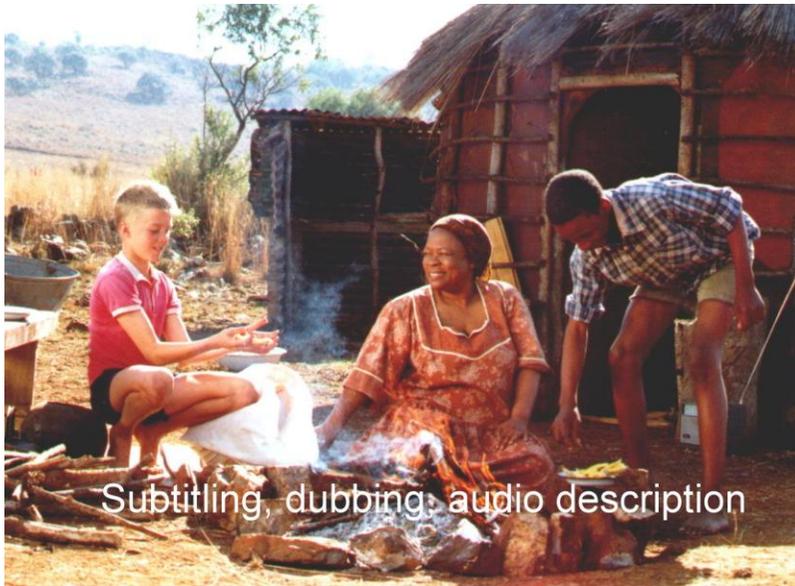


General Guidelines on Subtitling



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Sources

This handbook has been loosely adapted from the ITC Guidelines (UK), Channel 4, guidelines from CBC in Canada, ESIST and standard textbooks.

Other techniques are sourced from standard South African practice

The essence of subtitling

Equivalence

Subtitles are NOT a transcription.

Given all the limitations, you can hardly ever transcribe. Therefore, subtitles are a re-writing of the dialogue into the written word that is EQUIVALENT to the original dialogue.

Audience-directed

Write and design subtitles for the audience, and only for the audience.

They must be easy to read, easy to understand, and at the same time, complement the look and feel of the programme.

They must also take into account the reading age of the audience.

Translation

Subtitles not only translate language, they also enable the audience to hear dialogue that is:

1. In a dialect or accent that is difficult to understand
2. Not easily audible because of background noise, music or effects.

The very Basics

Becoming an effective subtitler

Is subtitling in South Africa well done? Most of us in South Africa can understand two or more languages, so we should be able to judge if the subtitles convey the meaning of the dialogue or not.

Subtitles can never be a transcription; they have to be an equivalent written form of the dialogue, where everything is translated including mood, character, dialects, slang and idiomatic speech. Subtitles translate not only the words, but also the culture.

Just look at a few programmes that are subtitled, and ask yourself:

1. Can I read the subtitles?
2. Are they too small, too fast, and too crowded?
3. Do they mean the same as the original?

4. If I can't read them, will deaf people be able to read them?

5. If I can't read them, why are they there?

The fact is that subtitling in South Africa is not well done. We could do better, but how can we learn and practice? Learning subtitling is easy. Doing them is hard. It's like playing a guitar. The chords look easy, but actually being able to play music so that the mechanics of the chords are technical like riding a bicycle is very, very hard.

Subtitlers can learn subtitling in three days. The mechanics of it, anyway. Whether you learn in three or six days, it will still take you a year to subtitle well.

Subtitlers are always translators. Even if you're doing same language subtitling (such as English dialogue in to English subtitles for the deaf), you are still translating. The answer lies in the first of the only NINE rules that subtitlers have to know.

Rule One

The subtitler's home and first language must be the target language (the language the subtitles are written in). The translator's second language must be the source language (the language of the original dialogue.)

When you are translating, you always have time to find out, ask an expert or look in a dictionary for the meaning of the original dialogue. The audience doesn't have that luxury. They have to understand the subtitles at the speed displayed to them. The translator will therefore be better at designing and writing subtitles where her home language is the target language

Rule Two

You can never make a transcription of the source language work as subtitles. We read, if we read well, about 130 words a minute. The speech rate in drama can be 200 to 250 words a minute, and the dialogue is often full of expressions and words known only to the people from that specific culture.

In subtitling, to make the lettering big enough so viewers can read it, you will hardly ever get in more than 130 words a minute. (These are not accurate figures, as it depends on the words. "A" is only one letter long. "Eavesdropper" is 12 letters. Which is why a subtitler may subtitle it as "snoop" or "spy".

Rule three

Subtitles start as the person on the screen starts speaking, and the subtitles come out when the person stops speaking. Subtitles sound effects that are crucial to the action.

This is sometimes possible, often it is not possible. But it is one of those rules you try to stick to.

Rule four

Try and get subtitles into one line. If you can't, you can use two lines. Three lines are OUT.

Rule five

If two people are speaking at the same time, design subtitles that best convey the meaning of what is being said. Subtitlers are extremely creative. That is why subtitlers are classified as creative writing, and the subtitler is the author and thus original owner on the copyright on subtitles.

Rule six

Subtitles are 26 TV lines high. This means that lower case letters are 4.5% of the screen height. Capitals and letters like b, g, l, and p are 5% of the height of the screen.

Because of the height restriction, and the restriction that subtitles must be within safe title area, you cannot have more than 38 characters across the screen, including blank spaces.

Rule seven

Each line of subtitling must be on the screen for no less than 1.8 seconds. This makes allowance for the fact that most viewers can speak their own language faster than they can read it.

Rule eight

Keep subtitles in white lettering with a black shadow around them, or within a black box. This keeps the contrast ratio at its highest. Coloured subtitles reduce the contrast ratio, and are the same as subtitling in grey.

Rule nine

Assume that the average viewer does not yet have a matric. People who have university degrees want very little TV. TV is for the masses, ordinary people.

You have just read six rules. Those are all the rules you need to know.

(Note: When digital TV comes to South Africa, subtitles will also be known as captions.)

How to teach yourself subtitling

Download a very good subtitling software programme, Subtitle Workshop, FREE from the Internet.

You can find it at <http://www.softpedia.com/get/Multimedia/Video/Other-VIDEO-Tools/Subtitle-Workshop.shtml>, or Google Subtitle Workshop and download it from a variety of mirror sites.

Install the programme. Go to the help file and familiarise yourself with the workings and instructions. They are very easy to read. You can also Google "subtitle workshop tutorial", and you will find a few.

Download a clip in English from a movie from YouTube, or use any clip you may be able to find as long as it is in a common format.

Now start practicing so that you can develop your creativity and gain speed. To be a reasonably well-paid subtitler, you will have to subtitle a half-hour soap opera in less than day.



Basic Text Display

Subtitle size

You cannot measure in cm or points. You have to measure them relative to the size of the screen. Since all TV consists of 625 lines, we measure subtitle height in terms of TV lines.

The international guidelines vary between 24 and 28 lines at the capital V.

For international recognition, the SABC recommends 26 TV lines at the capital V.

Most subtitle packages will adjust height in terms of TV lines. If in doubt, get assistance of an engineer who can help measure subtitle height in terms of 26 TV lines.

Therefore ...

Subtitles are 26 TV lines high. This means that lower case letters are 4.5% of the screen height. Capitals and letters like b, g, l, and p are 5% of the height of the screen.

Cut off

As with all captions and graphics, make allowance for the TV cut-off and safe area.

Ensure that no subtitles go over the usual safe area of 10% from the edge of the frame.

Line length

Subtitles should never exceed 38 characters per line. The number of characters INCLUDES blank spaces.

Timing

You should not take them off after less than two seconds (or 1.6 seconds for 32 characters)

The subtitle should synchronise with the action. Thus, as far as possible, the subtitle should appear as the character starts speaking, and come off as the character stops speaking.

Rows

Subtitles should be limited to two rows.

Grammar

Distribute the subtitle text over the rows in grammatical units.

Each subtitle should be semantically self-contained.

Position the subtitles consistently. That is, left, centre or right justified.

Fonts, shading and colour

Readable fonts are sans-serif fonts (e.g. Arial, Times, and Univers)

There should be a light text on a dark background, with good contrast

Use a black outline around the text.

Use a black or semitransparent box to improve readability against bright or blurred backgrounds

There should be sufficient inter-character spacing

For best readability, characters should be proportionately spaced

Subtitles should be synchronised with the dialogue.

If you select boxed text, shaded text or even coloured text, make sure it is the same throughout the programme. Do not change font, shading or colour style during a programme.

The process of subtitling

Spotting

Subtitling begins with a process known as **spotting**.

Transfer the completed film to a file. The spotter goes through the film, referring to a printout of the script, and breaks it down into sequences of a suitable length that he can print across the bottom of the screen.

The general rules of thumb are as follows:

- Only one character speaks per line,
- There should not be more than two lines of dialogue per subtitle.
- Each subtitle should not consist of more than forty characters per line, spaces and punctuation included.
- No subtitle should go over a cut, unless there is no other choice.

Translate the lines, adapted to conform to spotting constraints, reconciled with time-codes and synchronised with the dialogue and action. The subtitles are tested, adjusted and finally recorded onto a subtitle file.

The success of the whole process is largely dependent on the linguistic skills, background knowledge and research capabilities of the spotter.



The person who translates should be the same person who places the subtitles on the picture. This results in subtitling being a single, one-person operation from the first conception of the translation through to the first draft of placed and timed subtitles

The translator designs an equivalent series of words that convey the meaning of the sentence, but within the physical confines of the subtitle

General issues

Language length

Different languages occupy different textual space, in other words, some languages are longer than others. This may result from grammatical structures (for example, French and Afrikaans grammar tend to use more words than other languages.) In addition, some languages use more and longer syllables (for example, African languages). However, this is only a factor when the translation is literal.

Most African languages are about 30% longer than English is, but so is Spanish. The "length" of the language is no impediment to good subtitles.

Earlier, we emphasised that audiovisual translation is **not** literal: it is an equivalent within the constraints of the audiovisual media.

There is a world trend towards the following as non-negotiable rules that subtitling should:

- be as accurately timed to speech as practicable
- provide good readability
- identify different speakers in different coloured print
- indicate sound effects.

Punctuation

Use the standard punctuation of printed English. You can also use punctuation to emphasise points, or create a mood. Note that dots, full stops and dashes do not sometimes come over clearly.

Remember

Subtitles are a representation of spoken language, and they are also a shortened EQUIVALENCE of the original dialogue.

Punctuation therefore is meant to assist the subtitler and viewer to make COLLOQUIAL sense. Use punctuation as a tool, and not in the strict sense of being part of English Grammar.

Colour

The majority of text/background colour combinations are not satisfactory for subtitling, being insufficiently legible. The most legible text colours on a black background are white, yellow, cyan and green. Avoid the use of magenta, red and blue.

Of the combinations with coloured background, the most legible are:

- blue on white,
- white on blue,
- red on white,
- white on red,
- cyan on blue
- blue on cyan.

White on general picture with a black background is still the best.

Remember, never change subtitles styles, colours, backgrounds or blocks once you have started.

Aspect ratios

It is common to broadcast programmes shot in 16:9 in the same format, which gives a letterbox effect. Subtitles in the letterbox are highly effective. You should still always follow the rules of cut-off, letter size, font and colour.

Formatting

Do not exceed two lines. You may use three lines if you are confident that your subtitles will not obscure important picture information.

Ideally, each subtitle should also comprise a single complete sentence. Depending on the speed of speech, there are exceptions to this general recommendation, as follows:

- Combine short sentences into a single subtitle if the available reading time is limited.

You gain valuable reading time in this way because the viewer's gaze needs to be directed to the subtitle area only once, rather than two or three times, if two or three short sentences are displayed on consecutive subtitles.

Long sentences

What to do with very long sentences, which are too long to fit into a single two-line, subtitle.

There are two options for dealing with such cases:

Example

Try breaking a long sentence into two or more separate sentences and to display them as consecutive subtitles e.g. 'We have standing orders, and we have procedures which have been handed down to us over the years.' becomes:

We have standing orders
and procedures.

They have been handed down to us
over the years.

This is especially appropriate for 'compound' sentences, i.e. sentences consisting of more than one main clause, joined by coordinating conjunctions 'and', 'but', 'or';

This procedure is also possible with some 'complex' sentences, i.e. sentences consisting of a main clause and one or more subordinate clauses joined by subordinating conjunctions such as 'since', 'when', 'because', etc or by relative pronouns such as 'who', 'that': 'All we wanted was a quiet chat just you and me together, but you seemed to have other ideas.' becomes:

All we wanted was a quiet chat
just you and me together.

But you seemed to have
other ideas.

It is sometimes also possible to break single main clauses effectively into more than one subtitle; e.g., 'I saw a tall, thin, bearded man with the stolen shopping trolley disappearing into the crowd.' becomes:

I saw a tall, thin, bearded man
with the stolen shopping trolley.

He disappeared into the crowd.

Example

Segment the sentences as natural clauses. Break the segments into little chunks of meaning.

You can accept segmentation as follows:

On two minor occasions
immediately following the war,...

...small numbers of people
were seen crossing the border.

AVOID random segmentation such as

*On two minor occasions
immediately following the war, small...*

...numbers of people, etc.

In the examples given above, sequences of dots (three at the end of a to-be-continued subtitle, and two at the beginning of a continuation) are used to mark the fact that segmentation is taking place.

Line Breaks

When you break a line, follow the same concept of breaking up the lines into chunks of meaning. For example:

DO

We are aiming to get
a better television service.

DON'T

We are aiming to get a
better television service.

Similarly:

DO

He said it would increase
the number of shareholders.

DON'T

He said it would increase the
number of shareholders.

Never break a line inside a word. Avoid hyphens.

Your line breaks are also affected by justification. Often you will position the lines according to the side where the speaker is.

We are always trying to break lines in such a way that the viewer's eye has the least distance to travel between the end of the first line and the beginning of the second line.

Example

Left, right and centre justification can be useful to identify speaker position, especially in cases where there are more than three speakers on screen. In such cases, line breaks should be inserted at linguistically coherent points. Remember however to consider eye-movement. For example:

We all hope
you are feeling much better.

This is left justified. The eye has least distance to travel from hope to you.

We all hope you are
feeling much better.

This is centre justified. The eye now has least distance to travel from are to feeling.

We all hope you are feeling
much better.

This is right justified. The eye has least distance to travel from "feeling" to "much".

Example

You get a problem with justification when a short sentence or phrase is followed by a longer one. In this case, there is a risk that the bottom line of the subtitle is read first.

DON'T

Oh.
He didn't tell me you would be here.

Oh.
He didn't tell me you would be here.

This could result in only half of the subtitle being read. Allowances would therefore have to be made by breaking the line at a linguistically non-coherent point:

DO

Oh.
He didn't tell me you would be here.

Oh. He didn't tell me
you would be here.

Oh. He didn't tell me you would be
here.

When you are forced to make a decision of whether to break into two lines or keep it as one line, always bear in mind the background. Make sure the subtitle fits into the background, and that the subtitle lies against the darker side of the background.



Timing and Synchronisation

It is crucial that you display subtitles for enough time for viewers to read them. The subtitle presentation rate for pre-recorded programmes should not go over 140 words per minute.¹ You may however in some cases have to go to 180 words per minute.

The speed of dialogue varies with the genre. Talk shows rare much faster than documentaries. Dramas vary with the mood of the drama, and the action of the sequence.

The subtitler tries to prevent the viewer being frustrated with the sight of moving mouths that have no subtitle.

Dramatic Scenes

For drama and programmes with continuous changes of shot, avoid subtitles which lag behind dialogue or commentary by more than two seconds.

Shot Changes

Besides the general recommendation for subtitle/speech synchronisation, there are other places where picture affects the subtitle.

Avoid subtitles that are over-run shot changes. They can cause considerable perceptual confusion.

Eye-movement research shows that camera-cuts in the middle of a subtitle presentation cause the viewer to return to the beginning of a partially read subtitle and to start re-reading. Practically however, the frequency and speed of shot changes in many programmes present serious problems for the subtitler. You should try to 'anchor' the subtitle over a shot change by at least one second to allow the reader time to adjust to the new picture. Shot changes normally reflect the beginning or end of speech. Try to insert a subtitle on a shot change when this is in synchrony with the speaker.

General rules for dealing with camera-cuts are as follows:

1. Avoid inserting a subtitle less than one second before a camera-cut and removing a subtitle less than one second after a camera-cut.
2. Try to insert a subtitle in exact synchrony with a camera-cut.
3. Make a decision to segment a single sentence into more than one subtitle, to be placed around a camera-cut, depending on whether the sentence can be segmented naturally and on whether the resulting subtitles can be allowed sufficient display time.
4. Camera fades and pans do not produce the same perceptual effect as camera-cuts, and accordingly need not influence the subtitler in the same way.

¹ 140wpm (138wpm) corresponds to 690 characters per minute and uses 2 seconds and 15 frames per line. These speeds are increased to 180wpm when add-ons are used (increasing the reading speed by one quarter again).

5. Major scene changes can cause the same problems as shot changes within a scene. A particular difficulty arises when a speaker's last line in a scene, especially a vital punch line, is followed instantaneously by a scene change. In this case, remove the subtitle before the scene change to avoid visual confusion.
6. Some film techniques introduce the soundtrack for the next scene before the scene change has occurred. If possible, wait for the scene change before displaying the subtitle. If this is not possible, clearly label the subtitle to explain the technique.

JOHN: And what have we here?

Special techniques

Emphasis and Phrasing

Text in upper case characters can indicate an increase in volume. Try using a change of colour to emphasise an individual word.

Tone of Voice

There's no easy of portraying tone of voice in subtitles. Hearing-impaired people make use of facial cues in day-to-day communication, and they do this on TV as well. That is why they have to be able to see the action, and also read the subtitles clearly.

Where tone of voice is critical to meaning, and facial expression and body language are not enough to convey the tone, use '(!)' and '(?)' immediately following speech to indicate sarcasm and irony as shown below:

No, no. You're not late (!)

Identifying speakers

You can use colours to identify speakers, but then each speaker must be subtitled with the same colour throughout the programme.

If there are too many characters, then you can confine each set of colour to within a scene.

Remember the coloured subtitles have their own problems in terms of visibility.

So it is helpful to use screen position and justification to support the identification of the speaker. Place each subtitle horizontally towards the appropriate speaker. The main problem here is when characters move about while speaking. In such cases, position the caption at your own discretion to identify the position of the speaker as clearly as possible.

A blue background with white text can also be useful to indicate a different quality of voice such as a robot or ghost.



Off-Screen and Off-Camera Voices

When is it not obvious from which side of the screen the off-screen voice comes from, you can use special techniques.

The best way to determine the effectiveness of visible context is to watch the scene without sound and then insert arrows to indicate the off-camera speaker. Use the 'greater than' (>) or 'less than' (<) symbols.

When there is off-screen speech throughout the programme, e.g. as in narrative documentaries, then centre subtitles without symbols.

Telephone voices, radios, loudspeaker announcements, etc. also could be coming from either side of the screen. It's best to use an identifier in capitals.

LOUDSPEAKER:

"Fasten your seat-belts, please."

Sometimes you need to identify characters, for instance if they are in the dark.

JOHN: What's happened to the lights?

Dialogue Techniques

There are special techniques for very fast dialogue, such as when people speak with a machine gun effect.

All obvious speech should be accompanied by subtitle information, but under conditions of rapid dialogue, several short subtitles displayed in rapid sequence can result in staccato or 'machine-gun' effect. There are two possible solutions for this:

Double text

Use double text when more than two characters speak simultaneously and contradict one another:

Have you had lunch?

Yes.

No.

Both people's speech is contained within one subtitle.

Add-ons or cumulative titles

You can also use 'dynamic' text known as 'add-ons' or 'cumulative titles'. This is effective when the two subtitles fit naturally together, for example in a question and answer sequence, or providing the punch line of a joke.

You simply add the second part of the title to the first part.

When the first part of the dialogue appears, you subtitle it. When the second part appears, you subtitle the second part, without removing the first part.

Double-text is useful when two characters or more speak simultaneously.

Add-ons are useful when two or more characters speak consecutively and time does not allow individual subtitles.

The total length of either double-text or add-on sequence should never exceed four lines.

Idiomatic expressions

Use an equivalent expression in the target language – NEVER translate a saying, proverb, slang or any idiomatic expression.

The translation of one sequence from Tarrantino's Pulp Fiction is regarded as the ultimate challenge. Here equivalence is displayed in French and in Afrikaans.

Intralingual subtitles:	Interlingual subtitles:	Afrikaans subtitles:
Three tomatoes are walking down the street.	La famille citron se ballade.	Drie eiers loop in die straat af.
Papa, mama and baby tomato. Baby tomato starts lagging behind.	Papa, maman et bebe citron. Bebe citron se met en boule...	Papa, mama en baba eier. Baba eier raak agter.
Papa tomato gets really angry... goes back and squishes him. Says "Ketchup"	le rejoint et l'ecrabouille en disant "presse-toi ... citron presse"	Papa eier word woedend... loop terug en klits hom en se "roer jou"

This shows the extent to which subtitles are not translations – they are rewrites.

Sound Effects

Hard of hearing people cannot hear both the dialogue and the sound effects.

You therefore have to subtitle those effects that are crucial to understanding the action.

This includes sound effects that become apparent in the subsequent action, e.g. the telephone ringing before it is picked up, an explosion occurring outside before everyone dives under the table.



You should use descriptive statements rather than descriptions of the sound.

GUNSHOT is usually preferable to BANG!!!

Sound effect subtitles can also be used judiciously to create the background atmosphere for a scene:

ROAR FROM AUDIENCE

LIVELY CHATTER

If you watch the programme you are subtitling with all the sound turned off, you will see where it is important to caption sound effects.

Music

The title of the music playing should be given. Where possible, include the words of a song. This is especially important where the programme is targeted to younger people. Pop programmes, opera and songs connected to the story line are particularly important areas.

Subtitle song lyrics word for word; but, if the pace of the song is very rapid, you can omit whole couplets or verses.

Make the lyrics of a song obvious by means of a sign. The 'hash' or 'sharp' sign is most commonly used. Where speech and song are interspersed, take care to signpost each title correctly.

If it is significant, it helps to subtitle for mood music, if it is significant to the plot.

FRENCH PROVINCIAL MUSIC

Use these subtitles sparingly.

Sometimes, consecutive scenes take place in pitch darkness. Scene changes are signalled entirely by changes of incidental music. In such cases, if time permits, you can use subtitles such as:

LIVELY DANCE BAND MUSIC

Then, when the tempo of music changes dramatically, it is followed by:

MOVES INTO SLOW DANCE MUSIC

This makes deaf viewers aware of the scene change.

Silence

If there are long speechless pauses in programmes, viewers may think the subtitles have broken down.

Insert an explanatory caption such as:

INTRODUCTORY MUSIC

LONG PAUSE

ROMANTIC MUSIC

