

Tabea Scheel
Christine Gockel

Humor at Work in Teams, Leadership, Negotiations, Learning, and Health

Second Edition

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Chapter 1

Introduction



Tabea Scheel  and Christine Gockel 

Abstract This chapter contains (1) introductory explanations on the relevance of studying humor in work and organizational psychology and what to expect from the book as a whole, as well as (2) an organizer for the reader, including short paragraphs on every topic. The core chapters cover the role of humor in teams, leadership, negotiations, learning, and health in the work context. Each chapter will conclude with a summary of the main findings, an outline of research gaps for future studies, and a discussion of practical implications for work and organizational psychology (e.g., consequences for employees and organizations). References for further reading will be provided at the end of the chapters. The appendix provides a collection of humor measures that are applicable in workplace contexts.

Keywords Workplace humor · State-of-the-art · Humor theories · Teams · Leadership · Negotiations · Learning · Health · Diversity · Virtual environments · Pandemic · Sustainability

1.1 Why Humor in Work and Organizational Psychology

Humor is inescapable, and humor may have far reaching consequences—these are two intriguing reasons for the relevance of studying humor in relation to work and in organizations. Although there are many similarities between humor use in private and general life as compared to work contexts, the latter has unique features which

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impact humor use and effects. These include the utility of humor, the nature of the audience (e.g., which is more diverse and hierarchical), the potential consequences (e.g., which can be more severe in and for organizations), and the influence of hierarchy (e.g., which implies certain behavioral norms and role expectations; Cooper & Schweitzer, 2025).

Humor is inherent in human beings and their interactions. Polimeni and Reiss (2006) relate the evolutionary origin of humor to adaptivity with regard to, for instance, the origins of language, hominid group size, and primate teasing. Likewise, Ramachandran (1998) combines neurology and the evolution of humor, laughter, and smiling in the “false alarm theory”: following initial threat perceptions, laughter signals that there is no such (interpersonal) threat.

Much has been written on the semantics of jokes, on humor and health or romantic relationships, but less about humor at work—though humor is potentially related to all aspects of work. However, quite some publications emerged since our first edition of this book, especially in regard to humor at work in leadership and health. Part of the reasons for the (former) lack of empirical research on workplace humor may be the immanent non-seriousness and related fear of jeopardizing one’s reputation with such a “fun topic.” However, humor is not just fun: “Humor is an inherently unstable phenomenon that can be used for a variety of purposes, from worker resistance to management discipline” (p. 421, Butler, 2016). Thus, ambiguity is fundamental for humor. Humor and laughter are inherent in and for human communication, including the sphere of work (Scheel & Zekavat, 2024).

Types of humor in the workplace can be puns, slapstick, jokes, anecdotes, and teasing, mainly used for bonding in order to reach unity and common purpose (Huang & Kuo, 2011). With joking practices, workers undermine management control and subvert power structures, but humor also functions as a safety valve for employee dissatisfaction. Jokes serve as a reflection on how things could be otherwise, showing a counter-reality to the one offered by the dominant corporate culture, thus temporarily interrupting the serious world of work (Butler, 2016). From organizational side, humor is a resource for motivating organizational members and for fostering creativity and productivity (Butler, 2016).

Likewise, Barsoux (1996) viewed spontaneous humor as an important organizational resource with multiple benefits like closing the communication gap between leader and follower, helping to reduce barriers between people, and making organizations more participative and responsive. This way, trust and a plurality of visions may foster learning and renewal. Using and managing humor in the workplace is also said to provide such benefits as stress relief, team unification, employee motivation, idea generation, and diffusion of frustration through venting (Lyttle, 2007).

Despite these positives, humor in this context has its downsides as well. For example, humor can distract us from the job at hand, hurt our credibility, or cause offense in increasingly diverse work settings. For instance, Gruber et al. (2011) describe the dark side of happiness, negative humor styles include self-defeating and aggressive types (e.g., Martin et al., 2003), and group research has a strong research history on disparagement humor (e.g., Ford et al., 2015). Accordingly, humor can be divided into adaptive and maladaptive types with a multitude of

functions each (e.g., Romero & Cruthirds, 2006). Among others, managers are responsible for fostering beneficial and reducing dangerous effects of humor. In a synthesis of studies about physiological consequences of laughter, Ferner and Aronson (2013) stress the immediate and dose-related harm; “hearty laughter” may cause cardiovascular harm (e.g., syncopes), “good belly laughs” may cause gastrointestinal harm, or laughing may dislocate the jaw.

Said, several reviews about workplace humor cover the organization management perspective (Huang & Kuo, 2011), like managerial communication (Wood et al., 2011) and managing humor in the workplace (Lyttle, 2007). Also, humor in workplace relationships is reviewed by Cooper (2008), humor styles and their implications for work contexts such as leadership are summarized by Romero and Cruthirds (2006), respectively leader humor expression and its consequences by Kong et al. (2019), and humor and emotion for workplace climate are described by Robert and Wilbanks (2012). Butler (2016) provides an organizational perspective on humor. All these reviews are very useful, still most proposed humor functions lack sound empirical support—making them prime starting points for future research attempts.

Mirroring the practical relevance of humor, the business press frequently takes up the topic (e.g., Romero & Cruthirds, 2006), with catchy titles like “Are you weird enough?” (Castelli, 1990) or “Transforming a conservative company. One laugh at a time” (Hudson, 2001). Joking practices were rather prohibited in most workplaces for much of the twentieth century—today, we observe “cultures of fun” in contemporary organizations, most famous of them being Google (Google Company Culture, 2016). The concept of Playful Work Design (PWD) by Scharp et al. (2023) promotes fun and competition at work. According to Parke and Seo (2017), humor and happiness are relevant factors of a positive experiential organizational climate. Both, the prohibition as well as an artificially induced atmosphere of playfulness can backfire. There is nothing less likely to raise a smile than being forced to enjoy yourself—especially when determined by your employer.

Humor accompanies the whole life cycle of organizations. At one extreme, start-ups with their loose, innovative appeal and informal culture may vent their ways via becoming established formal organizations by using humor for developing their culture. In Coworking Spaces, coworkers with their flexible work in diverse businesses and employment types may use humor for fulfilling their much-sought social needs (e.g., social support, Gerdenitsch et al., 2016). At the other end, the global spread of—originally Mexican (<http://fuckupnights.com/>)—Fuck-up nights presents the aftermath of organizational development: Entrepreneurs speak publically about their biggest failures and mistakes, sharing their insolvencies, misfortunes, and a laugh with their audience.

Even in science, the notion of the seriousness of scientific knowledge production changed to the popularity of positive psychology. That said, our work is not based in the tradition of the positive psychology—its potential neglect of the negative side makes it a less useful approach for grasping the multidimensional and ambiguous nature of humor. When scientists allow themselves to be funny, the reactions are heterogeneous—in 2011, an article titled “25 Years of Portative Behavior as a

Problem of Modern Psychology—Status Quo” (“25 Jahre portatives Verhalten als Problem der modernen Psychologie—Status quo”) was published in the German journal *Psychologische Rundschau*, authored by Budischewski and Nock (2011). Taken up a satirical article about the so-called door-related behavior (Salzgraf, 1985, which is a pseudonym of a German professor), the authors introduce a comprehensive model relating the intensity, frequency and speed of knocking to the dichotomous outcome “opened” or “not opened” door. Personality factors like impulsivity and dominance are modeled as mediators, resulting in portative or even contra-portative behavior. Budischewski and Nock (2011) also link the “new area of psychological research—PoPsy” to several established areas of psychology (e.g., psychiatry with the “locked-in” syndrome). After publication, it created an outrage in the scientific community, which forced the editors to explain and reply (Schmitz, 2011). It was never quite clear whether some scholars did not *get* the joke, or seriously perceived a violation of norms. Mummendey (1993) reported “of an experimental investigation surveying vampire-acts of 35 retired vampires” (p. 7), including bidimensional dentograms. Pennycook et al. (2015) published a paper “On the reception and detection of pseudo-profound bullshit,” taking the same line of satirical perspective on the scientific profession and its ways. In some cases, the very topic of the research lends itself to being made fun of, such as the book of Ringenbach (1971) cited by Knaus (1979, cf. Steel, 2007) about the history of procrastination—only that this book was never actually written. It turned out to be a joke between author and publisher (see Steel, 2007). The paper by Upper (1974) is legendary: titled “The Unsuccessful Self-treatment of a Case of ‘Writer’s Block’” it is basically a blank page—with the fictional (*really?*) reply of a reviewer praising the paper for concision and recommending print without revision. Also, the sometimes humiliating and frustrating digestion of reviewer comments inspired papers with mocking replies to some virtual reviewer (e.g., Glass, 2000).

When writing this issue of the SpringerBrief series, we kept asking ourselves whether there is any aspect in and about work that could not be related to the presence or absence of humor. We concluded that—if humans are involved—humor seems to be inevitable. However, boundary conditions may be extreme work situations (e.g., firefighting, Rosing et al., 2022) or the (female) sex of the manager producing humor (Evans et al., 2019). Finally, something we—as humor researchers—are quite used to being asked for is our favorite joke. To provide you with an answer before the question can even distract you, we agreed on this famous quote from Einstein: “We all know that light travels faster than sound. That’s why certain people appear bright until you hear them speak” (see also Butler, 2016, p. 422).

Our aim was to prepare the ground for more methodologically sound and meaningful future humor research, and thus for evidence-based humor practice. We hope you find this book and its second edition informative and useful in this regard.

1.2 What to Expect from the Book

We provide a state-of-the-art overview of humor in the workplace, offering an extensive review of existing findings from work and organizational psychology as well as additional results from other fields of humor research, if adaptable (e.g., social and cognitive psychology, sociology, linguistics). Thus, we include the latest of the relevant humor research. Our focus is on workplace humor. However, as most research is not conducted in work contexts, the chapters of this SpringerBrief refer to general results, too—sometimes extensively. However, in order to lay ground for future research, including transferring results to the work context, this is done on purpose.

Approaches in humor research are diverse (Hurley et al., 2011; Martin, 1998; Xu et al., 2023). They not only originate from different disciplines (e.g., linguistics, sociology, psychology), but include different methods ranging from participant observations to diary studies with factor analytical or multidimensional approaches. Also, the focus and levels vary (e.g., liberation, mental health, emotion-based temperament, reversal theory, comedians) as well as the conceptualization of humor (e.g., humor as a characteristic of a person or a message).

Our review depends heavily on the quality and quantity of the original work and the shortcomings of the empirical and theoretical work it is based on. The methods (e.g., quantitative/diary, qualitative/interview) and generalizability with regard to the nature of the setting and the sample are (mostly) reported in order to evaluate the contributions of the findings. We also comment on current theories and point out where further theory refinement is necessary.

Each chapter concludes with a summary of the main findings, an outline of research gaps for future studies, and the implications for practice in work and organizational psychology (e.g., consequences for employees and organizations, like well-being or turnover intentions). References for further reading will be provided in the text and at the end of the main chapters (Chaps. 3–7).

As both authors were responsible for specific chapters, different approaches will be apparent: Christine wrote Chaps. 3, 4, 5, and Sect. 8.2. Her writing follows a US-American style with a narrower focus on the topic and a view on big-picture issues. Tabea wrote Chaps. 2, 6, 7, and Sects. 8.1, 8.3, and 8.4. Her writing follows a German style with a broad focus on the topic and attention to detail. Both styles are strongly affected by our academic training on two different continents.

As a consequence of concerning ourselves with the state of the art of humor research, we strongly encourage research of all topics presented here—small and large—with a sophisticated mixed-method approach, across time and levels where appropriate, and with regard to different cultures/across cultures. Not least this latter ambition implies that even high-quality research conducted in the field of humor at work deserves sound replication.

1.3 What the Chapters Will Provide

In Chap. 2 (Scheel), the foundations for humor research are laid in that the concept(s) (and definitions) of humor and the most prominent theories are introduced. While the three main approaches of humor are superiority, incongruence and arousal theories, other useful theories for humor research are supplemented. Finally, diverse functions of humor are introduced and the different approaches to the assessment of humor are briefly described.

Chapters 3–7 are the core chapters with regard to specific topics of humor at work. Chap. 3 (Gockel) starts with a focus on humor in teams. Positive forms of humor have been found to increase cohesion and identification in teams. A close look at the evolution of laughter and humor might help to explain these bonding effects of humor in groups. We summarize which conditions help humor to increase or undermine cohesion, how humor is related to group productivity, and why it is beneficial to foster a humor-friendly climate in teams.

Chapter 4 (Gockel) focuses on humor in leadership. We first present various functions and consequences of humor use by leaders, place a special emphasis on the relationship between leader and follower, and explain how leader humor can enhance employee creativity and psychological safety. We describe why humorous leaders are perceived to be more effective and vice versa. We also point out that the association between leader humor and perceived effectiveness is influenced by several important moderators. Recent research shows which task and follower characteristics influence the effect of leader humor on various outcomes. The chapter closes with findings about how female and male leaders differ in their use of humor and in how their humor is perceived.

In Chap. 5 (Gockel), we highlight the role of humor in negotiations. First, we describe the general functions and explain the verbal indicators of humor in this specific context. We then explain the outcomes of humor in negotiations, such as financial concessions and clarify some mediators of these effects. We present divergent findings about how power is related to the production of humor in negotiations and close by explaining the potential effects of humor in online negotiations.

Chapter 6 (Scheel) focuses on humor in learning. As most of the research is done in academic settings rather than in work contexts, this chapter relies heavily on general empirical findings. We introduce two theoretical approaches, that is, the Instructional Humor Processing Theory as well as the perceived humor hypothesis. The cognitive, social and psychological functions and consequences of humor in learning and instruction are presented. For example, research on memory, immediacy, and motivation is discussed, as well as on performance and creativity—areas in which more studies have emerged since the first edition of this book. The sparse knowledge about the mode of humor presentation (i.e., textbooks, tests) and about humor in online instruction are an additional aspect. A brief discussion of humor trainings is added.

Chapter 7 (Scheel) summarizes research on humor and mental as well as physical health, in work as well as general contexts. Findings for the relationship between

humor and well-being, anxiety, depression, and burnout are presented. In addition to mental health aspects, related concepts, which are especially important in work contexts, are introduced with their relation to humor—for instance, work engagement, flow, and withdrawal. The stress-buffering hypothesis and social facilitation are discussed as mechanisms for the health-beneficial effects of humor. Empirical findings for the relation between laughter as well as trait humor and physiological processes are presented. A brief discussion of laughter and humor intervention studies are newly included. Future research has to replicate studies in the work context. Also, it is worthwhile to investigate the mediating role of humor between newer concepts like job crafting and passion for work and mental health.

In Chap. 8 (Scheel & Gockel), new avenues for future research on humor are introduced, including diversity, virtual environments and—new to this edition—humor in pandemics and how humor relates to sustainability. Moderators for the effects of humor like age, gender, and culture become more salient due to globalization as well as the sociodemographic changes in industrialized countries. As work becomes increasingly virtual, it challenges traditional routines of cooperation and makes it more difficult to send and receive cues for humorous messages. We show how people have adapted their humorous communication to the scarcity of nonverbal cues. In these environments, sometimes virtual agents take over tasks; thus, we clarify the circumstances under which these agents are perceived as humorous and the resulting consequences. Humor use and its functions in the COVID-19 (Coronavirus SARS-CoV-2) pandemic, starting in 2019, is summarized. Also, rather than fear-mongering, the functions of humor may be deployed for encouraging sustainability at the workplace, like fostering pro-environmental behavior in organizations.

Finally, in the Appendix (Scheel), a list of scales is provided that might be useful for future research about humor in work contexts. This compilation encompasses scales with a focus on coping, personality characteristics, humor types, as well as scales especially for communication and leadership in work contexts.

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Chapter 2

Definitions, Theories, and Measurement of Humor



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Abstract This chapter provides an overview of conceptualizations of humor, the most prominent theories, and theories that may be a useful foundation for research on humor at work. Definitions of humor are manifold, ranging from a communicative activity with positive emotional reactions in perceivers to an individual trait (e.g., sense of humor, cheerfulness). Humor is seen as multidimensional construct and includes the abilities to produce, recognize, and appreciate humor and to use humor as a coping strategy. The three most prominent humor theories are the superiority, incongruity, and arousal-relief theories. We discuss the intra- and interpersonal functions of humor in general, the functions of humor at work, and humor measurement. Measures of (usually self-assessed) humor range from more trait-focused and internal perspectives to humor styles and humor in work contexts. A selection of 31 humor scales for work and general contexts is presented in Appendix.

Keywords Humor definitions · Incongruence theory · Arousal-relief theory · Superiority theory · Humor functions · Humor styles

2.1 Introduction

The complexity of humor and humor theories is comparable to the experience of blind men touching an elephant. This originally Indian (but nowadays widespread) story describes how blind men touch an elephant to get an idea of what it looks like. As each one feels a different part of the elephant, they experience complete disagreement when comparing their descriptions. For instance, placing a hand at its side felt like a wall, and the one feeling the tail describes the elephant as a rope.

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Likewise, humor is a very complex phenomenon, and although each theory or definition may be correct, it may also acknowledge only part of the phenomenon.

There are many different approaches, including social and neurological ones, which can be used to grasp the concept of humor or to explain its origins. One can also explain humor from an evolutionary or cognitive perspective (Hurley et al., 2011), or collect jokes to diagnose the humor of a whole generation—as Winick (1976) did in the USA.

Nearly everyone laughs when a person slips—when it is clear that she/he/they is not seriously hurt. Slapstick works at work, too. Maybe you have a colleague who often dropped his (full) cup, so that later the mere expectation produces witty comments and laughter in your team. Maybe you share a joke about your supervisors' mood, or your colleague makes everyone giggle by wearing bright colorful shoes to an otherwise expensive, elegant suit. Or some comments of your boss may embarrass yourself while all your colleagues laugh. This list of diverse situations may be continued endlessly and demonstrates the variety humor. As evolution got us hooked on humor, we long to eat titbits of that “endogenous mind candy” (Hurley et al., 2011).

This chapter explains why such diverse phenomena as described above are labeled humor. More theory about the evolution of humor and laughter can be found in the chapter about humor in teams (Chap. 3). In the following, we provide an overview of definitions, theories, and concepts of humor as well as the ambiguous functions of humor (at work) and its measurement.

2.2 Definitions of Humor

The term “humor” has undergone several changes of meaning and has evolved from a physiological to a mental quality. One of the earliest meanings of humor (humores) was bodily fluids (lat. *Ūmor*: liquid, moistness). According to Hippocrates (400 BC), the regulation of blood, phlegm, and yellow and black bile was central for health (in Schubert & Leschhorn, 2006). During the Middle Ages, humor was understood as a quirky or odd character trait and was brought to the stage by Ben Jonson as objects of the *Comedy of humours* (1600, 1927). The shift toward an active term was initiated by Corbyn Morris (1744), including the ability to perceive and depict the comic. Jean Paul (1804/1990) was one of the first to develop a full theory of humor, with humor becoming a matter of aesthetics. Establishing a genuine psychological perspective, Sigmund Freud (1905, 1960, 1927/1961) labeled humor as the “most frugal of the types of the comic” and as the supreme defense mechanism in (re)gaining pleasure as he introduced the relevance of humor and jokes into psychotherapy.

Definitions of humor are manifold, depending on whether humor is seen as a communicative activity (e.g., Martineau, 1972) with positive emotional reactions in perceivers (e.g., Romero & Cruthirds, 2006) or as an individual trait-like sense of

humor (Martin, 1998) or cheerfulness in personality psychology research (Ruch et al., 1996). Humor is nowadays seen as having multidimensional characteristics. Citing Hehl and Ruch (1985), Martin and Ford (2018) summarized (sense of) humor as (1) the ability to understand jokes and other humorous stimuli, (2) an expression of humor and cheerfulness, (3) the ability to make humorous comments or have humorous perceptions, (4) the appreciation of diverse types of jokes, cartoons, and other humorous material, (5) the active seeking of sources that elicit laughter (e.g., comedies), (6) the memorizing of jokes and funny anecdotes in life, as well as (7) the tendency to use humor as a coping mechanism. Thus, Martin and Ford (2018) describe humor as a characteristic of a person rather than of a statement. Likewise, humor includes the abilities to produce, recognize, and appreciate humor and to use humor as a coping strategy (Thorson & Powell, 1993)—a description that demonstrates circular reasoning. In line with the multitude of humor perspectives, the characteristics of humor vary, including surprise, incongruity, comprehension, and funniness (Aillaud & Piolat, 2012). Martin and Ford (2018) distinguished four components of the humor process, that is, a social context, a cognitive-perceptual process, an emotional response, and the vocal-behavioral expression of laughter.

According to Long and Graesser (1988), humor is “anything done or said, purposely or inadvertently, that is found to be comical or amusing” (p. 4). Martineau (1972) defined humor as any communication that is perceived as humorous (reflecting circular reasoning), whereas Crawford (1994) highlighted the positive cognitive or affective reactions of listeners when witnessing someone else’s verbal or nonverbal humorous behavior. Similarly, Romero and Cruthirds (2006) defined humor as amusing communications that create a positive cognitive and emotional reaction in a person or a group. All these definitions are problematic in that they refer to the reactions of the audience. They would thus not include attempts at humor.

Also, humor is seen as an international form of social communication (Robert & Yan, 2007) and as a verbal or nonverbal message that evokes amusement and positive feelings by the receiver (Hurren, 2006). Booth-Butterfield and Booth-Butterfield (1991) emphasized the intentional use of both verbal and nonverbal communication behaviors that elicit positive responses such as laughter and joy. Though intention is not a crucial element of definitions of humor (e.g., unintentional humor; Martin & Ford, 2018; definition by Long & Graesser, 1988), it is an appropriate characterization of much of the instructional (and also organizational) humor examined so far. All these approaches view humor as a communicative activity, which ideally leads to laughter, but none of these definitions really refer to what kinds of statements are humorous as compared with nonhumorous (apart from the reaction of the audience).

Meyer (2000) defined humor as a cognitive state of mirth. Focusing on humor appreciation, Weisfeld (1993) defined humor appreciation as “a distinct, pleasurable affect that often is accompanied by laughter” (p. 142). Laughter is the most obvious behavioral expression of humor (or rather: is caused by humor) and includes a distinctive behavioral pattern that also has psychophysiological correlates (Ruch & Ekman, 2001). Ruch and Ekman (2001) defined *laughter* as a vocal expressive-communicative signal and provided an overview of laughter in terms of respiration,