



Studying Verbal Irony and Sarcasm

Methodological Perspectives from
Communication Studies and Beyond

Edited by
Natalia Banasik-Jemielniak ·
Piotr Kałowski · Maria Zajączkowska

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To my parents. N. B.-J.

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Introduction

*Natalia Banasik-Jemielniak, Piotr Kałowski,
and Maria Zajączkowska*

INTRODUCTION

This volume collects chapters on various approaches, methods, and operationalizations in studying verbal irony and sarcasm. Verbal irony is typically understood as an utterance which is (a) overtly untruthful (often ostensibly saying the opposite of what the speaker intends) and (b) implicitly expresses a certain evaluation (Dynel, 2017). It is a popular figure of

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speech and part of everyday interactions (Gibbs, 2000). It frequently appears in media and popular works of culture. In turn, sarcasm is variously conceptualized as an especially aggressive form of verbal irony (Dynel, 2017).

In the last decades, a significant body of research has been produced on irony comprehension by children (Banasik-Jemielniak & Bokus, 2019; Zajączkowska & Abbot-Smith, 2020) and irony use by adults (Kałowski et al., 2023; Colston & Athanasiadou, 2017), with reference to sociocultural and individual factors, such as personality traits (Bruntsch & Ruch, 2017), gender (Colston & Lee, 2004, Milanowicz & Bokus, 2013), age (Phillips et al., 2015), knowledge of cultural norms (Caffarra et al., 2018), and second-language proficiency (Tiv et al., 2019).

Researchers investigating irony and sarcasm use and comprehension have developed numerous quantitative and qualitative measures of these abilities in specific populations (e.g., adults, children, or clinical groups). They vary from self-report questionnaires and comment elicitation, through experimental studies using comprehension and production tasks and/or eye-tracking, to natural observations and corpus studies. Sophisticated neuropsychological methods have also been employed (Skalicky, 2023). With such variety, a consolidation of the findings with regard to the differences and challenges in data collection seems pertinent.

A particularly significant challenge is also the question of cross-cultural comparisons and generalizability. A range of studies indicates that cultural norms of communication impact both irony use and understanding in specific ways (Banasik-Jemielniak & Kałowski, 2022; Blasko et al., 2021). Therefore, the cultural specificity and potential for cultural adaptation of non-observational measures must also be considered.

Our aims in preparing this volume were twofold. First, we wanted to offer a comprehensive yet approachable introduction to the phenomenon of verbal irony and sarcasm, as well as the methodological aspects of their study. Second, due to the aforementioned rise in popularity, the field of irony and sarcasm studies is relatively heterogeneous. By offering methodological reflections, we wanted to bring attention to this issue. Thus, our volume combines a broad range of theoretical and methodological perspectives into an accessible overview. It contains both theoretical chapters with literature reviews and empirical results from studies on both children and adults. Our volume also contains an open online appendix with a list of non-English language publications on verbal irony. In this way, we hope

to contribute to the maintenance of a high standard of methodology in irony studies and help bring this topic into the mainstream of psychological research.

PART I: THEORETICAL CONSIDERATIONS ON IRONY RESEARCH

In most cases, most of us have little trouble with understanding irony and/or sarcasm. Nevertheless, exhaustive and parsimonious definitions of these phenomena are surprisingly difficult to create. Kreuz (2020) and Skalicky (2023) mention a notorious example of the 1995 song “Ironic” by Alanis Morissette, which provoked a popular debate on whether it actually is ironic. From the academic point of view, according to some, it represented situational irony, whereas others claimed it did not (e.g., Simpson, 2011). Interestingly, Attardo (2013) also discusses a semantic shift in American English where “irony” is increasingly often understood precisely as situational irony, while the traditional concept of verbal irony is frequently referred to as “sarcasm” in popular speech.

The above anecdote points toward a significant issue in the field of irony and sarcasm studies, namely, the proliferation of definitions, theories, and conceptualizations. Sometimes, authors are interested in creating a new theory or systematizing existing ones. However, such a wide scope may lead to definitional misunderstandings (Dynel, 2014). At other times, researchers carrying out empirical studies adopt a somewhat commonsensical yet narrow approach to the phenomenon in question (Kałowski & Branowska, this volume). As in every field of study, having a solid theoretical grounding and being aware of the various assumptions that result from it is crucial. Thus, in the first section of our volume, we focus on a theoretical overview.

Chapter 2: On Verbal Irony Methods: Giving an Old Dog Some New Tricks (Herbert L. Colston)

In this chapter, Colston revisits well-established methods of studying irony and invites the reader to reflect upon the motives that underlie the development of new methods. The author emphasizes the need of changing the focus of the methodological discussions from tweaking the existing methods to meet the demands of the research questions to actually

reconsidering the research questions in the first place. This shift of focus may lead to the development of new methodologies. The author discusses the definitional issues around different types of irony, revisits some of the main questions asked in irony research, and offers directions in this area of study.

Chapter 3: A Minimal Account of Irony (Joana Garmendia)

In her chapter, Joana Garmendia revisits her established theory of irony, offering a broad perspective on the main pragmatic theories and their limitations. She explains that while contradiction, echo, and pretense are typical in irony, they are not essential. Garmendia argues for a minimalistic approach, focusing on the clash between the speaker's intention and the apparent message, and a typically negative attitude. This reframing of traditional mechanisms as communicative cues allows for a more inclusive understanding of irony. Her chapter reaffirms her long-standing views, providing an accessible overview of her valuable and accessible theory of irony and its interpretations, emphasizing the flexibility and inclusiveness of her minimalistic approach to irony research.

Chapter 4: Rethinking (Assumptions About) Irony: The Bilingual Factor (Katarzyna Bromberek-Dyzman)

Bromberek-Dyzman suggests that since monolingualism is no longer the communicative norm, increasingly prevalent bilingualism should be taken into account in studies on irony. The author highlights that there are no separate accounts or models for irony comprehension for monolingual and bilingual language users. She then discusses both the relation of general language proficiency and pragmatic proficiency to the ability to understand ironic remarks in monolingual and bilingual speakers, thus offering a new and fruitful perspective.

Taken together, our theoretical introduction equips readers with both a solid understanding of some of the most notable theoretical achievements in the pragmatics of irony, but also hints at important areas of development and evolution. While studies on irony should be informed by solid theoretical foundations, the field itself is much broader than just tests of pragmatics hypotheses (see also Skalicky, 2023). New, creative methodologies are necessary to capture irony and irony-like phenomena in their full scope, as well as to take full advantage of the potential irony offers for

studying various social-cognitive processes. Indeed, as the above chapters show, irony can be harnessed in a surprising range of topics, from bilingual language processing, through theory of mind, to pragmatic strategies of making impactful, effective statements or patterns of intergroup interactions.

PART II: IRONY RESEARCH: DEVELOPMENTAL PERSPECTIVE

Many theoretical accounts focus on irony and sarcasm as linguistic phenomena. However, notable psychological theories of irony as a social-cognitive skill or process have also been developed (see, e.g., the parallel-constraint-satisfaction model, Pexman, 2008). Particularly fascinating, and with a rich empirical tradition, is the developmental study of how children and adolescents gain the ability to use and understand irony and sarcasm (as well as other forms of nonliteral language). These studies offer an excellent window into irony/sarcasm research overall, as increasing methodological refinements have led to significant revisions and updates in accepted empirical results, often within the span of just a few years between publications. Therefore, knowledge of how this field has developed is beneficial for researchers overall, not just developmental psychologists.

Chapter 5: Experiments on The Development of Irony: Walking Through a Methodological Maze (Ana Milosavljevic)

Milosavljevic reviews the paradigms and methodological approaches that have been used to study irony comprehension in children. The author refers to the acquisition of other figures of nonliteral speech and notes the methodological improvements that have been introduced throughout the years, suggesting that they could also be implemented for irony research. The suggestions include (a) using relevant contextual circumstances in the procedure, (b) including the presence of an explicit antecedent, (c) the choice of age-appropriate stimuli in terms of type and complexity, and (d) prosodic features. For example, popular tasks requiring verbal judgments are far from suitable for studying language acquisition in young children, since they require a certain level of linguistic competence. Nonverbal paradigms that allow children to either choose a response from suggested options, or ask for nonverbal answers may be more valid. These include picture selection tasks, act-out tasks, accuracy judgment tasks, and reward

paradigms. This chapter will be a valuable source of inspiration for researchers planning empirical investigations.

*Chapter 6: Verbal Irony and Gossip Appreciation Among
Children and Adults in Poland and Canada (Marta
Krygier-Bartz, Melanie Glenwright, and Penny M. Pexman)*

Krygier-Bartz, Glenwright, and Pexman investigated whether adults and nine- to ten-year-old children from different cultural backgrounds would consider the perspective of the addressee or the bystander while interpreting ironic utterances. Participants watched several videos in which characters addressed ironic criticism, ironic compliment, or literal compliment toward a present or absent addressee, either with or without a bystander, in conditions of private evaluation, public evaluation, and gossip. Both Polish and Canadian children rated ironic speakers as more mean than did Polish and Canadian adults, and all participants rated ironic criticism as less serious than literal criticism. Furthermore, interpretative perspective-taking influenced irony appreciation among Canadian adults, while the number of parties present served as a cue for Polish participants. The authors thoroughly discuss the methodological considerations of studying irony appreciation in children. Their results also testify to the broad variety of factors which can influence irony appreciation and which can be creatively manipulated in empirical studies.

*Chapter 7: Investigating Irony Comprehension in Children:
Methods, Challenges, and Ways Forward (Ingrid Lossius Falkum
and Franziska Köder)*

Falkum and Köder discuss the potential reasons for the lack of consistency in data on when children acquire the ability to understand verbal irony. They comment on the differences between studies that are related to operational definitions of irony, the measures (ranging from comment elicitation, through emoticon pointing, to eye-tracking), as well as the expectations induced by the experimental setting. They emphasize the challenge of creating experimental stimuli that are ecologically valid and present a novel task, the “irony game,” which overcomes some common methodological issues. The authors also present the results of their study using the irony game. They tested 91 three- to seven-year-olds on their ability to understand ironic statements. They found no evidence for irony

understanding in 3–5 year olds. Even in the older age group (6–7 year olds), the average accuracy was only 33%. Falkum and Köder also offer several methodological recommendations for future research, such as (a) creating irony tasks simple enough to exclude confounding factors in children’s performance, (b) controlling for children’s background and contextual knowledge, (c) providing children with multiple cues for irony, (d) using both offline and online (e.g., pupillometry) methods, and (d) examining individual differences such as prior exposure to verbal irony.

*Chapter 8: The Influence of Intentional and Accidental Moral Transgressions on Children’s Understanding of Verbal Irony
(Vera Hukker, Simone Sprenger, and Petra Hendriks)*

Expanding the consideration of factors and cues for irony understanding in children, the authors hypothesized that children aged 5–8 years would understand irony better when the intention behind a moral transgression, mentioned explicitly in the scenarios presented to the children, was intentional compared to accidental. The authors did not find differences in children’s understanding of the ironic speaker’s beliefs and intentions depending on the type of moral transgression, even though children distinguished between the transgression types outside ironic contexts. However, children found it more challenging to understand the ironic speaker’s intentions compared to the ironic speaker’s beliefs, which is in line with earlier studies. A novel aspect of this study is that it was carried out remotely. The strengths and limitations of the investigation are discussed, inviting further research on the social-cognitive factors in irony understanding in children.

Taken together, the chapters included in the second part of the volume build upon the earlier theoretical call for methodological creativity, offering a nuanced view of how children and adolescents develop the ability to understand and use irony and sarcasm. The authors emphasize the need to create experimental setups and let the reader think about the evolution of irony research. The section also illustrates that irony is not a one-size-fits-all phenomenon; rather, its comprehension and use are influenced by a variety of factors, including age, cultural background, and linguistic context. This insight is particularly valuable for researchers and educators, as it highlights the importance of taking these variables into account when studying or teaching irony and sarcasm.

In addition, the chapters show the importance of age-appropriate methods when studying irony comprehension in younger populations.

The research described in these chapters demonstrates how children's ability to understand irony develops with age, highlighting the need for tailored approaches to accommodate different developmental stages.

PART III: IRONY RESEARCH: ADULTS

Part III blends presentations of interesting data with detailed analyses of the methods and measures of studying irony and sarcasm in adults. As linguistic and humor behaviors, irony and sarcasm always dynamically arise in a specific context. This context also includes the interlocutors, with all their psychological richness and variability. Recent evidence increasingly points to the importance of numerous individual and personality factors for irony and sarcasm. Therefore, borrowing concepts and methods from various branches of academic psychology offers a wide variety of approaches, methodologies, and hypotheses to test in the context of irony and sarcasm use and appreciation. There is likely no universal or perfect measure of irony. Rather, researchers should be aware of the specific strengths and limitations of each methodological solution and match them to their stated goals. The following chapters may offer inspiration in this process.

*Chapter 9: The Form and Content of Vignette Stimuli in Irony
Research with Adult Participants (Piotr Kałowski
and Katarzyna Branowska)*

Kałowski and Branowska offer an in-depth exploration of vignette stimuli—one of the most popular methods of measuring irony use and comprehension. Although ironic vignettes are a mainstay in psycholinguistic irony research, their use remains relatively unstandardized. Compounding the problem is a general lack of consistency in reporting how the vignettes were designed, and sometimes even what they were. Kałowski and Branowska present the rationale behind using vignette tasks in irony studies, contrast their strengths and weaknesses with those of questionnaires, discuss the most significant pitfalls in their design and implementation, and suggest possible best practices. In this, they draw both on illustrative examples from published studies and preliminary results showing that the specific form of the ironic vignettes—in this case, the perspective that the participants are asked to assume—can confound the obtained ratings. The

result is a comprehensive yet accessible chapter which draws attention to the depth and richness of the field of irony studies.

Chapter 10: Exploring the Polish Adaptation of the Sarcasm Self-Report Scale Using the Think Aloud Protocol: Three Lessons About Studying Irony Through Questionnaires (Maria Zajączkowska, Olga Zimna, Malwina Kurzawa, and Natalia Banasik-Jemielniak)

Zajączkowska, Zimna, Kurzawa, and Banasik-Jemielniak investigated the properties of the Polish adaptation of the Self-Reported Sarcasm Scale (SSS; Ivanko et al., 2004) using the think-aloud protocol (TAP). In it, participants are requested to make spoken comments as they work on a task or fill in a questionnaire. Here, the authors recorded the comments and responses of 32 Polish speakers while they were filling in the SSS online. Via a qualitative content analysis, three main themes were developed: (a) participants' connotations of irony, (b) approaches to responding to the SSS, and (c) problems with responding to the SSS. For instance, the authors noted that participants were more likely to indicate the likelihood of using irony if they could refer to personal experiences similar to those described in the SSS item. The analysis also revealed that many participants misinterpreted some items. The authors discuss the strengths and limitations of the TAP and highlight the importance of this method in gaining insight into how participants interpret questionnaire items. As a result, this novel investigation contributes to the refinement of quantitative methodologies in irony and sarcasm studies.

Chapter 11: Humorous Irony in Female Stand-Up Comedy: A Sociopragmatic Analysis (Esther Linares Bernabéu)

Linares Bernabéu contributes a valuable perspective by examining naturalistic performances of irony by female stand-up comedians. She starts with a careful delineation of humorous irony as involving humorous meta-representations. It allows for interpreting irony as a strategy of subversion and empowerment. Indeed, in the specific context of female stand-up comedy, it is effectively brought to bear on rigid, oppressive, and outdated gender norms. To show this, Linares Bernabéu describes a unique methodology of corpus composition in the field as an audience member of a total of 15 stand-up performances comprising 122 instances of humorous

irony use. Then, a qualitative analysis shows how humorous irony in stand-up comedy mixes negative feelings about gender-based social concerns with a playful attitude of dissociation, detachment, and ridicule. This way, Linares Bernabéu applies a comprehensive theoretical framework to real-life instances of irony formalized in modern culture. Her chapter thus represents a valuable counterweight to more controlled, stimulus- and task-based studies.

*Chapter 12: Irony Across Cultures: A Contrastive Analysis
of Conceptualizations and Social Functions (Francesca Ervas
and Zsuzsanna Schnell)*

Francesca Ervas and Zsuzsanna Schnell adopt a cross-cultural perspective along the high/low context and cultural individualism/collectivism dimensions. These dimensions are expressed in communication as well. This inevitably plays a part in irony use and comprehension, as they involve a range of social-cognitive processes and contextual cues, with culture being one of them. Thus, Ervas and Schnell present a pilot study of irony appreciation using a traditional vignette task to collect such quantitative ratings as humor, insult, status enhancement, politeness, or conflict potential, from an international student sample. They found that, among other results, participants from individualistic cultures rated ironic criticism as funnier and more status-enhancing than participants from collectivist cultures. However, both groups rated ironic criticism as softer and less rude in terms of relational impact than literal criticism. Although preliminary in nature, Ervas and Schnell's study highlights the significant influence of cultural background on irony as well as the need to study it further in fine-grained analyses which have begun appearing only recently.

*Chapter 13: Examining the Structure of the Sarcasm Self-Report
Scale Cross-Culturally: Evidence from Canada, Poland,
and Türkiye (Julia Kuczmierowska, Duygu Kandemirci-Bayız,
Büşra Akkaya, Yasemin Abayhan, Maria Zajączkowska, Melanie
Glenwright, Penny M. Pexman, and Natalia
Banasik-Jemielniak)*

Kuczmierowska, Kandemirci-Bayız, Akkaya, Abayhan, Zajączkowska, Glenwright, Pexman, and Banasik-Jemielniak introduce and discuss the Sarcasm Self-report Scale (SSS, Ivanko et al., 2004). The authors collected SSS data from three samples: Canadian, Turkish, and Polish, with the aim

of examining its psychometric properties. In all three samples, four components consistently emerged, but there were some differences in terms of which items loaded onto specific components. The authors discuss the possible interpretations of these findings. Together with Zajączkowska et al.'s chapter (this volume), Kuczmierowska et al. provide valuable evidence for the validity of measuring irony use with a questionnaire, thus helping to improve the methodological standards of irony and sarcasm studies.

Chapter 14: “Am I Glad To See Myself?”: The Self-Irony Tendency Task as a Measure of the Tendency to Use Verbal Self-Irony for Self-Presentation Purposes (Aleksandra Siemieniuk and Łukasz Malanowski)

Siemieniuk and Malanowski investigated the understudied notion of self-irony and its relation with self-esteem, self-presentation style, humor as a coping strategy, and gelotophobia, or the fear of being laughed at. They introduced a novel hypertextual measure for assessing self-irony use. In it, participants create their own narrative through choosing in-character options and responses, resulting in an immersive procedure that is similar to the experience of playing a video game. Participants' choices of self-ironic comments in the measure were counted and analyzed. The results showed that a higher tendency to use self-irony was related to higher self-esteem as well as the self-affirming self-presentation style. The authors are the first to offer a hypertextual measure of self-irony, which is a very promising new method of measuring this phenomenon.

Chapter 15: I Will Act as if I Understand Irony Better: The Relationship Between the Histrionic Self-Presentation Style and the Interpretation and Appreciation of Verbal Irony (Agnieszka Fanslau)

Fanslau offers a study on the histrionic self-presentation style and irony use and appreciation. Histrionic self-presentation involves quick changes between different roles one is performing, including imitating other people or characters and engaging others in role-plays. She presents quantitative data collected from 160 Polish speakers who filled out a histrionic self-presentation questionnaire and participated in a vignette-based irony use task. She found a relationship between histrionic self-presentation and

irony use, such that histrionic self-presentation was related to ratings of irony as funnier and more polite, as well as to greater subjective certainty when interpreting statements as ironic. Thus, Fanslau contributes new evidence to the emerging field of research on individual differences in personality in the context of irony and sarcasm.

Taken together, the chapters in the section explore various aspects of irony research, from the design and use of vignette stimuli to the analysis of naturalistic performances in stand-up comedy. They explore the nuances of irony across cultures, demonstrating how cultural backgrounds may influence the perception and use of irony. In addition to presenting a range of methodological discussions and new solutions, the chapters in this section also tackle several fronts of research on individual differences in the context of irony.

A recurring theme across these chapters is the absence of a universal or perfect measure for irony. This stresses the importance for researchers to be cognizant of the specific strengths and limitations of each methodological approach and to align them with their research goals. The chapters serve as a source of inspiration, guiding researchers in the intricate process of selecting and refining their methods.

*Chapter 16: Further Directions: Overcoming the Bias of Research
Published in English (Piotr Kałowski, Natalia
Banasik-Jemielniak, Maria Zajączkowska, Agnieszka Sroka,
Edwar Makhoul, and Ewa Dryll)*

Kałowski, Banasik-Jemielniak, Zajączkowska, Sroka, Makhoul, and Dryll conclude the volume with an introduction and description of an online appendix containing a database summarizing non-English scientific articles on verbal irony and sarcasm. Spanning 701 publications in 15 languages, the database is intended to raise awareness of the importance of cultural factors in irony and sarcasm, as well as of the valuable contributions of non-English-speaking authors studying irony in non-western contexts. Greater integration of results from various cultural contexts will not only foster collaboration and generate new ideas but also create fairness and equity.

Throughout this book, the focus is on exploring the methodological intricacies of studying verbal irony and sarcasm, highlighting developmental, social, and cultural considerations. It is important to note that while some of the research presented utilized online and computer-mediated