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Humorous Effect as the Linguistic, Cultural, and Pragmatic Basis of Forming Public Opinion in Journalistic Discourse

Keywords: humorous effect, humor, satire, irony, journalistic discourse, pragmatic potential, public opinion

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1. Introduction

The globalization of the world at large and the rapid development of the Internet as an open platform for mass communication redefined intercultural communication and opened up accessible ways of exchanging ideas and opinions among people representing diverse countries and cultures. In the global world as we know it today, finding subtle and yet powerful ways of exerting influence on public opinion via mass media became a priority both for politicians aiming to shift the people's opinion in favor of their policies and for journalists writing political articles in support of a certain governing or opposing political power. In the recent years, an important trend in influencing public opinion in mass media has been the use of language means and stylistic devices of achieving humorous effect on the reader.

The studies of language means of creating humorous effect in general can be considered diverse and rather extensive. For example, N. Norrik studied the stylistic devices in context of the dominating function in establishing humorous effect (Norrik, 1993, 124). Multiple research efforts were dedicated to individual language means and stylistic devices capable of producing humorous effect on the reader: allogisms (Chiaro, 1992, 58); oxymoron (Hughes, 1983, 47); word play and ambiguity which is resolved in context and communicative situation (Nash, 1985, 241); polysemy and homonymy as means of creating humorous effect (Arnold, 1976, 103); pun (Vinogradov, 1981, 137); occasionalisms based on contextual interplay of word meanings (Galperin, 1991, 86).

The tendency to use humor in politics and in media as a means of influencing the reader's point of view was recently observed and analyzed from various points of view: the impact of exposure to political parody as a means of achieving political efficacy (Becker, 2014, 424–425); the effects of political humor on message persuasiveness,



analyzed in context of the extant political entertainment theory (LaMarre, 2014, 401); the affect effect of sarcastic political humor through negative emotions (Lee, 2014, 307–308); journalistic humorous commentary on Twitter challenging norms of objectivity and independence (Molyneux, 2015, 1–2) and blurring the lines between news and entertainment (Mourão, 2015, 1–2); enjoyment of disparagement humor and comedic ridicule of other people in online television (Parrott, 2015, 1–2); the influence of parody humor as a way of establishing sympathy and enjoyment in shaping credibility and trust of political figures (Peifer, 2016, 173); the use of conceptual metaphors in newspapers to create humor as a means of downgrading others or gaining the readers' sympathy through laughter (Perez-Hernandez, 2016, 541–542).

At the same time, understanding the essence of comicality in journalistic discourse presents numerous difficulties. In particular, there is a lack of theoretical unity in defining comicality as a concept and in understanding its essence and its diversity in different languages and cultures, which we surmise to be an important factor in establishing the specific patterns in choosing language means and stylistic devices used in each particular country. The language means of achieving humorous effect are commonly researched as standalone entities, without establishing a historical point of reference which would explain the reasons for particular choices of language means and stylistic devices and without linking the used devices to the pragmatic intentions and ideology of the newspaper article author and to the fact that he is a representative of a certain ethnic culture.

Therefore, our goal is to analyze and compare the language means and stylistic devices of influencing public opinion through humorous effect in English (British and American), Russian, and French journalistic discourse from several perspectives: (a) from the historical standpoint, in correlation with the relevant aspects of the development of democracy and journalism in England, the United States of America, the Russian Federation, and France; (b) from the linguistic standpoint, singling out specific language means and stylistic devices prevalent in each country and language under analysis; (c) from the cultural standpoint, putting the language constructs in question into the context of the culture of the country where the given language is spoken; (d) from the pragmatic standpoint, linking the devices used by the article author to his ideology and his aims as a journalist.

2. Methodology and Model of Research

According to the research plan outlined above, we propose the following model as a basis for analyzing the humorous effect in journalistic discourse in various languages (Fig. 1).

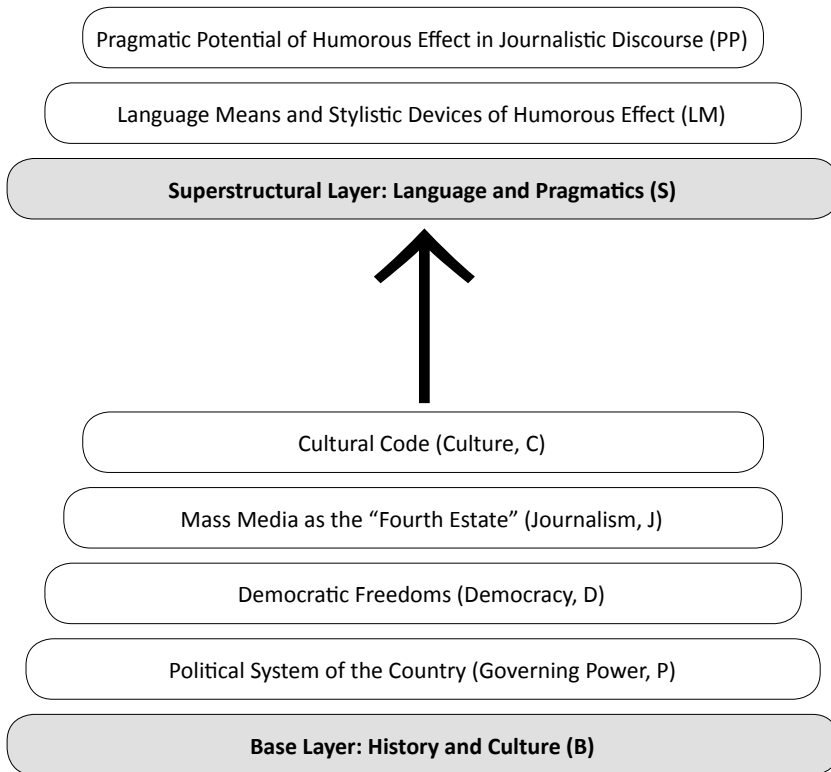


Figure 1: The model of analysis of humorous effect in journalistic discourse.

The model consists of two layers: (a) the base layer which, as we propose, serves as a historical and cultural foundation for developing specific patterns in utilizing humorous effect in political articles, and (b) the superstructural layer which defines the set of language means and stylistic devices which are used to achieve humorous effect, as well as their pragmatic potential in affecting the reader.

In accordance with the presented definition, it is possible to express the model above with the following formula:

$HE = [B(P+D+J)+C] + S(LM+PP)$, where:

HE is the resulting humorous effect in journalistic discourse;

B is the base layer consisting of the following elements:

P is the governing power in the country which superimposes specific constraints on what is legally allowed in journalistic discourse;

D is the status of democratic freedoms in the country, the most important ones for the present research being the freedom of speech and the freedom of press;

J is the status of journalism as the “fourth estate” in the country, in the context of its historical development;

C is the culture of the country, the most important aspect of which for our consideration is the ethnic specificity of humor;

S is the superstructural layer consisting of the following elements:

LM is the set of language means and stylistic devices used in the given language to achieve humorous effect in journalistic discourse, in accordance with the grammar rules of the language and in the historical and cultural context defined by the elements above;

PP is the pragmatic potential of the language means and stylistic devices of achieving humorous effect, dependent on the author's intentions as a journalist.

We argue that the first step in explaining the tendencies in choosing and using language means and stylistic devices of humorous effect in different languages is to determine the historical and cultural context of their development. Thus, we present our findings in studying the correlation between the development of British, American, French, and Russian humor and the establishment of democratic freedoms in the countries where the relevant languages and their varieties are spoken.

For the purpose of our analysis, we have chosen 130 authentic online newspaper articles published between 2014 and 2017, each of which was confirmed to contain at least one relevant and representative linguistic device of creating humorous effect in the headline. The distribution of articles by country of origin is as follows: (a) 31 British articles from “The Telegraph”, “The Times”, “The Guardian”, and “The Independent”; (b) 23 American articles from “The Wall Street Journal”, “The New Yorker”, “The Washington Post”, “The Daily Beast”, and “MapQuest Travel”; (c) 32 French articles from “Les Echos”, “Politique du monde”, “Le Figaro”, “Le Monde”, “Libération”, and “Tête-à-tête magazine”; (d) 44 Russian articles from “Komsomolskaya Pravda”, “Argumenty i fakty”, “Nezavisimaya Gazeta”, “Pravda.ru”, “Lenta.ru”, and “Rossiyskaya Gazeta”.

3. The United States of America

The United States of America as a federal republic is historically characterized by the supreme power of the federal Constitution which presupposes the existence and dominance of democratic freedoms, including the freedom of speech, as outlined in the 1791 Bill of Rights. The American concept of the freedom of press is characterized by complete independence of the press from the government, and journalism has been developed in the condition of absence of censorship, starting with the publishing of the first pamphlet “Common Sense” in 1776 containing elements of strong satire. From hence, American humor is historically based on generally free American culture

and is thus characterized by directness and explicitness. The democratic character of American humor is supported by its historical connection to oral folklore tradition, satire, and self-parody. At the same time, the development of American humor is characterized by a shift from spoken and public humor towards written and personal humor, from longer humorous stories towards epigrams (Commager, 1950, 23). As such, American humor distanced itself away from the oral tradition and is now characterized by practicality and coldness, sophistication, hyperbolization, and pretentiousness. Sarcasm, irony, and exaggeration characteristic of American humor are clearly demonstrated in the following newspaper headlines.

(1) *“Resurgent” Russia Is Actually Starting To Show Worrying Signs Of Decline (Forbes.com).*

The author's sarcasm is implied in using the word “resurgent” in quotation marks. The example also demonstrates the use of antithesis, seen in the contrast between the words “resurgent” and “decline”. The pragmatic intention of the author in this example is to express skepticism about the strengthening of Russian economy, which goes in line with the one of the existing Western interpretations of Russia as bordering between the apocalyptic scenario of being in the state of economic collapse and the optimistic scenario of actively trying to take over the world.

(2) *Captain Error Given as Cause in Capsizing of Migrant Ship (The Wall Street Journal).*

The sarcastic character of this headline is strengthened by the use of the noun “error” as a proper name in “Captain Error”, which serves as an allusion to the fictional television character Captain Obvious and is also an instance of antonomasia, a replacement phrase for the vessel captain's real name. The author's intention is to convey the opinion that hundreds of migrants sank in the Mediterranean due to a possible collision with a vessel that had come to its aid and which potentially happened due to the vessel captain's error.

(3) *In Putin's Russia, Anyone Can Be A Spy (The New Yorker).*

The intentional use of possessive “Putin's Russia” is sarcastic, and the following hyperbole “anyone can be a spy” hints at the existence of governmental prosecution of “spies” similar to the one characteristic of Stalin's times in the USSR. The author aims to show that Russia is a country where the people's rights are being infringed upon and to express the point of view that in accordance with the 2012 law amendments, anybody in Russian Federation can be prosecuted for having contacts with foreigners.

(4) *How to Not Get Arrested for Ridiculous Reasons in Texas (MapQuest Travel)*.

This headline, phrased as the title of a manual or a step-by-step guide, demonstrates the humorous use of antithesis in the form of contextual contrast between the notion “to get arrested”, which normally presupposes the presence of a valid and serious reason for arrest, and the following word combination “ridiculous reasons”. The author's goal is to warn the readers that it is possible to get arrested in Texas for reasons that most people would not consider to be a form of punishable offense, such as flirting or carrying wire cutters in a pocket.

Overall, the present study shows the predominance of sarcasm and hyperbole as the key means of producing humorous effect in contemporary political articles, which is demonstrated in Fig. 2.

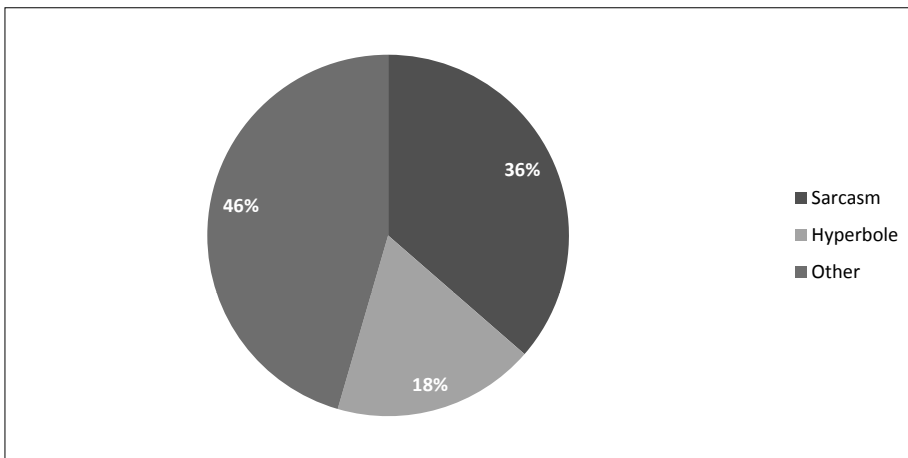


Figure 2: Predominant Means of Creating Humorous Effect in American Mass Media.

4. England

England is the historical center of the United Kingdom of Great Britain and Northern Ireland, with parliamentary constitutional monarchy as the form of government. In absence of the written Constitution the law of the country is based on statutes and precedents, and democracy in England is founded on the basis and the principles of “traditional” constitutional monarchy. Historically the new model of establishing relationships between the government and the people was proclaimed in the Bill of Rights in 1689. This new model guaranteed the freedom of discussing royal matters, but journalism at that time was characterized by strict censorship and limitation of the freedom of speech. From hence, the peculiar features of English humor

are: restraint, subtlety, sophistication requiring the reader's analysis and imagination, explicit and deliberate underestimation, innuendo, eccentricity and, in some cases, absurdity. Direct and explicit attacks and insults are not characteristic of English humor, and the writer's discontent and dissatisfaction are masked behind descriptive comparisons and euphemisms. We surmise that these features of English humor are historically explained with the dominant traditional monarchic power which forced people to hide and mask their thoughts with implicit language constructs. In line with the general tendency for understatement and implicitness, the English humor is also characterized by the ample use of stylistic devices such as litotes, pun, allusion, oxymoron, and contextual transformation of idioms creating the effect of broken expectations and strengthening the overall humorous effect.

The following examples demonstrate the use of humorous effect in English newspapers.

(5) *David Cameron and François Hollande sound like a couple of gangsters (The Telegraph).*

The author of the article uses the comparison “like a couple of gangsters” to underline his ironic attitude towards the statements of both politicians, one of whom “threatens” to leave the European Union and the other “threatens” with negative consequences. The pragmatic intention behind this headline is to express negativity towards the contemporary political courses of Great Britain and France by comparing them to actions characteristic of organized criminal groups.

(6) *Russia has a new mission for General Winter (The Telegraph).*

The allusion “General Winter” referencing the precedent name “General Frost” is used ironically in the author's attempt to excuse the loss in the political battle with Russian Federation for the Eastern regions of Ukraine with an “objective” reason, namely, the extremely cold weather in winter.

(7) *Pop, glamour and gangsters: Boris Yeltsin's new rave Russia (The Telegraph).*

The author's sarcasm is underlined with an allusion to the well-known phrase “Sex & Drugs & Rock & Roll” which hints at the relaxed mores, the lack of commitment and responsibility, and the destruction of existing norms of morality. The author's intention is to convey to the readers the image of breakage of the traditional cultural norms and popularization of hedonistic ideas in modern Russian Federation.

The results of our research indicate the predominance of comparison, allusion, rhetorical question, sarcasm, and the use of transformed and untransformed idioms

as the key means of producing humorous effect in contemporary English political articles, which is demonstrated in Fig. 3.

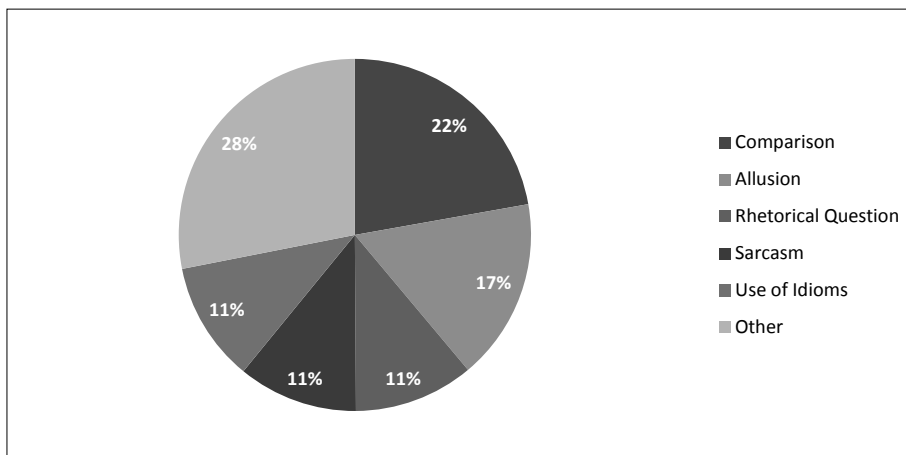


Figure 3: Predominant Means of Creating Humorous Effect in English Mass Media.

5. France

France is a unitary semi-presidential republic in which democratic freedoms and liberal ideas proliferated after the July Revolution of 1830. The first highly relevant historical document proclaiming the freedom of press was the “Declaration of the Rights of the Man and of the Citizen” of 1789. Before this document, the press was strictly controlled by the authorities from the ideological point of view. Periodical press belonged to the monarchy and severe censorship was established, journalists were subjected to prosecution without prior court decisions. The widespread introduction of humorous content in French mass media is seen in the 1970s, fueled with the May 1968 events, in particular, the student protests and the following social crisis. Emancipation and freedom of self-expression led to the active use of word play and other forms of achieving humorous effect (Kolesina, 2002, 39).

The predominant features of French humor are: aggressiveness, frivolity, wittiness, elegance and refinement, irony and self-irony, optimism, hedonism, presence of biting satire and sarcasm (Propp, 1976, 18). These features are explained by the fact that French humor was commonly a form of resistance and a weapon in political battles (Sychev, 2003, 41). Modern French humor is characterized by features such as burlesque style and improvisation, tendency towards the use of pun and ample use of visual caricature and comics. The key peculiarities of French humor in political articles can be demonstrated with the following examples.

(8) *Poutine annonce une amnistie pour stopper l'hémorragie de capitaux (Putin Announces Amnesty to Stop the Bleeding of Funds) (Les Echos).*

This example shows biting satire which is conveyed with the help of personification applied to the word “funds” with the help of the defining adjective “bleeding”. The author's aim here is to demonstrate the flexibility of Vladimir Putin's efforts to stabilize Russian economy in the period of crisis.

(9) *Les élections du 4 mars. Les Russes souhaitent-ils un “printemps russe”? (The 4th of March Elections. Do Russians Want a “Russian Spring”?) (Politique du monde).*

This satirical headline contains an allusion to the “Arab spring”, the 2011 protests and demonstrations. The author's pragmatic intention is to focus the readers' attention on the protests before the Russian presidential election in 2012.

(10) *Mistralles pour Poutine (Mistral-Class Ships for Putin) (Politique du monde).*

In this headline, the author's irony is strengthened with the word play based on the polysemy of the preposition “pour”, meaning “for” either as in “meant for Putin” or “for” as in “supporting Putin”. In the latter case, Mistral-class ships are also stylistically personified. The author's goal was to express support for shipping Mistral-class ships to Russian Federation, in line with the contemporary survey in which 78% of respondents expressed their support for those shipments.

(11) *Le monde doit-il avoir peur de Donald Trump? (Should the World Fear Donald Trump?) (Le Figaro).*

This example demonstrates the use of a rhetorical question as a means of expressing the author's attitude towards the unpredictable, inconsistent and thus potentially dangerous behavior of Donald Trump, who at the time of writing the article was running for president of the United States of America. Judging by the contents of the article, in which the author claimed that the governments of many countries were fearful of Donald Trump's actions, the rhetorical question in the headline was intended to be used as a form of indirect statement with which the reader would typically agree or at least sympathize before starting to read the article.

Overall, our research indicates the predominance of word play, rhetorical question, allusion, sarcasm, and personification as the key means of producing humorous effect in contemporary French political articles, which is demonstrated in Fig. 4.

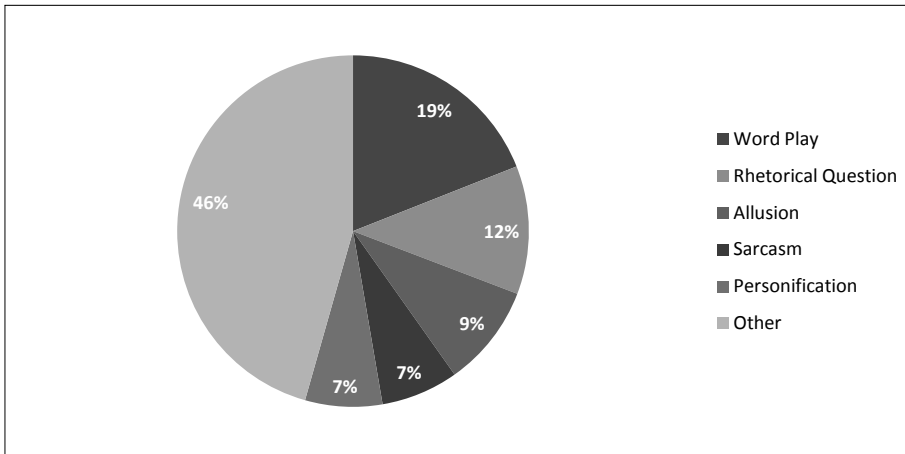


Figure 4: Predominant Means of Creating Humorous Effect in French Mass Media.

6. The Russian Federation

The Russian Federation (Russia), according to the federal Constitution, is a democratic rule-of-law state with a republican form of government. Democracy in Russia is established on the historical basis of Soviet ideology with elements of censorship. Historically journalism in Russia was established by the royal decree in 1702, which predetermined the presence of strong political censorship. This led to a rather peculiar phenomenon – the emergence of Russian satirical journalism in the form of parody pamphlets in which various implicit devices were used to convey the author's opinion to the readers while masking the normally unwanted and censurable ideas and opinions. The first law dealing with the press was established in 1865 in the “Temporary Rules of the Press”. This law effectively canceled censorship for Moscow magazines and newspapers, but preserved it for satirical and provincial press. Social and political journalism was fully formed as a separate literary genre in Russia by the end of the 19th century. The emergence of comicality in Russian journalism took place in the age of Catherine the Great (1769–1774), while the proliferation of satirical press took place in 1905–1930. The following years, marked by the cult of personality, brought forward the more careful and implicit forms of humor compared to the previously prevalent biting newspaper satire. Thus, in 1970–1980 the newspaper humor featured the wide use of literary quotes, gentle hints by way of association, and paradox. After 1990, when the Soviet law “On press and Other Forms of Mass Media” canceled governmental censorship, biting satire and sarcasm once again became dominant, and modern Russian journalism

is characterized by the prevalence of irony as a form of expressing the author's point of view.

Russian humor is predominantly explicit and didactic in character, and commonly contains an expression of contrasting feelings and elements of reflection on absurd situations. The key peculiarities of Russian humor in political articles can be demonstrated with the following examples.

(12) *Господин посол, а не пошёл бы вы? (Mister Ambassador, Wouldn't You Kindly Go to Hell, Please?) (Komsomolskaya Pravda).*

In this satirical headline, the humorous effect is achieved due to the phonetic proximity of the words “пошёл” (imperative “go to”, as in “пошёл к черту” – “go to hell”) and “посол” (ambassador). In the second part of the headline, the word “ambassador” replaces the negatively loaded word “go to [hell]” as a contextual euphemism. The author's intention is to point out the impropriety of patronizing and didactic treatment of the Czech Republic by the USA, represented by the statements of the United States assistant secretary of state for political-military affairs Andrew Shapiro.

(13) *Рубль освободили условно-досрочно (Ruble was released on parole) (Rossiyskaya Gazeta).*

This headline demonstrates the author's irony which is expressed through the personification of Russian currency in the fragment “ruble was released”. The author's goal was to inform the readers about the free rate of exchange of the Russian ruble, which is done in humorous form due to the presence of a metaphor that compares the free rate of exchange with the personal freedom granted to a person by way of release on parole.

(14) *Милонов призвал послать на “Евровидение-2017” ансамбль Вооруженных сил России (Milonov appealed to send the Russian military orchestra to Eurovision-2017) (Lenta.ru).*

The humorous effect in this headline is created by means of oxymoron because the Eurovision song contest is logically incompatible with the notion of Russian military, even in context of the orchestra. The author intended to express antagonism towards the Ukrainian negative treatment of the Russian contest applicant Julia Samoilova and to hint at the possibility of demonstrating military power in response.

Russian humor in journalistic discourse is also characterized by the use of spoken vocabulary represented by colloquial words and expressions for additional emphasis, as, for example, in the headline “Лидеры и лузеры образовательной политики” (*Leaders and losers of education reforms*) (*Nezavisimaya gazeta*), where

the word “лузеры” (from English “losers”) is used in contrast to the word “leaders” for additional humorous and emphatic effect. The presence of singular elements of spoken vocabulary in Russian journalistic discourse may be explained with the double-sided pragmatic effect that these elements produce. On the one hand, their use allows the author to attempt to establish a closer and more personal connection with the readers by making the words more casual and easier to relate to, as if the author and the reader were participating in a friendly communication. On the other hand, they serve as focal elements of the headline, attracting the reader's attention due to their substandard and sometimes unexpected appearance in journalistic discourse. It should also be noted that the use of emphatic colloquialisms in modern Russian journalistic discourse is in line with the general trend of relaxed limitations in Russian journalism since the censorship was effectively canceled in the post-Soviet era.

Overall, our results show the prevalence of allusion, word play, emphatic spoken vocabulary, oxymoron, and personification as the key means of producing humorous effect in contemporary Russian political articles, which is demonstrated in Fig. 5.

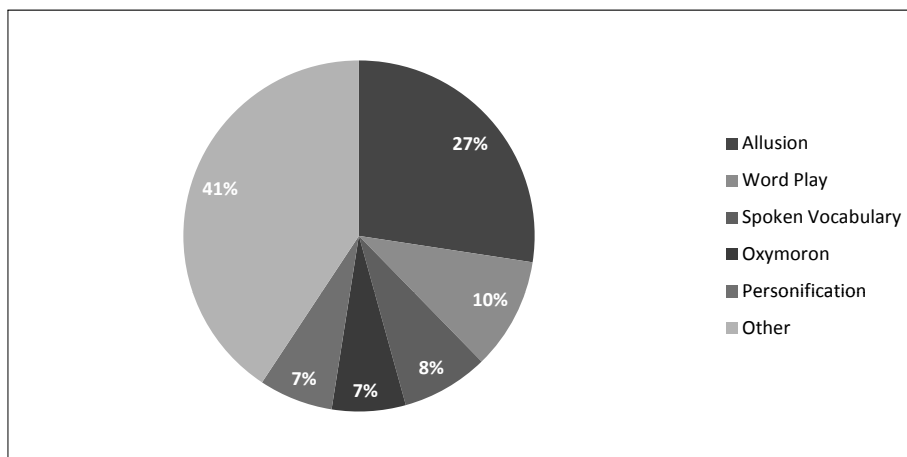


Figure 5: Predominant Means of Creating Humorous Effect in Russian Mass Media.

The analyzed humorous contexts in British, American, French, and Russian journalistic discourse may be grouped by the general type of humorous effect. Following A. N. Luk's approach to understanding and classifying comicality (Luk, 1968), we distinguish humor, satire, and irony as the three basic types of humorous effect. The distinguishing features of these types can be explained as follows. Humor is characterized by explicit positive and reconciling attitude towards the object of ridicule. Contrariwise, satire is an unambiguously negative and biting expression of the author's opinion. Irony is implicit in its character and typically presents the author's negative

attitude in a form which is masked behind seemingly positive words and expressions. Each of the above-mentioned types of humorous effect may be produced with one or more language means and stylistic devices and is either localized in a specific word or expression or spread across several sentences or paragraphs and thus requires broader contextual understanding.

The combined results of grouping the analyzed contexts into the three general types of humorous effect outlined above is demonstrated in Fig. 6.

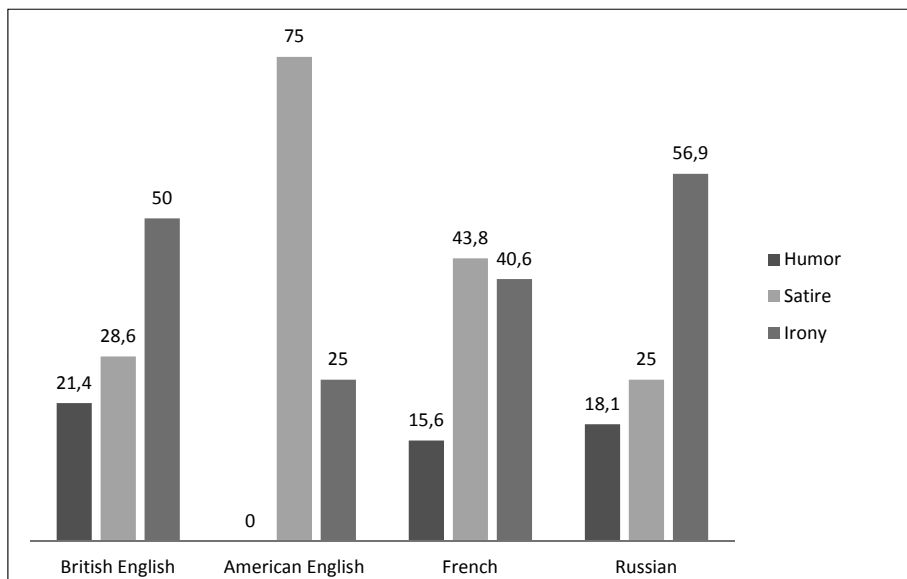


Figure 6: Correlation of Different Types of Humorous Effect in the Political Articles in Studied Languages.

7. Conclusion

The research results presented above allow us to conclude that the specific patterns of using language means and stylistic devices of humorous effect in mass media as a means of influencing the public opinion depend largely on: (a) the state structure and the state form of government; (b) the historical development of democratic freedoms, primarily the freedom of speech and the freedom of press; (c) the resulting model of journalism and its specific features and constraints, including the presence and the extent of governmental censorship of social and political journalism.

At the same time, the distribution and the prevalence of specific language means and stylistic devices producing humorous effect in journalistic discourse in different

languages are also constrained and influenced by their pragmatic potential. The analyzed means of creating humorous effect on the reader serve as powerful devices which allow the authors of political articles to exert significant influence on the readers and shift the public opinion on various political and social matters either explicitly or implicitly in accordance with the author's pragmatic intention. The pragmatic functions of the humorous devices in mass media are: (a) focusing the reader's attention on the key points of the article; (b) relating the author's evaluation of the matter discussed in the article; (c) manipulating the reader's opinion and attitude towards the subject matter; (d) masking the censurable, unethical, or otherwise undesired public statements behind humorous devices with implicit meaning.

As for the prevalence of different types of humor and different language means and stylistic devices in different languages, our comparative research shows that in American political newspaper article headlines there is a considerable dominance of satire (75.0%), a significant portion of which is sarcastic (36.4%), compared to irony (25.0%). Hyperbole is used in 18.1% of analyzed contexts, while allusion and antithesis, rhetorical question and rhetorical exclamation are used in 9.1% of contexts. British political article headlines are characterized by the prevalence of irony (50.0%) compared to satire (28.6%) and humor (21.6%). French newspaper article headlines are mostly satirical (43.8%), among which 7.1% are sarcastic, while 40.6% are ironic and 15.6% are humorous. The quantitatively prominent humorous devices in French are word play (19.0%), rhetorical question (11.8%) and allusion (9.4%). Russian political newspaper articles are characterized by the dominance of irony and self-irony (56.9%), compared to satire (25.0%) and humor (18.1%). The most commonly used language means and stylistic devices of humorous effect are allusion (27.4%), word play (10.3%), emphatic use of spoken vocabulary (8.0%), personification (6.8%), and oxymoron (6.8%).

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Keywords: humorous effect, humour, satire, irony, journalistic discourse, pragmatic potential, public opinion.

In this paper we present a theoretical interpretation of linguistic, cultural, and pragmatic aspects of using humorous effect in newspaper articles as a means of influencing and forming public opinion on political matters. The research material comprises the headlines of contemporary British and American, French, and Russian electronic newspaper articles. We present a model which can be used as a basis of interpreting the diverse means of forming public opinion via humorous effect in journalistic discourse in different languages and cultures. We demonstrate that the choice of specific humorous language means and stylistic devices used in newspapers in different languages to influence public opinion depends on the history of journalism, the peculiar features of democracy in the country where the given language is spoken, and on the individual pragmatic goals of the author.

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Humoristični učinek kot lingvistična, kulturna in pragmatična osnova za oblikovanje javnega mnenja v novinarskem diskurzu

Ključne besede: humoristični učinek, humor, satira, ironija, novinarski diskurz, pragmatični potencial, javno mnenje

V prispevku podajava teoretsko interpretacijo lingvističnih, kulturnih in pragmatičnih vidikov rabe humorističnih učinkov v časopisnih člankih kot sredstva za vplivanje in oblikovanje javnega mnenja o političnih zadevah. Predmet raziskave so naslovi sodobnih britanskih, ameriških, francoskih in ruskih elektronskih časopisnih člankov. Predstavljava model, ki ga je mogoče uporabiti kot osnovo za interpretacijo različnih sredstev oblikovanja javnega mnenja s humorističnimi učinki v novinarskem diskurzu v različnih jezikih in kulturah. V prispevku utemeljujeva trditev, da je izbira humorističnega jezika kot sredstva in slogovnega pripomočka, kakor ga uporabljajo časopisi v različnih jezikih, da bi vplivali na javno mnenje, odvisna od zgodovine novinarstva, specifičnih lastnosti demokracije v posamezni deželi, kjer se govori določen jezik, in avtorjevih individualnih pragmatičnih ciljev.