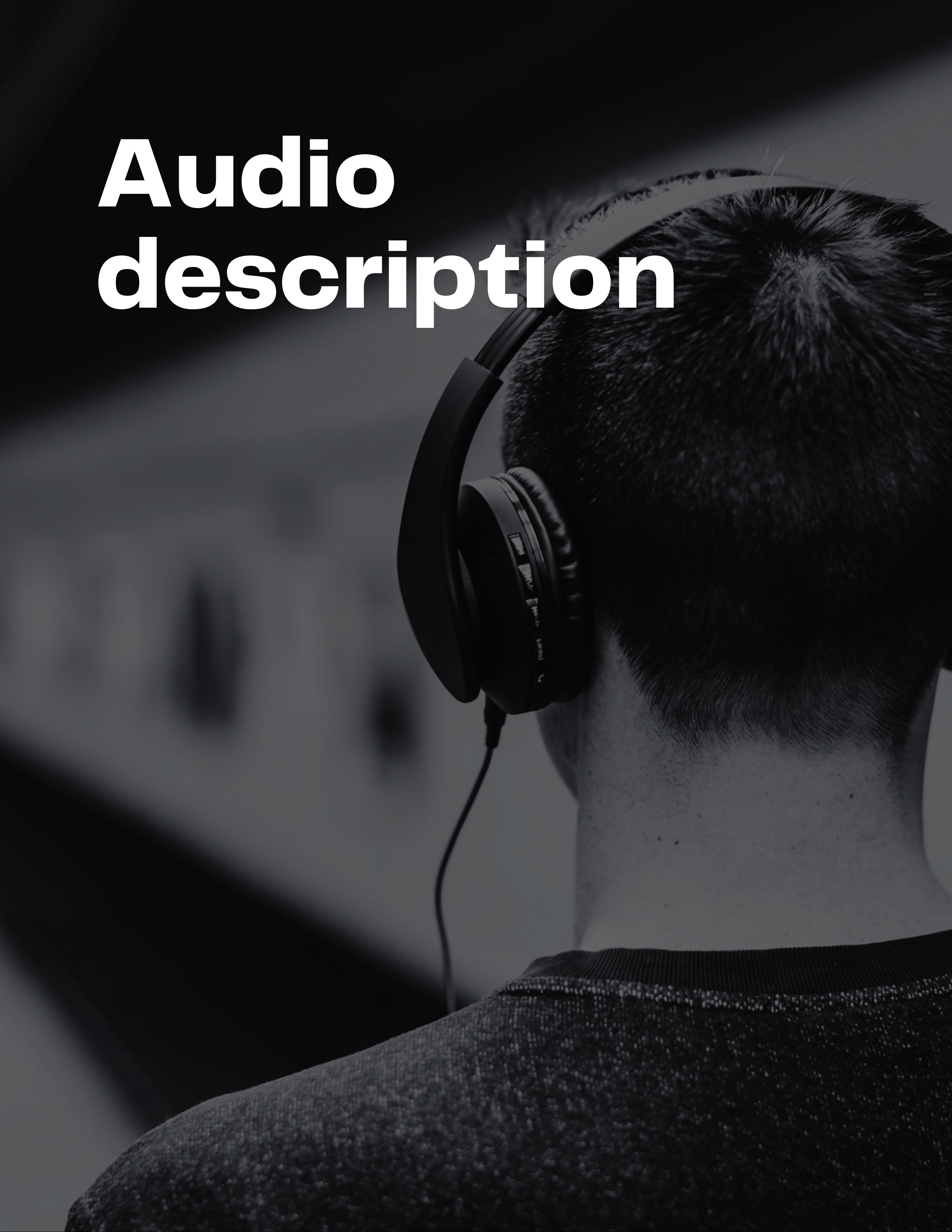
Despite the popularity of automatic captioning solutions, **only 14% of respondents believe they provide an accessible experience.**

Auto captions are most frequently used on educational content.

While this number is **trending down compared to previous years**, continued reliance on automatic captions in the education space could have a negative impact on class comprehension and student engagement.



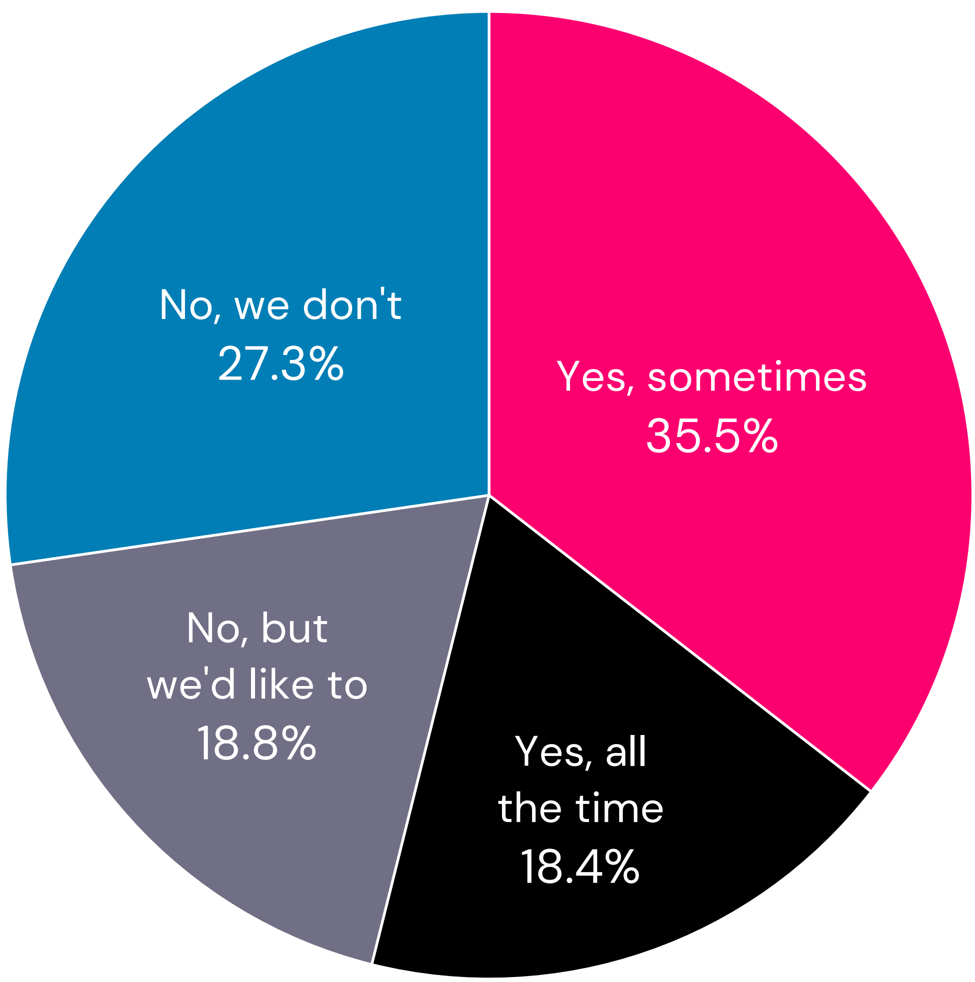
Audio description



Over half of respondents provide audio description.

Audio description (AD) is the translation of visual images into written or spoken language for the benefit of blind or low vision audiences. This is a more advanced accessibility service that requires expertise in order to make difficult judgements – like what to describe, when to describe it, and how to describe it.

This year, we’ve seen a rise in popularity with **53.9% of respondents reporting they use AD** at least sometimes. As with other services, the main barrier to including AD is cost/budget.



Localization services

LOCALIZATION SERVICES

Here's the difference:

Localization services make video content more reachable and relatable to global audiences. This space serves as another prime example of how human expertise can be effectively leveraged alongside technology – such as artificial intelligence (AI) – to produce innovative solutions, like **AI dubbing.**

Often, content localization can be as simple as translating audio from one language to another. However, not all localization services are created equal. Subtitles deliver a textual representation of translated audio, while dubbing replaces the original audio with a translated version.

The preference for **subtitles or dubbing** may vary greatly, depending on factors like:

- Geography
- Intended audience
- Individual viewer preferences

22% localize all the time.

38% localize sometimes.

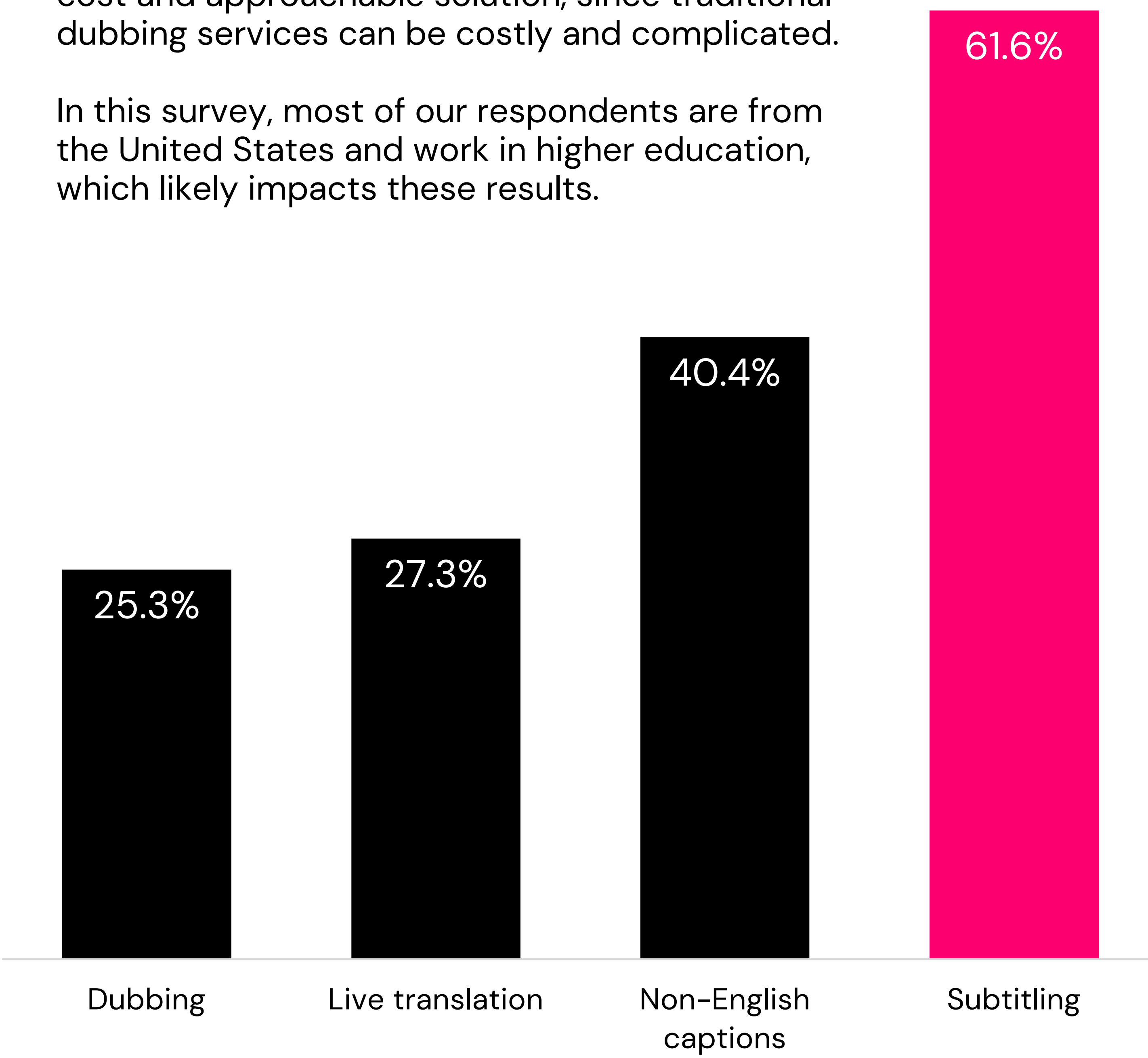
This year, **we saw a 17% increase** in the amount of respondents who localize at least some of their content.

Consistent with our findings on other services, the top-reported barrier in scaling localization is cost/budget (25%). The next biggest blockers include a lack of resources/time (21%) and uncertainty related to service needs (17%).

Subtitles are the most popular method of localizing.

Given that budget is the top-reported barrier, we can reasonably assume this informs service selection. Subtitling may be preferable as a low-cost and approachable solution, since traditional dubbing services can be costly and complicated.

In this survey, most of our respondents are from the United States and work in higher education, which likely impacts these results.



Future outlook

PREDICTIONS

What's coming next:

Our CEOs made predictions about what they expect from the media accessibility industry in 2024.

Based on their forecast, we asked respondents how strongly they agreed with top predictions.

55%

AGREE THAT Improvements in artificial intelligence will give way to AI-powered solutions/products in the accessibility space.

55%

AGREE THAT Hybrid work is here to stay, and accessibility will be a core capability of foundational investments.

48%

AGREE THAT The AI conversation will shift toward responsible use and human supervision.

42%

AGREE THAT Student requests for captioning as an accommodation will continue to increase.

Key findings

CONCLUSION

What we learned:

This year's State of Captioning revealed some of the most positive trends in media accessibility that we've seen in recent years! Here are our top three takeaways:

More (accessible) video is being produced than ever before.

Not only did this year's study see the highest reported quantities of video being produced, but we also saw a solid increase in the amount of that content being captioned.

Accessibility services being used are increasingly diverse.

Captioning has long been the front runner for most-used media accessibility service – after all, it's how this report got started. But this year we've seen increases across the board, all the way from audio description to localization.

Organizations are becoming more interconnected.

Last year, under half of respondents were localizing/translating their content. This year, more than half of organizations are using localization services and making their content accessible to international audiences.

About 3Play Media

3Play Media has created a premium platform offering services that make media accessibility easy. We are headquartered in Boston, MA and have been operating since 2007.

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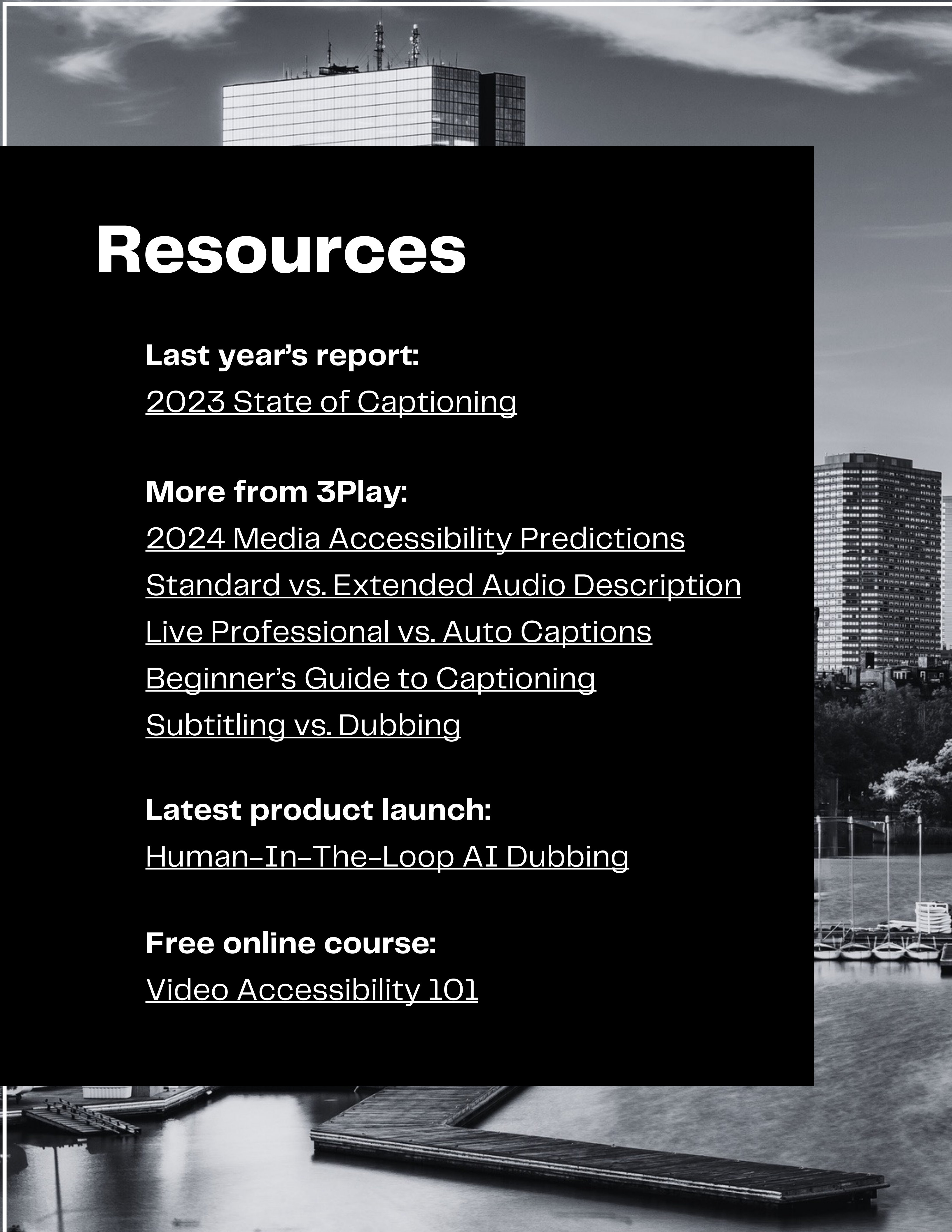

Resources

Last year's report:

2023 State of Captioning

More from 3Play:

2024 Media Accessibility Predictions

Standard vs. Extended Audio Description

Live Professional vs. Auto Captions

Beginner's Guide to Captioning

Subtitling vs. Dubbing

Latest product launch:

Human-In-The-Loop AI Dubbing

Free online course:

Video Accessibility 101