Part II
Behavioral Interdependence:
Social Exchange

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#### Chapter 4

# Equity and Intimate Relations: Recent Research

## Elaine Hatfield, Jane Traupmann, Susan Sprecher, Mary Utne, and Julia Hay

Equity theory is a social psychological theory concerned with justice in all interpersonal relationships. Until recently, however, equity principles have been examined only in causal role relations (i.e., employer-employee, philanthropist-recipient, and harmer-victim relations) and have not been examined in more personal relations (see Walster (Hatfield), Walster, & Berscheid, 1978). The distinction between role relationships and personal relationships is a long-standing and important one (see Cooley, 1902; Tonnies, 1887). Given the importance of primary, intimate relations, it would be a grave omission to overlook such relations in theory research on interpersonal behavior.

In this chapter, we will begin by reviewing equity theory and the theoretical debate as to whether or not equity considerations should apply to intimate relations. Then we will summarize the recent evidence indicating that equity principles do seem critically important in our most significant relations.

# Equity Theory: An Overview

The most recent formulation of equity theory, by Walster (Hatfield), Walster, and Berscheid (1978) and Hatfield and Traupmann (1980), evolved from the earlier versions of equity theory by Adams (1965) and Homans (1974). The theory contains four interlocking propositions:

Proposition 1: 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 rewards by evolving accepted systems for 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 others 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 that 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.

Theoretically, an equitable relationship is said to exist when the person evaluating the relationship concludes that both participants' relative gains are equal. Inequity can arise if one participant's ratio of outcomes to inputs is either larger or smaller than his or her partner's. According to the theory, individuals who find themselves in inequitable relationships will become distressed. The overbenefited will feel quilty about their favorable state of affairs, while their underbenefited partners will feel angry or resentful. These feelings of distress will lead the inequitably treated individuals to initiate steps to restore equity and balance to the relationship. It is assumed here that a state of equity (and its accompanying psychological comfort) is desired.

#### The Theoretical Debate

Theoretically, equity theory should apply to all relationships—from those of the most casual acquaintances to those of the most intimate lovers. A careful scrutiny of research applications of equity theory, however, reveals a bias toward the examination of casual relationships (see Walster (Hatfield), Walster, & Berscheid, 1978). In general, early equity researchers studied relationships between persons who barely knew each other. In study after study, such casual role relationships as philanthropist-recipient, employer-employee, and harmer-victim were observed to determine how participants react when they find themselves either exploiting others or being exploited. So long as researchers examined such casual role relations, equity theory was well received (see Adams & Freedman, 1976).

More recently, however, equity theorists have begun to argue that intimate relations, too, might be dependent on an equitable exchange of rewards. In reaction to this step forward, however, several objections were raised. Holding the traditional Western view of love as involving altruism and selflessness, many theorists have insisted that "true love" transcends equity considerations. In an equally forceful voice, another group of theorists have argued that concerns with fairness are important in love relations. Following are excerpts from both sides of the theoretical controversy.

Equity theory is not applicable to love relations. Some critics argue that intimate relations are special relations—untainted by crass considerations of social exchange. These critics include those who do not hesitate to apply exchange and equity principles to less casual relations, but object to their applications in special relations.

Chadwick-Jones (1976), an exchange theorist, observes:

On the topic of love, exchange theorists tended to have very little to say for the very good reason that, in love, and in unconditional commitment, there can be no exchange. (p. 2)

Brunner (1945) also states that love is special:

The sphere in which there are just claims, rights, debits and credits, and in which justice is therefore the supreme principle, and the sphere in which the gift of love is supreme, where there are no deserts, where love, without acknowledging any claim, gives all—these two spheres lie as far apart as heaven from hell... If ever we are to get a clear conception of the nature of justice, we must also get a clear idea of it as differentiated from and contrasted with love. (p. 104)

Other eminent theorists agree with the contention that love relationships should, and do, transcend "selfish" concerns. See for example, Douvan (1974), Fromm (1956), Kennedy (1980), Mills and Clark (1980), Murstein (1980), Rubin (1973), and Wexler (1980).

Equity theory is applicable to love relationships. Other theorists insist that in love relationships, as in less intense relationships, persons are deeply concerned with considerations of fairness. For example, Tedeschi (1974) observes:

Fromm defined love as primarily giving, not receiving.... The nature of true love is contrasted to the behavior of the marketing character ... the difference between true love and the false love of the marketing character is a matter of timing, illusion, and appearances.... The person should believe that he is willing to give without selfish intent, but implicitly his behavior depends upon expected reciprocity at some later, unstated time, and in a form to be decided upon by the other person. (p. 211)

Perhaps the strongest proponents of the equity perspective have been behavioral and family therapists. For example, Sager (1976) observes:

In work with marital couples and families, the concept of individual marriage contracts has proven extremely useful.... The term individual contract refers to a person's expressed and unexpressed, conscious and beyond awareness concepts of his obligations within the marital relationship, and to the benefits he expects to derive from marriage in general and from his spouse in particular. But what must be emphasized above all is the reciprocal aspect to the contract: what each partner expects to give and what he expects to receive from his spouse in exchange are crucial. Contracts deal with every conceivable aspect of family life: relationships with friends, achievements, power, sex, leisure time, money, children, etc.... It is most important to realize that, while each spouse may be aware of his own needs and wishes on some level of awareness, he does not usually realize that his attempts to fulfill the partner's needs are based on

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the covert assumption that his own wishes will thereby be fulfilled. When significant aspects of the contract cannot be fulfilled, as is inevitable, and especially when these lie beyond his own awareness, the disappointed partner may react with rage, injury, depression, or withdrawal, and provoke marital discord by acting as though a real agreement had been broken. (pp. 4-5)

e exercise, we say.

Other theorists from a variety of areas also agree that equity considerations are critically important in intimate relations. See, for example, Bernard (1964), Blau (1964), Lederer and Jackson (1968), McCall (1966), Patterson (1971), Scanzoni (1972), and Storer (1966).

Who is right—the theorists who insist that intimate relationships transcend equity considerations or the theorists who insist that issues of fairness and justice are very relevant to intimate relations? In the past few years, researchers have begun to collect some data designed to address this controversy. For the most part, these data have not been available to the larger audience of researchers in general. The "pro" and "con" advocates in this debate inevitably publish in very different journals—each side insisting that the others' research is based on an inappropriate paradigm, is poorly done, and is poorly written. In addition, much of this research remains unpublished. This chapter was designed to briefly review the existing literature, published or not, so it becomes available to researchers.

#### Specific Equity Hypotheses for Intimate Relationships

Theorists have derived five specific hypotheses from Equity theory that are applicable to intimate relationships (see Hatfield, Utne, & Traupmann, 1979). In brief, the hypotheses suggest that the more equitable relationships are, the more compatible they will be (i.e., the more satisfying they will be and the longer they will last). (The hypotheses follow, somewhat, the progression of a relationship—from the developing intimacy of the dating stage, to the long-term commitment and accompanying crises of a marriage, to the point of dissolution.) The hypotheses are as follows:

Hypothesis I: In the casual and steady dating period, couples who feel that their relationships are equitable will be more likely than couples in inequitable relationships to move on to more intimate relationships. (For example, equitable couples will be especially likely to become sexually involved—and to continue to data, live together, or marry.)

Hypothesis 2: Equitable relationships will be compatible relationships. Men and women in equitable relationships should be more content than men and women who are receiving either far more or far less than they feel they deserve. The more inequitable their relationships, the more distress they should feel.

Hypothesis 3: Since inequities are disturbing, couples should continue to try to resolve them over the course of their relationships. Men and women who feel underbenefited should be motivated to demand more from their partners. Men and women who feel overbenefited should find ways to meet the demands of

their partners. Thus, all things being equal, relationships should become more and more equitable over time.

Hypothesis 4: In all relationships, there are certain crisis periods (e.g., when a dating couple marries, when the first child arrives, when the children leave home, when someone loses his or her job or retires). At such times of precipitous change, relationships become unbalanced. If couples are contacted before, during, and after such crises, it is likely that couples will find the crisis period very unsettling, and will work to reestablish equity... or move in the direction of dissolution of the relationship.

Hypothesis 5: Among the committed relationships, equitable relations will be especially stable. Individuals in equitable relations will be more likely to perceive their relationships as long-term and will be more likely to have relationships intact months and years later.

#### A Review of Existing Research

Let us consider the recent data that have been collected in an effort to support, or to rebut, these equity hypotheses.

Hypothesis 1: In the casual and steady dating period, couples who feel that their relationships are equitable will be more likely than couples in inequitable relationships to move on to more intimate relationships. (For example, equitable couples will be likely to become more sexually involved—and to continue to date, live together, or marry).

In one study, Hatfield, Walster, and Traupmann (1978) interviewed 537 college men and women who were casually or steadily dating someone. Men and women were asked to rate the equity of their current relationship via *The Walster (1977) Global Measure*. (If they were not currently in a relationship, they were asked how equitable their last serious relationship had been before they had split up.) Specifically, the participants were asked: "Considering what you put into your dating relationship, compared to what you get out of it... and what your partner puts in compared to what he/she gets out of it, how well does your dating relationship stack up?" Based upon the respondents' estimates of their own inputs and outcomes and their partner's inputs and outcomes, the men and women were classified as overbenefited, equitably treated, or underbenefited in their dating relationships.

The researchers found that equitable relationships were more compatible (i.e., more stable) relationships. Couples in equitable relationships were more likely than couples in inequitable relationships to be moving toward a more intimate relationship. In terms of sexual intimacy, they found that equitable couples were more sexually active. In general, couples in equitable relationships were having sexual intercourse, while those in inequitable relationships tended to stop before "going all the way".

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The authors also asked the respondents who were sexually intimate why they had gone that far. The participants in relatively equitable relations were more likely to say that they had intercourse because they both wanted to. For example, they were more likely to rate high such reasons as "mutual physical desire" or "enjoyment." Those who felt extremely overbenefited or extremely underbenefited were less likely to say that sex was a mutual decision.

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While one aspect of being sexually intimate is engaging in sexually intimate behaviors, another important aspect of sexual intimacy is being satisfied with the sexual relationship. Traupmann, Hatfield, and Wexler (1981) interviewed 189 college men and women to investigate whether those who felt equitably treated had more compatible and satisfying sexual relations than those who felt either underbenefited or overbenefited. The authors received some support for their hypothesis. Equitably treated men and women felt more "loving and close" and more physically satisfied after sex with their partner than inequitably treated men and women did.

Another aspect of moving the relationship to greater intimacy is expecting the relationship to evolve into a more permanent one. In the above study of young dating men and women, by Hatfield, Walster, and Traupmann (1978), equitable relationships were found to be generally stable. While equitably treated men and women were confident that they would still be together in 1 year and in 5 years, the overbenefited and underbenefited were less optimistic about the future. If their relationships were not already in disarray, they expected that they soon would be. Furthermore, the equitable couples' confidence and the inequitable couples' pessimism may have been warranted. In a follow-up study 3½ months later, couples in equitable relationships were more likely to still be together than the other couples were.

In another study, Sprecher-Fisher (1980) interviewed a volunteer sample of 50 college dating couples. She also found that equitably treated men and women were more certain than their underbenefited and overbenefited counterparts that they would still be together in the future (equity was measured both via *The Walster 1977 Global Measure* and by a more detailed measure). In addition, 4 years after the initial interview, 48 of the 50 dating couples were interviewed once again to determine if they were still together. Of the 48 couples, 24 had broken up and 24 were still together. Using path analysis, Sprecher-Fisher found that inequities can lead to the termination of the relationship, but only when mediated by psychological distress. In other words, couples have to be distressed by inequities before they consider taking such a drastic step as breaking up.

Conclusion. These studies suggest that dating couples in equitable relations are more likely than other couples to move toward increasing intimacy. Couples in equitable relations are more likely to be sexually involved and sexually satisfied, and are more likely to expect their relations to evolve into more permanent ones.

Hypothesis 2: Men and women in equitable relationships should be more content than men and women who are receiving either far more or far less than they feel they deserve. The more inequitable their relationships, the more distress they should feel.

According to Equity theorists, equitable relationships are compatible (i.e., more satisfying) relationships. Researchers have found this prediction to be an intriguing one, and thus, more research effort has gone into testing it than any other. Most theorists have found it is easy to see why men and women who feel that they are getting far less than they deserve from their relationships (who feel that they are being "ripped off" by their partners) should be upset. These men and women may well feel unloved ("If you really loved me, you wouldn't treat me this way") as well as deprived of real benefits. But there is another, more interesting side to this hypothesis. According to Equity theory, men and women who feel that they are getting far *more* than they deserve should also feel distressed. On the one hand they are undoubtedly delighted to be receiving such benefits. However, they know they do not deserve them, and this should make them feel uncomfortable. Berscheid, Hatfield, and Bohrnstedt (1973) provide a graphic description of why an "embarrassment of riches" is often just that:

Among the *Psychology Today* respondents who are currently in stable relationships, 58 percent say that they are equally matched... we wondered what happens to a person who beats the odds, who wins a partner far more desirable than himself. Equity theory predicts that he or she might not be so lucky after all. For one thing, he will worry about losing his mate, who has every reason to leave him; he may feel he could never do so well again.

Waller, citing the epigram that "in every love affair there is one who loves and one who permits himself to be loved," pointed out that such inequitable relationships are costly to both partners. The less dependent person may feel guilty and uncomfortable about exploiting his or her mate while continuing to do so; the more dependent partner suffers exploitation and insecurity. Waller concluded that such lopsided affairs soon come to a sad conclusion. (p. 30)

Figure 4-1 depicts the relationship that Equity theorists expect to exist between equity and contentment/distress. (See Austin & Walster, 1974a, 1974b.)

Researchers have collected considerable evidence that couples at all stages of involvement—from dating and newlyweds to couples married for many years—do care deeply about equity. In the study referred to earlier, Hatfield et al. (1978) asked casually and steadily dating students how equitable their relations were and how content they were with them. To measure contentment, daters were given Austin's (1974) Measure of Contentment/Distress, which asks couples: "When you think about your relationship as a whole—what you put into it and what you get from it, and what your partner puts into it and what your partner gets out of it—how does that make you feel?" Respondents were asked how "content," "happy," "angry," and "guilty" they felt. An overall index of affect was calculated by summing the respondents "content" and "happy" scores and subtracting their "anger" and "guilt" scores: Affect = content + happy — angry — guilty. The higher the total score, the more content (and the less distressed) they were.

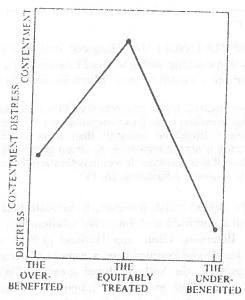


Figure 4-1. The hypothesized relationship between equity and contentment/distress.

These researchers found that men and women who were involved in relatively equitable relationships were far more content and happy than were their greatly overbenefited or greatly underbenefited peers. The greatly overbenefited felt extremely guilty about their favored position, while the greatly underbenefited felt extremely angry about the way they were being treated. Identical results were secured by Traupmann, Hatfield, and Wexler (1981) in a replication study. In her survey of 50 dating couples, Sprecher-Fisher (1980), too, replicated the curvilinear relationship between equity and contentment/distress. In addition, she secured some unexpected results. While, in general, equitable couples were more content that inequitable couples, men and women appeared to differ in which type of inequity was more distressing. Women were especially upset when they received too much, whereas men were most upset when they received too little. (This is a finding that has subsequently appeared in several other studies.)

After the dating studies appeared, some critics argued cogently that these data on dating and newlywed couples are not really relevant to the question of whether equity considerations are important in *committed*, *long-term* intimate relationships. For example, Rubin (1973) stated that only *early* in relationships are people concerned with equity:

The principles of the interpersonal marketplace are most likely to prevail in encounters between strangers and casual acquaintances and in the early stages of the development of relationships. As an interpersonal bond becomes more firmly established, however, it begins to go beyond exchange. In close relationships one becomes decreasingly concerned with what he can get from

the other person and increasingly concerned with what he can do for the other. (pp. 86-88)

Murstein and MacDonald (1977) agreed with Rubin that although equity considerations shape dating and newlywed relationships, they should not and do not operate in more committed ones: Murstein and MacDonald observe:

An exchange-orientation [was] hypothesized to be quite appropriate for limited or beginning friendships, and exchange-oriented couples were predicted to develop greater friendship intensity than other combinations—perceived exchange equity is almost impossible to obtain in marriage because of greater sensitivity to self than to other. It was hypothesized that exchange-orientation is inimical to marriage adjustment. (p. 1)

At least three studies exist, however, to indicate that equity considerations are important in committed and long-term relationships.

Traupmann, Peterson, Utne, and Hatfield (1981) interviewed a random sample of 118 newlywed couples from a variety of occupational backgrounds. Equity was assessed via both a global measure (Walster (1977) Global Measure) and a detailed measure (Traupmann, Utne, & Walster (1977) Scales). These researchers found that newlywed couples are distressed by inequity. Men and women who felt equitably treated were more content than those who felt either overbenefited or underbenefited. Similar to the findings reported above for dating couples (Sprecher-Fisher, 1980), there was a trend for husbands and wives to react differently to advantageous and disadvantageous inequities. Men were more negatively aroused by negative inequities, whereas women were more aroused by positive inequities.

Schafer and Keith (1980) interviewed more than 300 married couples who ranged in age from 19 to 88. The couples were selected in a random area sample designed to include couples who were married for various lengths of time and who were at various stages of the family life cycle. Equity was measured within the context of performance in the family roles of cook, housekeeper, provider, companion, and parent. Husbands and wives evaluated their own and their spouses' levels of effort in the different roles, and equity was determined by taking the difference in the scores of self-evaluation and evaluation of the partner. The prediction that husbands and wives who felt either overbenefited or underbenefited would report higher levels of depression than equitably treated persons received strong support.

In yet another study, Traupmann, Hatfield, and Sprecher (1981) interviewed a random sample of 400 middle-aged and elderly women (ages 50 to 92) living in Madison, Wisconsin. The subjects were asked to think about their lives and say how equitable their relationships had been at various stages in their lives—when they were dating, newlywed, and in their 30s, 40s, 50s, 60s, 70s, and 80s. (They indicated their impressions via *The Hatfield (1978) Global Measure*.) They were then asked to recall, using the *Austin (1974) Measure of Contentment/Distress*, how they had felt about their state of affairs during each of these periods.

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As can be seen from Figure 4-2 the results of the Traupmann et al. (1981) study provide additional confirmation for the contention that equity and fairness remain of concern to individuals over the life span.

There is one exception, however, to this clear pattern of results. Traupmann and Hatfield (1983) asked the women in the preceding study how equitable they perceived their current relationships to be and how contented/distressed they were by this at the present time. Although the open-ended interview data suggested that elderly women were deeply concerned about equity, the data did not reflect this. Both the overbenefited and the equitably treated women were equally content with the status quo. It was only the underbenefited who expressed any dissatisfaction. This finding raises an interesting possibility. Perhaps late in life, the overbenefited come to feel comfortable about their good fortune. They become confident, finally, that it will last. Of course, the data suggest that one never adapts to underbenefit. Unfortunately, though, the measures of equity used in this study were developed for use with dating and newlywed couples, and perhaps they are simply not appropriate for an olderaged sample. Which of these possibilities is correct will have to be determined by subsequent research.

Conclusion. There is evidence that inequity is distressing for couples at all ages and at all stages of a relationship—dating couples, newlywed couples, couples married an average amount of time, and those married a long time. Equitable relations do appear to be the most compatible relations. Everyone seems to feel

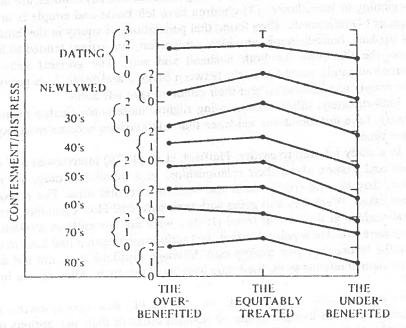


Figure 4-2. The relationship between the equity of a relationship and contentment/distress of each stage in a woman's life.

most content in equitable relations. In general, men and women seem to feel uncomfortable receiving either far more or far less than they think they deserve. It appears that one never gets used to injustice.

Hypothesis 3: Since inequities are disturbing, couples should continue to try to resolve them over the course of their relationship. Men and women who feel underbenefited should be motivated to demand more from their partners. Men and women who feel overbenefited should find ways to meet the demands of their partners. Thus, all things being equal, relationships should become more and more equitable over time.

When couples find themselves experiencing distressful inequities, there are two ways in which they can restore equity to the relationship. Individuals can restore actual equity by inaugurating real changes in the relationship; that is, they can alter their own inputs or encourage their partners to alter theirs. Alternatively, individuals can restore psychological equity by trying to convince themselves (and their partners) that everything is fair.

Is there any evidence to indicate that inequitable couples do try to restore actual or psychological equity over time? Only one study exists that suggests that relationships may become more equitable over time. Schafer and Keith (1981) interviewed a random sample of more than 300 married couples. They examined how perceptions of equity/inequity change at different developmental stages of the family life cycle. The researchers selected couples that fell into one of four family life cycle stages: (1) early child-raising, (2) children are older and beginning to leave home, (3) children have left home and couple is in middle age, or (4) retirement. They found that perceptions of equity in the family roles of cooking, housekeeping, provider, companion, and parent tended to increase over the life cycle for both husband and wife. The greatest increases in perceived equity tended to occur between Stage 2 and Stage 3—a period when the couple is middle-aged and their children have left home.

Unfortunately, other studies, using slightly more sophisticated measures of equity, have *not* found any evidence that relationships become more equitable over time.

In a study referred to earlier, Hatfield, et al. (1978) interviewed 537 college men and women about their relationships. In a follow-up study, 3½ months later, they interviewed the men and women a second time. The respondents were asked: Were they still going with their partners? How equitable were their relationships at the present time? (If they were not currently in a relationship, they were asked how equitable their last serious relationship had been in the few months before they had broken up.) Although Hatfield et al. did not analyze these data of interest to us, their data were available to us. They appear in Table 4-1.

From inspection of Table 4-1, we can see (1) how casual daters, steady daters, and those living together or married differ in their perceptions of how equitable their relationships are, and (2) how people's perceptions change over time. These results provide *no* evidence that relationships become more and

Table 4-1. The Equity of a Couples' Relationships Over Time

namely - New Markey - suggested in the suggested of the s	terition d	Time I How Equitable is Relationship?	Time 2 How Equitable is Relationship? <sup>a</sup>	Change
Relationship		all Excessions		0
All couples who are still together; Daters, Living Together, Married)	181	1.23	1 25	02
All couples who are still apart, or who have separated	115	3.67	Manual mand	ALENS.
$F_{Total}(1.294) =$	1400 B	in a land	5.43	-1.75
Finer Grained Analyses				5.01*
Couples who are still together				
Casual Daters Steady Daters Living Together Married	( 20) (129) ( 20) ( 12)	2.14 .98 2.23 .78	1.84 1.26 .59 1.33	+.30 28 +1.63 56
$F_{Linear}^{c}(1/176) =$	ne el dan	.72	69	
Couples who are still apart		out to see being		.02
Casual Daters Steady Daters	( 42) ( 37)	4.57 4.46	4.37 5.37	+.20 87
Couples who have separated	in a mark			
Casual Daters Steady Daters	( 14) ( 20)	3.35	4.57 8.65	-1.22 -7.87
$F_{Linear}^{d} (1/256) =$	a Tea care	14.81***	1.56	silin m
F <sub>Linear</sub> B		.10	26.23***	1.82
F <sub>Linear A</sub> × Linear B		.64	3.59*	19.79***

<sup>&</sup>lt;sup>a</sup>The higher the number, the more inequitable couples perceive their relationships to be. <sup>b</sup>A + (positive) change indicates that the couple's relationship is becoming more equitable over time; a - (negative) change indicates that it is becoming less equitable. Analyses for Still-together couples only.

Analyses for all couples-Still-together, Still-apart, and Separated \*p < .05

<sup>10. &</sup>gt; q\*\*

<sup>100. &</sup>gt; q\*\*\*

more equitable over time. Intimates of various statuses (casual daters + steady daters  $\nu s$ . couples living together + the married) do not differ from one another in the perceived equity of their relationships. (Linear F [1,176], Time I = .72, n.s.)

Nor is there any evidence that intimates' relationships became any more equitable during the  $3\frac{1}{2}$  months of the study. For couples who are still together, the change from Time 1 to Time 2 was virtually nonexistant (F[1,176] = .00, n.s.).

What is interesting is how men and women's memories of their relationships changed. If a relationship died, men's and women's perception of how equitable it had been in its last few months changed precipitously. (The F[1,256] Linear B effect—assessing the difference between the Still Together groups [M = +.02] change, the Still Apart's [M = -.30], and the Separated groups, [M = -5.13]—is 19.79; p < .001.) In this case, rather than inequity breeding instability, instability seems to breed a perception of inequity.

Additional evidence that fairness of couples' relationships may not increase over the life span, comes from the previously cited interview study of a random sample of 400 elderly women living in Madison, Wisconsin. (Unfortunately, for our purposes, their husbands were not interviewed.) Traupmann et al. (1981) asked the women to indicate via *The Hatfield (1978) Global Measure*, how equitable their marriages had been at various stages in their lives. The women were asked: Did they perceive that their marriages became more and more equitable over time? Stayed about the same? Got less and less fair over time? Varied randomly? As can be seen from Figure 4-3, there is no evidence to support Hypothesis 3. During the early days of dating and marriage, women generally recalled feeling overbenefited. For almost all of the remainder of their lives, however, they felt slightly underbenefited. It was only at the close of their lives that they began to feel fairly treated.

These data raise an intriguing question: If the authors had interviewed men, would they have secured the same pattern of results? Some theorists suggest they would. For example, Lobsenz and Murstein (1976) observe that if men and women "keep score" in their marriages, they both will come out feeling "ripped off." Both men and women, they argue, feel underbenefited most of their lives.

Bernard (1972), on the other hand, argues that men and women should differ markedly in how fair they feel their marriages are. She argues that there is a "His" marriage and a "Her" marriage. In the dating period, women have the advantage. Later on, however, men do. These data support this contention for women, but unfortunately, without data for husbands, we do not know how older men react to the fairness in their relationships.

Conclusion. While one study exists to suggest that perceptions of equity may increase over time, most research provides no support for the contention that relationships become more equitable over time.

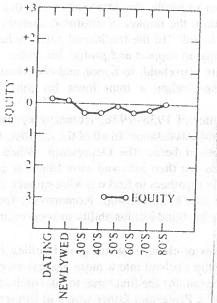


Figure 4-3. Women's perceptions of the equity of their marriages throughout their lives.

Hypothesis 4: In all relationships there are certain crisis periods. At such times of precipitous change, relationships will often become unbalanced. If couples are contacted before, during, and after such crises, it is likely that couples will find the crisis period very unsettling, and will work to reestablish equity... or move in the direction of dissolution of the relationships.

The preceding evidence suggests that most couples start off in fairly well-matched relationships (see Hypothesis 1). In time, however, there will be changes in the relationship balance; relationships that were once equitable become inequitable. Change in the balance of equity may occur in a variety of ways. Getting acquainted: Regardless of how well dating couples think they know each other, once they begin living together they are likely to make some marked discoveries about themselves and their partners. They may come to realize that the relationship that they thought would be so perfect, so fair, is, in fact, grossly inequitable. Day-to-day changes: Over the years, people change. Such mundane changes, too, may produce inequities. Still other changes occur later in life (i.e., during the empty-nest period, retirement or illness). Dramatic changes: Sometimes dramatic changes occur in partners' assets and liabilities. Eventually, the impoverished medical student evolves into an affluent doctor. The good provider may be laid off. The overweight wife may join Weight Watchers.

There is a limited amount of survey data that support the contention that any change in the equity of a relationship can send reverberations throughout the

entire system. For example, the Depression afforded Komarovsky (1971) an opportunity to study the impact of dramatic changes on the marital balance. Komarovsky reasoned: "In the traditional patriarachal view of the family, the husband is expected to support and protect his wife...she, in turn, is expected to take care of his household, to honor and obey him" (p. 2). What happens, Komarovsky asked, when a man loses his job? Does he begin to lose authority?

During the winter of 1935–1936, Komarovsky contacted 58 families who were receiving public assistance. In all of the families, the husband had been the family's sole provider before the Depression. When the Depression hit, this changed: The men lost their jobs and were forced to go on relief. Komarovsky interviewed family members to find out what impact, if any, this change had on the husband and wife's relationship. Komarovsky found that in 13 of the 58 families, when the husband lost his ability to support his family, he began to lose his authority.

Two major types of changes occurred in families: (1) In some families, the couple's relationship evolved into a more egalitarian one. For example, in one family, the man began, for the first time, to take on part of the household duties. In another family, a Protestant father who had formerly forbidden his children to go to a Catholic school now relented. (2) In a very few cases, the husbands' and wives' status was reversed. The dominant husband became subordinate. For example, in one family, so long as the husband was employed, his wife had treated him with careful respect. Once the Depression hit, she no longer bothered to be so polite; she began to blame her husband for unemployment, to ignore his wishes, to complain about his behavior, to argue with him, to nag him constantly, and to criticize him sharply even in front of the children. In another family, the husband admitted: "There certainly was a change in our family, and I can define it in just one word—I relinquished power in the family. . . ." (p. 31).

There is other survey evidence to indicate that crisis periods may change the balance of power in ways that restore equity to the marital relationship. Also studying the effects of unemployment from the Depression, Angell (1936) and Cavan (1959) found that men who became unemployed also lost power in the family, especially if respect and authority were contingent upon earnings. In addition, there is cross-sectional research to suggest that if the status quo (which is usually the husband being the provider) changes, there will also be changes in the relative power of the couple. Scanzoni (1970, 1972) surveyed 900 marriages from all socioeconomic levels and found that the better the husband's performance in the economic system, the more likely it was that the wife believed her husband deserved greater power in the relationship. Those husbands who were not as successful in acquiring status, prestige, and wealth tended to have wives who believed in an equal distribution of power. Aldous (1969) and Gillespie (1971) found that working wives with an independent source of income may have more power than those who stay at home with no independent income. In a sample of 231 dating couples, Peplau (1978) found

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that the higher the educational and career goals of women, the more power they had in the relationship. Goode (1956), in a study of divorce, commented that "willful failure in the role of breadwinner is often met by willful destruction of the sexual and social unity of the marriage" (p. 63).

Conclusion. There is, then, considerable anecdotal and survey evidence that indicates indirectly that couples do try to "fine-tune" the equitableness of their relationships. As yet, however, researchers have collected little compelling survey or experimental data to test directly this intriguing hypothesis.

Hypothesis 5: Equitable relationships will be especially stable relationships. Individuals in equitable relations will be more likely to perceive their relationships as long-term and will be more likely to have relationships intact months and years later.

According to Equity theory, if a couple's relationship becomes grossly inequitable, and if it becomes too costly to restore equity psychologically or actually, they could be tempted to sever the relationship. Dating couples who are unhappy with their relationships may find it relatively easy to end things. As we saw in discussing Hypothesis 1, the most inequitable dating relationships simply end. (See Hill, Rubin, and Peplau [1976] for a further discussion of this point.)

What about couples who have been married? Once couples marry, their lives become more intertwined, and separation becomes much more difficult. In the traditional notion, marriages last forever-they are for "better or worse." In addition to the moral and religious issues, there are very practical costs to divorce. Divorce is very costly in both emotional and financial terms. When a long-married couple separates, parents and friends are stunned, close friends often stop calling, and one of the parents often loses the rights of visitation to his or her children. (See Bohannan, 1971; Hunt & Hunt, 1977; and Napolitane & Pellegrino, 1977.) Thus, when married men and women, after trying to set things right in a marriage, ruefully concede failure, they may first respond by withdrawing psychologically from the situation—to bury themselves in their work, or give their all to their children, their friends, or to backgammon. Yet if a marital relationship is unbalanced enough, for long enough, couples do sometimes opt for separation or divorce. In 1973, 913,000 couples opted for an annulment or a divorce. Udry (1971) calculated that 20 to 25% of first marriages end in annulment, desertion, or divorce.

Is there any evidence that equitable marriages are more compatible (i.e., stable) than inequitable ones? In the study referred to earlier of 118 newlyweds who were interviewed immediately after their marriage and a year later, Utne, Hatfield, Traupmann, and Greenberger (1981) found that even a few weeks after their marriages, couples who feel equitably treated in their relationships are more secure about their marriages than are either overbenefited or underbenefited men and women. In the study, the couples were asked how often they had considered moving out, how often they had considered getting a

divorce, and whether they thought they would still be together in 1 year and in 5 years. Equitably treated spouses were more certain of the stability of the relationship than were inequitably treated spouses. An interesting difference, however, was found between men and women in how likely they were to consider moving out or getting a divorce. While underbenefited men were more likely than other men to report having considered moving out or getting a divorce, overbenefited women were more likely than other women to have considered getting out of the relationship.

Another indication of the compatibility (i.e., stability/instability) of the relationship is the willingness of a spouse to become sexually involved with someone outside the marriage. Hatfield, Traupmann, and Walster (1979) predicted that inequitable relationships would be fragile relationships, because men and women who feel that they are not getting their just deserts in their marriage may be especially likely to explore a fleeting, or more permanent, love affair. To test their hypothesis, the authors reanalyzed the data from a survey study conducted by *Psychology Today*. In 1973, *Psychology Today* readers had been asked to express their feelings about dating, living together, or being married. Sixty-two thousand readers returned the 109-item questionnaire, and 2000 questionnaires were sampled for analysis. The researchers stratified the sample on sex and age to approximate the national distributions.

In the original survey, the respondent's willingness to engage in extramarital sex had been assessed in two ways: (1) how soon after they began living with or married their partner they first had sex with someone else, and (2) how many

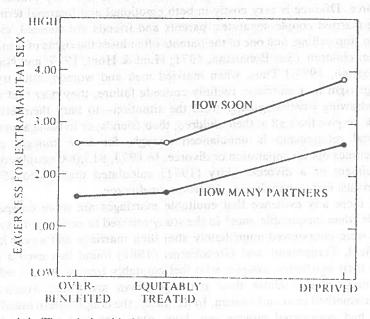


Figure 4-4. The relationship between equity and eagerness for extramarital sex.

people they had had extramarital affairs with. The researchers defined underbenefited respondents as those who had a partner who was less desirable than themselves. Equitably treated respondents were those who had a partner of equal social desirability, and overbenefited respondents were those who had a partner more socially desirable than themselves.

The researchers found some support for their hypothesis. They found that, on the average, equitably treated and overbenefited men and women waited 12 to 15 years before becoming sexually involved outside the relationship. Underbenefited men and women, on the other hand, began extramarital sex 6 to 8 years after marriage. In addition, underbenefited men and women had more extramarital affairs than did their equitably treated and overbenefited counterparts. See Figure 4-4.

Conclusion. It appears that equitable relations are likely to be more compatible (i.e., stable) than inequitable ones. In equitable relationships, both partners are motivated to be faithful.

#### Summary and Discussion

We have reviewed a fair amount of research indicating that Equity theory does provide a convenient paradigm for examining romantic and marital relationships. Evidence was presented to support the contention that equitable relationships are compatible relationships. Specifically, we found the following:

- 1. In early stages of a relationship, couples who feel that their relationships are equitable are more likely to move to more intimate relationships than couples in inequitable relationships (Hypothesis 1).
- 2. Men and women in equitable relationships are more content than men and women who are receiving either far more or far less than they feel they deserve (Hypothesis 2).
- 3. Equitable relationships are more stable than inequitable relationships (Hypothesis 5).

However, only one study indicated that relationships may become more equitable over time (Hypothesis 3)—most of the research suggests that relationships do not become more or less equitable with time. In addition, only indirect evidence was found to indicate that couples try to "fine tune" their relationship as a result of crises that may occur (Hypothesis 4). It is clear that more research is needed to examine these last two hypotheses.

In the five hypotheses we prepared initially, we assumed that the causal direction was from perceptions of inequity to psychological distress and/or the desire to terminate the relationship. However, because the research we reported is correlational in nature, a causal direction cannot automatically be assumed. A plausible argument could also be made that general feelings of dissatisfaction and discontent with the relationship could lead to perceptions of inequity. Some

intimate relations, for example, arise out of passionate love—the type of love that can be very intense, but also very fleeting. Once the critical spark of passion dissipates, one or both partners may want to terminate the relationship, but may need to seek a more rational explanation for wanting out, other than simply an absence of excitement. The distraught lovers may, for example, search for other ways that the relationship may be imperfect (e.g., they may notice gross inequities that they were able to blindly ignore before).

While in real life there is probably a reciprocal relation between perceptions of inequity and incompatibility (feelings of distress), the causal direction predicted from Equity theory (inequity  $\rightarrow$  incompatibility/distress) seems particularly plausible as an explanation for most of the above data in light of two considerations: First, although it is fairly easy to understand how the individual who becomes dissatisfied with a relationship could suddenly perceive how "cheated" he or she is in the relationship, it is a little more difficult, using such a causal direction, to explain the association between advantageous inequity and distress. Second, there is voluminous amount of experimental evidence examining other types of relationships (i.e., industrial relationships) that indicates that inequities do lead to feeling of distress (see Adams & Freedman, 1976).

As we reviewed the research related to the five Equity hypotheses, an unexpected "finding" seemed to emerge. In at least three of the studies reviewed above, men and women were found to react differentially to inequities. In a sample of 50 dating couples (Sprecher-Fisher, 1980), in a sample of 189 casually and steadily dating couples (Traupmann, Hatfield, & Wexler, 1981), and in a sample of 118 newlyweds (Traupmann, Peterson, Utne, & Hatfield, 1981), a consistent difference in men's and women's concern with equity emerged. While women became unusually upset when they were overbenefited, men seemed to be able to take overbenefit more in stride. Conversely, while women seemed to be able to endure underbenefit with more equinimity, men were extremely upset by it. How do we explain the fact that women are more upset by overbenefit than men? Why is the opposite true for men?

Hay and Horton (1981) argue that women may be more sensitive, in general, than men to issues of fairness and justice in interpersonal relations. These authors explain that justice concerns are more salient to those with little power. Because women traditionally have had much less power than men, they should be especially concerned with the equity/exchange aspects of relationships. Although it may not require special sensitivity to fairness issues to recognize and react to being underbenefited, it may require such sensitivity to recognize and react to being overbenefited. Women, who traditionally have had less power, may be socialized to be more sensitive to such issues.

A second possibility to consider is that the types of resources that men offer women (which subsequently lead the women to feel overbenefited) are different from the types of resources women offer men. The differential reaction of males and females to feeling overbenefited/underbenefited may be due more to something inherent about the type of resources controlled by men and women

than to any sex difference in reaction to inequity per se. It is likely, for example, that the woman who is receiving too many extravagant gifts from her lover will feel a different kind of distress (and perhaps a more intense type) than the man who feels that his wife is devoting too much time to housework. It would be interesting to examine how men and women react to inequities when controlling for the types of resources exchanged.

A third, less exciting possibility to consider is that these gender "differences" are not differences at all. Although the same pattern of results has been detected in several studies, in none of these studies were the differences statistically

significant. More research will help clarify these issues.

While it was found that young dating and newlywed women are uneasy about receiving more than they deserved, elderly women appeared to feel comfortable with overbenefit. In the sample of women aged 50 to 92, both the overbenefited and the equitably treated women were content with the way things were. Only the underbenefited were dissatisfied. In light of the possible explanations we gave above for the sex differences in reactions to inequity among young people, why might women, as they get older, become less distressed about being overbenefited? One possibility is that the older women (who report feeling underbenefited for the bulk of their lives) feel that they finally deserve their just awards—and feel no remorse about accepting them. Another possibility is that they become less concerned with any possible future consequences of being overrewarded. More research is needed on how reactions to inequity change over the life cycle for both men and women.

## The Future of Equity Research

The debate we have considered thus far concerns the question: "Do principles of equity operate in love relations?" The evidence we have considered makes it clear that they do. Is this the end of the debate? Hardly. When eminent theorists are so sharply divided on an issue, the ultimate answer to the question "Who is right?" often turns out to be "Both of them are."

We might expect subsequent research to try to find some principles to determine who is especially concerned about equity in love relations, and under what conditions. In fact, research working toward such an understanding already exists. Let us *briefly* review the research, and suggest some areas for further investigation.

1. Who is especially concerned with equity/inequity?

As yet, very little research has been conducted to examine how personality variables may mediate perceptions of inequities and subsequent reactions to such inequities. We do not know what types of individuals are especially concerned with equity and/or especially intolerant of perceived inequities once they are perceived.

Some work, however, has been done by Murstein and his associates (see Murstein & MacDonald, 1977; Murstein, MacDonald, & Cerreto, 1977) to

suggest that people may differ in the degree to which they are concerned with equity in their relationships. These researchers developed an Exchange Orientation Scale, which measures the degree to which people have an "exchange mentality"—carefully maintaining a balance sheet and insisting that equity be maintained at all times, regardless of circumstances, in their relationships. A person who scores high on the scale tends to be primarily concerned with achieving an "equivalent or itemized exchange" and less concerned with meeting the other's needs. According to these researchers, individuals who are highly exchange-oriented tend to have negative personality traits (see discussion below).

Ways in which other, more traditional personality constructs may be related to concern with equity/inequity are clearly speculative at this point. Utne and Kidd (1980) have suggested that whether the individual has an internal or external locus of control may affect how distressed he or she becomes over inequities. Because persons with an external locus of control believe that reinforcements are not contingent on their own behavior, they may be less likely to suffer self-concept distress. They tend to believe that what happens to them has little to do with the self. They tell themselves that the inequities are beyond their control. Conversely, internals may be more likely to experience selfconcept distress as a result of inequities because they do believe that what happens in their lives has a great deal to do with the self . . . and little to do with the environment.

Self-esteem may also be related to concern with inequities in ways that have yet to be explored. Similar to the hypothesized difference predicted between internals and externals, it is possible that individuals with high self-esteem may be more likely than those with low self-esteem to experience self-concept distress. The higher the self-esteem, the more likely it is that the individual will become distressed over possible violations of self-expectations and moral standards (see Glass, 1964).

It is clear that much research could be conducted in the future to examine how people differ in their degree of concern about equity in their relationships. 2. In what types of relationships are people especially concerned with

equity?

In some types of relationships, equity and exchange may be especially salient issues; in other types of relationships, individuals may be less concerned with such issues. One promising avenue for investigating how relationships may differ in affecting their members' concern for equity/inequity comes from the work of Clark and Mills (1979) and Mills and Clark (1980) (see Chap. 5 of this volume). They argue that there are two distinctly different types of relationships-communal and exchange. In communal relationships, intimates give out of love and concern for the other. They avoid exchanging tit for tat. In exchange relationships, on the other hand, people give to get. They carefully keep mental score of what is being exchanged—and who is ahead and who is behind.

Mills and his associates have conducted a series of laboratory experiments designed to illustrate this distinction. Men and women are brought together and

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asked to work on a task. If the newly acquainted couple is eager to begin a "communal" romantic relationship, they are found to "signal" this by carefully not exchanging "tit for tat." If they are motivated to avoid establishing a romantic relationship, they keep things on an exchange basis; after receiving

aid, they pay the other back, in kind, immediately.1

Some theorists have even argued that people may set up inequities in their intimate relations for special purposes. Adams (1976), for example, points out that intimates may purposely generate inequities in order to increase their overall return. Men may shower beautiful women with presents in order to buy their love. The fabeled "Jewish mother" tries to tie her children to her either with gifts (i.e., by overbenefiting them) or with guilt (by presenting an image of herself as extremely underbenefited). So, sometimes, intimates may seek out inequities in order to demonstrate their affection for others... or in order to control them.

What is needed is research designed to explore how concern for equity may differ in different types of relationships, and how inequities may be used for different purposes in different types of relationships.

3. Under what conditions and situations are people especially concerned with equity?

It may be that there are certain conditions or certain situations in which people are especially concerned with equity—or especially intolerant of inequities. For example, inequities may be tolerated by the participants as long as they are receiving the rewards they most want—or as long as their costs are not too great. Perhaps it is only when people stop getting what they most want that they become especially concerned with justice and fairness. A husband who feels that he has always been "cheated" by his demanding wife, for example, may not become distressed until she refuses his sexual requests.

Leventhal (1980) has stated that a concern with inequity and unjustice may be especially salient under those conditions when there are sudden and obvious changes in what is exchanged. This would suggest that concerns with equity may be especially salient when there are dramatic shifts in the relationship (e.g., when the husband gets a promotion or when the wife suddenly loses 40 lb).

Finally, whether people are especially concerned with equity may vary as a function of what alternatives to the relationship exist. If the individual perceives that there are no viable alternatives to the relationship (that is, has a "low

<sup>&</sup>lt;sup>1</sup>The Mills scenario is one possible way in which aid recipients may signal that they want a special (communal) relationship with another. A second, quite different scenario is possible, however. One can also signal that he or she desires a more communal relationship by "upping the ante." When a person is given a present (and thus, is put in an overbenefited position), he or she may wait (it would be considered peculiar to respond too quickly), and then find just the right present to give in return (perhaps escalating a little). Relationships are often furthered by a series of increasing commitments (Dillon, 1968; Mauss, 1954). (Essentially one is communicating: "I care about you," "You can trust me," "I will be fair.")

comparison level for alternatives"), he or she may not be that concerned with how equitable and just the relationship is. Conversely, if the individual perceives that there are desirable alternatives to the present relationship (has a "high comparison level for alternatives"), he or she may be able to better afford being concerned with the equity in the relationship (Thibaut & Kelley, 1959).

4. What are the consequences of encouraging people to be concerned with equity?

One of the most interesting debates to arise recently is between Murstein (1980) and Hay and Horton (1981). Murstein and his associates (see Murstein, 1977, 1978; Murstein & MacDonald, 1977, Murstein, MacDonald, & Cerreto, 1977) argue that a concern with short-term equity can have a disastrous impact on an intimate relationship. Things go best, they argue, when couples do things out of love for each other. A generous spirit sparks generosity in return. A "score-keeping mentality" causes everyone to be dissatisfied.

As described above, these researchers give couples the Exchange Orientation Scale (a scale designed to tap an extreme concern with short-term inequities).<sup>2</sup> Their findings have suggested the following associations:

- 1. Those who tend to be "uneasy much of their lives," "suspicious," "compulsive," "paranoid," "fearful," "defensive," and "insecure" are most concerned with equity (Lobsenz & Murstein, 1976; Murstein, 1978). People who are not "exchange-oriented" tend to be caring, giving, and trusting individuals (Lobsenz & Murstein, 1976; Murstein, 1978).
- 2. The "spirit and meaning" of marriage as an institution is degraded by an exchange-oriented approach to marriage (Lobsenz & Murstein, 1976). In addition, a concern for balanced exchange in any type of close relationship "leads to trouble." Murstein finds that an "exchange orientation" is related to poor dyadic adjustment for married couples (Murstein, MacDonald, & Cerreto, 1977), for cohabitators (Milardo & Murstein, 1979), and for samesex friends (Murstein, MacDonald, & Cerreto, 1977).

Hay and Horton (1981), on the other hand, argue that Murstein and his colleagues are actually arguing for the status quo. If men's and women's relations are to change and grow, couples must openly acknowledge their concern with justice and work out fair agreements. In addition, they point out that there are problems with the Exchange Orientation Scale. Ideally, in a scale designed to measure concern with equity, there would be an equal number of items measuring concern with giving (overbenefit) and taking (underbenefit.) Essentially, the E Scale asks only about intimates concern over being

<sup>&</sup>lt;sup>2</sup>There is some ambiguity as to whether Murstein means to equate concern with exchange with concern with equity. In Murstein, MacDonald, and Cerreto (1977), he argues that the two concepts have nothing to do with each other. In Murstein (1977), he indicates that the *E-Scale* does measure concern with equity. In this chapter, for the sake of discussion, we have assumed that the two are related.

"cheated." Worse yet, the questions are worded—so that in order to express a concern with fairness (which could, theoretically, be a positive or a negative trait), one must reveal oneself to be "selfish, rigid, and petty." It is not surprising, then, that persons scoring high on Murstein's Exchange Orientation Scale are neurotic and unhappy and have unsuccessful relationships. In the future, researchers may want to create a more value-free scale that measures concern with both advantageous inequity and disadvantageous inequity. Only then can we more clearly delineate what the consequences and correlates are of being especially concerned with equity and exchange.

5. Under what conditions can injustice exist in love relations?

Theorists are sharply divided as to whether or not love relations are ever unfair. Family therapists, such as Napier and Whitaker (1978), argue that families are a perfectly balanced system. Everyone must be getting something out of the status quo if it is to survive, thus, what may seem at first glance to be an exploitative relationship will turn out to be an exquisitely balanced exchange on further examination. In love, they argue, there are no bullies, no victims. (This observation reminds us of a "sainted" wife we once interviewed. Neighbors agreed that she was shabbily treated by her brutal husband—who happened to be an Episcopal priest. He was a hard-driving cleric who longed to be a bishop. She never spoke of his shabby treatment of her. She told no one . . . except, it turns out, her husband's bishop—the very man in charge of his promotion.) On the other hand, Marxist theorists such as Wexler (1980) and Kennedy (1980) argue that marriages can hardly be equitable if they take place in a context in which men have the economic advantage.

If inequities can exist in a marriage, under what conditions will they be especially disruptive? Under what conditions will they be tolerated? Only further research will prove some answers

In this chapter, we have traced some promising lines of research which may enable Equity theory and its critics to come up with a synthesis that will tell us more about how love and a concern with justice can coexist and promote each other.

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