

## 7.2 Equity Theory and Research: An Overview<sup>1</sup>

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### Equity: the theory

#### *Propositions I–IV*

Equity theory is a strikingly simple theory. It is composed of four interlocking propositions:

**PROPOSITION I:** Individuals will try to maximize their outcomes (where outcomes equal rewards minus punishments).

**PROPOSITION IIA:** Groups (or rather the individuals comprising these groups) can maximize collective reward by evolving accepted systems for equitably apportioning resources among members. Thus, groups will evolve such systems of equity, and will attempt to induce members to accept and adhere to these systems.

**PROPOSITION IIB:** Groups will generally reward members who treat others equitably and generally punish members who treat each other inequitably.

**PROPOSITION III:** When individuals find themselves participating in inequitable relationships, they will become distressed. The more inequitable the relationship, the more distress they will feel.

**PROPOSITION IV:** Individuals who discover they are in inequitable relationships will attempt to eliminate their distress by restoring equity. The greater the inequity that exists, the more distress they will feel, and the harder they will try to restore equity.

#### *Definitional formula<sup>2</sup>*

Equity theorists (see Walster, 1975) define an equitable relationship to exist when the person scrutinizing the relationship—who could be Participant A,

Participant B, or an outside observer—concludes that all participants are receiving equal relative gains from the relationship; that is, when

$$\frac{(O_A - I_A)}{(|I_A|)^{k_A}} = \frac{(O_B - I_B)}{(|I_B|)^{k_B}}$$

where  $I_A$  and  $I_B$  designate a scrutineer's perception of Person A's and Person B's inputs,  $O_A$  and  $O_B$  designate his or her perception of Person A's and Person B's outcomes, and  $|I_A|$  and  $|I_B|$  designate the absolute value of their inputs (i.e. disregarding sign).<sup>3,4</sup>

### *Definition of terms*

Inputs ( $I_A$  or  $I_B$ ) are defined as 'The scrutineer's perception of the participants' contributions to the exchange, which are seen as entitling them to reward or punishment.' The inputs that participants contribute to a relationship can be either assets (entitling them to rewards) or liabilities (entitling them to punishment).

In different settings, people consider different inputs to be relevant. For example, in industrial settings, businessmen assume that such hard assets as capital or manual labor entitle one to reward; such liabilities as incompetence or disloyalty entitle one to punishment. In social settings, friends assume that such social assets as wit or kindness entitle one to reward, whereas such social liabilities as drunkenness or cruelty entitle one to punishment.

In addition to assessing what participants have put into their relationship, the scrutineer must also assess whether or not participants are getting the outcomes they deserve from the relationship. Outcomes ( $O_A$  or  $O_B$ ) are defined as 'the scrutineer's perception of the rewards and punishments participants have received in the course of their relationship with one another.' The participants' total outcomes, then, are equal to the rewards they obtain from the relationship minus the punishments that they incur.

The exponents  $k_A$  and  $k_B$  take on the value of +1 or -1 depending on the sign of A and B's inputs and the sign of their gains (outcomes - inputs):  $k_A$  or  $k_B$  are +1 if I and (O - I) are both positive (or both negative); otherwise  $k_A$  and  $k_B$  are -1.<sup>5</sup>

### *Who decides whether a relationship is equitable?*

According to the theory, equity is in the eye of the beholder. Observers' perceptions of how equitable a relationship is will depend on their assessment of the value and relevance of the participants' inputs and outcomes. If different observers assess participants' inputs and outcomes differently, and it is likely that they will, it is inevitable that they will disagree about whether or not a given relationship is equitable. For example, a wife—focusing on the fact that she works

long hours, is trapped with no one to talk to all day, and is constantly engulfed by noise, mess, and confusion—may feel that her relative gains are extremely low. Her husband—focusing on the fact that she gets up in the morning whenever she pleases, and can see whom she wants, when she wants—may disagree; he thinks she ‘has it made.’ Moreover, an ‘objective’ observer may calculate the couple’s relative gains still differently.

### *The psychological consequences of inequity*

According to Proposition III, when individuals find themselves participating in inequitable relationships, they feel distress—regardless of whether they are the beneficiaries or the victims of inequity. The overbenefited may label their distress as guilt, dissonance, empathy, fear of retaliation, or conditioned anxiety. The underbenefited may label their distress as anger or resentment. Essentially, however, both the overbenefited and the underbenefited share certain feelings—they feel ‘distress’ accompanied by physiological arousal (see Austin and Walster, 1974a, b).

### *Techniques by which individuals reduce their distress*

Proposition IV states that individuals who are distressed by their inequitable relations will try to eliminate such distress by restoring equity to their relationship. There are only two ways by which participants can restore *actual equity*—by altering their own or their partners’ relative gains. For example, imagine that an unskilled laborer discovers that a contractor has been paying him less than the minimum wage. He can re-establish actual equity in four different ways: he can neglect his work (thus lowering his inputs); he can start to steal equipment from the company (thus raising his own outcomes); he can make mistakes so that the contractor will have to work far into the night undoing what he has done (thus raising the employer’s inputs); or he can damage company equipment (thus lowering the contractor’s outcomes). (The ingenious ways people contrive to bring equity to inequitable relationships are documented by Adams, 1965.)

Participants can restore *psychological equity* to their relationship by changing their perceptions of the situation. They can try to convince themselves and others that the inequitable relationship is, in fact, perfectly fair. For example, suppose that the exploitative contractor starts to feel guilty about underpaying his unskilled laborers. He can try to convince himself that his relationship is equitable in four ways: he can restore psychological equity by minimizing his workers’ inputs (‘You wouldn’t believe how useless they are’); by exaggerating his own inputs (‘Without my creative genius the company would fall apart’); by exaggerating his workers’ outcomes (‘They really work for the variety the job provides’); or by minimizing his own outcomes (‘The tension on this job is giving me an ulcer’).

### *Actual versus psychological equity restoration*

At this point, equity theorists confront a crucial question: Can one specify when people will try to restore actual equity to their relationships, *versus* when they will settle for restoring psychological equity? From Equity theory's Propositions I and IV, one can make a straightforward derivation: people may be expected to follow a cost-benefit strategy in deciding how they will respond to perceived inequity. Whether individuals respond to injustice by attempting to restore actual equity, by distorting reality, or by doing a little of both has been found to depend on costs and benefits participants think they will derive from each strategy (see Berscheid and Walster, 1967; Berscheid *et al.*, 1969; or Weick and Nessel, 1968).

### **Equity: the research**

Researchers have applied the Equity framework to four major areas of human interaction—exploiter/victim relationships, philanthropist/recipient relationships, business relationships, and intimate relationships. (See Walster *et al.*, 1978; Hatfield and Traupmann, 1980; or Hatfield *et al.*, in preparation, for review of this voluminous research.)

Let us consider a sampling of the kind of research that Equity theorists have conducted in the first of these areas—exploiter/victim relationships.

#### *Exploiter/victim relationships*

People have always been concerned with promoting social justice. It is not surprising, then, that early Equity theorists, who could have begun by investigating any of the four Equity propositions, in fact, focused on a single question: 'How do exploiters and their victims respond to injustice?'

*Definition of terms.* Researchers began by defining terms. They defined *exploiters* (or *harm-doers*) as 'People who commit acts that cause their relative-gains to exceed their partners'. The *exploited* (or *victims*) are 'People whose relative-gains fall short of their partners'.

*Reactions of exploiters and their victims to inequity.* (a) *Distress:* According to Equity theory (see Hatfield *et al.*, 1979):

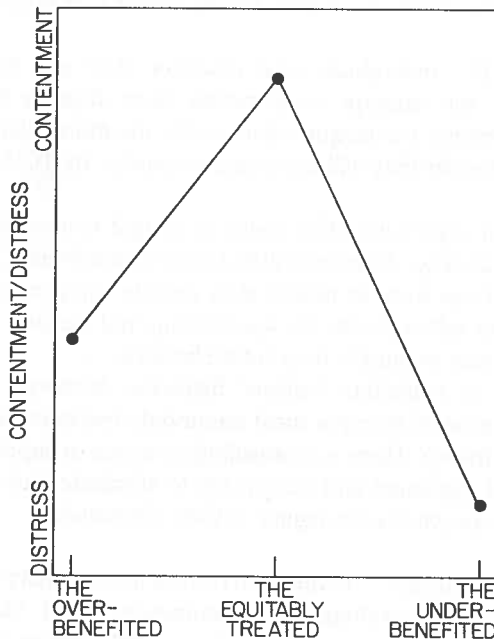
Proposition III: When individuals find themselves participating in inequitable relationships, they will become distressed. The more inequitable the relationship, the more distress they will feel (p. 101)

According to the theory, then, any time people take more than they deserve . . . or

accept less, they should feel distress. On first glance one might think that people who receive far more than they deserve should be delighted, not distressed. The theory, however, predicts that they will feel both delight at receiving such a large reward . . . mixed with the distress they feel at finding themselves caught up in an inequitable relationship. If inequitable relationships are distressing to exploiters, they should be doubly distressing to their victims. Equity theorists, then, predict that Equity will be related to contentment/distress as indicated in Figure 1.

Compelling evidence exists to support the contention that both exploiters and their victims *do* feel intense distress after an inequitable exchange. (See Austin and Walster, 1974a, b; Walster *et al.*, 1978; Hatfield, *et al.*, in preparation, and Utne *et al.*, in press, for a review of this research.) In one study, for example, Austin and Walster (1974b) investigated workers' cognitive, affective, and physiological reactions to equity and inequity. They tested the dual predictions that (1) workers will be more content (and less distressed) when they are fairly rewarded than when they are either over-rewarded or under-rewarded. Further (2) participants will be less distressed when they are over-rewarded than when they are under-rewarded.

Austin invited college students to participate in a psychological study of decision making. Each student was assigned to work on a task with a partner (actually an experimental accomplice). A third student (also an experimental accomplice)



**Figure 1** The predicted relationship between equity and contentment/distress

was designated 'decision maker' and told to pay the two students on the basis of their task performance. Since both students performed equally well, the 'decision' should have been a simple one—each student should have received \$2.00. Sometimes, the decision maker did pay the student an equitable \$2.00. Sometimes, however, by prearrangement, he did the unexpected: sometimes he overpaid her (i.e. gave her \$3.00; \$1.00 more than she deserved); other times he underpaid her (i.e. gave her \$1.00; \$1.00 less than she deserved). The student was then quizzed about how she felt about the way she had been treated. As predicted, equitably paid students were more cognitively and emotionally content than either overpaid or underpaid individuals. Also as predicted, overbenefited students were more content than underbenefited ones. The women who received \$1.00 more than they deserved were slightly upset, those who received \$1.00 less than they deserved were extremely upset.

Physiological data tended to substantiate the women's reports of how they felt about the decision. *Galvanic Skin Response* measures revealed that equitably treated workers were the most tranquil. Overbenefited women were slightly aroused; deprived women were even more aroused. (Additional evidence in support of this contention comes from Austin and Walster, 1974a, b; Walster *et al.*, 1978; Hatfield and Traupmann, 1980; Hatfield *et al.*, in preparation, and Utne *et al.*, in press.)

(b) *Restoration of Equity*: According to Equity theory (see Hatfield *et al.*, 1979):

Proposition IV: Individuals who discover they are in inequitable relationships will attempt to eliminate their distress by restoring equity. The greater the inequity that exists, the more distress they will feel, and the harder they will try to restore equity. (p. 101).

Theoretically, an exploiter/victim could be taught to perform *any* action that reduces his or her anxiety. Aronfreed (1961) has demonstrated the wide variety of ways transgressors can learn to reduce their anxiety: they may find relief by confessing their sins, in self-criticism, by apologizing and making reparation to their victim, or in promising to modify their future behavior.

When we look at exploiters'/victims' behavior, however, we find that two classes of responses seem to occur most commonly (perhaps because they reduce anxiety most effectively). There is compelling evidence to support the Proposition IV contention that exploiters and victims try to eliminate their distress by restoring either actual or psychological equity to their relationships.

*Restoration of actual equity.* People can restore actual equity to a relationship in a straightforward way—exploiters can compensate their victims; victims can insist on restitution. Cynics such as Junius have acidly observed that even 'a death bed repentance seldom reaches to restitution.' Such pessimism is not always warranted. Recent studies verify the fact that *harm-doers often do voluntarily*

*compensate their victims* (see, for example, Berscheid and Walster, 1967; Berscheid *et al.*, 1969; Brock and Becker, 1966; Carlsmith and Gross, 1969; Freedman *et al.*, 1967; Walster and Prestholdt, 1966; Walster *et al.*, 1970).

*Demands for compensation.* Undoubtedly the victim's first response to exploitation is to seek restitution (see Leventhal and Bergman, 1969, and Marwell *et al.*, 1970). If victims secure compensation, they have 'set things right' and benefited materially. It is easy to see why this is a popular response.

*Restoration of psychological equity.* As we noted earlier, people can restore equity in a second way—they can distort reality and convince themselves that their unjust relationship is, in fact, perfectly fair. If exploiters and victims can minimize the exploiter's relative gains, or can aggrandize the victim's gains, they can convince themselves and perhaps others that their relationship is, in fact, equitable. Some distortions that harm-doers and victims use include: blaming the victim, minimization of the victim's suffering, or denial of responsibility for the victim's suffering.

Let us focus first on the exploiter's responses:

*Blaming the victim.* It is not unfair to exploit others if they deserve to be exploited. Thus, an obvious way by which exploiters can persuade themselves that their acts were equitable is by devaluing their victim's inputs. That harm-doers will often derogate their victims has been demonstrated by a number of researchers (see Berkowitz, 1962; Davidson, 1964; Davis and Jones, 1960; Glass, 1964; Katz *et al.*, 1973, Sykes and Matza, 1957; and Walster and Prestholdt, 1966). In a typical experiment, Davis and Jones (1960) found that students who were recruited to insult other students, as part of a research project, generally ended up convincing themselves that the students deserved to be ridiculed. Sykes and Matza (1957) found that juvenile delinquents often defended their victimization of others by arguing that their victims are really homosexuals, bums, or possess other traits that make them deserving of punishment. In tormenting others, then, the delinquents can claim to be the restorers of justice rather than harm-doers.

*Minimization of the victim's suffering.* If exploiters can deny that their victims were harmed, they can convince themselves that their relationship with the victim is an equitable one. Sykes and Matza (1957) and Brock and Buss (1962) demonstrate that harm-doers will consistently underestimate how much harm they have done to another. Brock and Buss, for example, found that college students who administer electric shock to other students soon come to underestimate markedly the painfulness of the shock.

*Denial of responsibility for the act.* If exploiters can convince themselves that it was not their own behavior, but rather the action of someone else (e.g. the

experimenter or fate) that caused the victim's suffering, then their relationship with the victim becomes an equitable one. (The person who is unjustly assigned responsibility for reducing the victim's outcomes will now be perceived as the harm-doer, and it will be this third party's relationship with the victim, not the original harm-doer's relationship, that is perceived as inequitable.)

That harm-doers will often deny their responsibility for harm-doing has been documented by Sykes and Matza (1975) and by Brock and Buss (1962, 1964). In daily life, the denial of responsibility seems to be a favorite strategy of those who are made to feel guilty about exploiting others. War criminals protest vehemently that they were 'only following orders.'

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But, it is not just exploiters who justify their unjust acts. Victims, too, have been found to justify their own exploitation. Sometimes, victims find that it is impossible to elicit restitution. Under such circumstances, the impotent victims are then left with only two options—they can acknowledge the exploitations and their inability to do anything about it, or they can justify their own exploitation. Often, victimized individuals find it less upsetting to distort reality and justify their victimization than to acknowledge that the world is unjust and that they are too impotent to elicit fair treatment [see Lerner and Matthews, 1967].

Victimized individuals have been found to restore psychological equity to the exploiter/victim relationship in several ways:

*Concluding it was all for the best.* Sometimes victims console themselves by imagining that they were not really exploited, or by insisting that exploitation has brought compensating benefits. For example, there is evidence that when things are arranged so that people cannot win, they often convince themselves that they do not want to win. For example, Solomon (1957) set up an experimental game. A powerful player treated some players benevolently (benefiting them whenever he could) and others malevolently (depriving them whenever he could). As we would expect, the benefited players were more content than the frustrated ones. More interestingly, the players who were treated benevolently attached far more importance to doing well in the game than did the malevolently treated ones.

*It will all come out in the wash.* Sometimes victims console themselves by concluding that in the long run the exploiter will be punished as he deserves ('The mill of the Lord grinds slowly, but it grinds exceedingly fine').

*He who has deserves to get.* Or, victims may convince themselves that their exploiters actually deserved the enormous benefits they received. Recent data demonstrate that the exploited are inclined to justify their exploiter's excessive benefits. Jecker and Landy (1969), Walster and Prestholdt (1966), and Hastorf and Regan (personal communication, 1962) pressured individuals into performing



a difficult favor for an unworthy recipient. They found that the abashed favor-doers tried to justify the inequity by convincing themselves that the recipient was especially needy or worthy.

Reformers who work to alleviate social injustice are often enraged to discover that the exploited themselves are sometimes vehement defenders of the *status quo*. Black militants encounter 'Uncle Toms' who defend white supremacy. Women's liberation groups lobbying for the Equal Rights Amendment must face angry housewives who threaten to defend to death the inferior status of women. Reformers might have more sympathy for such 'Uncle Toms' if they understood the psychological underpinnings of such reactions. When one is treated inequitably, but has no hope of altering the situation, denying reality is often less degrading than facing up to one's humiliating position.

## Summary

### *The theory*

Equity theorists agree that people try to maximize their outcomes (Proposition I). A group of individuals can maximize its collective outcomes by devising an equitable system for sharing resources. Thus, groups try to induce members to behave equitably: that is, they try to ensure that all participants receive equal relative outcomes:

$$\frac{(O_A - I_A)}{(|I_A|)^{k_A}} = \frac{(O_B - I_B)}{(|I_B|)^{k_B}}$$

They can do this in only one way: by making it more profitable to be good than to be greedy. They can reward members who behave equitably and punish members who behave inequitably (Proposition II). When socialized persons find themselves enmeshed in inequitable relationships, they experience distress (Proposition III) and are motivated to reduce such distress either by restoring actual equity or by restoring psychological equity to their relationships (Proposition IV).

### *The data*

Equity theorists have collected evidence in support of Proposition III, namely, they have shown that:

1. Men and women feel most content when they are engaged in equitable relationships. Both the overbenefited and the underbenefited feel ill at ease. The more inequitable the relationship, the more uncomfortable participants feel. Participants are less distressed by inequity when they gain from it than when they lose from it.
2. People who discover they are in an inequitable relationship (and become

distressed) try to reduce their distress by restoring either actual equity or psychological equity to their relationships.

Cynics have expressed skepticism that exploiters will voluntarily compensate their victims to restore equity . . . but the data suggest that they often do. It probably comes as no surprise that victims are generally eager to be compensated.

If compensation does not occur, both exploiter and victim have been found to restore psychological equity by aggrandizing the exploiter, minimizing the victim's suffering, or assuming that some outside power will intervene and set things right.

## Notes

1. The research reported in this article was supported, in part, by a grant from the University of Wisconsin graduate school.

2. For a detailed explanation of the logic underlying this definition of Equity, see Walster (1975).

3. There is one restriction on inputs: The smallest absolute input must be  $\geq 1$ , that is,  $|I_A|$  and  $|I_B|$  must both be  $\geq 1$ .

4. Of course, other theorists have proposed other, related definitions of equity. See, for example, Alessio (1980), Harris (1976), Moschetti (1979), or Zuckerman (1975).

5. The exponent's effect is simply to change the way relative outcomes are computed: If  $k = +1$ , then we have  $O - I/|I|$ , but if  $k = -1$ , then we have  $(|I|) \cdot (O - I)$ . Without the exponent  $k$ , the formula would yield meaningless results when  $I < 0$  and  $(O - I) > 0$ , or  $I > 0$  and  $(O - I) < 0$ .

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