

**UNDERSTANDING TEACHERS' USE OF HUMOR
IN THE EFL CLASSROOM: A CASE STUDY IN
GUILIN, CHINA**

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by

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When I first entered Universiti Sains Malaysia as a doctoral student in 2019, a doctoral student in physics asked me what topic I was researching? I said humor. She blurted out: "Why? you are not very humorous." I was blank and a little humiliated. Then I responded weakly, "Then I need to study it." Does this sentence seem so powerless and without a sense of humor? I should have used irony to fight back but I didn't. Since then, I've been more determined to study humor, so maybe I also need to thank her. The last but not least, I would like to thank myself. After being an English teacher for many years, studying the theories of linguistics, second language acquisition

and English teaching methodology, and knowing how to analyze textbooks, understand students and design activities, I still do not seem to own the secret weapon--humor. So, I decided to study it from the time of being a Ph.D. student at USM. Besides benefiting my teaching, one of my goals is that one day I can use humor to defend my 'dignity' when faced with the 'You are not very humorous'. Instead of thinking hard, I would quickly jump out of the original frame and respond confidently, "You are also not serious."

What I am reluctant to admit but must confess is that in my first year of PhD studies, I was reviewing literature on my computer when I was suddenly seized by a panic attack. I hurriedly took a taxi to the hospital, but after a thorough examination, doctors found no underlying physical cause. They surmised I might be suffering from an anxiety disorder. While I had previously only read about such conditions in textbooks, I was experiencing firsthand the anguish of anxiety during my PhD program. The relentless self-doubt and dread hampered my progress. However, with the completion of my first major draft and newly acquired psychological techniques to adjust my mindset, the anxiety slowly began to subside. Though difficult, I learned to be gentler with myself and celebrate small wins. Now when those familiar feelings creep up, I have tools to calm my nerves and carry on with this challenging but rewarding journey.

Finally, thanks to humor, an ingenious language but full of great energy. It may not only make mundane life full of joy but also be a 'medicine' in your 'miserable' 'permanent hair damage' journey or a 'weapon' to defend yourself without going too 'weak' or too 'strong'.

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LIST OF ABBREVIATIONS

CHS	Coping Humor Scale
CLT	Communicative Language Teaching
DOPAC	3,4-Dihydroxyphenylacetic acid
EFL	English as a Foreign Language
ESL	English as a Second Language
ELM	Elaboration Likelihood Model of Persuasion
HSQ	Humor Styles Questionnaire
IHPT	Instructional Humor Processing Theory
L1	First language
L2	Second language
NCEE	The National College Entrance Examination
RQ	Research question
SLA	Second language acquisition
SDT	Self-determination Theory
TBLT	Task-based language teaching
TBHIM	The Balanced Humor Integration Model
TL	Target language

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**MEMAHAMI PENGGUNAAN HUMOR OLEH GURU DALAM BILIK DARJAH
BAHASA INGGERIS SEBAGAI BAHASA ASING: KAJIAN KES DI GUILIN,
CHINA**

ABSTRAK

Humor, sebagai satu fenomena trans-displin kompleks yang melibatkan linguistik, psikologi, sosiologi, dan antropologi, telah mencabar untuk menetapkan peranan yang jelas dalam pendidikan. Pengajar bahasa boleh mempertimbangkan humor sebagai satu alat pengajaran tetapi bukan teras pengajaran, walaupun penyelidik dan pengamal telah mengesahkan bahawa humor mempunyai pelbagai fungsi dan faedah dalam pembelajaran bahasa. Potensinya untuk memudahkan pembangunan L2 dan kepentingannya dalam kehidupan pengguna L2 semakin diiktiraf, tetapi terdapat jurang perbezaan antara bukti faedah humor dan penggunaan terhad dalam amalan. Kajian-kajian lepas meneliti faedah penggunaan humor dalam bilik darjah bahasa, tetapi sedikit yang meninjau pemahaman mendalam tentang peranan humor dari perspektif guru-guru. Menangani bagaimana dan mengapa guru bahasa Inggeris sebagai bahasa asing Cina memilih untuk mengintegrasikan atau menahan diri daripada menggunakan humor di dalam kelas adalah penting untuk menjelaskan bagaimana pembinaan kesesuaian dan keberkesanan yang ditempatkan membentuk pilihan pengajaran dalam konteks sosiobudaya. Kajian kes kualitatif ini meneroka penggunaan humor dalam kelas bahasa Inggeris sebagai bahasa kedua (EFL) Cina dan dengan itu berharap dapat menawarkan inspirasi tentang implikasi menggunakan humor dalam pengajaran bahasa Inggeris. Kajian ini sengaja memilih tiga orang guru di sekolah menengah swasta di Guilin, China,

berdasarkan tahun pengajaran guru-guru dan kemudahan penyelidikan. Sebagai tambahan kepada pemerhatian formal dan temu bual, pandangan juga dikumpul dari perbualan tidak formal dengan peserta semasa kajian enam bulan. Data dikumpul melalui rakaman suara yang dibuat oleh penyelidik semasa memerhati kelas, serta temu bual berkenaan kepercayaan dan pengalaman pengajaran peserta serta pandangan mereka tentang humor dan persepsi mereka terhadap interaksi humor tertentu di dalam kelas. Teori Ketidaksamaan, teori pemprosesan humor Instruksional dan teori penentuan sendiri digunakan sebagai kerangka konsep bagi kajian ini. Penemuan menunjukkan bahawa bilangan kali mereka menggunakan humor dalam setiap kelas adalah sangat stabil dan kekerapan penggunaan mereka hampir dengan laporan sendiri. Mereka menggunakan humor secara intuitif dan terbenam dalam gaya pengajaran mereka. Di samping menganalisis humor setiap guru mengikut taksonomi terdahulu, kajian ini mencadangkan satu taksonomi strategi humor yang digunakan dalam kelas bahasa Inggeris sebagai bahasa kedua Cina. Sikap guru-guru terhadap penggunaan humor adalah positif tetapi ambivalen atas sebab-sebab tertentu. Kajian ini mendapati lima faktor yang mempengaruhi motivasi mereka untuk menggunakan humor: strategi pengajaran, manfaat pelajar, suasana dan hubungan, manfaat guru, dan keupayaan guru. Kajian ini juga mencadangkan humor sebagai agen dalam peralihan kuasa. Humor boleh berlaku dalam peralihan kuasa melalui tiga laluan – laluan pengetahuan, emosi, dan bahasa – sementara guru menggunakannya untuk memecahkan ketidakseimbangan kuasa. Oleh itu, kajian ini mencadangkan model humor terintegrasi seimbang untuk guru-guru yang bersedia menggunakan humor dalam konteks yang sama dengan persekitaran pendidikan Cina. Memandangkan kajian ini telah meneroka penggunaan dan persepsi humor dalam kalangan guru bahasa Inggeris sebagai bahasa kedua Cina,

mendedahkan strategi dan sebab, adalah diharapkan bahawa pandangan ini akan memaklumkan integrasi humor yang berterusan dalam pengajaran bahasa Inggeris dan menunjukkan arah yang berfaedah untuk penyelidikan selanjutnya.

**UNDERSTANDING TEACHERS' USE OF HUMOR IN THE EFL CLASSROOM:
A CASE STUDY IN GUILIN, CHINA**

ABSTRACT

Humor, as a complex trans-disciplinary phenomenon involving linguistics, psychology, sociology, and anthropology, has been challenging to establish a clear role in education. Language instructors may consider humor as a teaching tool but not a core of teaching, although researchers and practitioners have verified that humor has multiple functions and benefits in language learning. While its potential for facilitating L2 development and its importance in the lives of L2 users is steadily gaining recognition, but a discrepancy exists between the evidence of humor's benefits and its limited use in practice. Previous studies examined the benefits of the use of humor in language classrooms, but few have queried a deep understanding of the role of humor from teachers' perspectives. Addressing how and why Chinese EFL teachers elect to integrate or abstain from using humor in the classroom is imperative to elucidating how localized constructs of appropriateness and efficacy shape instructional choices within sociocultural contexts. This qualitative case study explores the use of humor in Chinese EFL classes and thus hopes to offer inspiration on the implications of using humor in teaching English. This study purposefully selected three teachers in a private secondary school in Guilin, China, based on the teachers' years of teaching and research convenience. In addition to formal observations and interviews, insights were also gathered from casual conversations with participants during a six-month study. The data were collected through voice recordings made by the researcher while observing classes,

as well as interviews concerning the participants' teaching beliefs and strategies and their views of humor and their perceptions of specific humorous interactions in class. Incongruity theory, Instructional humor processing theory and Self-determination theory were used as the theoretical framework for this study. The findings indicated that the number of times they used humor in each class was very stable and they used humor intuitively and embedded it in their teaching style. Besides analyzing each teacher's humor categories according to the previous taxonomy, this study proposed a taxonomy of humor strategies used in Chinese EFL classes. The teachers' beliefs toward humor use were complicated and ambivalent for specific reasons. This study found five factors influencing their motivations to use humor: teaching strategy, students' benefits, atmosphere and relationship, teachers' benefits, and teachers' ability. This study also proposed humor as an agent in the power balancing. Humor can happen in the power balancing of three paths—knowledge, emotion, and language path—while teachers use them to break the power imbalance. Therefore, this study proposed a balanced integration humor model for teachers who are willing to use humor in contexts similar to Chinese educational settings. Now that this study has explored Chinese EFL teachers' beliefs, strategies and motivations for the use of humor, it is hoped that these insights will inform humor's continued integration in English language teaching and point to fruitful, promising directions warranting in-depth exploration for further impactful research.

CHAPTER 1 INTRODUCTION

1.1 Introduction

Educational research generally has not prioritized the study of humor because they usually see classrooms as sites where serious work is taking place (Bell, 2017). Language instructors may consider humor a teaching tool but not regard it as the core of teaching (Farnia & Mohammadi, 2021). Despite that humor is not mandatory for language learning or teaching, its potential for facilitating L2 development and its importance in the lives of L2 users is steadily gaining recognition (Bell, 2017). L2 teachers may be encouraged to produce more humor after recognizing the benefits of humor in students' learning, although it also can serve negative social functions (Attardo, 2020; Banas et al., 2011). However, the appropriate and effective use of humor in the classroom is a complex issue that requires further research across cultural contexts (Dai & Liu, 2018; Petraki & Pham Nguyen, 2016). Specifically, there is a need to examine how teachers employ humor in the distinct cultural and educational environment in China, where the cultural norms and educational values may differ from Western contexts (Yue, 2017). Investigating the use of humor within Chinese classrooms would provide useful insights into this issue and help determine best practices for the local context.

Different types of humor are utilized by EFL teachers (Heidari-Shahreza, 2018; Neff & Dewaele, 2023), but this study focuses specifically on teachers' verbal humor. Non-verbal humor (e.g. singing, dancing, acting) and student-initiated humor are excluded, as the intent is to examine the "language" part of language teachers' practice. Successful humor is defined as when the teacher makes a playful verbal utterance,

eliciting immediate laughter from students (Bell & Pomerantz, 2015; Tong & Tsung, 2020a). Moreover, this study mainly focuses on humor use by EFL teachers, rather than humor understanding and appreciation. Although the understanding and appreciation of English humor varies in Chinese culture (Dai & Liu, 2018; Jiang & Leong, 2021), humor can be an effective pedagogical tool if used appropriately (Pawlak, Kruk, & Zawodniak, 2020; Tam, 2022). Given the differences in the use of humor in the Chinese context, the present study focuses on this difference to explore EFL teachers' lived experiences and reasoning behind integrating humor.

As one of the core compulsory subjects in both Chinese primary school and secondary school curriculums, the English language has historically been taught predominantly by native Chinese teachers rather than native English speakers (Hu, 2021). Even though English skills are considered essential for Chinese students' academic and professional prospects, the vast majority of English teachers at primary and secondary levels in China are non-native speakers who learned English as a foreign language themselves (Yu & Liu, 2022). This situation raises questions about the ability of these teachers to provide high quality English instruction. Teachers with a high level of TL proficiency are believed to be more capable in providing extensive input for learners (Van Canh & Renandya, 2017), and using playful language is a signal of high English proficiency (Pomerantz & Bell, 2011). However, little research has examined whether non-native English teachers in China are able to effectively employ playful and humorous language in the classroom. Given the benefits of English teaching in a vivid, interactive and playful way that teachers appeal to, there is a compelling need for researchers and practitioners to understand how and why teachers use humor in their

classes. Investigating this issue could provide insights into how to support non-native teachers in creatively and appropriately leveraging humor and identifying educators' specific humor techniques and their rationales for employing humor provides critical insights into effective pedagogical practices. This chapter introduces the study by outlining the background and objectives of the study, the significance and statement of the problem, the research questions, definition of key terms and the limitations of the research.

1.2 Background of the Study

English as a foreign language (EFL) teachers in China work in a unique context that can make using humor challenging. Most teach large classes of 40-60 students at public secondary schools (Hu, 2021). Their students are teenagers, aged 12-18, who are mandated to take English classes multiple times per week. Teaching is highly structured around prescribed textbooks, with a strong emphasis on grammar, vocabulary and test preparation (Yu & Liu, 2022). EFL teachers rely heavily on lecturing, with students expected to listen and memorize the content. Classroom activities are teacher-centered, with minimal interaction or creative activities (Mo, 2020a). Teachers face pressure from school administrators to cover curriculum and prepare students for high-stakes English exams (Mo, 2020b). With large class sizes and limited class time, it is difficult to foster student engagement, critical thinking, and communicative abilities, let alone use humor. The focus is on serious textbook learning rather than fun rapport-building. Many EFL teachers may want to incorporate humor to enhance traditional teaching approaches, but struggle to do so given the rigid, exam-focused context they operate in (Tong & Tsung,

2020a). These factors likely influence whether and how Chinese EFL teachers use humor in the classroom.

The use of humor in the EFL classroom has gained increasing attention in recent years (Dubinsky & Holcomb, 2011; Neff & Dewaele, 2023; Suardi, 2020). Humor can be a powerful instructional tool that can enhance student engagement, reduce anxiety, and foster a positive learning environment (Akimbekov & Razzaque, 2021; Ms & Ascp, 2018). However, the effective and appropriate use of humor in the language classroom is a complex endeavor that requires a nuanced understanding of various factors. Two key factors that play a crucial role in shaping teachers' use of humor are their beliefs about humor and their motivations for incorporating humor into their instruction. Teachers' beliefs about the value, appropriateness, and role of humor in language learning can significantly influence their decision to use (or not use) humor in the classroom (Şahin, 2021). For instance, teachers who view humor as a distraction or as undermining academic rigor may be less inclined to incorporate it into their lessons, while those who see humor as a tool for fostering student engagement and rapport may be more likely to use it regularly (Heidari-Shahreza, 2021; Richmond et al., 2015).

In addition to beliefs, teachers' motivations for using humor can also shape their instructional practices. Teachers may be motivated to use humor for a variety of reasons, such as to create a positive classroom atmosphere, to manage student behavior, to facilitate language learning, or to express their own personality and teaching style (Bolkan et al., 2018; Pranoto, 2021). Understanding the underlying motivations that drive teachers' use of humor can provide valuable insights into their decision-making processes and the contexts in which they choose to employ humor. Besides humor

beliefs and humor motivations, research has shown that the humor strategies used by teachers can have a significant influence on student engagement, learning, and perceptions of the teacher (Neff & Dewaele, 2023; Schmitz, 2002; Yue, 2021). For instance, the use of linguistic humor strategies, such as puns or wordplay, may enhance students' language learning by drawing attention to the nuances of the target language (Tam, 2022). In contrast, the use of more aggressive or inappropriate humor strategies, such as sarcasm or put-downs, may undermine the learning environment and negatively impact student-teacher relationships (Luo et al., 2023).

In the past four decades, the traditional ideology of teaching methodology and the teacher's role has been criticized in China (Hu, 2002, 2021; Rao, 2002). The teacher-student relationship is a hierarchy formed because of maintaining teachers' authority and the discipline of students in the classroom (Rao, 2006; Rao & Chen, 2020). Also, students' and teachers' opinions on humor may vary. Chinese students appreciate humor and regard humorous/funny as one of the privileged characteristics of their favored teachers (Wu & Huang, 2003). Nevertheless, teachers probably do not have the same perception as students (Tong & Tsung, 2020a). They emphasize teaching content and techniques more than rapport, and many of them have not realized the challenges of building rapport with the students. Instructional humor is identically complex, and it is rarely discussed or even rarely employed in the classroom on a conscious level by language teachers and researchers (Askildson, 2005; Chen & Dewaele, 2021). Moreover, humor is less used in language classes than in other classes, and secondary teachers use slightly less humor than college instructors (Banas et al., 2011; Reddington, 2015;

Wagner & Urios-Aparisi, 2011). Thus, studies on teachers' views are research-worthy as their views play a powerful role in their performances.

Humor is a universal human experience, but people of different societies perceive, appreciate and use humor differently across cultures, maturity, level of education, intelligence, and context (Banas et al., 2011; Gibson, 2019; Jiang et al., 2019a). Cultural norms and individual knowledge play an important role in influencing how humor is used in communications and what topics are considered appropriate (Martin, 2007; West & Martin, 2019). Moreover, even people who share the same ethnicity, culture, or language might not share the same sense of humor. Even jokes from the past often fail to amuse the modern hearer (Bell & Pomerantz, 2016b). Thus, this study is one of few empirical studies conducted in the EFL context. The Chinese context shares many challenges with other Asian contexts, such as big-size classrooms, emphasis on rote memory, teacher-centered teaching, and little classroom interaction (Liao & Li, 2020; Nunan, 2004; Rao, 2002). Examining the use of humor in China hopes to reveal its applications and potential in language teaching in many similar contexts.

The Chinese teachers may be motivated to use humor regarding the benefits of humor, especially being humorous or using humor was proved as a characteristic of the master teacher, although using humor depends on several factors and does not necessarily require teachers to use it (Daumiller et al., 2019; Keeley et al., 2010, 2016). However, there are a few challenges in using humor in the EFL classroom. First, instructional humor is only a very limited part of the large repertoire of humor varieties we use in daily life (Tong & Tsung, 2020a). Second, humor is generally admitted as a challenging form of interaction for L2 users to comprehend and use, especially for those

secondary school students who are mostly at lower proficiency levels (Dewaele & Li, 2021b). Last but not least, teachers did not consider humor as important as teaching ability, and spontaneous jokes are funny but hard to make for language teachers (Luo et al., 2023; Schmitz, 2002). Moreover, humor was not valued by the Chinese even though they all loved it, and humor was often regarded as the least important factor in creativity and ideal Chinese personality (Yuan et al., 2023; Yue, 2010). So what about the situations of the use of humor in educational settings? Thus, whether Chinese EFL teachers use humor or not, what types of humor they use and why they use it or do not use it remain unclear and are worth exploring.

Based on the studies conducted in other cultures, teachers likely have used humor as long as there have been educational institutions (Dewaele & Li, 2021a; Wanzer et al., 2010). Nevertheless, related research in the Chinese context is scarce. How Chinese EFL teachers perceive humor is supplementary to understanding humor in a different context. Moreover, understanding teachers' factors regarding their use of humor can promote awareness about the motivations and types of humor used in the second language classroom, especially for those teachers who have motivations to use it. Despite previous studies affirming humor's pedagogical benefits, little research has examined how humor is actually incorporated by teachers in rigid, exam-focused EFL contexts like China.

This study will provide insights into whether and how Chinese EFL teachers incorporate humor within rigid contexts. Findings regarding EFL teachers' humor usage and perspectives can inform teacher training and encourage classroom innovations to engage students and develop positive teacher-student rapport. By exploring the interplay

between teachers' humor beliefs, humor motivations, and their actual use of humor strategies in the EFL classroom, this study aims to develop a comprehensive understanding of the factors that influence the integration of humor in language instruction. This knowledge can inform the development of teacher training programs, classroom practices, and educational policies that support the effective and appropriate use of humor as a pedagogical tool.

1.3 Problem Statement

There remains an important gap in understanding the specific humor strategies Chinese EFL teachers employ in the classroom and what factors influence their decisions regarding if and when to use humor. Specifically, there is a lack of research exploring Chinese EFL teachers' beliefs about the role and appropriateness of humor in language instruction, as well as the underlying motivations that drive their decisions to incorporate (or not incorporate) humor into their teaching practices. This problem statement justifies a study aiming to gain additional insights into these underexplored areas that impact Chinese EFL teachers' pedagogical choices related to humor usage and effects. By qualitatively examining Chinese EFL teachers' humor strategies and analyzing their beliefs and motivations around employing humor, this research can help fill the current knowledge gap around how and why teachers strategically leverage humor to support student learning and engagement.

While prior studies have validated the benefits of humor in language teaching, such as reducing anxiety (Askildson 2005), increasing motivation (Bell 2009), and facilitating comprehension (Wagner and Urios-Aparisi 2011), a gap persists in

understanding the specific ways teachers employ humor and integrate it into their pedagogy. The integration of humor into language lessons has been strongly endorsed by both students and instructors (Neff & Rucynski, 2021). Thus, humor should be taken seriously as a potentially powerful tool within a teacher's pedagogical repertoire (Neff & Dewaele, 2023). However, the strategies of using humor that Chinese EFL teachers employ in the classroom are seldom seen in academics. It is not uncommon for Chinese EFL teachers to become frustrated when they try to integrate humor into their teaching but without using effective humor strategies (Tong & Tsung, 2020b). It is also not uncommon for some teachers who tell jokes only in Chinese in their English class (Fang & Liu, 2020). This tendency indicates that those teachers may not have sufficient strategies for effectively integrating humor through the English language. They default to telling Chinese jokes, suggesting a gap in skills for leveraging humor to engage students in English. All of these factors motivate the researcher to understand better the use of humor.

Earlier studies on the use of humor in language teaching tended to focus on ESL contexts in English-speaking countries (Bell, 2012, 2005; Pomerantz & Bell, 2007). However, in recent years, an increasing number of studies have examined the use of humor in EFL classrooms in non-English speaking countries, including China, Japan, and other countries (Karahan et al., 2019; Luo et al., 2023; Neff & Rucynski, 2021; Pham Nguyen, 2014). Moreover, most of the previous studies were conducted at the tertiary level and much more research is needed at the secondary level, as secondary schools are where most EFL teaching takes place across the world (Daumiller et al., 2019; Mak, 2016). With recent curriculum reforms and calls for more communicative

teaching methods in China, teachers may be prompted to reflect on how to build better rapport with students (Dewaele & Li, 2021a). Though high-stakes testing still dominates, there is growing awareness that activities like humor can engage students, reduce anxiety, and create a more positive classroom culture (Daumiller et al., 2020). This increasing openness to innovative teaching approaches could motivate Chinese EFL teachers to consider how humor might be incorporated appropriately and effectively. Previous humor research tends to focus on the tertiary or adult level (Hofmann et al., 2020a; Huss & Eastep, 2016; Pomerantz, 2019), while an understanding of secondary level may contribute to the research.

Although the research on the learning characteristics and individual differences of language learners is the mainstream of English education in recent years, the teacher is also a factor that cannot be ignored (Lei et al., 2022; Ryan, 2020; Xu & Cooper, 2022). However, the attention of English teachers has been greatly reduced, and their emotions, such as burnout or enjoyment are rarely discussed in the field of English education even though the “student-centered and teacher as a guide” ideology is strongly advocated in China (Liu & Wang, 2020). Given this lack of focus on teachers' experiences in China, further research examining Chinese EFL teachers' perspectives and practices related to humor could provide useful insights. Considering most related studies have been done in ESL contexts and a few in China, mainly discussing the benefits of humor (Hofmann et al., 2020b; Liu & Rao, 2023; Yue, 2021), this study focus on the analysis of teacher's humor and factors influencing their behavior.

A thorough database search of Google Scholar, Scopus, and CNKI (China National Knowledge Infrastructure) was conducted to retrieve and analyze the most

cited 20 articles from 2000 to 2023. Eighteen publications were conducted in the ESL context. In the EFL context, specifically in an Asian context, the previously cited studies on EFL and language play were mainly undertaken in Thailand, Vietnam, Iran and Japan (Farnia & Mohammadi, 2021; Forman, 2011; Karahan et al., 2019; Neff & Rucynski, 2021; Petraki & Pham Nguyen, 2016). While there have been some studies examining Chinese cultural perspectives on humor (Jiang et al., 2011; Luo et al., 2023; Yuan et al., 2023; Yue, 2021, 2010, 2011), very few have investigated the specific ways that Chinese EFL teachers use humor in their classrooms. Moreover, previous studies on humor in the classroom have mostly investigated either the benefits of using humor through questionnaires or teachers' perceptions via interviews on the teachers who use humor (Bell & Pomerantz, 2016b; Bieg et al., 2019; Rao & Yu, 2019; Tam, 2022). Hardly ever research addressed why some teachers use or do not use humor. This study addresses the gap by examining the factors or motivations behind teachers' practices of humor use in China, which could understand and promote awareness of the use of humor in the EFL context.

1.4 Research Objectives

The aim of the study is to explore three key variables humor beliefs, humor strategies, and humor motivations of secondary school EFL teachers in China, in order to develop a rich, contextual understanding of how these factors influence and shape the use of humor in the EFL classroom. The objectives of this study are to:

1. Measure the frequency with which Chinese secondary school teachers employ humor in their English language teaching.

2. Identify the specific humor categories used by Chinese secondary school English teachers.

3. Identify the specific humor strategies used by Chinese secondary school English teachers.

4. Investigate Chinese secondary school teachers' humor beliefs in English language instruction.

5. Investigate the underlying humor motivations driving Chinese secondary school teachers' utilization of humor in English language teaching.

1.5 Research Questions

In order to achieve the above objectives, this study will be conducted to answer the following questions:

1. How often do Chinese secondary school teachers incorporate humor in their English language teaching?

2. What humor categories do Chinese secondary school teachers utilize in their English language instruction?

3. What humor strategies do Chinese secondary school teachers utilize in their English language instruction?

4. What humor beliefs do Chinese secondary school teachers have in English language teaching?

5. What humor motivations do Chinese secondary school teachers incorporate in their English language teaching practices?

1.6 Scope of the study

The scope of this study is restricted to the description and analysis of Chinese EFL teachers' use of verbal humor, including its frequency, types, strategies, beliefs and motivations. The purpose of the qualitative case study was to explore the role of humor in Chinese EFL teachers to understand better the differences in perceptions and practices of the use of humor. The sample is limited to six EFL teachers, including three teachers in a pilot study and three teachers who teach English language courses at a private secondary school in Guilin, China. Subject criteria excludes foreign EFL teachers as well as teachers in elementary schools or tertiary institutions. The data collection methodology involves interviews and classroom observations in six months. Geographical constraints limit the subject pool to educators in one city, and no external funding was provided, with the researcher self-financing all costs. Limitations of the study include the small sample size restricted to one locale, self-perceived data subject to individual biases, and the short research timeframe. There are a few reasons on which this study is based on.

First, there is a gap in the humor literature where teachers who use humor and those who abstain from using humor have not been compared side-by-side to understand the reasons behind their divergent choices. The previous literature has only focused on the benefits and perceptions of teachers and students. They also have not analyzed humor excerpts from the observational conversation under theoretical frameworks.

Moreover, the core research question is qualitative because the variables for explaining the research phenomenon have not been easy to identify, which is needed to explore the Chinese EFL teachers' experiences with their internal and external factors. Thus, the case study is appropriate since qualitative analysis is essential for depth, particularly when providing exemplars for a discipline, although quantitative analysis is necessary to develop the breadth of social science research (Creswell, 2014, 2015; Creswell & Poth, 2016a). Third, using a qualitative approach allowed the researcher to study the phenomenon of the use of humor in its naturalistic setting and to dress the participants' process of self-awareness and self-reflection. This research fills the gap in the use of humor by Chinese secondary school English teachers to a certain extent because most of the previous studies were conducted at the tertiary level and much more research is needed at the secondary level, for secondary schools are where most EFL teaching takes place across the world (Crossman & Harris, 2006; Mak, 2016; Silver et al., 2002). The use of humor is a complex substance in the educational context, and this study will provide some references for teachers who want to use humor and scholars who want to know the role of humor from teachers' point of view.

1.7 Significance of the Study

This study will be significant for the following reasons. Firstly, it contributes to understanding the use of humor in foreign language teaching. It reveals how Chinese EFL teachers perceive and use humor. Humor often involves sophisticated knowledge of language and culture to be interpreted successfully, and it is hard to use it even for advanced learners (Bell, 2002; Wang, 2014), so it would be necessary to know how

Chinese EFL teachers who are also as advanced learners use humor. While communicative language teaching has become prevalent, how to teach English vividly and playfully has been researched. However, few studies focused on how non-native speakers of English teachers creatively used the target language. Using humor is a creative way for EFL teachers to involve their English proficiency, communicative competence, and intercultural competence. English teachers in China may expect to use humor to teach English efficiently but their efforts of wishing to use it are hindered due to the lack of a firm theoretical foundation. This study will contribute to having more insights into the use of humor in academic research and the efforts of teachers who wish to use humor. Moreover, this study reflects different findings in the Chinese EFL context and may be useful and applicable to other similar contexts.

Secondly, it reveals the influence of education and culture in the Chinese EFL context. It makes us reflect on the unequal status in Chinese EFL classes due to exam-oriented, large-sized classes and Confucius culture. This study regarded humor as a strategy that balancing the power in the Chinese teaching context. The teachers are ambivalent about humor use because they do not want the class “lose control” and be “too relaxed”. The students are also ambivalent to some extent although they desire humorous teachers. Many students need serious teachers to supervise their studies to get good grades in exams, given that they are all under pressure to get into good schools. This research will contribute to a deeper understanding of using humor in a secondary school in the Chinese context.

Finally, this study hopes to attract attention from policymakers and practitioners to add a few humor courses on student-teacher education to improve their intercultural

competence. Booth-Butterfield and Wanzer (2010) argued that although training is unlikely to change instructors' humor orientation from low to high, as with several other communication skills, humorous communication behaviors can be improved with training and practice. Moreover, Ruch et al. (2018) found that the sense of humor can be developed to some extent through targeted training programs. For a long time in China, student-teacher education has focused on English language proficiency, rarely on intercultural competence. However, using humor relies on language proficiency and intercultural competence, especially culture-based humor, which is more difficult to appreciate than universal humor and linguistic humor (Farnia et al., 2020; Schmitz, 2002). Moreover, language play can be a marker of language proficiency because high-level participants use L2 linguistic materials in more creative ways, and high-level learners can make interactional adjustments in terms of their intercultural competence (Bell, 2006; Reddington, 2015). Understanding teachers' perceptions of their use of humor can promote awareness about improving intercultural competence through deliberate courses that can be employed in student-teacher education.

1.8 Limitations of the Study

Like other qualitative studies, this study also existed some limitations although it was carefully planned. The first was the nature of the study. Using a qualitative methodology allowed the researcher to study the phenomenon of the use of humor in its naturalistic setting, but it would be cautious about making generalizations about the participants' unique experiences and the researcher's bias and excessive self-reflection during the research. The second was the length of the study. The data was only collected

in six months, so it may not predict the changes that could happen in the long-term run. The third was the number of participants. The three participants were selected based on their years of teaching and research convenience, so it might not have included more participants from different backgrounds. Finally, the methods utilized for the data collection could be another limitation. This study relies on self-reported data from interviews and observations of classroom teaching. A potential limitation is the Hawthorne effect, whereby participants may alter their behaviors or responses because they know they are being observed and studied. Teachers may employ humor more intentionally or answer interview questions in socially desirable ways that do not fully reflect their typical practices or candid perspectives. To mitigate Hawthorne effects, the researchers aimed to build open, trusting relationships with participants through sustained interaction over the six-month data collection period, emphasizing that the study was non-evaluative and focused on understanding motivations without judgment.

1.9 Operational Definitions of Key Terms

This section defines key terminology pertinent to the study's examination of humor usage by Chinese EFL teachers. Clarifying these central concepts and their specific meanings within the scope of this inquiry will establish foundational understandings upon which subsequent review, analysis, and discussion are built. The definitions reflect synthesized insights from prior scholarly perspectives to delineate the terms applicable to the unique context and aims of the present study.

1.9.1 Humor

Humor has been defined in various ways by scholars across disciplines like psychology, linguistics, and sociology. Drawing on Martin's (2007) definition, humor refers to anything verbal or non-verbal that people say or do that is perceived as funny and tends to make others laugh. It also includes the mental processes involved in creating and perceiving humorous stimuli and the enjoyment or affective response to such stimuli. However, for this study, humor will be operationally defined as the teacher's use of playful language that elicits laughter from students. Specifically, humor here involves the teacher making a verbal utterance with the intention of being amusing, known as "playful language" (Bell, 2012; Waring, 2013). If this playful language results in immediate audible laughter from students, it will be considered successful humor. Non-verbal humor by the teacher, like singing or dancing, as well as student-initiated humor, will be excluded, as the focus is on the teacher's use of humorous language. Given the group context of a classroom, playful language and laughter from even a small number of students will qualify an instance as successful humor, as it is expected that not all students will find the same utterance humorous or be attentive at the same moments. This operational definition provides clear criteria for identifying and analyzing humor excerpts in this study based on observable teacher verbalizations and student reactions.

1.9.2 Instructional humor

Humor in classroom contexts can take many forms, but instructional humor refers specifically to teachers' strategic use of humor to serve pedagogical goals and facilitate student learning (Wanzer et al., 2010). Thus, instructional humor is distinct

from humor unrelated to educational content and objectives. Drawing on definitions from prior literature, instructional humor can be operationally defined as humor that is intentionally, judiciously, and relevantly integrated into teaching to promote student learning. This type of humor arises from and enhances instructional content and activities, modeling and reinforcing material in a humorous, engaging way. Excluded from this operational definition is humor without clear educational purpose or connection to the curriculum and learning objectives. The key components that distinguish instructional humor are the teacher's intentional and pedagogical use of humor and its integration with course content and activities to facilitate student understanding and achievement of instructional goals.

1.9.3 Humor strategies

Humor strategies can be defined as the specific verbal methods, approaches, linguistic forms, and contexts that teachers intentionally use to incorporate humor into their language instruction and interactions with students (Neff & Dewaele, 2023). Drawing on this definition, humor strategies will be operationally defined in this study as the observable verbal techniques teachers employ to deliberately integrate humorous language into their English instruction and exchanges with students. This includes but is not limited to using puns, irony, sarcasm, funny stories, and role-playing in language teaching contexts to elicit amusement and laughter from students. The key components are: 1) teacher intentionality in using humorous verbalizations, and 2) the specific linguistic forms, methods, and contexts they utilize to do so effectively during English instruction.

1.9.4 Humor beliefs

Teacher beliefs can be defined as the conscious or unconscious propositions and conceptualizations that teachers hold about teaching (Borg & Alshumaimeri, 2019). More specifically, beliefs form a dynamic, complex system that guides teachers' instructional practices and decision-making (Barcelos, 2019; Barcelos & Ruohotie-Lyhty, 2023). Drawing on these definitions, humor beliefs will be operationally defined in this study as EFL teachers' mental models and conceptualizations regarding if and how humor should be integrated into language teaching. Humor beliefs influence teachers' willingness to use humor as an instructional technique, shaping their perceptions of the value and appropriateness of using humor for educational purposes. Key components include teachers' conscious and unconscious assumptions about the role of humor in language instruction and their evaluation of humor as an effective pedagogical tool to facilitate student learning.

1.9.5 Humor motivations

Motivations can be defined as the reasons, incentives, and thought processes that underlie teachers' behaviors in their instruction (Hattie et al., 2020). Drawing on this, humor motivations will be operationally defined in this study as the specific factors that influence EFL teachers' decisions to utilize or refrain from using humor in their classrooms. These motivations are shaped by teachers' beliefs about humor, their perceptions of potential outcomes, self-efficacy in delivering humor, contextual variables, and other individual differences. Key components include the conscious and unconscious reasons and influences that drive teachers' integration or avoidance of humor in their language instruction.

1.9.6 Humor use

The use of humor is also written as ‘humor use’, ‘humor usage’ and ‘using humor’ in the dissertation. This study is particularly interested in the use of humor in the classroom that EFL teachers try to use in teacher-student interaction. The use of humor is neither studying humor, appreciating humor, or teaching humor to students. Specifically, what is meant by the use of humor is teaching with humor. Humor use involves teachers intentionally employing humor through playful verbalizations and funny language when teaching English. This is distinct from simply appreciating or analyzing humor, or explicitly teaching types and concepts of humor. The key components of humor use are teachers consciously leveraging humor through their verbalizations and delivery to facilitate student learning during English language instruction.

1.9.7 Laughter

Laughter is the physical act of expressing amusement vocally by laughing. It is important to distinguish laughter from humor itself - humor involves something that is perceived as funny or amusing, while laughter is the outward expression elicited by humor or other stimuli (Attardo, 2015). Laughter does not always follow humor attempts and can occur without humorous intent. However, in many contexts, humor and laughter co-occur when something humorous provokes an amused response. Given this relationship, this study will operationally define humor as teachers' playful verbalizations that elicit audible laughter from students. The key components are the teacher's use of humorous language and the students' observable vocal laughter in response. Requiring both teacher humor attempt and student laughter provides clear

behavioral criteria for identifying humor, as opposed to solely relying on perception of amusement which can be ambiguous.

1.9.8 Language play

Language play, also known as playful language, can be defined as creative, non-serious manipulations of language forms, often for humorous purposes (Bell, 2005, 2015). Drawing on this, language play will be operationally defined in this study as a type of humor that involves intentionally playing with linguistic forms and features to amuse others. Key components of language play are the deliberate, amusing reshaping of language by teachers through techniques like puns, alliteration, rhymes, exaggeration, silly voices, nonsense words, and reinterpreting idioms. This requires linguistic awareness and skill to intentionally manipulate language to humorous effect. The core difference between humor and language play is humor encompasses amusing someone using language, physicality, absurdity, etc., while language play focuses specifically on playful rearrangements of linguistic forms.

1.10 Summary

In this chapter, the complex role of humor as an under-utilized pedagogical tool in language education is discussed. Despite recognition of humor's benefits, gaps persist regarding how and why teachers employ it. To elucidate this phenomenon within the distinct Chinese EFL context, an in-depth qualitative study exploring teacher perspectives and practices is proposed. This examination is influenced by claims that humor facilitates language learning and represents an important technique in teachers' repertoires. The research objectives, questions, problem statement, and significance are

outlined. Scope, limitations, and key terminology are delineated to establish boundaries among the key elements under investigation - namely teacher beliefs surrounding humor usage, motivational factors, and applied humor strategies. In summation, this inquiry aims to understand the specific ways Chinese EFL teachers use verbal humor and their reasoning behind integrating it into instruction. It is hoped findings will reveal effective techniques and empower teachers to employ this advantageous yet under-utilized tool.

CHAPTER 2 LITERATURE REVIEW

2.1 Introduction

A Chinese proverb goes ‘xiao4 yi1 xiao4, shi2 nian2 shao4’, which literally means a smile can make you ten years younger. There is also a saying in English: laughter is the best medicine. Indeed, laughter has been shown to reduce stress, boost the immune system, and promote overall health and wellbeing (Akimbekov & Razzaque, 2021; Bahari & Lorica, 2019; Chelly et al., 2022). Given these benefits, it can be seen that human society attaches great importance to humor. In the current period, countless humorous content is presented to us, such as comedy movies, talk shows, and funny cartoons. People enjoy the funny content and sincerely appreciate them bringing humor to their lives. Though people need humor, the attitudes towards those who make humor have constantly changed since ancient times. For example, in ancient China, people who used humor were considered unscrupulous based on Confucious tenets (Yue, 2010). Ancient Greek and Romans also had negativity toward laughter with conceptions that humor should be civilized behavior with moral values (Davis & Chey, 2011). Due to contradictory attitudes toward humor, using humor effectively can prove more challenging than simply appreciating it. This difficulty is compounded in formal settings like classrooms where humor must be employed judiciously.

This chapter reviews plenty of definitions of humor according to previous research, and the defined one chosen in this thesis refers to the teacher’s verbal humor, excluding non-verbal humor and student-initiated humor. The background of the study in the context of English education in China is also presented. Humor in Chinese culture, Chinese education, and EFL teaching was reviewed. The chapter also discusses the