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Equity Theory

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On June 4, 2009, President Barack Obama delivered his now well known “Cairo speech,” in which he proposed “A New Beginning.” He pointed out that Israelis and Palestinians had suffered terribly from religious wars and conflict. The Israelis, subjected to centuries of persecution, faced annihilation as a people in the Holocaust. The Palestinians, victims of colonialism and Cold War policies, had faced the daily humiliations of occupation for more than a half-century. Although these grievances, social injustices, horrors, and deaths could never be forgotten or forgiven, it was, he argued, time to start anew. In the end—whether the peace process took one year, 10 years, or 1,000 years—Palestinians and Israelis must find some way to share the Holy Land.

Critical reactions were fierce and immediate. Zealots on both sides insisted that God and social justice were on their side. A few Israelis stood outside the U. S. consulate, waving portraits of Obama wearing a Palestinian headscarf, with “Jew Hater” scrawled beneath his portrait. One protester declared, “we will never sacrifice the cherished conviction that we (and only we) are the rightful inheritors of the lands of the Ken’ites and the Ken’izites, the Kad’mo-n-ites and the Hittites, the Per’izzites and the Reph’aims, the Am’or-ites and the Canaanites, the Gergashites and the Jeb’u-sites . . .” On the Palestinian side, social commentators such as Mirza Beg, fired back:

While talking of violence by Palestinians, I wish he [Obama] would have also commented on much worse violence inflicted on the Palestinians by Israelis, as is obvious by the death toll in many of the Israeli military operations. The toll of violence in Gaza last January was approximately 1,300 Palestinian killed, mostly civilians, to about six Israeli soldiers . . .

The *cri de coeur* that comes through these passionate outcries is: “It’s not fair” and “your suffering is nothing compared to our own. Restitution must be paid.”

The Palestinians and the Israelis are not the only peoples who find themselves swept up in arguments about the nature of social justice in the midst of political, religious, and ethnic conflicts. In the past decade, the world has witnessed a plethora of the horrific: suicide bombers, mass murder, genocide, crimes against humanity, and global terrorism. We have only to speak the names “Serbia and Bosnia,” “Northern Ireland,” “Cambodia,” “Rwanda,” “Darfur,” “Palestine and Israel,” the “World Trade Center,” and a host of others to despair.

Social psychologists have devoted a great deal of thought to trying to unravel the mysteries of good people’s willingness to commit staggering wrongs—to engage in orgies of killing and torture in the name of God and social justice. Some political policy makers and psychologists have argued that one can best understand the white heat of people caught up in such holy crusades (such as the Arab-Israeli clash) by considering: (1) the cultural, historical, and economic factors sparking such conflicts; (2) the cognitive and rational calculations of combatants; and (3) the turbulent cognitions and emotions—the

shame, fear, rage, sorrow, hatred, and despair—of people caught up in such holy crusades.

In this entry, we will discuss one additional factor that has been found to be important in shaping people's cognitive and emotional reactions to others: their perceptions as to what is fair or unfair. It is our hope to provide a few insights into the powerful forces that unite people or divide them from their fellows . . . and to aid in a better understanding of the factors that provide a shared vision, push emotions to a fever pitch, and contribute to people's perplexing and unrelenting willingness to engage in Holy Wars—no matter how wasted the effort, horrendous the costs, and how devastated a suffering humanity. Let us begin by discussing Equity Theory.

I. An Overview of Equity Theory

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

A. The Theoretical Formulation

Equity theory consists of four propositions designed to predict when individuals will perceive that they are justly (or unjustly) treated and how they will react when they find themselves enmeshed in unjust relationships:

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 their relationships. If people feel over-benefited, they may experience pity, guilt, and shame; if under-benefited, they may experience anger, sadness, and resentment.

Proposition IV. People in inequitable relationships will attempt to reduce their distress through a variety of techniques—by restoring psychological equity (convincing themselves that an inequitable relationship is indeed fair), by restoring actual equity (setting things right), or abandoning the relationship.

During America’s civil war, for example, many slave owners, when challenged about the morality of slavery defended themselves, restored *psychological equity* (and reduced their guilt), by arguing that Africans were an inferior race that was better off under slavery than free. (In fact, most slave owners refused to use the word “slavery;” instead they opted for the bland euphemism “the peculiar institution.”) A few slave holders worked to set things right by freeing their slaves and making recompense—thus restoring *actual equity*. Finally, most Southerners elected to deal

with their conflicting ideals by voting to leave the Union, risking what would turn out to be a hideous war and unfathomable death and destruction.

B. What Constitutes an Equitable Relationship?

Technically, equity is defined by a complex formula (Walster, 1975). In practice, however, a person's perception of social equity in a given relationship can be reliably and validly assessed via a simple measure. Specifically, people are asked: "Considering what you put into your relationship, 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 relationship '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).

II. Social Justice and Equity: A Few Questions

Social commentators interested in fostering peace and social justice have often posed some difficult questions. Firstly, is the desire for social justice and equity a cultural universal? Secondly, do societies differ in who is included in the "family of man," and thus deserve to be treated with respect and fairness? Thirdly, do they differ in who is banished from the elect? Or who can be dismissed as "Godless infidels," "heathens," "strangers," "less than

human—animals,” to be despised and abused at will? Finally, do societies differ in what is considered profitable, fair, and equitable?

A. The Universality of a Desire for Equity

Most scholars generally agree that a concern with fairness and equity is a cultural universal. In the past 25 years or so, many have proposed that such desires are written in the mind’s architecture. As evolutionary psychologists Leda Cosmides and John Tooby (1992) observed:

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.

They contend that notions of social justice came to be writ in the mind’s “architecture” because such concerns possessed survival value. A concern with social justice, in all its forms, they contend, is alive and well today (in all cultures and all social structures) because in most instances, fairness remains a wise and profitable strategy. This begs the questions as to what is meant by “fairness” and “fairness to whom?” The history of humans, after all, has not been characterized by peace.

Paleoanthropological evidence supports the view that notions of social justice and equity are extremely ancient, albeit often with violent consequences. Ravens, for example, have been observed to attack those who violate social norms. Dogs get fiercely jealous if their playmates receive treats and they do

not. Wolves that don't "play fair" are often ostracized—a penalty that may well to lead to the wolf's death.

Primatologists have amassed considerable evidence that primates and other animals do care about fairness. In one study, Sarah Brosnan and Frans de Waal (2003) found that female monkeys who were denied the rewards they deserved became furious. They refused to "play the game" (refused to exchange tokens for a cucumber) and disdained to eat their "prize"—holding out for the grapes they thought 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.

B. Do Societies Differ in Whom is Included in the "Family of Man?"

Almost all religions endorse some variant of the golden rule: "Love thy neighbor as thyself" and "Do unto others . . ." Historically, however, societies have been found to possess very different ideas as to who those privileged "neighbors" are. In some cultures, one's "neighbors" mean close kin, members of their tribe, adherents to their religion, or fellow nationals. In others, there is a belief that there ought to be "justice for all," and a sense of universal brotherhood.

In attempting to predict whether people will possess a parochial or broad and inclusive view of who merits fair and equitable treatment, cultural researchers have attempted to classify various societies on a variety of dimensions. They point out that the world's cultures differ profoundly in the

extent to which they are family centered or universalistic, value collectivism or individualism, traditionalism or modernism, whether they are rural or urban, religious or secular, poor or affluent. They have found that societal values have a profound impact on whether people assume principles of fairness and justice are applicable only to family and clan or if they accept the notion that principles of fairness and equity apply to all. Thus, cultural norms may trump biology in these matters, although globalization could conceivably lead to the dominance of “fairness” hardwiring.

C. Do Societies Differ in What is Considered Fair and Equitable?

Even if societies agree that equity is important in a given relationship, citizens may differ as to the inputs and outcomes that they think ought to “count” in those relationships. Some dominant views:

- “All men are created equal.” (American idealism.)
- “The more you invest in a project, the more profit you deserve to reap.” (American capitalism)
- “To each according to his need.” (Communism)
- “Winner take all.” (Dog-eat-dog capitalism.)
- “It’s a man’s world.” (Traditional societies.)

Given the fact that people of good will can differ so markedly as to the meaning of fairness and equity, as to how broadly the imperative for equity must be applied, and how equity ought to be calculated, it is not surprising that so many opportunities for cultural misunderstanding and conflict exist. Let us hope that, in dialogue and in the development of a global culture, commonalities between peoples can overcome the narrow definitions of “the other” that have so defaced human history.

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Key Terms

Equity
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Fairness
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Biography

Dr. Elaine Hatfield is a Professor of Psychology and past-president of the Society for the Scientific Study of Sex. Her honors include Distinguished Scientist Awards (for a lifetime of scientific achievement) from the University of Hawai'i, the Society of Experimental Social Psychology (SESP), the Society for the Scientific Study of Sex (SSSS), and the Alfred Kinsey Award from the Midwest Region of SSSS.

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