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## **Equity Theory in Close Relationships**

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### **Abstract**

Throughout history, people have been concerned with social justice. In the 11<sup>th</sup> century, St. Anselm of Canterbury (1998) argued that the will possesses two competing inclinations: an affection for a person's own advantage *and* an affection for justice. The first inclination is stronger, but the second matters, too. Equity theory, too, posits that in personal relationships, two concerns stand out: firstly, how rewarding are one's societal, family, and work relationships? Secondly, how fair and equitable are those relationships? According to Equity theory, people feel most comfortable when they are getting exactly what they deserve from their relationships—no more and certainly no less.

In this paper, we begin by describing the social concerns that sparked our interest in developing a theory of social justice. Then we describe the classic Equity paradigm and the research it fostered. We recount the great intellectual debate that arose in the wake of the assertion that even in close, loving relationships, both reward and fairness matter. We end by describing current multi-cultural and multi-disciplinary research that lends a new richness to theories of social justice . . . and contributes to the theory's usefulness in addressing current social issues.

## I. Introduction

In the West, the 1960s and 1970s were a time of intellectual and social ferment. There was a great concern with social justice and spirited debate as to what was fair in life, law, marriage, and work. In the United States, it was the time of Martin Luther King's historic 1965 civil rights march from Selma to Montgomery. (On "Bloody Sunday", March 7, 1965, 600 civil rights marchers were attacked by state and local police with clubs, dogs, and tear gas.) It was the time of Jane Fonda's 1972 trip to North Vietnam to protest the war. In that same year, women lobbied, marched, petitioned, picketed, and committed acts of civil disobedience in the hopes of persuading the 92<sup>nd</sup> Congress to pass the Equal Rights Amendment, which guaranteed men and women equal rights under law. (It passed the Senate and the House, but in the end the states failed to ratify it.) It was an era when feminists such as Betty Friedan described the *Feminine Mystique*, Gloria Steinem and her colleagues founded *Ms. Magazine*, and Shulamith Firestone penned *The Dialectic of Sex*. All these feminist leaders argued for women's rights in education, law, and the workplace. On the comic side, Bobby Riggs spewed out chauvinist insults in challenging tennis star Billie Jean King to the "Battle of the Sexes". (King won handily.) Valerie Solanas contributed her mad ravings to the *SCUM Manifesto*. (*SCUM = The Society for Cutting Up Men*.) (We assumed Ms. Solanas was a witty satirist until she put her money where her mouth was and shot her pal Andy Warhol.)

## II. Personal Narrative of Equity Theory's Development

Given the times, it is not surprising that many of our friends and colleagues began to hotly debate the nature of social justice and the role that reward and fairness

play in men and women's close intimate relationships. Opinions and experiences differed widely. A few older women admitted they were grateful that their husbands allowed them the luxury of working. Thus, they went out of their way to make sure his masculinity was never threatened by their professional commitments—to ensure that their husbands never came home to a tired, disheveled, or cross wife; that the men were never “stuck” with childcare, housework, or yard work. A few of my more spirited younger friends were sick and tired of such inequities and argued that women ought to demand a marriage contract to ensure marital fairness.

Intrigued by all this speculation, Elaine Hatfield, G. William Walster, and Ellen Berscheid (1978) set out to devise a theory as to what men and women perceived to be fair in their daily encounters and the consequences of such perceptions. Ideally, we hoped to devise a theory that would be applicable to all cultures and all historical eras. We believed that a concern with fairness was a cultural universal. We were convinced that during humankind's long evolutionary heritage, a concern with social justice came to be writ in the mind's “architecture” because such values possessed survival value. Such concerns were maintained, we thought, because behaving fairly continued to be a wise and profitable strategy in today's world<sup>1</sup>. (For a further discussion of this point, see Hatfield, Rapson, & Aumer-Ryan, 2008; Tooby & Cosmides, 1996.)

Yet, we were also aware that, throughout history, societies have had very different visions as to what constitutes “social justice,” “fairness,” and “equity.” Some dominant views:

- “All men are created equal” (Equality).

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<sup>1</sup> As you can see, in developing this theory we were hoping to combine the insights of Darwinian theory, economic theory, and reinforcement theory.

- “The more you invest in a project, the more profit you deserve to reap” (contemporary American capitalism).
- “To each according to his need” (Communism).
- “Winner take all” (Dog-eat-dog capitalism).
- It’s a man’s world (Traditional patriarchy. In 15<sup>th</sup> century England, we knew, the status hierarchy was God, men, farm animals (especially horses), then women and children.)

Thus, in crafting Equity theory, we attempted to create a model that would allow scholars to take men and women’s own social perspectives into account when defining reward and fairness and justice. We came up with this model.

### **A. Equity Theory and Research**

Equity theory is a straightforward theory. It consists of four propositions:

PROPOSITION I. Men and women are “hardwired” to try to maximize pleasure and minimize pain.

PROPOSITION II. Society, however, has a vested interest in persuading people to behave fairly and equitably. Groups will generally reward members who treat others equitably and punish those who treat others inequitably.

PROPOSITION III. Given societal pressures, people are most comfortable when they perceive that they are getting roughly what they deserve from life and love. If people feel over-benefited, they may

experience pity, guilt, and shame.<sup>2</sup> If they feel under-benefited, they may experience anger, sadness, and resentment.

Insert Figure 1 here

PROPOSITION IV. People in inequitable relationships will attempt to reduce their distress through a variety of techniques—by restoring psychological equity, actual equity, or leaving the relationship.

### **B. Assessing Equity**

In practice, a relationship's fairness and equity can be reliably and validly assessed with the use of a simple measure—The Global Measure of Equity. Specifically, research participants are asked: “Considering what you put into your dating relationship or marriage, compared to what you get out of it . . . and what your partner puts in compared to what (s)he gets out of it, how does your dating relationship or marriage ‘stack up’? Respondents are given the following response options:

- +3: I am getting a much better deal than my partner.
- +2: I am getting a somewhat better deal.
- +1: I am getting a slightly better deal.
- 0: We are both getting an equally good, or bad, deal.
- 1: My partner is getting a slightly better deal.
- 2: My partner is getting a somewhat better deal.
- 3: My partner is getting a much better deal than I am.

On the basis of their answers, persons can be classified as over-benefited (receiving more than they deserve), equitably treated, or under-benefited (receiving less than they deserve).

Other, more detailed measures of equity exist, of course. Hatfield and her colleagues (2008) asked men and women who were dating, living together, and married to indicate how fair and equitable they considered their relationships to be *via* a 25-item scale—The

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<sup>2</sup> And perplexity or disgust when contemplating their partner's weakness.

Multi-Factor Measure of Equity. The areas of interest included such *personal concerns* as appearance, intelligence, and social grace; *emotional concerns*, such as physical affection and understanding and concern, and *day-to-day concerns*, such as contributing to household expenses and helping around the house. (See Young & Hatfield, 2009, for information on the reliability and validity of both these measures.)

Regardless of societal definitions or one's own concern with equity, considerations of equity have been found to be important in a wide variety of cultures and relationships—social relationships, romantic and family relationships, friendships, helping relationships, and work relationships.

### **C. The Importance of Equity in Close Intimate Relationships**

Social psychologists are well aware that relationships change and deepen over time (Hatfield & Rapson, 1993). In *Intimate Relationships*, for example, Perlman and Duck (1986) argued that relationships go through stages. They charted the initiation, maintenance, problems, repair, and termination of relationships. Equity theorists, too, have been interested in charting the degree to which couples' concerns with reward, fairness, and equity wax and wane during the course of a love affair. Scholars have discovered that how concerned couples are with reward and equity depends on the stage at which their relationship has arrived. When couples are first dating, they participate in a kind of "dating and marriage marketplace," in which considerations of reward, fairness, and equity loom large. Once men and women are deeply committed, however, they become less concerned about day-to-day reward and equity. Should a relationship deteriorate, couples—knowing (perhaps) that they will soon be back on the dating and

marriage market—may begin to worry about “What’s in it for me?” and to ask: “Do I deserve better?”

Let us review the research leading to these conclusions.

### **1. Beginnings**

In fairy tales, Prince Charming often falls in love with the scullery maid. In real life, however, dating couples—whether they are young or old, gay, lesbian, or heterosexual—generally search for “suitable” partners. As Goffman (1952) observed:

A proposal of marriage in our society tends to be a way in which a man sums up his social attributes and suggests that hers are not so much better as to preclude a merger (p. 456).

Specifically, researchers find:

- Attractive men and women assume that a suitable partner should be more socially desirable—more attractive, intelligent, personable, rich, well adjusted, and kind—than do their less attractive peers.
- Dating couples are more likely to fall in love if they perceive their relationships to be fair and equitable.
- Couples are likely to end up with someone fairly close to themselves in social desirability. They are likely to be matched on the basis of self-esteem, looks, intelligence, education, and mental and physical health (or disability). Evolutionary theorists contend that in the dating marketplace, men are willing to pay a price for good looks, virginity, fidelity, and chastity, while women willingly pay for status, support, and kindness. Market considerations have also been found to affect the amount prostitutes charge for risky sex, the sexual bargains men and women craft in prison, and the like.

- Perceived equity is important in sparking passionate love, sexual attraction, sexual passion, and sexual activity.

- Equitable dating relationships are satisfying and comfortable relationships; inequity is associated with distress, guilt, anger, and anxiety.

- Equitable dating relationships are more stable than are inequitable relationships.

In conclusion: Research seems to indicate that in the *early stages* of a dating relationship, considerations of the marketplace prevail. Men and women attempt to attract socially attractive partners and are profoundly concerned with how rewarding, fair, and equitable their budding relationships appear to be. (Additional support for these propositions can be found in Baumeister & Vos, 2004).

## **2. Flowerings**

In *Equity: Theory and Research*, Hatfield and her colleagues (1978) argued that casual dating relationships differ from deeply committed, loving, intimate relationships in several ways. Specifically:

1. Intensity of liking and loving.
2. Depth and breadth of information exchange.
3. Length of relationship.
4. Value of resources exchanged.
5. Variety of resources exchanged.
6. Interchangeability of resources.
7. The unit of analysis: from “you” and “me” to “we” (p. 183).

Long married couples, who assume they will be together for a lifetime, are likely to be fairly sanguine about momentary injustices, confident that it will all work out in the end. Also, given the complexity of marital relationships, it may be difficult for married couples to calculate moment-to-moment whether or not their relationships are fair. They may well settle for a rough and ready definition of fairness. (“Yeah, all-in-all, things



seem pretty fair to me, I guess.”) Love might also affect how people caught up in inequitable relationships go about trying to set momentary inequities right.

Yet, in the end—in even the closest of relationships—fairness and equity do matter. Most intimates assume that good deeds will eventually be rewarded. (Their partners will be grateful. They will love them more. They will wish to reciprocate.) When people are forced to suffer too much, for too long, with no hope of return, they may well begin to resent life’s unfairness. The wife of the Alzheimer’s patient may begin to ask “Why me?” and to wish she could be released from her terrible burden. Her husband may feel guilty upon contemplating her terrible plight; he, too, may cry, shamefaced: “It’s not fair” (Clark & Grote, 1998; Hatfield, et al., 1978; Hatfield, et al., 2008; Markman, 1981).

Scientists have found that most couples—single, living together, or married; affluent or poor; dating for a few weeks or married for 50 years—do care about equity. In all of these groups, degree of reward, fairness, and equity have been found to be linked to passionate and companionate love, sexual satisfaction, marital happiness, contentment, satisfaction, and marital stability (Buunk & van Yperen, 1989; Byers & Wang, 2004; Hatfield, et al., 2008; Lawrance & Byers, 1995; Martin, 1985; Schreurs & Buunk, 1996; van Yperen & Buunk, 1990). Couples in equitable relationships are also less likely to risk extramarital affairs than are their peers. They are more confident that their marriages will last, and in fact their relationships *are* longer lasting than those of their peers (Byers & Wang, 2004; Hatfield, et al., 2008; van Ypern & Buunk, 1990).

In one longitudinal study, Pillemer, Hatfield, and Sprecher (2008), interviewed a sample of dating and married men and women in Madison, Wisconsin, who ranged in age from 18 to 92; the couples been married between one and 53 years. They found that:

- Older women were hesitant to talk about fairness and equity in a marriage.

They felt that couples shouldn't think in selfish ways—worrying about whether or not they were getting their fair share.

- The vast majority of older women (85%) considered their marriages to be fair and equitable.

- Older women appeared to be less concerned about day-to-day inequities than were dating couples and newlyweds. Nonetheless, even in the best of marriages, most admitted that niggling doubts about fairness did surface now and then. As predicted, those who were over-benefited felt a bit guilty; those who were under-benefited felt far more angry than did their privileged peers.

- Stressful life events—such as the arrival of children, retirement, serious illness, or the awareness of impending death—often brought to awareness long simmering resentments over issues of fairness.

In conclusion: Research seems to indicate that although men and women who have been in a close intimate relationship for a long period of time are more tolerant of inequity than are their peers, in the end, they appear to be deeply concerned with how rewarding and equitable their relationships are.

### **3. The end of the affair**

Hatfield and colleagues (1978) argued that if men and women are unfairly treated for a prolonged period of time, they will begin to wonder: “Does my partner love me? If

so, why would he (she) treat me so unfairly?” They begin to ask: “What’s in it for me?” and “Am I getting all I deserve in this relationship?” All would agree that when couples are at the point of break-up and divorce, they often become consumed with issues of profit (rewards minus costs) and fairness and equity.

Scholars agree that misery and unfairness are linked. They disagree, however, as to the nature of the causal relationship: Does perceived injustice cause dissatisfaction or is the causal order reversed? Clark (1986) takes the latter view: she argues that in communal relationships, couples do not “keep score”; they simply do not think in terms of reward and equity. Thus, if couples *are* concerned with such issues, it is a sure sign that their marriages are in trouble. Misery, then, is the *cause*, not the consequence of perceived injustice (Grote & Clark, 1998).

In a year-long longitudinal study, Van Yperen and Buunk (1990) set out to answer this question. The authors interviewed couples who had been married for various lengths of time. They found that people in inequitable marriages became less satisfied over the course of a year. There was no evidence for the converse. It is possible, of course, that in failing marriages *both* processes are operating. In any case, it is clear that when marriages are faltering, people often become preoccupied with the pain and marital injustices they have endured . . . and this may well lead to relationship dissolution.

In sum: Scientists have explored the impact that degree of reward and perceived fairness have on men and women’s marital happiness and stability. It appears that although the concern with fairness may wax and wane during the course of a marriage, such concerns always remain there, just beneath the surface, guiding people’s perceptions, happiness, and marital choices. Love is not blind.

### **III. Ideas and Intellectual History of Equity Theory**

#### **A. Philosophical Underpinnings**

Philosophers and ethicists have long been interested in the nature of social justice, fairness, and equity. The notion that others should be treated fairly is a ubiquitous one: More than 21 religions endorse some variant of the Golden rule: “Do unto others . . .” Philosophers Thomas Hobbes, John Locke, and Jean-Jacques Rousseau, spoke of the “social contract,” Immanuel Kant of the “categorical imperative.” John Rawls, a contemporary philosopher, speaks of “the veil of ignorance.” All of these concepts ask “What is fair?” and propose that it is generally in person’s best interest to treat others as they deserve—at least most of the time.

#### **B. Early Social Exchange Theorists**

Social psychologists also attempted to understand the nature of social justice. The first modern-day scholars to propose models of social justice and social exchange (in the late 1950 and early 1960s) were sociologists George C. Homans (1958) and Peter Blau (1964) and social psychologists John Thibaut and Harold Kelley (1959). They viewed all social life as involving the exchange of goods, such as approval, esteem, and material goods. All people, they contended, are seeking maximum reward at minimum cost. As a consequence, there tends to be a balance in exchanges. Relying on the economic and behavioristic theories of the day, these scholars attempted to describe the factors that mediate the creation, maintenance, and breakdown of exchange relationships. Later, J. Stacy Adams (1965), an industrial-organizational psychologist, argued that management and labor attempt to maintain equity between the inputs they contribute to their work (such things as time, effort, and sacrifice) and the outcomes they receive from their

professions (such things as security, salary, fringe benefits, etc.) . . . compared to the Is and Os of their supervisors, peers, and employees. Relational satisfaction was assumed to depend on how fair or unfair were distributions of rewards.

In the 1960s and 1970s, such social exchange theories were well received—so long as their advocates stuck to trying to predict behavior in academic, legal, or industrial settings. When we suggested that people might also be interested in reward and fairness in the arena of love, however, there was an explosion of indignation.

### C. Early Equity Theorists and Critics

As we observed earlier, Equity theory appeared in an era in which traditional views of gender roles, men's and women's liberation, and the rules of love and sex (including innovations such as marriage contracts) were being hotly debated. Thus, it is not surprising that the contention that couples care about “What's in it for me?” and “Am I being treated fairly?” sparked a great debate. True, a prominent group of theorists—such as Jesse Bernard, in *The Future of Marriage*; Willard Waller and Peter Blau, in *Exchange and Power in Social Life*; Michael McCall, in *Courtship as Social Exchange*; Mirra Komarovsky, in *Blue-Collar Marriage*; Gerald R. Patterson, in *Families*; John Scanzoni, in *Sexual Bargaining*; and Norman W. Storer, in the *Social System of Science*—agreed that in most intimate relationships, people do indeed care about pleasure and pain, fairness, and equity.

Yet, many people found the idea of speculating about the importance of equity in love relationships offensive. They harked back to Erich Fromm's writings. In *The Art of Loving*, Erich Fromm (1956) declared that while flawed “human love relationships [may] follow the same pattern of exchange which governs the commodity and labor market, the

truest form of love is unconditional love (love given without any thought of return.” p. 3).

He further observed that while men might be so crass as to act in selfish ways in love relationships, it was in women’s nature to love unconditionally—giving without any thought of return. He notes, for example:

Fatherly love is conditional love. Its principle is “I love you *because* you fulfill my expectations, because you do your duty, because you are like me . . .” Motherly love is by its very nature is unconditional (pp. 35-36.)

In the 1970s, a variety of social commentators agreed with Fromm’s contention that people, especially women, are generally *not* concerned with reward or fairness in their love relationships—most notably Margaret Clark and Judson Mills (1979), Elizabeth Douvan (1974), and Bernard Murstein (Murstein et al., 1977).

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Shortly after the publication of *Equity Theory and Research*, for example, Elaine was invited to give a speech at Yale. At Stanford, Minnesota, and Wisconsin, she was used to quite academic discussions of research. She was stunned when at Yale she received shouts and catcalls from the audience. One fellow, for example, complained that modern-day women were selfish and unfeminine in their concerns about marital fairness. Another shouted that his sainted mother had dedicated her life to him, with nary a thought of reward. “Pleasing the family,” he contended, “should be woman’s chief joy.” Elaine was surprised that in that day and age, academics wouldn’t be more aware of the complexities of human experience and of changing gender relationships. Certainly many wives and mothers are altruistic—but even they have moments when they wonder: “How did I get into this?” Certainly, anyone parenting a teenager thinks: “Wait until you

have children of your own. . .” Elaine had just talked to an elderly woman, who had nursed her sick husband for 30 years. After his death, she remarried. At first, she had been joyous, thinking: “Now is my time.” When she discovered a few weeks later that husband #2 was ill, and she was to be consigned to be a full-time nurse yet again, she couldn’t help but cry out: “It isn’t fair.”

Clark (1986) argued that people participate in two kinds of relationships—communal relationships and exchange relationships. She observed:

In communal relationships, often exemplified by friendships and romantic relationships, people feel a special responsibility for one another’s welfare. They give benefits in response to the other’s needs or to please the other. In exchange relationships, often exemplified by acquaintances and business relationships, people feel no special responsibility for other’s welfare. They give benefits with the expectation of receiving comparable benefits in return or in response to benefits previously received (p. 414).

(Today, a number of theorists would agree with Clark’s thesis that if couples are overly concerned with moment-to-moment equity, it is a “tip off” that there is something wrong with their relationships. See, for example, Aron, Aron, Tudor, & Nelson, 1991; Sprecher, 1989; Van Lange, Rusbult, Drigotas, Arriaga, & Witcher, 1997.)

In a series of studies, Clark studied behavior in communal versus exchange settings. In these prototypic studies, a *communal orientation* was manipulated by introducing college men to an attractive *single* woman who acted as if she were interested in friendship. An *exchange orientation* was manipulated by introducing college men to an attractive *married* woman, who claimed to possess all the friends she desired. Men

and women were assigned to work on some puzzles. During the encounter, the young woman asked the young man to assist her with her puzzles, and he complied. She then offered (or did not offer) to reciprocate. Men's feelings for the woman when she immediately offered (did not offer) to assist *him* depended on his orientation. In the communal condition, men preferred women who accepted help without immediately offering to pay them back. In the exchange setting, men preferred the (married) woman who accepted his aid, then offered to reciprocate in kind.

Clark (1986) and Williamson and Clark (1989) concluded that in dating, marital, and family relationships, communal norms prevail: men and women wish to please their partners, to care for and nurture them, and reject such crass considerations as “score-keeping” or a concern with *quid pro quo*. Relationships are complex, however, and a more cynical interpretation of Clark's results is possible. Normally it takes time for people to fall in love and commit themselves to an intimate relationship. In Clark's studies, men and women had just met. When “Prince Charming” assisted the “damsel in distress,” there might have been two reasons why he preferred the attractive single women who did not insist on reciprocating in kind: (1) men might have possessed a communal orientation, as Clark believes; or (2) men may offer dinners, theatre tickets, and assistance to a beautiful woman, in hopes that she will willingly repay them with affection, gratitude, a date, or sex. The breathless “How can I ever repay you?” is a TV cliché. In their heart of hearts, men in Clark's (1986) study may have may have been hoping to participate in an exchange—albeit a complex one.



On the face of it, the Clark perspective seemed diametrically opposed to our own. When one looks closer, however, the two often seem to merge. As they say, “the devil is in the details.” Consider the following observations by Clark and her colleagues:

- Men and women prefer physically attractive mates, in part because the attractive are perceived to be more sensitive, kind, and capable of communal relationships than their peers (Clark, 1986)
- People who sacrifice on their partner’s behalf, assume that their partners will be grateful, and become more loving and trusting than before, and thus more likely to “be there for *them* when the need arises” (Clark & Grote, 1998; Grote & Clark, 2004).
- Couples may prefer communal relationships, yet when desires and needs conflict, as they inevitably do, in the interests of fairness, men and women often decide to take turns in reaping benefits or suffering costs (Grote & Clark, 1998).
- People may differ in how communally oriented they are. A wife may assume her chivalrous husband is delighted to cater to her needs; her less communally oriented husband may resent what he considers to be her “exploitative” behavior (Mills et al., 2004).
- Some people are cunning and devious. A young medical student may ask his wife to put him through graduate school, only to divorce her upon graduation. In such cases, his communally oriented wife would naturally feel resentful at the betrayal (Williamson & Clark, 1989).
- When people suspect their mate is not communally oriented—i.e., he does not care about their desires and needs—they will begin to mistrust the other, to “keep records,” and worry about whether or not they are being fairly treated (Grote & Clark, 1998).

No matter how good a relationship, then, even in Clark's paradigm, it appears that now and then people ask themselves "Am I loved?" "Is my dating relationship or marriage rewarding?" "Is it fair and equitable?" The answers people come up with may well have a profound impact on their feelings about their relationships.

### C. Development and Growth of Equity Theory Over the Years

In many ways, the changing interests of Equity theorists has paralleled changes in Social Psychology theorizing and research (in general) over the last 25 years (see Berscheid, 1992). Specifically, with the passage of time we became increasingly interested in the cultural, social, and biological forces that shape people's lives; a broadening and deepening of Equity theory (to investigate more long-term relationships), and an increased sophistication in social psychological research methods.

**1. Crafting equity theory.** Firstly, although from the start we yearned to integrate the insights of Darwinian theory, economic theory, and Hullian and Skinnerian reinforcement theories in crafting Equity theory, in fact in those early days we were forced to focus more on nurture than nature. True, in the 1960s and 1970s, some pioneers like Hamilton (1964), Trivers (1971), and Smith (1974) assumed that altruism, as well as aggression, was wired into humankind. (Theorists talked about the advantages of "group selection," "kin selection or inclusive fitness" and "reciprocal altruism" (a version of "Blood is thicker than water," and "If you scratch my back, I'll scratch yours.") Nonetheless, the influential theorist was Dawkins (1976), who contended in *The Selfish Gene* that day-to-day people are programmed for savage competition, ruthless exploitation, and deceit. Admittedly, altruistic acts occurred—but alas, such altruism was more apparent than real. Our challenge was, then, to craft a theory that accounted for

people's desire for fairness and justice using primarily social constructionist and reinforcement models. Propositions I through IV focused on the social forces that prod people to care about social justice. The evidence for our contentions came, for the most part, from cultural psychology, social psychology, and I/O research.

In a subsequent section, we will discover that Darwinian theory has itself evolved. Today, evolutionary theorists have no trouble accounting for people's desire for fairness and justice. Were we crafting Equity theory today, we would be able to argue that people are predisposed both by nature and nurture to care very much indeed about social justice and to provide compelling evidence from a variety of disciplines for that contention.

**2. Broadening and deepening Equity theory.** In the early 1960s, I (EH) and my colleague Ellen Berscheid were primarily interested in theorizing about a totally neglected area—passionate love affairs. Our interest in this research topic was a natural one. Firstly, we were young and all our friends were personally interested in this topic. Better yet, we were working in an as yet untrodden territory. Anything we discovered was bound to be interesting! Luckily, college students, often in the throes of passionate infatuations, were readily available as research participants.

The critics of Equity theory—such as Margaret Clark and the late Judson Mills—were focused primarily on close, intimate, long-term relationships. Their contention that Equity processes were likely to operate in a completely different way in deeply intimate settings was an exciting impetus to broaden our theory. It motivated us to try to deal with people's perceptions of fairness at every stage of the life cycle and to learn more about how Equity processes played themselves out in these complex relationships.

**3. The appearance of Innovative psychometric and research techniques.**

Since the 1970s, social psychologists have been hard at work developing a panoply of “user friendly” psychometric techniques for measuring psychological constructs. Technically, equity is defined by a complex formula (Traupmann, Peterson, Utne, and Hatfield, 1981; Walster, 1975). Respondents’ perceptions as to the equitableness of their dating relationships or marriages is computed by entering their estimates of the Inputs and Outcomes of Persons A and B ( $I_A$ ,  $I_B$ ,  $O_A$ , and  $O_B$ ) into the Equity formula:<sup>3</sup>

$$\frac{(O_A - I_A)}{(|I_A|)^{KA}} = \frac{(O_B - I_B)}{(|I_B|)^{KB}}$$

Respondents are classified as “over-benefited” if their relative gains exceed those of their partners. They are classified as “equitably treated” if their relative gains equal those of their partners, and as “under-benefited” if their relative gains fall short of those of their partners.

After conducting a great deal of research—and suffering through laborious data entries and complex calculations (which were often done by hand in that era), we abandoned our devilishly complex technique for assessing equity. Our original equity measure required us to ask questions (about inputs and outcomes) that respondents found it difficult to answer, and for the experimenter to record data, and perform calculations that were often difficult to perform—at least without errors! (A lot of calculations were

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<sup>3</sup> The Equity formulas used by previous researchers, from Aristotle to Stacy Adams, only yield meaningful results if A and B’s Inputs and Outcomes are entirely positive or entirely negative. In mixed cases the formulas yield extremely peculiar results. Thus, we proposed an Equity computational scheme designed to transcend these limitations. See Walster (1995) for a discussion of the problems and the mathematical solutions. The superscript k simply “scales” equity problems (by multiplying all inputs and outcomes by a positive constant) such that the minimum of  $|I_A|$  and  $|I_B|$  is greater than or equal to 1.

done by hand or with hand calculators in those days.) Then one day, it suddenly occurred to us that the best way to find out what we wished to know was to directly ask our respondents! Thus, in the Equity Global Measure (described earlier) we simply asked couples to think about their relationships and tell us how fair and equitable they seemed to be. Possible answers ranged from +3: “I am getting a much better deal than my partner” to -3: “My partner is getting a much better deal than I am.”

So obvious—and yet it had taken us a year or two to realize that this was the best way to find out what we wanted to know. (Sort of like the NASCAR builder who suddenly realizes that the horse-and-buggy might not be the best automotive model.) This “time saving” was especially useful when we used the Multi-trait Measure of Equity. Twenty-five questions instead of 100!

Since the early days, social psychologists’ repertoire of research techniques has increased markedly. In the 1960s (as today), I (EH) was a specialist in social psychological experiments. Though I still value true experiments, now and then I and my colleagues turn to more complex methodologies—qualitative analyses, cross-sectional and long-term longitudinal studies, interactive paradigms, analyses of papal and church edicts, demographic data, historical and anthropological research, and the like.

The “hardware” of social psychologists has improved, too. Today, scholars can study people’s reactions to inequity by utilizing audiovisual recordings, social-psychophysiological measures, fMRIs, physiological recordings, and a variety of unobtrusive measures. All of these new techniques give us a better understanding of the way concerns with Equity play themselves out in real life settings.

#### **D. Current Research: A Multi-Disciplinary Approach**

At the present time, some of the most interesting research into the nature of social justice emanates from scholars from four different intellectual traditions: (1) cultural scholars interested in societal definitions as to what is fair and equitable; (2) evolutionary theorists, who argue that a concern for justice arose early in humankind's long prehistory, and speculate about the ways in which this ancient "wiring" might affect contemporary visions of social justice; (3) neuroscientists, who are interested in charting the brain activity associated with perceptions of fairness or unfairness; and (4) primatologists, who speculate about the extent to which primates' sense of justice is similar or different from that of humankind.

Let us now consider a scattering of research from these four areas, just to give readers a sense of what is going on.

Is morality relative to culture? I would say that it is—and also that it isn't.

—Eric Knickerbocker

##### **1. Equity: Cultural Considerations**

Cultural theorists have long been interested in the impact of culture on perceptions of social justice. Anthropologists like Richard Shweder (1987) and Alan Fiske (2002), for example, surveyed moral concerns across the globe. All people, they argue, possess a sense of fairness; they assume people should reciprocate favors, reward benefactors, and punish cheaters.

Cultural theorists also contend that culture exerts a profound influence on how fairness is defined, how concerned men and women are that their intimate affairs be

equitable, and how rewarding and equitable love relationships are likely to be (Amir & Sharon, 1987; Aumer-Ryan, et al., 2006; Murphy-Berman & Berman, 2002).

Triandis and his colleagues (1990), for example, argued that in individualistic cultures (such as the United States, Britain, Australia, Canada, and the countries of northern and western Europe) people generally focus on personal goals. In such societies, people are concerned with how rewarding (or punishing) their relationships are and how fairly (unfairly) they are treated. Collectivist cultures (such as China, many African and Latin American nations, Greece, southern Italy, and the Pacific Islands), on the other hand, insist that their members subordinate personal goals to those of the group: the family, the clan, or the tribe. It is tradition, duty, and deference to elders that matter. Rosenblatt and Cunningham (1976) claimed that equity is of less importance in collectivist societies: “[regardless of] who has the better life, a man or a woman, they [people of non-U.S. cultures] might argue . . . that the lives of men and women are different and not comparable” (cited in Buunk & VanYperen, 1989, p. 82).

Do cultures differ in how much importance they attach to dating and marital fairness and equity? In a series of studies, Aumer-Ryan and her colleagues (2006) attempted to find out. They interviewed a Japanese-American, West Indian, and multi-cultural internet users, seeking answers to three questions. In different cultures, do men and women: (1) differ in the value they ascribe to equity in dating and marital relationships—some considering it to be crucial, others dismissing “fairness” as of trivial importance? (2) differ in whether they consider their own relationships to be equitable or inequitable? and (3) differ in how satisfied (or upset) when they discover their own relationships have turned out to be strikingly equitable/inequitable?

Aumer-Ryan and her colleagues (2006) found that, in all cultures, people considered reward and equity to be the gold standard of a good relationships. Both Westerners and their non-Western counterparts insisted it was “important” to “very important” that a courtship relationship or marriage be equitable.

The authors did observe some fascinating cultural differences, however. People around the world may aspire to social justice, but few were lucky enough to achieve that goal. People in the various cultures differed markedly in how fair and equitable they considered their relationships to be. Men and women from the United States claimed to be the most equitably treated. Men and women (especially women) from Jamaica, in the West Indies, felt the least equitably treated. Jamaican women often complained about men treating women as “second class citizens” and about men’s lack of commitment to relationships. In describing men’s attitudes, one woman quoted a classic Calypso song by Lord Kitchener (1963), and the repeated lyric: “You can always find another wife/but you can never get another mother in your life.” Such attitudes, the women claimed, make it very difficult for them to find a relationship that is rewarding, fair, and fulfilling.

In all cultures, men and women reacted much the same way when they felt fairly or badly treated. All were most satisfied when receiving exactly what they felt they deserved from their relationships—no more (perhaps) but (just as in the West) certainly no less. (For additional research on this topic, see Murphy-Berman & Berman, 2002; Westerman, et al., 2007; Yamaguchi, 1994.)

Cultural psychologists not only give us information as to cultural differences in the way people define social justice. Cultural psychologists and historians also provide a window onto understanding the impact of social change on societal definitions of



fairness. Some examples. Historians point out that globalization carries with it profound transformations in men and women's roles and in gender equality (Hatfield & Rapson, 2005). What impact does the movement from a traditional to a modern-day society have on the way men and women define fairness? How contented are men and women facing such changes? Do men tend to cling to the past while women rush into the future? How do men and women attempt to deal with the changes they perceive? Such research may provide new insights into the nature of social justice.

*Is it not reasonable to anticipate that our understanding of the human mind would be aided greatly by knowing the purpose for which it was designed?*

—George C. Williams—

## **2. Equity: The evolution of a cultural universal**

In the past 25 years or so, social psychologists have begun to explore the evolutionary underpinnings of social justice. (See, for example, the classic work of Robert Trivers [1972] or Richard Dawkins [1989], on the probable evolution of reciprocal altruism and social exchange.) As Cosmides and Tooby (1992) observe:

It is likely that our ancestors have engaged in social exchange for at least several million years. . . . Social exchange behavior is both universal and highly elaborated across all human cultures—including hunter-gatherer cultures . . . as would be expected if it were an ancient and central part of human life (p. 164).

Currently, interesting work on social justice from evolutionary perspective is being conducted by scholars such as Rob Boyd (Boyd, et al, 2003). They provide strong support for the notion in Proposition II that Groups will reward those who treat others fairly and punish those who do not.”—even at considerable cost to themselves. Later in

this chapter, we will discuss some of the evidence from neuroscientists and primatologists relevant to their observations.

### **3. Equity: fMRI research**

In recent years, neuroscientists have begun to investigate the cognitive factors (and brain processes) that are involved when men and women's confront moral dilemmas. These concern such things as the nature of social justice and how a variety of competing moral claims—such as “What's more important: the claims of friendship or the demands of fairness and equity in a social exchange?”—are resolved. Robertson and her colleagues (2007), for example, presented men and women with several real life moral dilemmas. Using functional magnetic resonance imaging (fMRI) techniques, they studied people's brain activity as they pondered such dilemmas. The neuroscientists found that sensitivity to moral issues (in general) was associated with activation of the polar medial prefrontal cortex, dorsal posterior cingulated cortex, and posterior superior temporal sulcus (STS). They speculated that moral sensitivity is probably related to people's ability to retrieve autobiographical memories and to take a social perspective. They also assessed whether sensitivity to social concerns as distinguished from impartial justice involved different kinds of neural processing. They found that sensitivity to issues of justice (and social exchange) was associated with greater activation of the left intraparietal sulcus, whereas sensitivity to care issues was associated with greater activation of the ventral posterior cingulated cortex, ventromedial, and dorolateral prefrontal cortex, and thalamus. These results suggest that different parts of the brain may operate when people ponder their duty to loved ones versus their obligation to be fair and just to all. For additional neurobiological speculations as to the neural circuits

involved in the perception of and reaction to social inequality, see Borg, et al. (2006), Raine and Yang (2006), Reis, et al. (2007), Watson and Platt (2006), and Witvliet, et al. (2008).

Neuroscience is still in its infancy, of course. Many social scientists have sharply criticized the widespread use of fMRI techniques to study the nature of social justice, claiming that currently the fMRI studies track only superficial changes and lack reliability and validity (Cacioppo, et al., 2003; Movshon, 2006; Panksepp, 2007; Wade, cited in Wargo, 2005). Nonetheless, this pathbreaking research has the potential (as it grows ever more sophisticated) to answer age-old questions as to the nature of culture, perceptions of social justice, and the ways in which people react when faced with equitable or inequitable treatment.

#### **4. Equity: The “concern for justice” in other species**

Today, paleoanthropological evidence supports the view that notions of social justice and equity are extremely ancient. Ravens, for example, have been observed to attack those who violate social norms. Dogs get jealous if their playmates get treats and they do not. Wolves who don't “play fair” are often ostracized—a penalty that may well lead to the wolf's death (Bekoff, 2004; Brosnan, 2006).

Primatologists have amassed considerable evidence that primates and other animals do care about fairness. In a study with brown capuchin (*Cebus apella*) monkeys, Brosnan and de Waal (2003) discovered that female monkeys who were denied the rewards they deserved became furious. They refused to play the game (i.e., refused to exchange tokens for a cucumber) and disdained to eat their prize—holding out for the grapes they deserved. If severely provoked (the other monkey did nothing and still got

the highly prized grapes instead of the cucumber) capuchins grew so angry that they began to scream, beat their breasts, and hurl food at the experimenter. Interestingly, in a later study, the authors found that chimpanzees (*Pan troglodytes*) were most upset by injustice in casual relationships. In chimps' close, intimate relationships, injustice caused barely a ripple (Brosnan, Schiff, & de Waal, 2005). There is some evidence that in close groups, chimps will voluntarily set things right. We see, then, that different species, in different settings, may respond differently to injustice. (Some critics have argued that in these experiments there is a confound between "impaired self-interest" and "injustice", since injustice was manipulated by denying the chimps reward. Only subsequent research can determine whether or not these primates can truly be said to be seeking justice.)

In the late 1990s, Ronald Noë and Peter Hammerstein (1994) proposed the notion of "biological markets"—predicting that primates would respond to much the same market forces as men and women do in selecting their mates. Recently, Ronald Gumert (2008) observed 50 longtailed macaques in a reserve in Central Kalimantan, Indonesia. He found that in essence male macaque monkeys pay for sex by grooming the female. "It suggests that sex is a commodity," he observed. And as with other commodities, the value of sex is affected by considerations of supply and demand. Gumert observes:

A male would spend more time grooming a female if there were fewer females in the vicinity . . . And when the female supply is higher, the male spends less time on grooming. . . . The mating actually becomes cheaper depending on the market (p. 1).

Potentially, this fascinating animal research may provide some insights into three questions that have intrigued equity researchers:

- When, in primates' long pre-history, did animals begin to feel "guilty" about receiving "too much," as well as feeling outraged when they are "ripped off"? (Brosnan, et al., 2005; Brosnan, 2006).

- Are animals more (or less) concerned about fairness in despotic, hierarchical societies than in those that are relatively egalitarian? (Brosnan, 2006).

- Are primates and other animals more (or less) concerned about inequities in close kin relationships than in more distant encounters? (Brosnan, et al, 2005).

#### **IV. Equity Theory's Applicability to Relationship Issues**

Essentially, the Equity argument goes as follows: People may be motivated by self-interest, but they soon learn that the best way to survive and prosper is by following social rules as to what is fair or unfair. Thus, all-in-all, men and women will feel most comfortable when they are getting roughly what they deserve from their relationships. This fact has several practical implications:

**Mate Selection.** When pop-psychology authors give advice, they often assume that all their readers are entitled to all of life's riches. Romantics are eager to take such "advice." We once asked one of our clients, who complained that all the good men were taken, what she was looking for in a mate. She quickly scribbled a list of qualities she considered indispensable. Her list comprised more than 200 items! Many of them were contradictory. ("I want an ambitious and successful moneymaker" and "I want someone who will do at least 50% of the housecleaning and childcare." This list was presented without a trace of irony.

Many people, sad to say, think very much along these lines and are convinced that through the magic of positive thinking, “affirmations,” eHarmony.com, and such, they can “have it all” (Rapson, 2008). And, you may ask, why not?

To equity theorists, such expectations are wildly impractical. Of course everyone longs for perfection. Unfortunately, the supply of perfection is somewhat limited.

In the musical *Showboat*, a hard working showman, Frank, pleads with a young girl, Ellie, to marry him. Her saucy reply:

After I have looked around the world for a mate,

Then, perhaps, I might fall back on you!

When I am convinced that there is no better fate,

Then I might decide that you will do.

A harsh way of putting it, but indeed there is more than a grain of truth in her soliloquy. People do often consider their “market value” when deciding what they will settle for in a mate. In real life, imperfect humans with run-of-the-mill flaws (like all of us) had better resign themselves to the fact that they will have to settle for other humans no better and no worse than themselves.

**Saints and Sinners:** How do couples, caught up in unbalanced relationships, generally handle their feelings of distress? Equity theorists observed that men and women can reduce distress via three techniques:

1. *Restoration of actual equity.* One way individuals can restore equity to an unjust relationship is by voluntarily setting things right . . . or by urging their partners to do so. Couples do often make considerable effort to balance things

out. The husband who has been irritable because of stress at work may try to make amends by taking the family on a holiday when the pressure lets up.

2. *Restoration of psychological equity.* Couples in inequitable relationships can reduce distress in a second way. They can distort reality and convince themselves (and perhaps others as well) that things are perfectly fair just as they are. A variety of studies have documented the imaginative techniques that people use to justify injustice. Some studies find, for example, that harm-doers rationalize the harm they inflict on others by denying they are responsible for the victim's suffering ("I was just following orders"), by insisting that the victim deserved to suffer, or by minimizing the extent to which the victim suffered from their actions. There is even some sparse experimental evidence that, under the right circumstances, victims will justify their own exploitation.

3. Finally, if couples are unable to restore equity to their intimate relationships, there is a third way they can try to set things right. They can *leave the relationship*. This does not always mean divorce. A person will sometimes "opt-out" by abandoning their partners emotionally. New mothers, less attracted to their husbands than to their newborns, may insist that their infants sleep between them. This is a most effective strategy for keeping the couple apart. Or couples may spend all their leisure time "drinking with the boys" or "shopping with the girls," ensuring that they will rarely spend time alone together as a twosome. Both partners may risk their hearts in extramarital affairs. Or, finally, they may simply leave altogether.

The vast literature on how people deal with inequity has practical implications for close relationships. We know, for example, that people come to love those they treat with kindness and to despise those they abuse. Relationships should go best when they are balanced, when both people love one another, sacrifice for one another, and are loved in return.

Yet, even in the best of relationships, people have to be wary if they spot things going awry. If you think about the close relationships of some of your friends, you can probably come up with some examples of people who are emotionally stingy and hence give too little in relationships or who are always willing to give too much. How have these unbalanced affairs have worked out? Here are couple of examples from our experiences as psychotherapists:

- One of our clients was appallingly narcissistic. He was good-looking and had a sort of raffish charm, but he wasn't willing to make *any* compromises. "You compromise once," he said, "and you set a precedent; there's no end to it." In singles bars, women swarmed around him. However, once they started spending time with him, they soon became irritated. At first they could convince themselves that it was "just this once" that they would be stuck in the kitchen preparing a spontaneous dinner for 10 of his pals while they watched the Super Bowl. Only this once would he ask her to research and type his reports while he took a nap. But as the days turned into weeks and the "just-this-onces" became a mantra, the rationalizations turned to seething rage. The women felt ripped off. Eventually they left the kitchen and the computer keyboard, and walked away from the relationship.



If men and women know deep down that they are taking advantage of their partners, they should be warned that they may be playing a dangerous game. Sometimes people win all the battles only to lose the war. Their partners give in and give in, until finally they have had enough: they get fed up and leave.

- Another of our clients was very paternal; he was always attracted to “wounded birds”—beautiful young women who were so troubled and so uneducated that they couldn't make it on their own. He tried to anticipate all their needs and showered them with expensive presents. Any time that trouble threatened, he tried harder and gave yet more. Inevitably, his relationships fell apart. His young girlfriends were grateful; they felt they *should* love him (and were ashamed that they couldn't). But they just didn't. “Where was his self-respect? Why was he so desperate?” “What was wrong with him?” They felt smothered. They couldn't bear to touch him. They had to flee.

Men and women have to be able to set limits. If loving people become aware that their mates are taking them for granted or treating them like doormats, they must have the strength to complain, draw the line, or give up the relationship. Otherwise, the relationship becomes a dangerously inequitable one.

#### IV. Equity Theory's Applicability to Social Issues

In this chapter, we come full circle. When discussing the origins of equity theory, we spoke of the social ferment of the 1960s and 1970s. Today, 40 years later, in the West, these spirited debates about the nature of social justice have borne fruit. As Rapson (2008) observed, scholars generally agree that the two most significant social

transformations of the 20<sup>th</sup> and 21<sup>st</sup> centuries are: (1) the globalization of science and technology; and (2) the women's movement.

In the West, we have not yet achieved gender equality, though the approach toward that destination has been rapid in recent decades, particularly in parts of northern Europe. Male supremacy, however, continues to be the rule worldwide. When the United Nations sponsored a trio of human rights conferences in Vienna, Geneva, and Beijing, members of the world community agreed that abuses of women's rights—which include female infanticide, genital mutilation, the sale of brides, dowry murders, *suttee* or widow burning (in India, widows are still sometimes required to immolate themselves on their husbands' funeral pyres), and discriminatory laws against women's civic, social, and legal equality—are, in fact, abuses of human rights generally. The members also agreed that “culture” and “tradition” can no longer be cited to justify repression of half the world's population, especially since “tradition” has been defined by the powerful men in those societies. Gender equality around the world, including the developed world, is a long way off.

Yet, the winds of modernism are sweeping even into the most well-guarded sanctuaries of the male privilege. A revolution in gender and love relations has begun in China, Japan, Mexico, Latin America, North Africa, Russia, and even in Turkey, Saudi Arabia, and some other Arab nations (see Hatfield & Rapson, 2005, for the research in support of these conclusions.) In different societies, these historic changes are moving at different speeds, of course. The women's movement has had a greater impact on men and women's lives in Europe than in the Middle East, in urban than in rural settings, in secular societies than in theistic cultures, and in wealthier than in poorer nations. But

the times they are a' changin'; and the changes we have described are of monumental significance.

These epochal historical movements are likely to profoundly transform men and women's perceptions as to what is fair and equitable in love relationships. Historically, women have had little power. This meant that they possessed little freedom to shape their own lives, were forced to resign themselves to minimal expectations, and to be dependent on husbands and sons for most of life's basic needs. But as women gain more social power, they are likely to possess more bargaining power, higher expectations, and be more demanding in the arena of life and love. Given these social changes—as surely as the earth orbits the sun—women's demands for fair and equitable treatment are sure to grow and, consequently, so will men's.

We believe that the continued global march towards gender equality will enlarge demands for equity in love relationships and profoundly alter (mostly for the better, we believe) love relationships around the globe.

## **V. Concluding Remarks**

We have traced Equity theory from its beginnings to the present day. We reviewed compelling evidence that at all stages in love relationships—from their tentative beginnings, through their flowering, and perhaps to their bitter ending—men and women are concerned with both reward and fairness. We reviewed new multidisciplinary research—cultural, evolutionary, primatological, and neuroscience investigations—which add new depth and richness to our understanding of human nature. We closed by pointing out that the massive social changes that are occurring in our times, suggesting that men and women may well be developing more complex and (especially for women)

more fulfilling notions as to what constitutes fair and equitable treatment in love and life.

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Figure 1: The Relationship Between Equity and Inequity and Dating and Marital Satisfaction.

