

Dubbing vs. subtitling

Francesca Riggio

Subtitling is a field of audiovisual translation that very little has been written about in terms of market and economic impact. The current situation of this specialty audiovisual translation market is gauged through data gathered on subtitling published by various sources in the past few years. Its economic status has been analyzed through data collected in both the United States and European countries in which subtitling is used. The choice of subtitling over dubbing in certain industries and regions is also briefly illustrated. Even though much has been already said on this subject, the impact of this choice is, as a matter of fact, high on the development of the economic map and the future of subtitling.

To date, there are few reliable per country data sources on the subject, especially in regards to subtitling. Updated resources for a reliable estimation of the current market condition are scarce at the moment. This makes it difficult for localization industry professionals to scientifically estimate the current size and potential

of this market. One of the main reasons is the fact that the market has evolved and changed drastically in the past few years, and it is still evolving.

Understanding the global market

Until a couple of years ago, it was expected that the attractiveness of the subtitling market would start its decline. This was more accentuated in European Union (EU) countries where subtitling companies had been experiencing difficulty due to ever-changing technologies and a crunch in the overall world economy. Today, on the other hand, the subtitling market again seems to be attractive to localization companies and audiovisually specialized language providers.

There are several factors that support an optimistic view of the market. The global market is highly fragmented, however, and drawing a precise picture would require a more extensive analysis of the subject. Increasingly, more countries today adopt both subtitling and dubbing according to whether it is for theatrical release, television programming or new media. The positive thing here is the increasing fragmentation of the market, which could indicate a market in transformation, an economy that is reshaping the boundaries of the two adopted localization methods and the expansion of subtitling in certain specific media content areas. On top of this, with the introduction of paid television programming, the development of video content through the growth of the internet and the development of new open-source media, subtitling has increased notably since the last data available to researchers from a few years ago, even in those countries where dubbing was traditionally preferred over subtitling.

Dubbing vs. subtitling in cinema and television

The purpose of the research we conducted was to examine the reality of today's subtitling market both in the United



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States and, by way of comparison, in Europe, a continent where subtitling is in some countries less common and less developed. The aim of this market research was to gather as much information as possible on the subtitling industry in the United States and to compare and understand the market trends on both continents.

I will use as references for the European market research conducted by the Media Consulting Group in 2007 and data collected through interviews to specialists working in this sector, among which are executives of client relations and vendor managers of major subtitling providers and studios.

In interviews and conversations carried out with a number of US subtitling agencies and industry colleagues, I have collected data on their companies, their product portfolios, their client profiles, their working methods and the kind of resources involved. The interview included additional technical questions regarding technology, subtitling standards and costs.

To fully understand the market we have to first distinguish and identify those countries that prefer subtitling versus dubbing and in which areas this choice is applicable: cinema, television and DVD/Blue Ray.

In Europe, movies distributed in theaters are typically subtitled. The exception to this is represented by those countries that have traditionally chosen to adopt dubbing as their main means of translation. The countries that historically have adopted dubbing over subtitling are Germany, Spain, France and even more so in Italy, where practically every foreign film or animated production is dubbed into Italian. However, the trend is clearly changing, as even those countries that traditionally have always opted for dubbing are moving towards subtitling, leaving behind the more costly and technically time-consuming dubbing.

In regard to television programs, subtitling is the preferred choice among the majority of European countries, with the exception of Germany, Austria, Spain, France, Italy, Czech Republic, Slovakia,

Switzerland and French-speaking Belgium, where dubbing is preferred. However, even in countries with a strong dubbing tradition, this trend is changing, and subtitling is making headway, thanks to the introduction of paid television programming and the growth in volume of internet video content. In Italy, for instance, with the introduction of pay-per-view cable television, subtitles are usually available on mainstream television channels, and all movies are available in English with Italian subtitles. Many television shows feature the original English soundtrack as well.

Eastern European countries such as Latvia, Bulgaria, Poland and Lithuania prefer the voice-over technique, and only in Luxembourg and Malta are the works distributed in their original language.

There are various reasons behind the choice between subtitling and dubbing, and the fragmentation of the audiovisual translations market, particularly in Europe. One of the major reasons is related to the cost involved in the production of a dubbed version versus the subtitling of a piece.

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Industry Focus

The labor involved in the production of a dubbed version is extremely intensive. It involves the use of highly trained and specialized talents, often recognized and remunerated as actors in certain countries, depending on the legislation and if they are associated with labor certification associations and unions or not. In certain countries, for instance, it is

typical for locally renowned voice actors to dub specific celebrities and foreign film star counterparts.

Dubbing is more popular, although more expensive, in countries where there is a majority of single language speaking communities and also in wealthier countries. Subtitling is adopted by countries with a more restricted market. The Scandinavian countries, for example, although among the wealthiest of the EU countries, prefer to adopt subtitling for both cinema and television and have a market share quantifiably less than a 10% of the total audiovisual market. The major market share is held by the southern European region, where while dubbing is still prevalent, subtitling has been increasingly growing through the introduction of new visual media such as paid television and the internet.

resources in strategic geographic regions in order to reduce costs. Others preferred to completely outsource the work, which was once assigned to experienced subtitlers, to amateurs or entry-level non-specialized translators. The rates have been so crunched and the budgets so reduced that specialized resources have received lower budgets, which are by definition already lower than those of traditional translators in comparison. This trend has affected the industry at a global level, leaving specialized fields with less prospective of income growth.

With studios cutting down budgets for specialized translation such as subtitling into foreign languages, subtitling providers, whether specialized agencies or freelance, are all left with less possibilities to invest in high-quality specialized translators or with the unfortunate choice of having to drastically reduce the rates to remain competitive.

Cost of specialized resources

In the last few years and specifically with the recent economic decline, the impact on investment in specialized resources has been a globally-shared concern by the specialists of the industry. This has also had an influence on whether companies should invest in acquiring and utilizing the necessary resources to provide and deliver high-quality subtitling versus the more cost-efficient outsourcing to India, China and other Southeast Asian countries.

The solution adopted by bigger and more structured companies was to dispatch different parts of the production involved in the subtitling workflow in globally located hubs, by allocating the necessary

Technology: curse or blessing?

Luckily, technology has come to the rescue. While in the past subtitlers had to be located exclusively at the studios or hired in-house to work at the various subtitling agencies offices, now they can work remotely, allowing subtitling companies to cut overhead costs.

Much work and improvement has been done through the use of software that can be easily downloaded on personal computers and that allow the files to be delivered directly from and to the linguists, without the in-between preparatory steps and training often previously required.

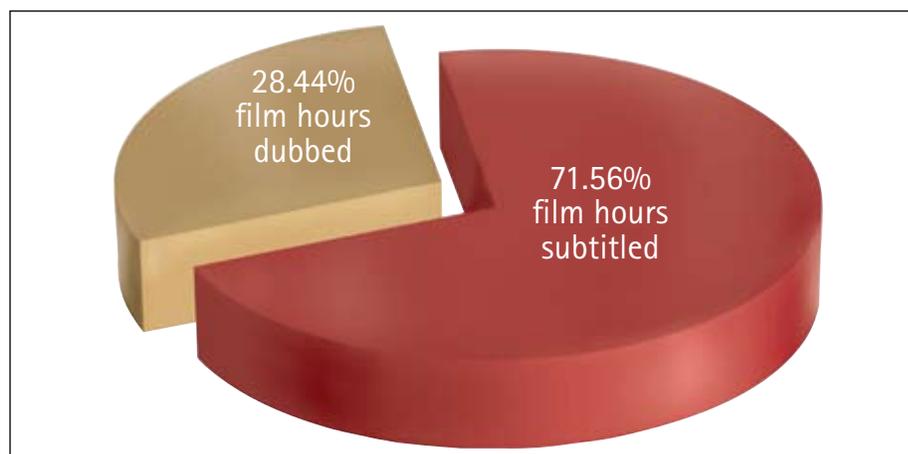


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In 2005 a total of 2,172 films from 31 non-national countries circulated in Europe, with a combined total of 3,793 hours of translation, of which 750 hours (28.44%) were dubbed and 3,043 hours (71.56%) were subtitled. (Source: Media Consulting Group Study on Subtitling 2007)

It may be argued that the introduction of this remote way of working has instigated the outsourcing to less competent and underpaid resources, thus making it more difficult for specialized subtitlers to be competitive in their own area of specialization. However, we also have to admit that by introducing new tools and software, localization service providers have been able to cut production costs of in-house training and engineering and better reallocate the available budget.

In addition to the above benefits, with the development of e-mail, chatrooms and instant messages, people are more used to reading short texts. With a larger number of people involved in this media and hence more used to reading subtitles, watching subtitled films while listening to the original content is now becoming the new social trend. Last but not least, since their introduction in the mid-1990s, DVDs allow viewers to see films in both dubbed and subtitled versions, hosting on average localized content of six dubbed versions and ten subtitled versions, according to Media Consulting Group Study on dubbing and subtitling.

Conclusion

Even though the global audiovisual localization market may have been experiencing difficult trends, the market seems to be attractive for subtitling companies and audiovisually specialized language providers. Many European countries traditionally inclined to choose dubbing can now choose between dubbed or subtitled films.

It is the case of Spain and France, for instance, traditionally dubbing-inclined countries, that many theaters offer the audience the choice between the two versions. Furthermore, with the development of new media, especially with the rise of video content, the trend is shifting more to subtitling. In the past decade audience taste and reception have also changed, with more acquired taste for written content, possibly sparked by the increased usage by the newer generation of text messaging and instant messaging. Therefore, if we as audiovisual localization market experts are reading the "writing on the wall" or better "on the video" correctly, we will soon come to the realization that dubbing may become in the future an obsolete and cost-consuming practice when compared to subtitling. **M**



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