

# Subtitling in the Streaming Era: A Comparative Analysis of Strategies Used to Translate Cultural References into Arabic

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Received: October 12, 2023

Accepted: November 17, 2023

Online Published: November 19, 2023

doi:10.5430/elr.v12n2p70

URL: <https://doi.org/10.5430/elr.v12n2p70>

## Abstract

In the wake of the COVID-19 pandemic and the subsequent frequent lockdowns, streaming platforms have become an essential part of people's media consumption. Translation has played a key role in the rapid growth of these streaming services by allowing global access to different translated versions of their content. While the impact of these streaming services on the reconstruction of media production has been a reoccurring topic in media studies, their impact on translation is still relatively underresearched. With that in mind, this article aims to identify current translation tendencies by examining the translation strategies commonly used in subtitling cultural references (CRs) into Arabic on three of the primary streaming platforms (Netflix, OSN+ and Prime Video) in the Middle East and North Africa (MENA). This is particularly significant not only because most studies on cultural references focus on European languages and contexts, but also because the few studies examining Arabic subtitles are mainly focused on subtitles available on DVDs (Alfaify, 2020), fansubbing websites (Abdelaal, 2019) and satellite television (Thawabteh, 2014). Additionally—and contrary to the common practice, which tends to ignore the complex multimodal nature of the cultural references—this article examines both verbal and crossmodal cultural references and the patterns of rendering them in professional subtitles across the investigated streaming platforms.

**Keywords:** audiovisual translation, cultural references, subtitling, translation strategies, Arabic, multimodality, streaming platforms

## 1. Introduction

In the last decade, streaming services have surpassed satellite TV, especially among younger viewers (Sweney, 2022). However, their rapid growth in the recent years is attributed to the COVID-19 pandemic, as people became 'increasingly dependent on streaming services to provide entertainment' (Bacon, 2020). Indeed, translation helped facilitate this global expansion by offering different translated versions of a given program to different regions for the purpose of accommodating the increasing number of viewers. While the impact of these streaming services on media production has been extensively documented in media studies (Dixon, 2013; Lobato, 2019; Lotz, 2014; Johnson & Woodcock, 2019; Pallister, 2019), their impact on translation is still relatively underresearched.

Subtitling and its challenges are a recurring topic in translation studies, especially when dealing with cultural references (CRs). However, three shortcomings can still be identified in the literature. First, there is a lack of descriptive data regarding the translation strategies commonly used in subtitling CRs into Arabic. This is because most of the available audiovisual translation studies focus primarily on European languages and contexts. Second, the few descriptive studies that consider the Arabic language focus mainly on subtitles that are available on DVDs (Alfaify, 2020), fansubbing websites (Abdelaal, 2019) and satellite television (Thawabteh, 2014), rather than examining professional subtitles available on primary streaming platforms. Third, the studies on audiovisual translation have the tendency to ignore the complex multimodal nature of CRs by considering only those in the verbal mode.

With all this in mind, this article aims to address those shortcomings by identifying the translation strategies commonly used in subtitling cultural references into Arabic and comparing them across the primary streaming platforms (Netflix, OSN+ and Prime Video) used in the Middle East and North Africa (MENA). Additionally, given the diverse semiotic channels which construct the multimodal films, this article examines both verbal and crossmodal references and how they are rendered in current professional practice. I will start by providing a short review of the relevant literature, then outlining the methodology used in the analysis and discussion of the findings.

## 2. The Translation of Cultural References in Films

The translation of cultural references has been described as the most challenging task a translator can face, with scholars referring to them variously as ‘cultural foreign words’ (Nida, 1945), ‘cultural bumps’ (Leppihalme, 1997) or ‘culture-bound elements’ (Gottlieb, 2009). These references can be ‘to people, places, customs, institutions, food, etc., that are specific to a certain culture, and which you may not know even if you know the language in question’ (Pedersen, 2011, p. 44). The importance of dealing with such a challenge arises from the fact that ‘language is embedded in culture . . . for the two are inseparable’ (Bassnett 2007, p. 23). In this article, I use Foreman’s term ‘cultural references’ (1992, cited in Cómite-Narváez, 2015), not only because these references are not always bound by (and could go beyond) a single culture, but also because this term is more inclusive, allowing us to consider a wider scope of challenges.

While some translation scholars continue to focus solely on the verbal mode when considering specific contexts, others continue to adopt a multimodal approach; these include Kress and van Leeuwen (2001), Bucaria (2005), Pedersen (2005, 2007), Pérez-González (2014; cited in Reviere, 2016), and Caffrey (2008), to name only a few. It is important to consider this approach, given that ‘non-verbal elements in multimodal texts not only perform the function of illustrating the linguistic part of the text, but also play an integral role in the constitution of the meaning, whether through interaction with the linguistic elements or as an independent semiotic system’ (Kaindl, 2004, p. 176). Adopting this approach in this study not only allows for the examination of translation strategies used to translate verbal and crossmodal elements, but also the identification of tendencies among translators. Consequently, the term ‘verbal’ is used in this article to refer to CRs that are erected through verbal resources only, while the term ‘crossmodal’ is used to refer to CRs that are erected through more than one mode, specifically through the verbal-visual mode.

Various descriptive studies have been developed to identify the strategies commonly used in translation, such as those of Leppihalme (1997), Gottlieb (2009) and Pedersen (2011), to name a few. Examining translation strategies plays a crucial part in uncovering norms, which leads to ‘gain[ing] a better understanding of the factors governing the communicative behavior of translators and the interaction between translators and their audiences’ (Hermans, 2012). In this study, I follow and build upon Pedersen’s (2011) taxonomy of strategies, given its comprehensive nature. His taxonomy includes ‘retention,’ ‘direct translation,’ ‘official equivalent,’ ‘specification,’ ‘generalization,’ ‘substitution’ and ‘omission.’ Nevertheless, as with most taxonomies that are designed for the translation within European language pairs, this taxonomy needs to be complemented to fit the context of subtitling into Arabic. For this purpose, the category of ‘transliteration’ (proposed by Arbabi et al., 1994) is added to address instances of converting characters from one writing system to another based on phonetic similarity. This strategy is practically relevant ‘given that Arabic presents a different writing system and script direction from other languages’ (Alfaify, 2020). Additionally, the category of ‘explicitation’ is added to refer to ‘additions in a translated text which cannot be explained by structural, stylistic, or rhetorical differences between the two languages’ (Séguinot, 1988, p. 108). This is different from the category of ‘specification,’ wherein the cultural reference is preserved but with added material to make it more specific (Pedersen, 2005, p. 4). Lastly, the category of ‘not addressed’ is added to refer to the unintentional omission of information, meaning it was ‘neglected or taken for granted’ (Chaume, 1997, p. 315). This strategy is specifically added to account for situations where crossmodal CRs are not addressed, given that ignoring them is the common practice.

Lastly, following the trail of Toury (1980), Venuti (1995) and Munday (2001), a spectrum of source- and target-oriented strategies is used to distribute translation strategies based on their degree of cultural intervention. Each translation strategy inclines towards being either source-oriented—that is, aiming to keep the text as close as possible to the source culture—or target-oriented, aiming to take the text as close as possible to the target culture. This distinction facilitates not only the examination of solutions used to deal with cultural references, but also the analysis of the tendencies of translators. The typology of strategies used in this analysis includes the following categories:

Table 1. Typology of Translation Approaches and Strategies

Source-Oriented Strategies	<b>Retention</b>	The CR is retained in the target text
	<b>Transliteration</b>	The CR is written in the target text based on phonetic similarity
	<b>Direct translation</b>	The CR is translated without any semantic changes taking place
Target-Oriented Strategies	<b>Official Equivalence</b>	The CR is replaced by an existing official term from the target culture
	<b>Specification</b>	The CR is reserved, but with added material to make it clearer
	<b>Generalization</b>	The CR is replaced by a general term in the target text
	<b>Substitution</b>	The CR is substituted by another from the target culture
	<b>Explication</b>	The implicit CR is made explicit in the target text
	<b>Omission</b>	The CR is deliberately omitted from the target text
	<b>Not Addressed</b>	The CR is unintentionally omitted

### 3. Data Analysis

The analysed material included two films that were selected because they were available across all three streaming platforms under examination, and because both featured a large number of cultural references, which helps to enrich the analysis. They varied slightly in genre; one was an action comedy, the other an action drama. Ultimately, each film is analysed three times, across each of the streaming platforms, so as not to make generalised conclusions based on one film and/or one platform. The chosen streaming platforms are considered three of the most popular in the MENA region: Netflix, which is a streaming service that offers a wide variety of TV shows, films, and documentaries; OSN+ (Orbit Showtime Network), which serves the Middle East and North Africa region with a wide variety of TV shows and films; and Prime Video, a service that has been growing steadily more popular in the region, offering a variety of shows and films as part of Amazon's Prime subscription.

The two films included in the analysis are the action drama *Heat* (1995; directed by Michael Mann), in which master criminal Neil McCauley (played by Robert De Niro) plans one last mission before he retires, all the while pursued by Lieutenant Hanna (Al Pacino), who is dealing with his own personal drama; and the action comedy *Knight and Day* (2010; directed by James Mangold), in which June Havens (Cameron Diaz) meets the charming passenger Roy Miller (Tom Cruise) while flying out of Kansas only to land in the middle of an adventure that finds her fighting for survival in Boston, Austria and Spain when she learns that Roy is a covert operative.

First, the verbal and crossmodal cultural references are identified and transcribed in each film, alongside their translations as they appear in the subtitles. The translation strategies used are then recorded in accordance with the typology in Table 1. Following this, the occurrences of the strategies used are recorded, and the sum is eventually calculated across each film. This process is then repeated for each platform, as can be seen in Table 2.

Table 2. Examples of the Analysed Data

<b>Cultural Reference</b>	<b>Category</b>	<b>Platform</b>	<b>Arabic subtitles</b>	<b>Back Translation</b>	<b>Translation strategy</b>
Trumpet flowers	Verbal	Netflix	الزهور	The flowers	Generalization
		OSN+	زهور الكولونيا	Colonia flowers	Official equivalent & Direct Translation
		Prime Video	الزهور	The flowers	Generalization
Hall & Oates (lapel pin)	Crossmodal	Netflix	هول و أوتز	Hall and Oates	Transliteration & Direct Translation
		OSN+	-	-	Not addressed
		Prime Video	هول و أوتز	Hall and Oates	Transliteration & Direct Translation

#### 4. Results and Findings

##### 4.1 Translation Strategies Used on Netflix

The total number of verbal cultural references found in the films *Heat* and *Knight and Day* was 259, while the total number of crossmodal cultural references found in both films was only 24. When examining the translation strategies used in subtitling these CRs on Netflix, the results showed an overwhelming use of the strategies ‘transliteration’ and ‘direct translation,’ which are both source-oriented, as can be seen in Figure 1.

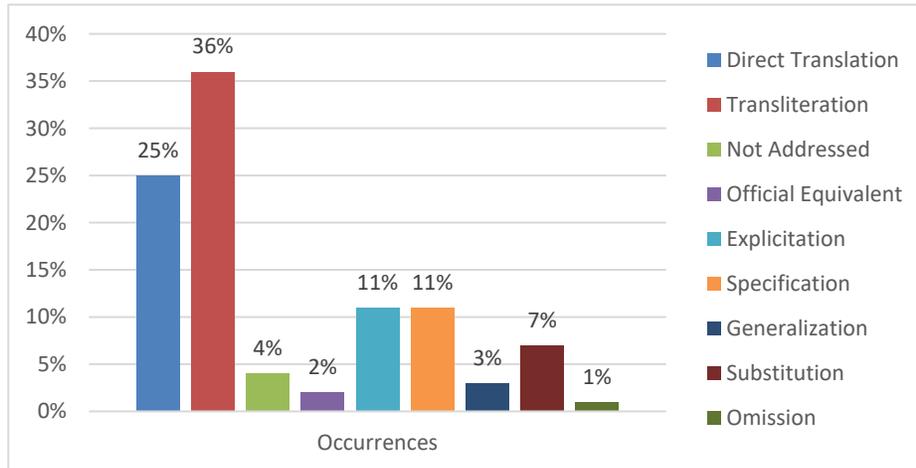


Figure 1. Data (in %) Regarding the Strategies Used in Subtitling CRs on Netflix

Other strategies that were used frequently included ‘explication,’ ‘specification’ and ‘substitution,’ which are target-oriented, while strategies such as ‘official equivalent,’ ‘generalization,’ ‘not addressed’ and ‘omission’ were the least used. Notably, ‘retention’ was not used at all in subtitling CRs in either film. The overall results revealed that 67% of strategies used on Netflix were source-oriented, while only 33% of strategies were target-oriented, as can be seen in Figure 2.

##### 4.2 Translation Strategies on OSN+

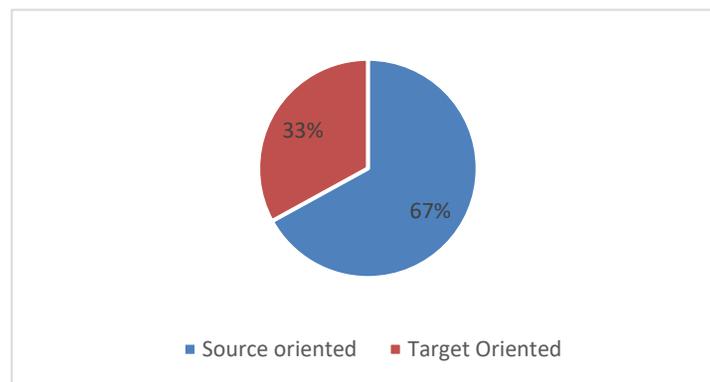


Figure 2. Data (in %) Regarding Translation Approaches Used on Netflix

The same process was repeated in examining the films *Heat* and *Knight and Day* on OSN+, which yielded similar results to those from Netflix, with ‘transliteration’ and ‘direct translation’ being the most used strategies in subtitling CRs, as can be seen in Figure 3.

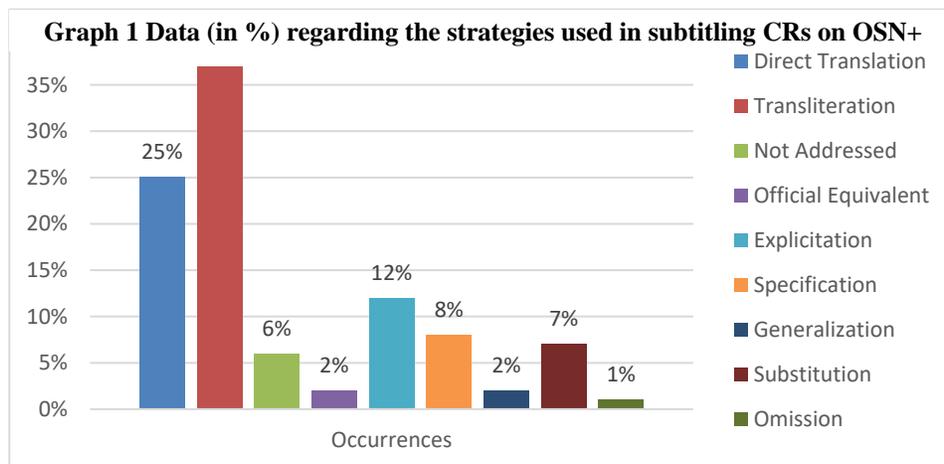


Figure 3. Data (in %) Regarding the Strategies Used in Subtitling CRs on OSN+

The strategies ‘explication,’ ‘specification,’ ‘substitution’ and ‘not addressed’ were frequently used, while ‘official equivalent,’ ‘generalization,’ and ‘omission’ were the least used. The strategy ‘retention’ was not used throughout both films yet again. Despite the similarity in the use of strategies between Netflix and OSN+, the strategy ‘not addressed’ was used more frequently in subtitling CRs on OSN+ than on Netflix. The overall results from both films revealed that 68% of strategies used on OSN+ were source-oriented, while only 32% were target-oriented, as can be seen in Figure 4.

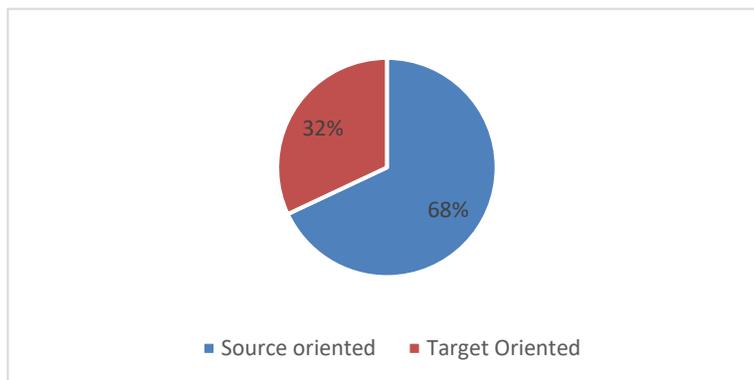


Figure 4. Data (in %) Regarding Translation Approaches Used on OSN+

#### 4.3 Translation Strategies on Prime Video

The same process was repeated in examining the films *Heat* and *Knight and Day* on Prime Video, finding ‘direct translation’ and ‘transliteration’ to be the most-used strategies yet again, as can be seen in Figure 5.

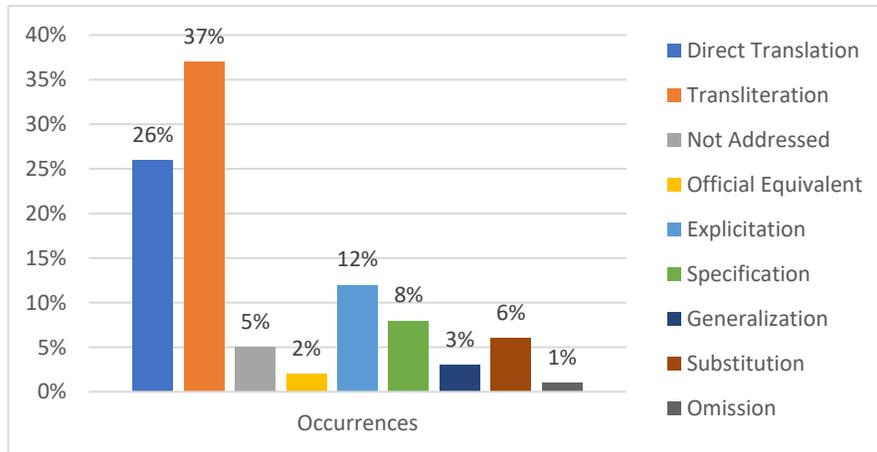


Figure 5. Data (in %) Regarding the Strategies Used in Subtitling CRs on Prime Video

The strategies ‘explicitation,’ ‘specification,’ ‘substitution’ and ‘not addressed’ were used regularly once more, while ‘official equivalent,’ ‘generalization,’ and ‘omission’ were the least used. Lastly, the strategy ‘retention’ was not used for either film. A striking resemblance can be seen in the use of strategies across Netflix, OSN+ and Prime Video. However, the strategy ‘not addressed’ was used more frequently in subtitling CRs on Prime Video than on OSN+, and even more frequently on Netflix than on Prime Video. The results also show that 69% of strategies used on Prime Video were source-oriented, while only 31% were target-oriented, as can be seen in Figure 6.

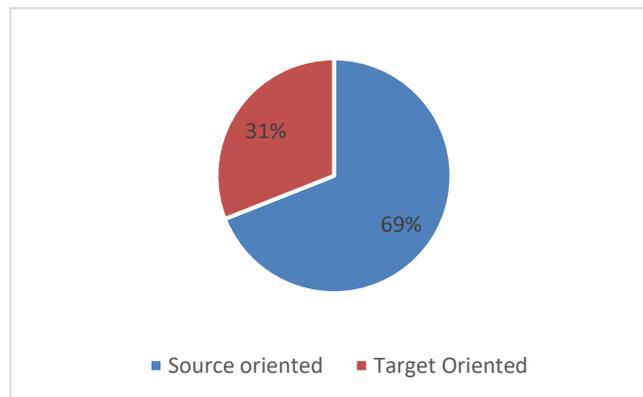


Figure 6. Data (in %) Regarding Translation Approaches Used on Prime Video

#### 4.4 Translation Strategies Across Platforms

When examining the combined results, it can be observed that the use of the strategies ‘direct translation’ and ‘transliteration’ is consistently high across all three streaming platforms, as can be seen in Figure 7.

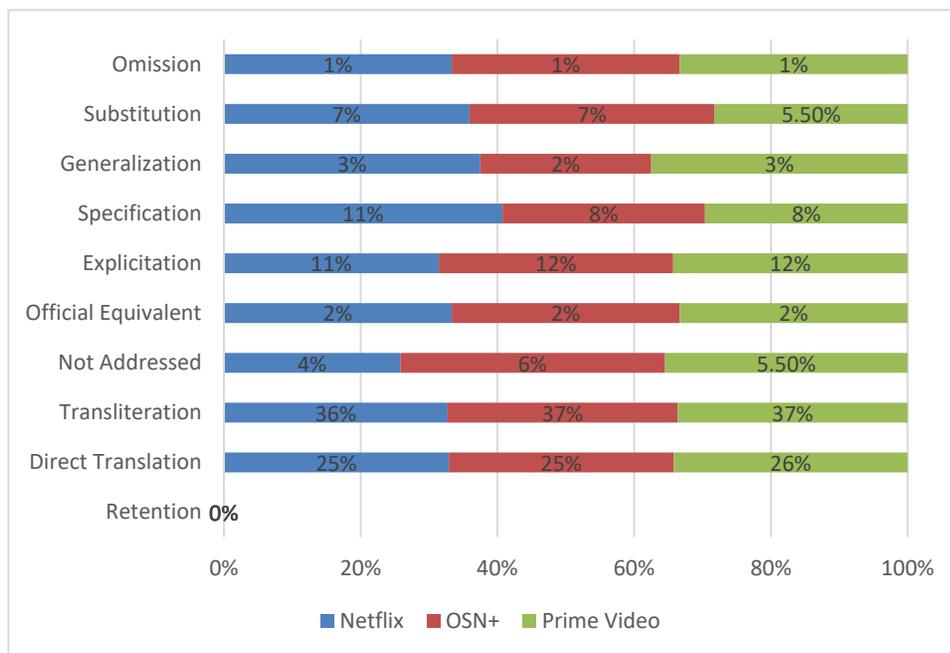


Figure 7. Data (in %) Regarding Strategies Used in Subtitling CRs Across All Platforms

The results also show the strategies ‘explicitation,’ ‘specification’ and ‘substitution’ being repeatedly used in subtitling CRs across the three streaming platforms. Some slight variation can be observed regarding the strategy ‘specification,’ which ranked higher on Netflix, but only by 3%. Another variation can be observed in the use of ‘substitution,’ which ranked lower on Prime Video. By contrast, the strategies ‘official equivalent,’ ‘generalization,’ and ‘omission’ were used with less frequency on all three streaming platforms. The strategy ‘not addressed’ fluctuated slightly, ranking higher on OSN+ and Prime Video, which essentially means that more crossmodal references have been translated on Netflix. This tendency among subtitlers on Netflix to address crossmodal CRs in the subtitles runs contrary to the common practice, which focuses solely on the verbal mode.

Contrary to the assumption that ‘retention’ is ‘the most common strategy for rendering ECRs’ (Pedersen, 2005, p. 4), we find it has not been used in subtitling CRs into Arabic on any of the platforms under investigation. This is perhaps due to how rigid and awkward it would be to transfer letters between two languages when they have different writing systems and script directions. Such a finding comes as no surprise given that Pedersen’s taxonomy, which this study follows and builds upon, is designed for the translation within European language pairs.

Consequently, an evident pattern can be detected of subtitlers adopting source-oriented strategies to subtitle CRs into Arabic across the streaming platforms, as can be seen in Figure 8.

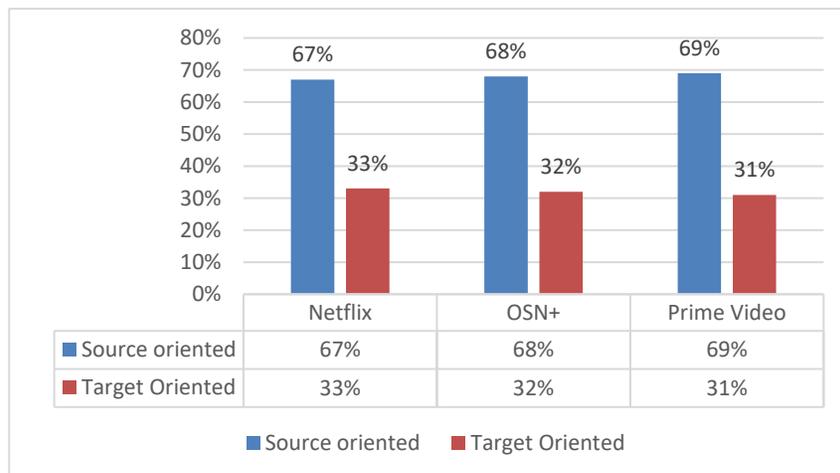


Figure 8. Data (in %) Regarding Translation Approaches Used Across All Platforms

This seems to confirm previous results suggesting similar tendencies in subtitling CRs into Arabic on DVDs (Alfaify, 2020). They also align with what some scholars have preferred and advocated for, stating that the source-oriented approach ‘can be a form of resistance against ethnocentrism and racism, cultural narcissism and imperialism, in the interests of democratic geopolitical relations’ (Venuti, 1995, p. 20).

#### 4.5 Verbal vs Crossmodal CRs

As mentioned earlier, this article acknowledges the multimodal nature of the cultural references, and therefore, investigates strategies used to translate verbal and crossmodal CRs, in accordance with the typology in Table 1. The aim of this investigation is to see if crossmodal CRs are given the same consideration as verbal CRs, and to examine any specific patterns or tendencies followed by subtitlers when translating them, as can be seen in Table 3.

Table 3. Examples of Different Strategies Used in Subtitling Crossmodal CRs

Cultural Reference	Platform	Arabic Subtitles	Back Translation	Translation Strategy
Cape Horn	Netflix	كيب هورن	Cape Horn	Transliteration
	OSN+	-	-	Not addressed
	Prime Video	-	-	Not addressed
Alps	Netflix	جبال الألب	Alps mountains	Transliteration & Specification
	OSN+	-	-	Not addressed
	Prime Video	-	-	Not addressed
Zacks Parking	Netflix	مواقف زاكس	Zacks Parking	Transliteration & Direct Translation
	OSN+	-	-	Not addressed
	Prime Video	-	-	Not addressed

Initially, verbal and crossmodal CRs were examined across the three streaming platforms Netflix, OSN+ and Prime Video. The results revealed an overwhelming consideration given to the verbal CRs when compared to the crossmodal ones, with an identical 98% of translated verbal CRs across all streaming platforms. That said, Netflix seems to take the lead with 54% of translated crossmodal CRs, followed by Prime Video with 38% and OSN+ with only 33%, as seen in Figure 9.

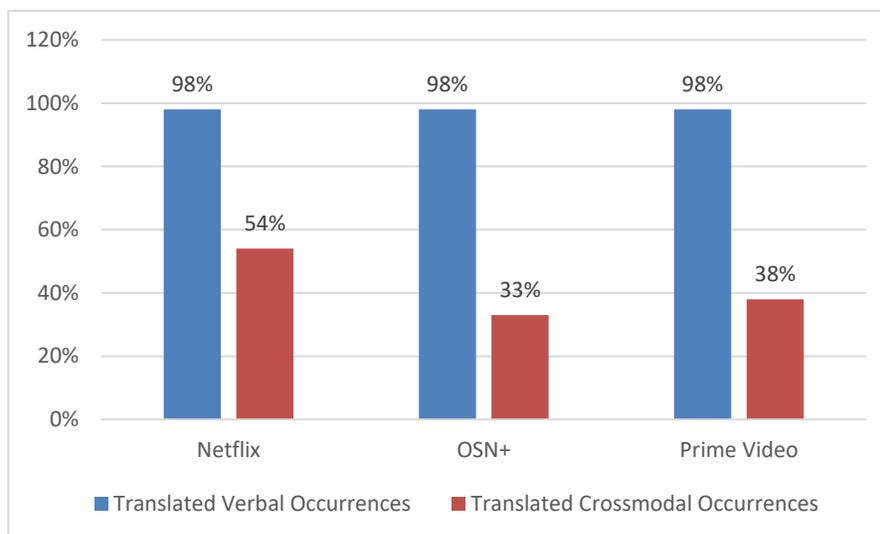


Figure 9. Data (in %) Regarding Translation of Verbal and Crossmodal CRs Across Platforms

Such findings suggest a striking discrepancy between how verbal and crossmodal CRs are treated in the subtitles across the streaming platforms. This comes as no surprise, given that it is in keeping with the tendency of subtitling professional guidelines to focus on the verbal mode while leaving the verbal-visual mode ‘for the viewer to interpret’ (Pettit, 2004, p. 37). Accordingly, it was interesting to see the crossmodal CRs in this study receiving any type of attention, especially when previous studies have observed these CRs being completely ignored in the subtitles (Alfaify, 2020; Jabbarzadeh, 2007). This could suggest a new emerging pattern of subtitlers finally realizing that texts are not ‘strictly speaking, monomodal’ (Gambier, 2006, p. 7), and that ‘subtitles belong properly neither to the text nor to the image; they occupy a hybrid and intermittent site that is never fully their own’ (Kapsaskis, 2008, p. 47).

## 5. Conclusion

This study yielded original findings providing insights into the translation strategies commonly used in subtitling CRs into Arabic in the MENA region’s primary streaming platforms (Netflix, OSN+ and Prime Video). It also provided insights beyond the usual European languages and contexts and from a multimodal perspective, which facilitated the examination of both verbal and crossmodal CRs.

The results showed a tendency among subtitlers across the investigated streaming platforms to use a source-oriented approach when subtitling CRs into Arabic. It particularly showed that ‘transliteration’ and ‘direct translation’ are the most adopted strategies (source-oriented), while ‘official equivalent,’ ‘generalization,’ and ‘omission’ are the least adopted strategies (target-oriented). Such substantial use of source-oriented strategies is possibly due to subtitlers not feeling obligated to bring the source text closer to the target audience, given that globalization had helped make aspects of western culture familiar in various parts of the world. Nevertheless, it would be interesting to see if similar tendencies are observed when the source culture is of less familiarity to the target audience—something that can be explored in future research.

The strategy ‘retention’ was not used at all in subtitling CRs into Arabic, which is contrary to previous findings based on European context that referred to it as the most frequently used strategy. This discrepancy demonstrates how CRs are treated differently based on how close or distant the target language is from that of the source, which can be examined further in the future.

The findings also revealed an inconsistency in the way verbal and crossmodal CRs are treated in the subtitles across the three streaming platforms, with crossmodal CRs receiving inadequate consideration from subtitlers. This inadequacy, which was more evident on OSN+ and far less evident on Netflix, is in line with the common professional practice of overlooking verbal visual elements. Nevertheless, the results still indicate that subtitlers are breaking new ground, considering that previous studies noted the absolute discounting of verbal visual signs in the subtitles. This could suggest a new emerging pattern of subtitlers finally realizing that meanings in multimodal products are expressed through different modes that are deserving of their equal attention.

My hope is that these findings could offer a useful foundation for further research, and that other researchers will find the framework and the typology equally useful in future studies.

**Acknowledgments**

Not applicable

**Authors contributions**

Not applicable

**Funding**

Not applicable

**Competing interests**

The author declares no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

**Informed consent**

Obtained.

**Ethics approval**

The Publication Ethics Committee of the Sciedu Press.

The journal's policies adhere to the Core Practices established by the Committee on Publication Ethics (COPE).

**Provenance and peer review**

Not commissioned; externally double-blind peer reviewed.

**Data availability statement**

The data that support the findings of this study are available on request from the corresponding author. The data are not publicly available due to privacy or ethical restrictions.

**Data sharing statement**

No additional data are available.

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