



UNIVERSIDAD JUÁREZ AUTÓNOMA DE TABASCO
DIVISIÓN ACADÉMICA DE EDUCACIÓN Y ARTES



**ANALYSIS OF THE STRATEGIES USED IN THE LATIN SPANISH
TRANSLATION OF CULTURAL REFERENCES IN THE ANIMATED
FILM *PENGUINS OF MADAGASCAR***

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**ANALYSIS OF THE STRATEGIES USED IN THE LATIN SPANISH
TRANSLATION OF CULTURAL REFERENCES IN THE ANIMATE...**



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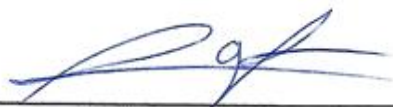
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DEDICATORIA

A mi abuelito Ramón, quien me regaló mis primeros libros y, sin saberlo, sembró en mí el amor por el conocimiento. Gracias por tu cariño, por cada palabra y cada detalle que me regalaste. Tú despertaste en mí el deseo de explorar el mundo con curiosidad. Aunque ya no estés físicamente, tus enseñanzas permanecen vivas en mí y continúan guiando mis pasos; por eso, este logro también te pertenece.

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RESUMEN

Las referencias culturales representan uno de los elementos más complejos de traducir, puesto que forman parte esencial de la identidad de las comunidades. Los traductores encargados de trasladarlas de su idioma original a otro asumen una gran responsabilidad, ya que deben seleccionar estrategias adecuadas que preserven el sentido y coherencia en el texto meta. Este artículo emplea la taxonomía de estrategias para la traducción de referencias culturales propuesta por Pedersen (2005) con el fin de identificar cuáles fueron las estrategias más utilizadas en la traducción al español latino de la película *Los Pingüinos de Madagascar*, así como analizar la manera en que fueron aplicadas. Para ello, se utilizó un método mixto con un diseño convergente paralelo y se trabajó con dos tablas de concentración: una para los datos cuantitativos y otra para los cualitativos. Los resultados muestran que la estrategia más empleada fue la generalización (37.5%), orientada al texto meta y utilizada para transformar el término cultural original en uno más accesible para el público hispanohablante. En conclusión, la elección de las estrategias puede variar debido a diversos factores presentes durante el proceso de traducción; sin embargo, es fundamental mantener un equilibrio entre el mensaje original y la traducción meta para preservar la relevancia cultural y garantizar el disfrute de la película.

Palabras clave: *traducción audiovisual, referencias culturales, estrategias de traducción, película animada.*

ABSTRACT

Cultural references are considered one of the most challenging elements to translate, as they are deeply tied to the identity of the communities they originate from. Translators who handle these elements bear a great responsibility, since they must choose strategies that preserve coherence and meaning in the target text. This article applies Pedersen's (2005) taxonomy of strategies for the translation of cultural references in order to identify which strategies were most frequently used in the Latin American Spanish translation of the animated film *Penguins of Madagascar*, as well as to analyse how they were employed. A mixed-methods approach with a convergent parallel design was used, along with two concentration tables: one for quantitative data and another for qualitative data. The findings indicate that the most frequently used strategy was generalization (37.5%), a target-oriented approach that adapts the original cultural term into one that is more accessible for Spanish-speaking audiences. In conclusion, the translator's choice of strategies may vary depending on several factors present during the translation process; however, it is essential to maintain a balance between the original message and the target translation to preserve cultural relevance and the audience's enjoyment of the film.

Keywords: *audiovisual translation, cultural references, translation strategies, animated film.*

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INTRODUCTION

In today's digital world, audiovisual translation plays a central role in how international audiences access and enjoy global media products. One of the most prominent forms of audiovisual translation in Latin America is dubbing, where foreign films are adapted for different audiences. Usually, the narratives and humour of animated films are based on cultural references that may be unfamiliar to viewers outside the culture of origin.

The translation of Cultural References (CRs) is considered one of the most difficult tasks for translators (Slamia, 2020). This is due to the different elements that Cultural References encompass, among them geography, sociolinguistic aspects or history (Abdelaal, 2019). In other words, attributes that belong to a particular community (Davies & Scott-Tennent, 2005). In addition to this, translators must take into account other aspects such as the target audience and what the original text wishes to convey, trying to find its closest and fairest equivalent (Nida & Taber, 1969). Therefore, the translator must know the appropriate translation strategies to handle cultural expressions.

Nowadays, there are different strategies for translating Cultural References, each of them from different authors. However, this study specifically focuses on the translation strategies for translating extra cultural referents by Pedersen (2005), considered one of the most comprehensive due to its classification: those oriented to the target text and those oriented to the source text.

This article analyses the translation strategies of Pedersen's (2005) taxonomy used to translate the film *Penguins of Madagascar* (2014), a DreamWorks animated film that combines action, spy fiction and comedy; which was chosen because it contains several cultural references, ranging from geographical and folkloric to humorous and popular culture elements.

The aim of this research is finding out which and how Pedersen's strategies were used in the translation of the aforementioned film as well as the frequency with which these

strategies were used. This will help to find out whether the translation leans more towards target-text-oriented strategies, in which the translator prioritises the cultural understanding of the target audience, or whether it leans more towards source-text-oriented strategies, in order to preserve the message of the original culture. In addition, it contributes to a better understanding of how dubbing mediates between cultures and adapts content for Latin American audiences, in this case children and families.

CHAPTER 1. STUDY FOUNDATIONS

The translation of Cultural References in dubbed animated films has been a topic of growing interest, particularly in exploring how translators navigate the challenges posed by the diversity of cultures. While existing research has shed light on general strategies and trends, there remains a gap in understanding how these strategies are applied in the Latin American context, specifically in the dubbing of animated films from English into the variety of Spanish used in the region. This research aims to contribute to this knowledge gap by analysing the translation strategies employed for Cultural References in the film *Penguins of Madagascar* and analysing their effectiveness in conveying the original cultural meaning to the Spanish-speaking audience.

1.1 Rationale

To establish a solid foundation for the research, a conceptual framework is presented, outlining the key concepts involved: translation, translation strategies, and cultural references.

In defining translation, authors refer to it in different ways although they allude to almost the same thing (see Table 1). Karunarathna (2015) refers to it as translation process, Mekin-Tekin (2019) says it is a journey between two different languages, Nida and Taber (1969) indicate that it is the restatement of messages, while Newmark (1961) and Catford (1965) agree that it is the remixing of a written text. They all agree that the message moves from one language to another, without altering the original message.

Table 1.

Definitions of Translation

Concept for the study	Definition	Author	Year
Translation	"...is the process of translating words or texts from one language to another."	Buddhima Karunarathna	2015

“...can be considered as a journey between two different languages and cultures.”	Bilge Metin-Tekin	2019
“... is a craft consisting in the attempt to replace a written message or statement in one language by the same message or statement in another language.”	Peter Newmark	1981
“... is the re-expression of messages from the Source Language (SL) in the Target Language (TL) with the closest and fair equivalent, in terms of meaning and language style.”	Eugene Nida and Charles Taber	1969
“... is the replacement of textual material in one language (SL) by equivalent textual material in another language (TL).”	John Cunnison “Ian” Catford	1965

Note. Author's compilation.

Regarding translation strategies, most authors agree that they are techniques and procedures that help to solve translation problems (see Table 2). However, they tend to differ in some ways. For example, Krings (1991) mentions that it is a conscious plan; while Newmark (1998) mentions that it considers the purpose, the context, and the audience of the translation. On the other hand, Nida (1964) mentions that translation strategies are those that seek to reach a dynamic equivalence.

Table 2.

Definitions of Translation Strategies

Concept for the study	Definition	Author	Year
Translation strategies	“... a plan or method used by a translator to achieve the most accurate and effective translation possible, considering the context, purpose, and audience of the translation.”	Peter Newmark	1998

“... the specific procedures, techniques, or methods employed by translators to deal with various translation problems and challenges, ensuring the translation is coherent and faithful to the source text.”	Mona Baker	1992
“...a potentially conscious procedure for solving problem faced in translating a text from one language to another.”	Wolfgang Loescher	1991
“...translator’s potentially conscious plans for solving concrete translation problems in the framework of a concrete translation task.”	Hans P. Krings	1986
... a set of principles and techniques used by translators to achieve dynamic equivalence, ensuring that the translated text evokes the same response in the target audience as the original text does in the source audience.	Eugene Nida	1964

Note. Author’s compilation.

The term Cultural References may seem easy to apprehend, but in reality, it has several definitions depending on the author (See table 3). Most of the authors mention that CRs relate to the culture of a place, basically things that make it distinctive. However, the most distinct definition is that of Davies and Scott-Tennent (2005) in which they refer to cultural references as any kind of expression (textual, verbal, etc.) that denotes manifestations of a community and that is only admitted as a feature of it by those who consider themselves members. This study adopts the definition of cultural references proposed by these authors, as it encompasses material, ecological, social, religious, linguistic, and emotional manifestations that can be attributed to a particular community. These may also include geographic, socio-economic, historical, political or religious elements, if they are recognized by members of that community as representative features of their identity.

Table 3.*Definitions of Cultural References*

Concept for the study	Definition	Author	Year
Cultural References	"...are always related to culture-specific contexts such as geography, sociolinguistic aspects, and history, among others."	Noureldin Abdelaal	2019
	"... will be therefore used to refer specifically to those culturemes or cultural references which are objects and which have a distinctive cultural capital, within the society as a whole, and which are capable of influencing the expressive value which we assign to the individuals who are associated with them."	Laura Santamaria	2010
	"...is any kind of expression (textual, verbal, non-verbal or audiovisual) denoting any material, ecological, social, religious, linguistic or emotional manifestation that can be attributed to a particular community (geographic, socio-economic, professional, linguistic, religious, bilingual, etc.) and would be admitted as a trait of that community by those who consider themselves to be members of it."	María González-Davies and Christopher Scott-Tennent	2005
	"... is defined as reference that is attempted by means of any culture-bound linguistic expression, which refers to an extralinguistic entity or process, and which is assumed to have a discourse referent that is identifiable to a relevant audience as this referent is within the encyclopedic knowledge of this audience."	Jan Pedersen	2005
	"...it may relate to a religious belief, a social custom, or even a type of food. Such concepts are often referred to as 'culture-specific'."	Mona Baker	1992

Note. Author's compilation.

Having presented the conceptual framework of the translation of Cultural References, it was decided to work with the key concepts of each category, limiting the definitions to those that offer greater precision and are the most appropriate for this research.

Firstly, with regard to translation, the definition of Nida and Taber (1969) was chosen as it is accurate and consistent with translation from the perspective of CRs as it is not presented as the literal translation from one language to another but as a re-expression of the message from one language to another with the closest equivalent.

Regarding to translation strategies, Newmark's (1998) definition is the most complete and the one that best fits what this study looks for, since the author mentions that translation strategies seek to achieve the most effective translation possible, taking into account various aspects such as context, purpose and audience.

Finally, Abdelaal's (2019) definition of CRs was chosen because it is brief but precise, mentioning that it refers to elements related to specific cultural contexts.

The chosen definitions provide a solid basis for the present study, so that what is involved in the translation of Cultural References can be understood.

1.2 Literature Review

The review of existing literature reveals a growing body of research on cultural reference translation in dubbing. While most studies focus on general strategies, there is a lack of specific research on the Latin American context, particularly for English-to-Spanish translations of animated films. The analysis of twelve relevant articles highlights the predominant focus on CRs and the exploration of various translation strategies. Therefore, these twelve articles about translation of cultural references were analysed in this state of the art. The thematic trend on which they focused the most was on the cultural references (5 articles), with the main theoretical trend being the strategies for translating CRs (7 articles). Also, it was found that the most frequent methodological trend was descriptive (4 articles), and the most common

methodological approach was mixed methods (7 articles); finally, the concentration table was most frequently used as an instrument for data collection (10 articles).

In the thematic trend there are in total five different topics (See table 4). Three topics have in common the analysis of cultural references and two focus on the audio-visual translation. Five articles agree in referring to Cultural References as Culture Specific Items (Slamia, 2022; Tang, 2022; Astrauskienė, 2021; Alipour' & Hadian, 2017; Horbacauskiene, Kasperavičienė & Petronienė, 2016). Furthermore, four articles refer to these elements as Culture Specific-References (Omer & Aminzadeh, 2023; Çavuşoğlu, 2022; Abdelaal, 2019; Karunarathna, 2015), while Al-Yasin (2020) calls them culture-bound expressions. On the other hand, the other two different topics are the assessment of dubbing (Metin Tekin, 2019) and the orientation of elements of audio-visual translation (Olwi, Kahina, & Zitouni, 2022).

Table 4.

Thematic Trend: Cultural elements and the translation in dubbing.

Central topics of the articles	Author(s)
Culture specific items [5]	Slamia (2022) Tang (2022) Astrauskienė (2021) Alipour' & Hadian (2017) Horbacauskiene, Kasperavičienė & Petronienė (2016)
Culture specific-references [4]	Omer & Aminzadeh (2023) Çavuşoğlu (2022) Abdelaal (2019) Karunarathna (2015)
Culture-bound expressions [1]	Al-Yasin (2022)
Assessment of the dubbing [1]	Metin Tekin (2019)
Orientation of elements of Audio-visual Translation [1]	Olwi, Kahina, & Zitouni (2022)

Note. Author's compilation.

The theoretical trend has five topics that are relatively similar, as most of them talks about different taxonomies of strategies; therefore, the only thing that changes is the type of strategies applied (see table 5). The majority of the articles focus on strategies to translate Cultural References (Omer & Aminzadeh, 2023; Çavuşoğlu, 2022; Tang, 2022; Astrauskienė, 2021; Abdelaal, 2019; Alipour' & Hadian, 2017; Horbacauskiene, Kasperavičienė & Petronienė, 2016). Two articles mention audio-visual translation strategies (Olwi, Kahina, & Zitouni, 2022; Metin Tekin, 2019). One article mentions strategies for rendering Culture Specific Items (Slamia, 2022). Only two articles do not have a theoretical focus on strategies: Al-Yasin (2020) focuses on culture-bound procedures, while Karunarathna (2015) describes the basic steps involved in the process of dubbing.

In the article by Horbacauskiene, Kasperavičienė, and Petronienė (2016), the aim is to examine culture-specific elements and how they were rendered in Lithuanian subtitling by using Pedersen's 2011 model of strategies for translating CSIs and obtaining data by means of a concentration table, using an explanatory mixed-methods approach. These authors found that retention and substitution were the most commonly used techniques for translating these items, and it was concluded that source-oriented transference via retention might be considered an easier way to deal with CRs, but may result in an inadequate quality of translation.

Table 5.

Theoretical Trend: Taxonomies of strategies to translate cultural elements.

Taxonomies of strategies mentioned	Author(s)
Strategies to translate cultural references [7]	Omer & Aminzadeh (2023)
	Çavuşoğlu (2022)
	Tang (2022)
	Astrauskienė (2021)
	Abdelaal (2019)
	Alipour' & Hadian (2017)
	Horbacauskiene, Kasperavičienė & Petronienė (2016)
Audio-visual translation strategies [2]	Olwi, Kahina, & Zitouni, 2022

Culture-bound procedures [1]	Metin Tekin, 2019
Strategies for rendering CSIs [1]	Al-Yasin, 2022
Basic steps involved in the process of dubbing [1]	Slamia, 2022
	Karunarathna, 2015

Note. Author's compilation.

The methodological trend is divided in three sections: focus, type and instrument (see Table 6). Of the articles found, seven are mixed-method (Omer & Aminzadeh, 2023; Al-Yasin, 2022; Tang, 2022; Astrauskienė, 2021; Metin Tekin, 2019; Alipour' & Hadian, 2017; Horbacauskiene, Kasperavičienė & Petronienė, 2016). The other five articles focused on the qualitative (Çavuşoğlu, 2022; Olwi, Kahina, & Zitouni, 2022; Slamia, 2022; Abdelaal, 2019; Karunarathna, 2015).

Seven different types of studies were found: three articles are descriptive (Omer & Aminzadeh, 2023; Slamia, 2022; Abdelaal, 2019; Karunarathna, 2015), four explanatory (Al-Yasin, 2022; Tang, 2022; Alipour' & Hadian, 2017; Horbacauskiene, Kasperavičienė & Petronienė, 2016), one empirical (Çavuşoğlu, 2022), one contrastive (Olwi, Kahina, & Zitouni, 2022), one comparative (Astrauskienė, 2021) and one exploratory (Metin Tekin, 2019).

Lastly, for data collection and analysis, the vast majority of the articles (10) used a concentration table (Omer & Aminzadeh, 2023; Al-Yasin, 2022; Çavuşoğlu, 2022; Tang, 2022; Astrauskienė, 2021; Abdelaal, 2019; Metin Tekin, 2019; Alipour' & Hadian, 2017; Horbacauskiene, Kasperavičienė & Petronienė, 2016; Karunarathna, 2015), while two used a contrastive analysis table (Olwi, Kahina, & Zitouni, 2022; Slamia, 2022). Al-Yasin's article (2022) uses a mixed-method explanatory approach in order to investigate the procedures used in the translation dubbing of culture-bound expressions from English into Egyptian Vernacular Arabic. Two concentration tables were used to collect quantitative and qualitative data. In the results, the author mentions the strategies applied, finding that adaptation was the most used. Al-Yasin concludes

that the procedures used were very effective, as the vernacular variety must take into account the cultural richness it reflects, and the translation achieves it.

Table 6.

Methodological trend: Methods for analysing translations of cultural elements

Methods mentioned in the articles	Author(s)
Focus	
Mixed Methods: 7	Omer & Aminzadeh (2023) Al-Yasin (2022) Tang (2022) Astrauskienė (2021) Metin Tekin (2019) Alipour' & Hadian (2017) Horbacauskiene, Kasperavičienė & Petronienė (2016)
Qualitative: 5	Çavuşoğlu (2022) Olwi, Kahina, & Zitouni (2022) Slamia (2022) Abdelaal (2019) Karunarathna (2015)
Type	
Descriptive: 4	Omer & Aminzadeh (2023) Slamia (2022) Abdelaal (2019) Karunarathna (2015)
Explanatory: 4	Al-Yasin (2022) Tang (2022) Alipour' & Hadian (2017) Horbacauskiene, Kasperavičienė & Petronienė (2016)
Empirical: 1	Çavuşoğlu (2022)
Contrastive: 1	Olwi, Kahina, & Zitouni (2022)
Comparative study: 1	Astrauskienė (2021)
Exploratory: 1	Metin Tekin (2019)

Instrument	
Concentration table: 10	Omer & Aminzadeh (2023) Al-Yasin (2022) Çavuşoğlu (2022) Tang (2022) Astrauskienė (2021) Abdelaal (2019) Metin Tekin (2019) Alipour' & Hadian (2017) Horbacauskiene, Kasperavičienė & Petronienė (2016) Karunarathna (2015)
Contrastive analysis table: 2	Omer & Aminzadeh (2023) Al-Yasin (2022)

Note. Author's compilation.

Most of the studies reviewed have several important elements. Among them, of primary interest are the theories, which in this case are strategies to translate cultural elements such as Ranzato's taxonomy (2015), Pedersen's Taxonomy (2005; 2011), Díaz Cintas and Remael's model (2007), Davie's model 2003, Ivir's taxonomy (2003), Newmark's model (1998), Aixelá's classification (1996), and Tomaszewicz's procedures (1993). In addition, the research questions and objectives of the articles contribute to what is sought to be analysed. The instruments used for data collection are also helpful because they all use a corpus and information that is linked to the field of study of the present analysis, contributing greatly to its realisation.

Based on the aforementioned review, it is important that more research is done on the translation of cultural references in films into Latin Spanish, as there are few studies in Latin America that focus on this, with most of the articles found coming from outside the region. Furthermore, no article has been found that investigates the dubbing of animated films in Spanish applying Pedersen's strategies, which is one of the most complete models, used by several researchers around the world.

This thesis aims to contribute to this lack of research, so that current and future translators can learn about strategies for translating CRs and explore whether it is advisable to maintain the original cultural message or adapt it to the cultural context of the target audience, in order to obtain a quality translation.

As shown in the state of the art (see tables 4, 5 & 6), the results indicate that 9 out of the 12 articles analyse the translation of Cultural References in the dubbing and subtitling of both animated and live action films, using various taxonomies, including Pedersen's. However, none of the research studies using this taxonomy, analyses the dubbing of animated films from English into Spanish.

1.3 The study

The analysis of the twelve studies reveals a predominant focus on Cultural References and their translation strategies. While the majority of articles employ a mixed-method approach and concentration tables for data collection, the specific strategies and techniques used vary across studies.

In Latin America, the field of translation of cultural references has not been widely developed; therefore, there is a lack of research on how professional translators in charge of dubbing animated films from English into Spanish deal with cultural references. Furthermore, no studies have been found that analyse cultural references applying Pedersen's (2005) taxonomy in animated films with a variety of cultural references specifically in English to Spanish translation. Therefore, the Universidad Juárez Autónoma de Tabasco intends to contribute to this field by carrying out a study in which the strategies used to deal with cultural references in dubbing translation are analysed. Specifically, this thesis analyses the strategies used to translate cultural references in the dubbing of the animated film *Penguins of Madagascar* (2014), observing how they were used and how often. Two research questions derive from the same objective:

1. What were the most used strategies from Pedersen's Taxonomy (2005) to translate cultural references for the Latin Spanish version of the animated film *Penguins of Madagascar*?
2. How were the translation strategies from Pedersen's (2005) taxonomy used to translate the cultural references in the Latin Spanish version of the film?

To answer these questions, a mixed methods approach with a convergent design was used in order to obtain more complete results. Two concentration tables were used to collect the data: one table for the quantitative data and the other one for the qualitative data. Furthermore, this study focuses on Pedersen's 2005 taxonomy of translation strategies, as it is considered the most comprehensive when dealing with cultural references (Abdelaal, 2016; Horbačauskienė, 2019). Regarding the case study, the film *Penguins of Madagascar* was chosen due to the wide variety of cultural references it contains. The next chapter covers all of these aspects of the research design in depth.

CHAPTER 2. THE TRANSLATION OF CULTURAL REFERENCES IN FILMS

Translating Cultural References represents significant difficulties within dubbing and subtitling processes. These elements are rooted in specific cultural contexts, which makes it difficult to find an exact equivalent in another language. To address this issue, several researchers have proposed various taxonomies that classify the translation strategies for dealing with cultural references. Among these taxonomies, the one proposed by Pedersen (2005) stands out for its comprehensiveness.

2.1. The Translation of Cultural References

The translation of CRs is one of the biggest problems for dubbing or subtitling translators, due to the great variety of characteristics of a culture, as mentioned by Slamia (2020).

CRs are more than words and phrases; they are the essence of communities, what makes them unique. This is because CRs always relate to culture-specific contexts such as geography, sociolinguistic aspects, etc. (Abdelaal, 2019). And not only that, the category also includes signs, gestures or symbols (Geertz, 1973). According to Baker (1992), CRs can be understood as culture-specific concepts, which may be either abstract or concrete in nature, and are often associated with aspects such as religion, social practices, or cuisine. Ramiere (2004) identified three main categories of CRs: sociocultural, historical, and extralinguistic references. Finally, Pedersen (2005) has argued that there are also intra-linguistic references linked to culture, such as idioms and proverbs.

All this complexity makes equivalence of CRs sometimes impossible, even "untranslatable", as they only make sense in the Source Language (SL) and may sound strange, meaningless or non-existent in the Target Language (TL).

Therefore, in order to deal with this problem, several taxonomies have been created, which focus on how to translate CRs: Newmark (1988), Tomaszewicz (1993), Venuti

(1995), Aixelá (1996), Davies (2003), Pedersen (2005). Each one has similarities and differences that allow the strategies to be analysed from different perspectives.

Among them, Pedersen's (2005) taxonomy of Extra Cultural References (ECR) transfer strategies is considered to be one of the most comprehensive (Abdelaal, 2016; Horbačauskienė, 2019), due to the fact that its strategies are classified into two broad categories: those oriented to the Target Text (TT) and those oriented to the Source Text (ST).

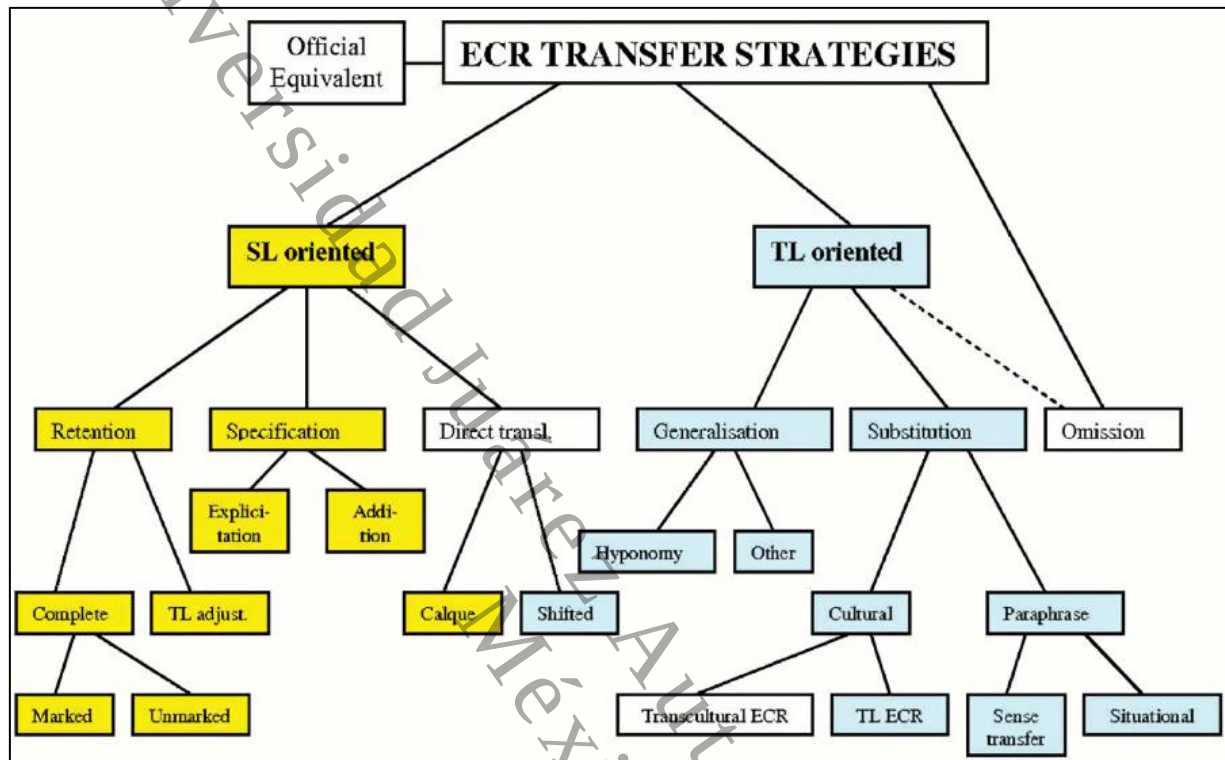
2.2. Pedersen's Taxonomy (2005)

Instead of the verb "translate", Pedersen (2005) uses the word "render" to refer to the different strategies involved in transferring Extra Cultural References (ECR) from a Source Language (SL) to a Target Language (TL), since not all strategies involve translation. In this model, the strategies are ordered on what could be called a scale, ranging from those closest to the Source Language to those closest to the Target Language. According to Pedersen, his taxonomy is based on descriptive observations of the rules underlying subtitling, but it can easily be adapted to other forms of translation, such as dubbing.

Pedersen suggests seven strategies in total: three SL oriented, three TL oriented and what he calls the official equivalent, which is a bureaucratic rather than a linguistic process. Figure 1 shows the taxonomy in a summarized graphic form.

Figure 1

Pedersen's taxonomy of Extra Cultural References transfer strategies (2005)



Note. Source: Pedersen (2005, p. 4)

2.2.1. Strategies oriented to the Source Text (ST)

1. **Retention**, which occurs when SL CRs are rendered in the TL. Commonly, they are differentiated by quotation marks or italics. They may also conform slightly to the conventions of the TL. In itself, this strategy means preserving the original term without translating it. However, using it too much can make the message unintelligible to the target audience. The strategy is usually applied when the term is known worldwide, as it happens in the movie *Penguins of Madagascar*, when Skipper makes a direct reference to the Super Bowl, which is kept in Latin Spanish.

2. **Specification**, is the strategy in which the CR is left in its untranslated form but adding more information in the TT, making it more specific than in the ST. This can be done through Explicitation or Addition. This strategy maintains the original term in the translated version but adds extra information, not found in the original text, to enhance understanding for the target audience. This can be seen in film titles, such as in the animated film *UP*, which in English has a very short title that does not reveal much if it is translated as “Arriba”, but adding more information, in this case "UP: Una Aventura de altura", specifies the nature of the film, making it more appealing to the audience.
3. **Direct translation**: This is the word-for-word translation of the CR. In Pedersen's taxonomy, it is subdivided into calque and displacement. In other words, it is translating word for word without changing the original meaning of the message. It is often used if the literal translation is understandable in the target language without the need for cultural adaptation. An example of direct translation can be found in the episode 'Survival of the Idiots' from *SpongeBob SquarePants*, where the term 'Dirty Dan' is translated literally into Spanish as 'El Sucio Dan'. Although it retains the original structure and is understood and perceived in Spanish as a nickname, it loses the cultural relevance it originally had in English. This is because in American culture 'Dirty Dan' is not just any nickname but alludes to connotations of an exaggerated cowboy stereotype that may be familiar in folklore or pop culture. This reference is lost in the literal translation into Spanish. This shows that the direct translation strategy, while understandable in Spanish, can lose deeper cultural implications.

2.2.2. Strategies oriented to the Target Text (TT)

4. **Generalization**: This occurs when the CR is presented in a less specific form in the target text than in the source text. Basically, it involves replacing a culturally specific term with a broader and more familiar one. However, although the

message is maintained, it often results in the loss of cultural specificity. An example of generalization appears in *Penguins of Madagascar*, where Kowalski mentions Flatt and Scruggs, a musical duo famous for their distinctive banjo sound. This term was translated as “música de banjo” so it is understood in the target language, even if it loses the original cultural reference.

5. **Substitution:** Occurs when the CR from the source culture is replaced by another CR. It is subdivided into cultural substitution and paraphrase. In this strategy, a cultural element is replaced by an equivalent that is more familiar to the target audience, allowing them to understand the joke without needing to know the original reference. A clear example can be seen in the movie *Meet the Robinsons* (La Familia del Futuro in Latin America), when Wilbur introduces his family to Lewis. Lewis asks him who Cornelius resembles, to which Wilbur replies ‘Tom Selleck’, referring to the original voice actor. While in Spanish Wilbur says ‘El Puma’ and Lewis replies ‘¿José Luis Rodríguez?’ referring to the singer and in this case dubber of Cornelius in Spanish (Lewis’ Spanish reply does not originally appear in English).
6. **Omission:** Occurs when the CR is omitted and not expressed at all. Simply put, it is omitting or eliminating the cultural element because it is irrelevant or unknown to the target audience. Sometimes this is necessary to avoid confusion.

2.2.3. Official equivalent

Unlike other strategies, the use of the official equivalent involves a bureaucratic rather than purely linguistic decision-making process, which means that this strategy occurs only when CR has been formally approved by a group of people with authority over extra-linguistic cultural references (Hermans, 2003, cited in Pedersen, 2005).

In other words, the officially recognised or established term is used in the target language, which is normally part of the common knowledge of the target audience and therefore does not require further adaptation.

A cultural reference with an official Spanish equivalent that is extremely well known and established is 'Little Red Riding Hood', always translated as 'Caperucita Roja' in different films and books.

2.3. Translation Strategies in the Dubbing of Animated Films

The translation of Cultural References in animated films involves unique and complex challenges due to the addition of visual and temporal elements (such as time and synchronization) that accompany the text. Animated films often contain not only CRs but also jokes and idiomatic expressions that may not have direct equivalents in the target language. Therefore, the translator's role is to convey the desired humour and meaning, considering the cultural context of the target audience as well as the visual elements.

Chiaro (2009) highlights the importance of humour in audio-visual translation, especially in animated films where the target audience is mainly children and families. However, it is important to clarify that the successful translation of jokes or CRs is not only a matter of language and linguistic differences, although these are of great importance (Zabalbeascoa, 1996).

Like Cultural References, humour also depends on language and culture, which makes it difficult to translate, especially in dubbing (Abomoati, 2019). Therefore, the process of translating elements such as humour and CRs in animated films encompasses various strategies in order to reduce the challenges involved and thus achieve a good translation. In dubbing, some translators take some creative liberties that end up creating humour and becoming iconic lines in the target language.

For example, in the animated series *Adventure Time*, episode "Reign of Gunthers", in the Ice King's line (Rey Helado in Spanish) "Gunther! You took my stuff!", a complete

creative adaptation was made, resulting in “Gunther! Te volviste reggaetonero!”, provoking a humorous reaction from the target audience.

Another example where creative liberties are taken as the main strategy can be seen in the series *Codename: Kids Next Door* (KND: Los chicos del barrio in Latin America), specifically in the episode “Operation: B.R.I.E.F. (Operación: C.A.L.Z.Ó.N in Spanish) where a talking underwear introduces himself to Numbuh 1 by saying “They call me Mr. White”. This same dialogue is replaced in Spanish as “Me llaman Súper Raja de Canela”, a completely different dialogue of the original, but maintaining a completely humorous tone due to the comic context of the scene.

Maintaining humour or a Cultural Reference in humorous contexts is of utmost importance, and to achieve this, it is not strictly obligatory to follow translation strategies such as omission, generalisation, direct translation, among others. Translators can use creative freedom as a strategy to cope with the difficulties involved, or when the context of the animation allows it. However, this flexibility can significantly alter the original message, and although it may occasionally resonate well with the target audience, it can also lead to unintended or negative interpretations.

2.4. Impact of Dubbing Translation on Audience Perception

The translation strategies selected can greatly influence how the audience interprets and experiences the film. For instance, retaining a cultural reference may preserve the authenticity of the original culture, but at the same time may confuse the audience if they are unfamiliar with it. On the other side, substituting or omitting a reference can make the content more accessible, but it may alter the original meaning or message. According to the findings of Alfaify and Pinto's (2021) study, domestication (target language-oriented strategies) facilitates viewers' comprehension of CRs more than foreignization (source language-oriented strategies). This can be because people have more knowledge of their own culture than of other cultures.

As mentioned above, creative freedom can be well received by the target audience. A great example of this is the dubbing of the *Shrek* franchise in Latin Spanish. Their

dialogue contains numerous jokes, colloquialisms and references that are quite memorable for the target audience. In fact, to this day many of these lines have become iconic and continue to circulate as memes, being very popular among people in Mexico. For example “¿Qué te panzó?”, “Más, más, más y a trotar y a trotar”, “Esa cosa ni sentimientos tiene”, “Mejor afuera que adentro”, “Por ti baby, sería Batman”, or “Doy clases los jueves, no cobro mucho”, among others.

However, there are times when dubbing can sound too forced or out of place, creating the opposite effect among viewers. Zabalbeascoa (1996) mentions that sometimes people complain about the quality of translations and may even consider them a ‘necessary evil’. A clear example is the dubbing of *Codename: Kids Next Door* which, despite being remembered fondly by Mexicans because of the many local references it used, was not well liked by viewers in other Latin American countries for that same reason, because the frequent Mexicanisms were not understandable for them. Many people did not like the addition of Mexican references to the series because the dubbing had to use neutral Spanish, which caused the producers to eventually reduce the creative freedom in the translation of the series (Latin Pop, 2023).

Therefore, the impact that dubbing has on the audience’s perception varies according to their cultural knowledge of both their own culture and the culture of origin. A 2015 audience study, involving Italian and Mexican viewers, found that dubbing is more than a simple translation; it has a significant cultural and social impact (Cornelio-Mari, 2022). The way the audience relates to international television content depends on their own knowledge and cultural background, as the perception of dubbing varies. For example, some viewers may consider a localized dub to be a “betrayal” of the original text, while others view it as a form of cultural closeness. This confirms that the effect of dubbing on an audience is deeply linked to their cultural background and their familiarity with both cultures.

Moreover, Cornelio-Mari’s (2016) findings reinforce the idea that dubbing is not as “transparent” as it is often believed to be. Viewers are fully aware of the translation/adaptation process, perceiving elements such as voice changes or lip-sync

and/or time mismatches. These aspects can cause a “distancing effect”, breaking the connection between the character and the viewer. Such findings highlight that dubbing strongly influences audience perception and immersion. Furthermore, audiences' preferences for dubbing are related to what they expect when watching. For example, dubbing is often chosen when viewers want to focus on the action on screen without being distracted by subtitles, or when the programme contains complex information that is easier to understand in their own language; whereas subtitling is often preferred when authenticity and closeness to the original culture are sought. Therefore, dubbing not only affects comprehension, but also it plays a role in how audiences perceive their cultural distance or proximity to the original material.

2.5. Other Challenges in the Translation of Cultural References

Audiovisual translation (AVT) includes several formats, including dubbing, subtitling and voice-over, each of which poses different challenges when dealing with Cultural References. These challenges stem from factors such as time constraints, the need for visual and audio synchronisation, and the adaptation of spoken lines to match visual cues.

Chiaro (2008) explores the constraints and creative solutions found in both dubbing and subtitling, emphasizing the importance to keep the original context and humour intact. The main difficulties for each of these methods are briefly discussed next.

2.5.1. Challenges in Dubbing

One of the biggest challenges translators faces in dubbing cultural references is synchronisation issues. Synchrony is an essential part of the dubbing process and therefore inevitably interacts with the creative phase of the dubbed production (Huber and Kairys, 2021). According to Chaume (2006), synchronization refers to the matching between what is being translated and the movements being made by the characters on screen. This shows that it is not enough for the translation to be faithful to the content; it must also fit with what the viewer sees on screen.

Chaume suggests three main types of synchronization.

1. Phonetic or lip synchronization. This focuses on ensuring that the translated words match the actors' lip movements, especially in close-ups, where viewers can notice if a word such as “bye” (which requires closed lips) does not match to the articulatory movement of the original version. Therefore, translators have the difficult task of choosing the most appropriate terms to reproduce open vowels, bilabial or labiodental consonants pronounced in the original text.
2. Kinetic synchrony. This refers to the characters' body movements or gestures. For example, if a character nods their head, it will not make sense for the viewers to say “no” in the dubbed version. Verbal language must be in harmony with body language to avoid contradictions that break the natural flow of the scene.
3. Isochrony. This focuses on ensuring that the duration of the dubbed speech coincides with the exact time characters speak on screen, from the moment they open their mouth until they close it. For example, if a line of dialogue lasts three seconds, the translation should take approximately the same amount of time, respecting pauses and silences.

Dubbing requires precise synchronization with lip movements and body language, making it challenging to maintain the original dialogue's meaning and cultural references. Thus, translators must find a balance between how much the verbal expression of jokes or CRs can deviate from lip sync and/or visual context. (Zabalbeascoa, 1996). In addition to these constraints, translators must take into account that the translated text is interpretable for the voice actors (Tarasiewicz, 2023).

2.5.2. Challenges in Subtitling

Perego (2009) highlights the need for a balance between readability and fidelity to the original text in the case of subtitling. On the other hand, Gottlieb (1992) explores the constraints of subtitling and how translators can overcome these limitations to provide accurate and attractive translations. One of these constraints is time. Subtitling often involves condensing the original dialogue to fit into limited screen time, which can lead

to the omission or alteration of Cultural References. It is therefore of utmost importance that the translator is fully aware of the original message, the message it is wished to convey and the time that message can appear on the screen.

2.5.3. Challenges for the translator

Zabalbeascoa (1996) mentions that translators frequently do not have the ultimate authority over their work, sometimes the translator needs permission, or the imposition of someone with greater authority for significant deviations from the original. Taking this into account, the final translation is not only the responsibility of the translator but also of the authority that validated the translation or made any imposition or change.

Another factor is that translators are often among the lowest paid members of the dubbing teams, and not only that, but they are also often under unrealistic deadlines that force them to work under extreme pressure, which in the end can compromise the quality of the work (Zabalbeascoa, 1996).

2.6. Categories and Indicators

As we know, there are several challenges and difficulties in translating elements that are deeply rooted in a specific culture, such as customs, traditions and historical events. However, there are strategies that help dealing with cultural references.

Table 7 was created to summarize the previous research. It presents the categories and indicators in the translation of Cultural References, and it is organised in three columns: category, description and indicator.

The 'Category' column is derived from the main topic of the thesis and reflects the main challenges identified in the literature reviewed on the translation of cultural references. These categories include: Translating cultural references, Strategies for translating Cultural references, Source language-oriented strategies and Target language-oriented strategies.

The 'Description' column briefly explains the difficulty or relevance associated with each category, such as the complexity of translating culturally specific content or the emergence of strategies to address such challenges.

The 'Indicators' column identifies key aspects that can facilitate or guide the translation process within each category. These indicators can be understood as competences needed to address the problems presented. For each of the categories, a brief analysis was carried out to determine which indicators might be appropriate.

Table 7.

Categories and Indicators in the translation of cultural references

Categories	Description	Indicators
Translation of CRs	The translation of cultural references is one of the biggest problems for translating due to the great variety of characteristics of a culture.	• Knowledge of the meaning of cultural references. • Knowledge of the cultural references of the source language. • Knowledge of the cultural references of the target language. • Use of translation strategies.
Strategies to translate CRs	Because of the problems in translating cultural references, a theory emerged so that translators could know how to translate them, or at least how to deal with them.	• Visualisation of translation strategies linked to the translation of cultural references. • Knowledge of the types and subdivisions of strategies. • Use of appropriate strategies.
Strategies oriented to the Source Language to translate CRs	Source language-oriented strategies (also referred to foreignization) are guided by the source culture. Their goal is to preserve as many CRs as possible, preserving the authenticity of the source culture.	• Identification and knowledge of strategies: Retention, specification, and direct translation. • Use of appropriate strategies.

Strategies oriented to the Target Language to translate CRs	Target language-oriented strategies (also referred to domestication) aim to adapt the original content to the cultural context of the target audience. These strategies reduce foreign elements by selecting expressions and terms that feel more natural and relatable to the audience. • Identification and knowledge of strategies: Generalization, substitution, omission. • Use of appropriate strategies.
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Note. Compiled by the author with information from Yang (2010) and Pedersen (2005).

Overall, this table aims to provide an overview of the theoretical framework of this thesis in a practical format, helping to visualise the relationship between the challenges of translating CRs and the competences needed to address them.

Once the theoretical review has been covered, the next chapter is devoted to the description of the methods applied for the analysis of the case study.

CHAPTER 3. METHODS

3.1 Type of Study

The approach used in this study was mixed methods, a type of enquiry that combines qualitative and quantitative approaches in the same study (Creswell, 2009). This approach was chosen because combining two methods can provide valuable information about research phenomena that cannot be fully understood if only qualitative or quantitative methods are used (Dawadi et al., 2021). Regarding the study design, a convergent design was used. According to Creswell and Plano Clark (2018), in this type of design the researcher collects qualitative and quantitative data at the same time, analyses them in two separate databases and then merges the results for the purpose of combining or comparing the results. This approach and design were chosen to have a better and more complete understanding of the research problem and; thus, achieve a more comprehensive study of the way in which the translator handled CRs in the case study.

With all of the above in mind, the mixed methods approach with a convergent design allowed analysing the frequency of application of Pedersen's translation strategies in the dubbing of the film *Penguins of Madagascar*, as well as identifying the way in which the translator employed the strategies.

3.2 Context of the case study

According to Internet Movie Database (2014), the movie *Penguins of Madagascar* is a 2014 animated film that includes elements of spy fiction, adventure, action and comedy. Produced by DreamWorks Animation in collaboration with PDI/DreamWorks and distributed by 20th Century Fox, the film was directed by Eric Darnell, an American animator and filmmaker; and co-directed by Simon J. Smith, British director and animator. This film is a spin-off of the *Madagascar* franchise, and the fourth film overall (see Table 8).

According to the website specialized in dubbing Doblaje Wiki (2025), the people in charge of the translation/adaptation of the film for Latin Spanish were Bárbara Morelos-Zaragoza Bartelt, translator, subtitler and adaptor; and Jesús Vallejo, translator and audio-visual adaptor specialising in dubbing, with more than 20 years of experience. Both of them are Mexican and have extensive experience in audio-visual translation.

Table 8.

Context of the movie

Title	<i>Penguins of Madagascar</i>
Type of film	Adventure, action and comedy
Year	2014
Country of origin	United States of America
Writer (s)	Michael Colton, John Aboud and Brandon Sawyer
Producer	Dreamwork animation, PDI/DreamWorks
Film studio	20th Century Fox
Directors	Eric Darnell and Simon James Smith
Franchise	Spin-off of the <i>Madagascar</i> franchise
Translators	Bárbara Morelos-Zaragoza B. and Jesús Vallejo

Note. Compiled by the author with information from Internet Movie Database and Doblaje Wiki.

3.3. Case Study

Penguins of Madagascar is a film that has captivated audiences of all ages thanks to its humour, its characters and its rich plot. However, behind its apparent simplicity lies a complex web of cultural references that require careful linguistic adaptation.

In order to analyse how the cultural references were translated into Latin Spanish, it is first necessary to know what the film is about and to know the characters (detailed information about the characters can be consulted in Appendix 1).

3.3.1 Plot of the movie

Below, a summary based on the film *Penguins of Madagascar* (2014) is presented.

The film begins with the origin story of the penguin squad: Skipper, Kowalski, and Rico. As young penguins, the trio fights against all odds to rescue an abandoned egg. Adrift on an iceberg, the egg hatches, introducing a new member to the group: Private.

After these events, the story shifts ten years into the future, following the events of *Madagascar 3*. The penguins decide to leave the circus life behind to celebrate Private's birthday. To do so, they attempt to break into Fort Knox to obtain a special snack from a vending machine. However, their mission fails when they are captured and transported to Venice, Italy. Their captor introduces himself as Dr. Octavius Brine, a scientist who is later revealed to be an octopus named Dave. He harbours deep resentment toward the penguins, whose undeniable cuteness has constantly overshadowed him, causing his repeated relocation from several zoos around the world.

The penguins manage to escape but soon find themselves cornered until they are unexpectedly rescued by the North Wind, an elite animal-protection organization. Once at the organization's headquarters, Dave hacks into their systems and reveals his plan: capturing all the penguins from the zoos he was expelled from and use the Medusa Serum to transform them into grotesque monsters.

Classified, the leader of the North Wind, sedates the penguins and sends them to the most remote place on Earth to keep them safe, but they wake up mid-flight and crash in the Sahara Desert. Upon discovering that Dave's next target is Shanghai, the penguins hurry there. However, their attempt fails, and Private, along with the Shanghai Zoo penguins, are captured.

The North Wind tries to execute a rescue, but their plan fails, and both their team and Skipper, Kowalski, and Rico are captured by Dave. Private manages to free the North Wind, but while they plan a retreat, he refuses to abandon his friends and decides to face the danger alone.

In New York, Dave finally executes his plan, mutating all the captured penguins (including Skipper, Kowalski, and Rico) into horrifying creatures. With Private's help, the squad regains their senses and devises a strategy to reverse the mutation: connect Private to the machine so that his pure and tender essence can neutralize the effects of the ray.

The plan succeeds, and all penguins return to their normal state. Dave attempts to interfere but is struck by the machine and reduced to a tiny version of himself, trapped inside a snow globe. Meanwhile, Private survives the ray but emerges with a peculiar appearance. Despite this, his courage earns him the admiration and respect of everyone.

In the end, Classified acknowledges the penguins as equals and promises to grant them a wish. The penguins choose jetpacks and soar into the sky, ready for their next adventure.

3.4. Data Collection Instruments

This section explains in detail everything about the creation, validation and implementation of the instruments.

3.4.1 Description of the instruments

The first instrument was a strategy concentration table. Its objective was to collect data on Cultural References in the source language as well as in the target language, in order to identify how of Pedersen's (2005) translation strategies were used: Source-oriented (retention, specification, direct translation), target-oriented (generalization, substitution, omission), and official equivalent. Regarding the identification of CRs, Table 3 was taken into consideration, mainly the definition by Davies and Scott-Tennent (2005), which explains that CRs are traits attributed to a particular community and recognized as such by its members.

The table consisted of six columns which were divided into timestamp, dialogue fragment from the original text, dialogue fragment from the translated text, strategy used, strategy orientation, the cultural reference, the type of cultural reference and the reason why that strategy was used (see Table 9). The first column was used to add the exact timestamp at which that dialogue appears; in the next column the dialogue fragment containing a CR in the source language was written; in the third column the same excerpt with the translated CR was added; in the fourth column it was specified whether the strategy was SL or TL oriented; in the fifth column the Pedersen strategy that best suited the way the translator translated the CR was added; in the sixth column the cultural reference (word or phrase) was added; in the seventh column the type of CR was added; and finally, in the last column the reason why the CR was used was briefly mentioned.

Table 9.*Example of the qualitative instrument*

Time stamp	Source text	Target text	Strategy used	Strategy orientation	CR	Type of CR	Use
08:20 - 08:32	Skipper: So tonight, Private, we celebrate your birthday by infiltrating the United States gold depository at <u>Fort Knox!</u>	Esta noche Cabo, celebraremos tu cumpleaños, infiltrándonos a la bóveda de oro de los Estados Unidos ¡El Fort Knox!	Retention	Source Language oriented	Fort Knox	The name of an US Army site in Kentucky	There is no literal English translation that fully captures the connotation and meaning of 'Fort Knox'.

Note. Author's compilation.

The second instrument is a frequency concentration table. Its objective was to collect data on cultural references in the source language as well as in the target language, in order to identify the frequency with which Pedersen's (2005) were used (Source oriented: Retention, specification, direct translation/ Target oriented: Generalization, substitution, omission/ Official equivalent).

The second table consists of three columns (see Table 10). In the first column the names of all Pedersen's strategies were placed, in the second column the number of times the cultural reference appeared was added, and in the third column the frequency was given as a percentage.

Table 10.*Example of the quantitative instrument*

Pedersen's strategy	Frequency	Percentage
Substitution	9	64.3

Retention	5	35.7
Total	14	100

Note. Author's compilation.

3.4.2 Validation of the instruments

In order to ensure that the instruments used to collect the data for the study were correct and in line with the desired results, a review process was carried out by professionals in the areas of research and translation, respectively. All of this with the aim of achieving a more objective study and in accordance with the analysis information to be obtained.

For the validation of the instruments, a process was carried out. First, the instruments were designed for data collection according to the needs of the research. Once having the idea, the creation of the instruments was started. With this aim, a Word document was created in which the purpose, and instructions of the instruments were mentioned. Subsequently, two professors specialised in the area of research were invited to read the instruments, give feedback and validate them.

An example of the first version of the qualitative instrument is shown in table 11.

Table 11.

First version of the qualitative instrument

Source Text	Timestamp	Target Text	Strategy used
Skipper: So tonight, Private, we celebrate your birthday by infiltrating the United States gold depository at Fort Knox!	08:20 - 08:32	Esta noche Cabo, celebraremos tu cumpleaños, infiltrándonos a la bóveda de oro de los Estados Unidos ¡El Fort Knox!	Retention

Note. Author's compilation.

According to their views and feedback on the first instrument, the experts mentioned that if the article talks about cultural references, a column had to be added to the table indicating the type of cultural reference. In addition, an important observation was also made to the qualitative research question, where it is mentioned that instead of just using "what", "how" should be added, as this is what is sought with the type of instrument used. They also mentioned that there had to be a column specifying the orientation of Pedersen's CR translation strategies. Likewise, two columns had to be added, the first specifying only the cultural reference, and the second specifying the type of reference.

In terms of feedback on the second instrument which is quantitative, the experts only mentioned that in order to get the percentage, an appropriate statistical test should be used so that the number was accurate. Therefore, no major changes were made, and the table 10 was not modified.

3.4.5 Implementation

The implementation of the instruments was carried out between May and June 2024, conducting an exhaustive analysis of the film *Penguins of Madagascar* in order to collect the necessary data to answer the research questions on which were the most used Pedersen's strategies and how they were used.

The film was watched several times to ensure a thorough analysis. First, the film was watched in English, followed by the Spanish dubbed version. Later, it was watched in Spanish with the original English close captions to allow a simultaneous comparison between the original and translated versions. In addition, it is worth mentioning that certain specific scenes where possible cultural references were detected were re-watched several times.

Regarding the script, the English script was found; however, no script was found for the Spanish dubbed version despite an exhaustive search. Therefore, some Spanish phrases were transcribed directly from the film whenever necessary during the analysis.

To ensure that no cultural references were overlooked, the identification process was determined by the definitions of cultural references in Table 3, mainly the definition proposed by Davies and Scott-Tennent (2005), which highlights that CRs could be expressions of any kind (verbal, non-verbal, textual or audiovisual), and concern geographic, religious, professional or linguistic traits attributed to a community. The film was analysed with this definition in mind, so that whenever a possible cultural reference appeared, separate research was carried out into the type of cultural reference and, if it was one of those mentioned by Davies and Scott-Tennent (2005), it was added to the qualitative concentration table. First the timestamp was written, then the dialogue with the CR in English, and then the dialogue in Spanish. Later, the cultural reference and the type of cultural reference was added to the table. In addition, it was determined which of Pedersen's strategies was used by the translator to render each of the cultural references found, followed by a thorough analysis of why the translator chose to use that strategy in particular.

As for the quantitative table, having the strategies at hand, an Excel file was created in which the quantitative concentration table was filled, calculating the frequency and percentage with which each strategy appeared in the film. The total CR frequency was 14, and the percentages were calculated using the formula (individual frequency ÷ total frequency × 100) in order to properly identify the most used strategy.

In summary, the implementation of the instruments provided the qualitative and quantitative data to answer the research questions. The concentration tables as well as the type of approach chosen, helped greatly to speed up the process and to carry out a correct and exhaustive analysis in order to meet the desired objective.

CHAPTER 4. RESULTS

This chapter presents the findings to address the research questions. Following the mixed methods approach with a convergent design, the results are divided into two main sections. The first section reports the quantitative data obtained while the second section presents the qualitative data.

4.1. Quantitative findings: Predominant Translation Strategies

The first part of this section is the quantitative analysis where Pedersen's (2005) translation strategies of cultural references from English to Latin Spanish in the animated film *Penguins of Madagascar* are presented.

Table 12 shows the frequencies and percentages of the Pedersen's strategies used in the dubbing of cultural references that appear throughout the film in order to determine which were used most frequently.

Table 12.

Frequencies and percentages of Pedersen's strategies to translate CRs

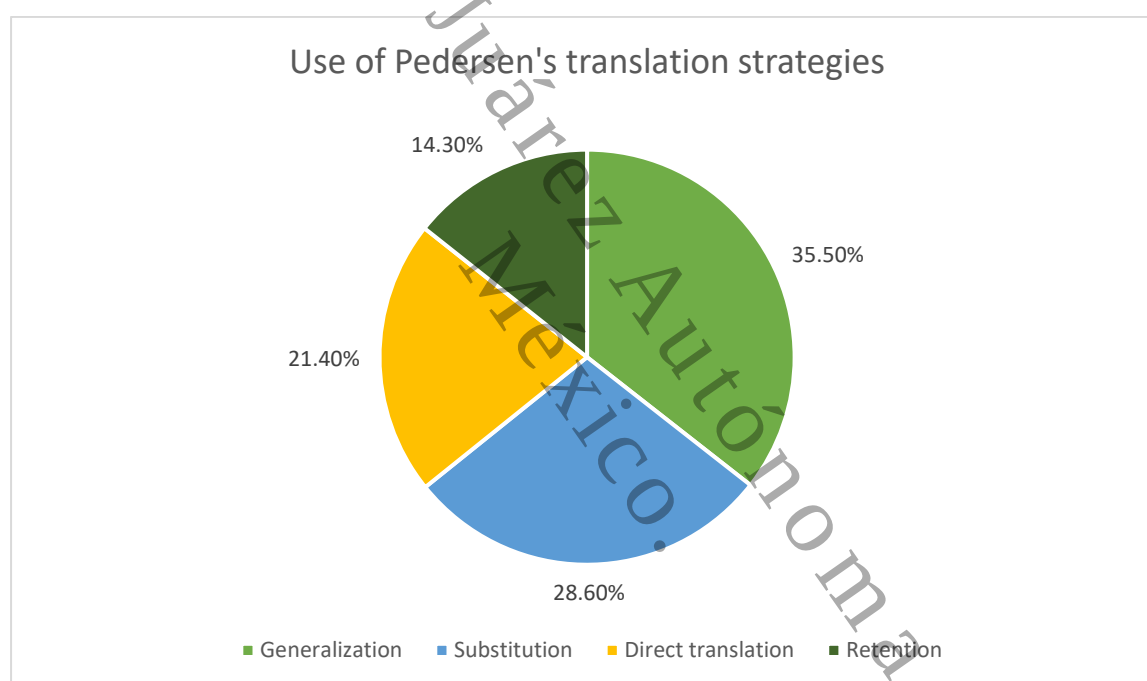
Pedersen's strategy	Frequency	Percentage
Retention	3	14.3
Specification	0	0.0
Direct translation	2	21.4
Generalization	5	35.7
Substitution	4	28.6
Omission	0	0.0
Official equivalent	0	0.0
TOTAL	14	100

Note. Author's compilation.

As it can be seen in Table 12, CRs' translation strategies were observed 14 times. Four out of the six strategies were used in the film, except for specification and omission. The official equivalent was not used either. The most frequently used Pedersen strategy in the sampled film was generalization with 35.7%. Substitution came second with 28.6%. This was followed by the direct translation strategy in third place with 21.4%, and then by retention with 14.3%.

Figure 2.

Percentage of use of Pedersen's translation strategies



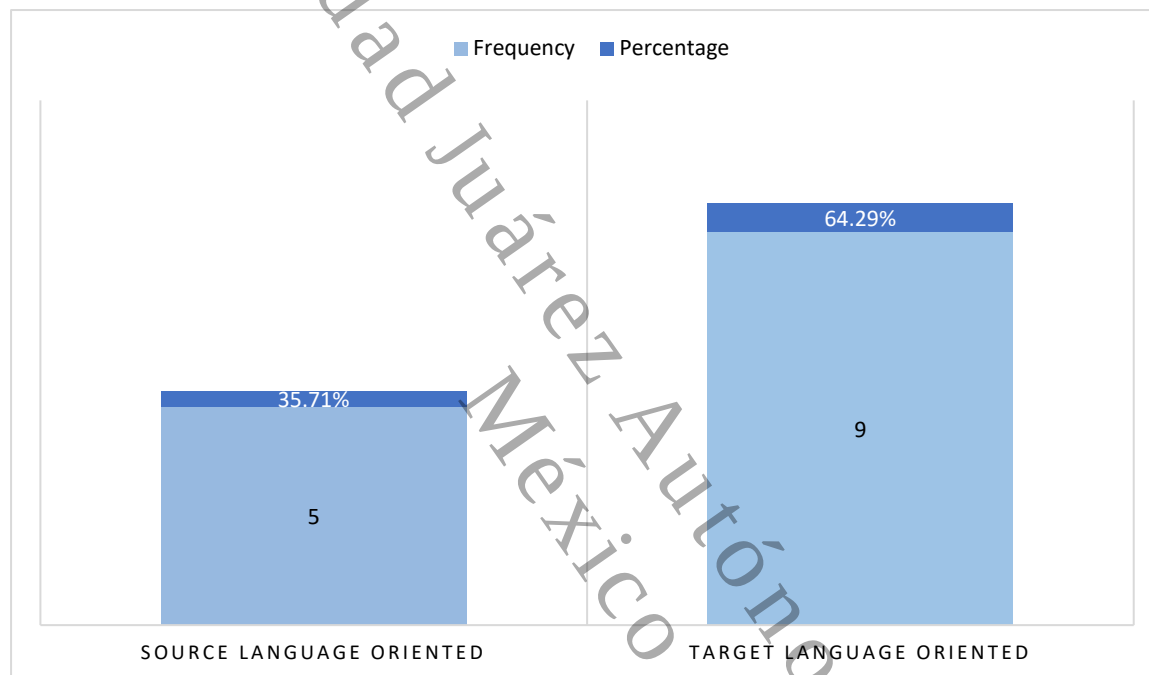
Note. Author's compilation.

As it can be seen in Figure 2, the quantitative data reveal that generalization was the predominant strategy, indicating a tendency to make cultural references more general and accessible to the target audience. Substitution, the second most frequent strategy, suggests that translators often replaced cultural references with more familiar or relevant ones for the Latin American audience. Direct translation and retention were less frequently used, showing a preference for adapting cultural references rather than maintaining their original form or translating them directly. The absence of specification,

omission, and official equivalent strategies indicates that these methods were not considered suitable or necessary for the translation of cultural references in this particular film.

Figure 3.

Distribution of Source-oriented and Target-oriented strategies



Note. Author's compilation.

Furthermore, the dominance of target text-oriented strategies such as generalization and substitution highlights the translators' efforts to prioritize the comprehensibility and relatability of the translated content for the Latin American audience (See Figure 3). This approach suggests that the translators aimed to make the film more engaging and culturally relevant to its viewers, even if it meant sacrificing some of the original cultural nuances.

In contrast, the less frequent use of source text-oriented strategies like retention and direct translation points to a selective application based on the importance and recognizability of certain cultural references. When these references were deemed

crucial for preserving the film's original context and meaning, the translators opted to retain or directly translate them. This strategic choice reflects a careful consideration of when to prioritize cultural authenticity versus audience accessibility.

4.2 Qualitative results: Application of Translation Strategies

The second part of this section presents a qualitative analysis of the use of Pedersen's (2005) translation strategies employed by dubbing translators to translate cultural references. Each of them is mentioned according to the frequency with which they appeared in the *Penguins of Madagascar* film.

The generalisation strategy, oriented to the target language, was used to generalise a specific cultural reference not well known to Latin American audiences to a broader and more familiar category; however, this may cause the cultural nuance of the original text to be lost.

As for substitution, another target language-oriented strategy, it was mostly used to replace the original sentence with an expression or word that captures the general message of the sentence and transforms it into a cultural term more familiar and understandable to Spanish speakers.

On the other hand, retention, belonging to the source language orientation, was used in two specific situations: when there was no Spanish word that fully captured the meaning of the original word; when the word was so popular and well known to the Latin American public that there was no need to translate it.

Finally, as for direct translation, oriented to the source language, it was used when the Spanish term was equivalent to the English one, so the translation was literal.

As for cultural references, a total of 14 were found in the dialogues (see table 13). References to American culture are found, including references to: soldier installations, the US military, a famous musical duo, to the law, to fundraising campaigns, to dance steps, to the legendary bigfoot creature, to the Super Bowl, to children's jokes and even

to the Old West. However, not only are there cultural references to American culture, there are also references to Irish culture (references to Riverstone, a famous tourist attraction; and to Irish music and dance), and references to German culture (reference to a traditional cultural object and to a major German football league).

Table 13.

Use of Pedersen's CR translation strategies in the film Penguins of Madagascar

Time stamp	Source text	Target text	Strategy used	Strategy orientation	CR	Type of CR	Use
08:20 - 08:32	Skipper: So tonight, Private, we celebrate your birthday by infiltrating the United States gold depository at Fort Knox!	Esta noche Cabo, celebraremos tu cumpleaños, infiltrándonos a la bóveda de oro de los Estados Unidos ¡El Fort Knox!	Retention	Source Language oriented	Fort Knox	The name of an US army site in Kentucky	There is no literal English translation that fully captures the connotation and meaning of 'Fort Knox'.
09:10 - 09:13	Skipper: Fire in the hole!	¡Que inicie la operación!	Substitution	Target language oriented	Fire in the hole	Military cultural reference	Replace the original sentence with an expression that captures the general meaning of the sentence in a context that might be more understandable to a Spanish-speaking audience.
09:42 - 09:50	Skipper: Oh, come on, you're kidding right?	Skipper: No puede ser. Es broma ¿verdad?	Generalization	Target language oriented	Flatt and Scruggs	An iconic American bluegrass duo.	Flatt and Scruggs refer to a famous musical duo in bluegrass

	Kowalski: Kentucky, skipper. They do love their flatt and Scruggs.	Kowalski: Kentucky, Skipper. Les encanta su música de banjo.					music, by translating it as 'música de banjo', it is generalising the specific cultural reference to a broader category familiar to the public.
11:07 – 11:12	Kowalski: (...) always feeling the hot breath of Johnny Law on our necks?	Kowalski: (...) siempre sintiendo la presencia de la ley en nuestros talones?	Generalization	Target language oriented	Johnny law	Cultural reference related to crime, law and order. Refers mainly to the police.	A more general term is used that can be understood in a broader context, although it loses the specificity and cultural nuance of the original.
14:55 – 14:59	Dave: (...) and frequent donor to NPR pledge drives.	Dave: (...) y donador frecuente a muchas causas pérdidas.	Substitution	Target Language oriented	NPR pledge drives	The fundraising campaigns carried out by National Public Radio (NPR) in the United States.	The specific reference is replaced with a more general expression that does not have a direct equivalence but can convey a related idea about the funding situation.
19:04 – 19:07	Dave: (...) and sashay right out the exit hatch.	Dave: y salir de aquí bailando el chachachá en reversa.	Substitution	Target Language oriented	Sashay	Cultural reference of a dance step.	The reference of the type of movement is substituted with a culturally known term

26:22 – 26:25	Skipper: Canada is secretly training an army of Sasquatch.	Skipper: Canadá entrena en secreto a un batallón de pies grandes.	Direct translation	Source language oriented	Sasquatch	A legendary creature that inhabits forests in the Pacific Northwest of North America	in the field of dance. The direct translation is used, as both terms (in English and Spanish) refer to the same “big foot.” However, <i>sasquatch</i> is the term used by the indigenous peoples of the Pacific Northwest of North America.
29:48 - 29:50	Skipper: Oh, yeah, baby! Whee! Just like Super Bowl XIX	Skipper: ¡Así me gusta! Igual que en el Super Bowl XIX	Retention	Source language oriented	Super Bowl XIX	A sporting event, specifically, the American football game that defined the champion of the 1984-85 NFL season.	The Super Bowl is one of the most popular events worldwide, so many Spanish speakers recognise the term.
35:40 - 35:43	Riverdance !	¡Danza Irlandesa!	Generalization	Source text oriented	Riverstone	A famous show that consists mainly of traditional Irish music and dance. It belongs to the legends of Irish culture.	The reference to the specific performance is lost and a more general term is used to describe the type of dance which can encompass a variety of styles

						original to Ireland.
35:50 – 35:52	Skipper: No time to kiss the Blarney stone, boys.	Skipper: No hay tiempo para besar la Piedra de Blarney.	Direct translation	Source text oriented	Blarney stone	Geographical and folkloric cultural reference. It is a stone from an Irish castle which, according to legend, will grant you the 'gift of eloquence' if you kiss it. It was translated literally, maintaining reference to the actual place and to the fact that it is also commonly known in Spanish as 'Piedra de Blarney'.
	Classified: At 22:02 knock, knock.	Clasificado: A las 22:02 toc toc.				
	Corporal: Who's there?	Montaña: ¿Quién es?				This is a generalisation as 'joke' is a much broader term that encompasses a wide variety of types of humour, while 'knock knock jokes' refers to a specific type of joke with a particular structure and characteristics.
	Classified: The North Wind.	Clasificado: La Ráfaga Polar.				
52:15 – 52:25	Corporal: The North Wind who?	Montaña: ¿Cuál Ráfaga Polar?	Generalization	Source text oriented	Knock-knock jokes	A popular verbal humour common in children's culture.
	Classified: The North Wind who doesn't have time for knock-knock jokes because we're too busy taking down Dave.	Clasificado: La Ráfaga Polar que no tiene tiempo para chistes porque está demasiado ocupada atrapando a Dave.				

56:20 - 56:24	Skipper: These hosen are riding up my bundesliga	Skipper: Esta cosa me está apretando la Bundesliga.	Generalization	Source text oriented	Hosen (lederhosen)	'Lederhosen' or in this case shortened to "hosen", is a reference to a specific cultural object, a traditional garment associated with the culture of Bavaria, Germany. A generic term has been chosen which does not specify the type of garment, thus losing the cultural reference to 'lederhosen', which are traditional Bavarian lederhosen.
56:20 - 56:24	Skipper: These hosen are riding up my Bundesliga	Skipper: Esta cosa me está apretando la bundesliga.	Retention	Source text oriented	Bundesliga	The word 'Bundesliga' is a German word that alludes to 'butt'. The joke is that the lederhosen went up his butt. In Spanish, the original term was retained, although the audience probably does not know its meaning. However, from the visual scene, it is understood that in this case 'bundesliga' refers to the butt. Although the joke makes more sense in English Reference to a cultural institution, a sports league of great significance in Germany and in the world of football.

						(because of the pronunciation), it is still understood in Spanish thanks to the visual context.
						The substitution strategy was used to adapt the cultural reference 'rootin'-tootin' to a different context and audience. The choice of 'parrandero' allows the festive and energetic spirit of the original expression to be maintained, albeit with a different cultural connotation.
57:35 – 57:39	Welcome, Skipper, Kowalski and rootin'-tootin Rico!	¡Bienvenidos, Skipper, Kowalski y Rico el parrandero!	Substitution	Target language oriented	Rootin'-tootin'	'Rootin' tootin'' is a cultural reference to the American Old West, or Wild West. It is an expression that suggests enthusiasm, excitement and often a bit of swagger.

Note. Author's compilation.

In summary, the results obtained indicate that the most frequently used translation strategy for the CRs was generalisation, which suggests the translator's tendency to prioritise the understanding of the target audience. Although this approach improves audience comprehension and allows for greater immersion, it sometimes results in the partial or total loss of the original cultural reference.

These results suggest that the translators made conscious decisions aimed at a family audience, as *Penguins of Madagascar* is an animated film intended primarily for children and their families.

Taking this into account, it is understandable that the translators chose to simplify cultural references that might be unfamiliar to the target audience, thus ensuring that the viewing experience was not interrupted by confusion or lack of understanding. Therefore, even though in some cases this strategy involved the partial or total loss of the original cultural reference, immersion and humour were prioritised.

In short, the results show that the translation was not aimed at a specialised or adult audience, but rather at a diverse audience, with an emphasis on ensuring immediate comprehension and enjoyment of the film by Latin American families.

The following chapter will discuss these findings in relation to previous research in the study foundations, offering a comparison with the results of other studies, as well as a deeper interpretation of the choices made by translators.

CHAPTER 5. DISCUSSION

The present study aimed to explore the translation strategies employed in the Latin Spanish translation of CRs within the animated film *Penguins of Madagascar*. Specifically, it sought to identify the strategies used from Pedersen's taxonomy and analyse their frequency of application, shedding light on the preferences and decisions made by translators. The findings of this study provide valuable insights into the intricate processes and challenges associated with translating CRs in animated films, specifically within the Latin American Spanish translation.

The analysis revealed that the most commonly used strategies were generalization and substitution, both of which are oriented towards the TT. Generalization was applied to simplify complex or unfamiliar CRs from the ST into more familiar concepts for the target audience. Substitution, on the other hand, involved replacing the original CR with a culturally equivalent term in the target language. This approach aligns with the translators' objective of maintaining the film's humour, coherence, and overall appeal without confusing the viewers.

Retention and direct translation, strategies oriented towards the ST, were also utilized, but less frequently. Retention was employed when the CR was deemed too familiar or essential to the original meaning to be altered. Direct translation was applied when a literal translation was deemed appropriate due to the equivalence of the terms in both languages. The use of source text-oriented strategies like retention and direct translation, although less frequent, indicates a balance between preserving the original cultural context and making the content accessible.

The findings of this study do not coincide with some previous research on the translation of CR in animated films, as these mention that source text-oriented strategies are the most commonly used (Horbačauskienė, 2016; Omer, 2023; Díaz-Pérez, 2017). It is worth noting that these studies were conducted in Lithuania, Kurdistan and Spain, respectively. The findings of these studies lead to the idea that source language-oriented cultural transfer prevails, probably because they consider it

an easier way to deal with translation errors, and avoid inadequate translation quality (Horbačauskienė, 2016); which might partly explain the tendency to preserve cultural elements of the source text more frequently than in the Latin American context. This discrepancy highlights the nature of translation strategies, which may vary based on the specific characteristics of the film, the intended audience, and the cultural contexts involved.

In this study, the preference for target-oriented strategies, in particular generalisation and substitution, suggests that translators often prioritise the comprehension and cultural accessibility of the target audience over the strict preservation of the original cultural nuances, especially since it is a family film aimed primarily at children. This approach aligns with the translators' objective of maintaining the film's humour, coherence, and overall appeal without confusing the viewers.

However, the use of ST-oriented strategies also indicates that translators are not always willing to completely sacrifice the original cultural context. In some cases, retaining or directly translating CRs can help preserve the authenticity of the film and enhance its cultural richness.

So, even though cultures have several points in common, the particularity of the cultural content can create difficulties when translating into the target language, therefore, the translator must find the most appropriate strategies to be able to handle the cultural reference (Çavuşoğlu, 2020).

CONCLUSION

This study has shown that the decisions made by translators regarding the dubbing of the film *Penguins of Madagascar* prioritise audience comprehension over strict cultural fidelity. This approach indicates that the translators chose to focus on clarity and humour for the greater enjoyment of Latin American children and families. Although this has several advantages for the target audience, such as greater clarity and narrative fluidity, preservation of humour and greater immersion, it also results in the partial or even total loss of the original cultural references.

These findings reveal two interesting points. First, they reveal how translators have a face-to-face approach between two cultures, and how translators' decisions can influence the perception of a foreign culture. Taking this into account, rather than a linguistic task, the work of translators becomes cultural mediation. Secondly, it shows the importance of considering the audience profile to evaluate translation strategies, whether they are oriented towards the target text or the source text, and to consider which will be better received. For instance, if the target audience has extensive knowledge of the source culture and little knowledge of the target culture, prioritising accessibility over cultural fidelity may not be the best option.

With this in mind, understanding the balance between preserving cultural authenticity and ensuring audience accessibility can guide translators to make informed decisions that improve the viewing experience.

It is important to mention that this study has some limitations. First, the sample is limited to a single film and a finite set of identified references. In addition, the analysis of the Spanish dubbing was based only on the audio and the researcher's own transcription, as no official script was available. Therefore, future related research could expand the corpus, either by adding multiple films or mixing different; it could also interview industry professionals to understand the translator's intentions and the limitations. Besides, quantitative studies could assess audience perception of various translation strategies.

to provide deeper insight into their effectiveness, with a view to improve or refining translation techniques.

In conclusion, translating cultural references goes beyond literalism. It is a process that requires the translator to make informed decisions that take into account factors such as the genre of the audiovisual work, the target audience, and their level of familiarity with the source culture. Nevertheless, although this task requires rigorous professional judgement, it is important to recognise that some translators may be subject to external constraints, such as those imposed by executive production, which condition creative decisions and can therefore compromise the final result.

In general, this work aims to contribute to the field of audiovisual translation by exploring a strategic framework for handling cultural references. It could also serve as a guide for students who are beginning their training or seeking to perfect their translation skills. The research demonstrates that achieving an effective translation is not just a simple linguistic act, but must be a reflective and conscious process, focusing on the target audience and how the adaptation of cultural references has a significant impact on the understanding and perception of viewers.

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INDEX

ABBREVIATIONS

- CR's: Cultural references
- CSI's: Cultural Specific Items
- ECR's: Extracultural references
- SL: Source Language
- ST: Source Text
- TL: Target Language
- TT: Target Text

C

- Cultural References: 14, 18, 27
 - Culture: 13, 14
- Context: 17, 23, 29
 - Movie Context: 18, 24

D

- Data Collection: 22, 26, 31
 - Qualitative Instrument: 23, 27
 - Quantitative Instrument: 24, 28

M

- Methodology: 10, 20, 30
 - Study Type: 11, 21
 - Data collection: 12, 22

R

- Results: 10, 25, 33

T

- Translation Strategies: 3, 4, 9, 10, 12, 17, 23, 25, 26, 32, 34
 - Source language oriented: 14, 20

- Retention: 6,15,16, 23,24, 25, 27, 32.
- Specification: 15, 16, 23, 24, 25, 26, 27.
- Direct Translation: 15, 16, 23, 24, 25, 27, 32, 33.
- Target language oriented: 15, 21
 - Generalization: 15, 16, 23, 24, 26.
 - Substitution: 6, 15, 23, 24, 25, 27, 32, 33.
 - Omission: 15, 23, 24, 25.
- Official equivalent: 14, 25, 23, 24, 25.

APPENDIX 1

In order to gain more knowledge about the film analysed in this thesis, this appendix details information about each of the characters in the film *Penguins of Madagascar*, based on information gathered from Madagascar Wiki (2024).

Main Characters



Skipper: He is the commanding leader of the penguin group and the main person responsible for their missions. His leadership style is characterized by a firm attitude, combined with an unwavering determination to succeed, detecting threats even in everyday situations. He usually has exaggerated and intense reasoning, but his confidence in his team ensures the success of most missions.



Kowalski: He is the strategist and scientist of the group. Kowalski personifies intelligence taken to the extreme in a satirical way. He is usually equipped with his notebook and analytical mindset, providing the team with technical explanations and creative solutions, although most of the time they are impractical. Despite this, he plays a crucial role, as he is the one who provides the team with the necessary tools and strategies to succeed in their missions.



Rico: He is the team's wrecker. Rico has a chaotic and unpredictable personality. He has the ability to regurgitate tools and explosives at will, making him an invaluable resource during high-risk missions. He usually has the right tool at the right time, which contributes to the penguins' success in their many missions.



Private: He is the youngest member of the team. Private represents innocence, naivety, and empathy within the group. He often feels uncertain about his role within the team, as the others have assigned roles and he does not know if he is a distraction or just a pawn. His kindness and empathy make him a unique member of the team, contrasting compassion with the militarism of the team.



Dave: He is the antagonist of the film. Dave is a discontented and resentful octopus who pretends to be human and operates under the alias Dr Octavius Brine. His obsessive desire for revenge against the penguins, whom he blames for his misfortunes, makes him a formidable opponent. Despite his hostility towards the penguins, Dave harbours no ill will towards humans, focusing solely on his enemies. His resentful behaviour makes him a key figure in the film.



Secondary Characters

Short Fuse. He is a harp seal and explosive specialist for the North Wind. Short Fuse mirrors Rico's role but in a more organised and disciplined context, making him a crucial member of the North Wind team. His technical precision and ability to handle explosive situations contrasts with Rico's chaotic explosions.



Classified. He is a wolf known as Classified and is the leader of the North Wind organisation. His seriousness and professionalism bring him into conflict with Skipper's improvised methods. Despite his failures on missions, he has strong faith in his team and is reluctant to trust anyone outside of it. His leadership emphasises teamwork.



Corporal. He is a polar bear, whose role is to be the muscle for the North Wind organisation. Despite being 'muscular' and strong, he has an affectionate nature and shows admiration and tenderness for the penguins, whom he often calls "cute and cuddly". His physical strength, combined with his calm personality, contributes to the balance between toughness and tenderness within the squad.



Eva. She is a snowy owl and serves as the analyst for the North Wind organisation. Eva is a snowy owl and serves as the analyst for the North Wind squadron. She is extremely intelligent, calm, and methodical. She is very focused on her missions, and her analytical mindset complements the more action-oriented members of the team. Her analytical skills and concentration ensure that missions are approached with logic rather than impulsiveness.



Julien is a narcissistic, fun-loving, ring-tailed lemur who has a penchant for being adored. In the film *Penguins of Madagascar*, Julien tries every which way to push the button on Dave's machine. After several attempts, he presses the button and returns Private to normal. In the end, Mort swallows him, leaving King Julien amazed because that is 'pizzazz'.



Mort is an innocent but annoying lemur who has an obsession with King Julien's feet. In the film *Penguins of Madagascar*, the penguins use him as a source of tenderness to restore normality to the now ugly Private.



Alojamiento de la Tesis en el Repositorio Institucional	
Título de Tesis:	Analysis of The Strategies Used in the Latin Spanish Translation of Cultural References in the Animated Film <i>Penguins of Madagascar</i>
Autor(a) o autores(ras) de la Tesis:	Karla Crystell Guzmán Camacho
ORCID:	https://orcid.org/0009-0003-2637-2507
Resumen de la Tesis:	Las referencias culturales representan uno de los elementos más complejos de traducir, puesto que forman parte esencial de la identidad de las comunidades. Los traductores encargados de trasladarlas de su idioma original a otro asumen una gran responsabilidad, ya que deben seleccionar estrategias adecuadas que preserven el sentido y coherencia en el texto meta. Este artículo emplea la taxonomía de estrategias para la traducción de referencias culturales propuesta por Pedersen (2005) con el fin de identificar cuáles fueron las estrategias más utilizadas en la traducción al español latino de la película Los Pingüinos de Madagascar, así como analizar la manera en que fueron aplicadas. Para ello, se utilizó un método mixto con un diseño convergente paralelo y se trabajó con dos tablas de concentración: una para los datos cuantitativos y otra para los cualitativos. Los resultados muestran que la estrategia más empleada fue la generalización (37.5%), orientada al texto meta y utilizada para transformar el término cultural original en uno más accesible para el público hispanohablante. En conclusión, la elección de las estrategias puede variar debido a diversos factores presentes durante el proceso de traducción; sin embargo, es fundamental mantener un equilibrio entre el mensaje original y la traducción meta para preservar la relevancia cultural y garantizar el disfrute de la película.
Palabras claves de la Tesis:	Traducción audiovisual, referencias culturales, estrategias de traducción, película animada

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