

NEW DIRECTIONS IN EQUITY RESEARCH¹

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This article consists of four sections: The first section elucidates a general theory of social behavior—equity theory. Equity theory consists of four propositions designed to predict when individuals will perceive that they are justly treated and how they will react when they find themselves enmeshed in unjust relationships. The second section summarizes the extensive research that has been conducted to test equity theory. The third section points out the ways in which equity theory interlocks with other major social psychological theories. The final section hints at some ways in which equity theory can be applied to understanding social problems.

THE THEORETICAL FORMULATION

The proposition that individuals seek for themselves maximum reward at minimum cost is hardly startling. Theories in a wide variety of disciplines rest on the assumption that "Man is selfish." Psychologists believe that behavior can be shaped by the careful application of reinforcements. Economists assume that individuals will purchase desired products at the lowest available price. Moral philosophers conclude that the ideal society can only be one which insures the "greatest good for the greatest number." Politicians contend that "Every man has his price." Equity theory, too, rests on the assumption that man is selfish.

Thus, our first proposition states:

Proposition I: Individuals will try to maximize their outcomes (where outcomes equal rewards minus costs).

If everyone were unrestrained in his attempts to get what he wanted, everyone would suffer. Every man would attempt to monopolize community resources; every man would be continually confronted by rivals bent on reclaiming these resources. Only by working out a compromise can the group avoid continual warfare and maximize collective reward.

This fact is acknowledged in Proposition IIA:

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Proposition IIA: Groups can maximize collective reward by evolving accepted systems for "equitably" apportioning rewards and costs among members. Thus, members will evolve such systems of equity and will attempt to induce members to accept and adhere to these systems.

If group members are to be effective in inducing their fellow members to behave equitably, they must make it more profitable for the individual to behave equitably than inequitably (see Proposition I). Thus, Proposition IIB proposes that groups will insure the profitability of equitable behavior in the following way:

Proposition IIB: Groups will generally reward members who treat others equitably and generally punish (increase the costs for) members who treat others inequitably.

What Constitutes an Equitable Relationship?

In Proposition IIA we argued that every culture must institutionalize systems for equitably apportioning resources among its members (see De Jong, 1952). We must admit, however, that the perception of *what* is equitable varies enormously between cultures. In spite of the fact that different societies have established strikingly different procedures for partitioning their resources, we have found a single general principle to be useful in characterizing these widely diverse conceptions about what is equitable (see Adams, 1965; Blau, 1967; Homans, 1961; Walster, Berscheid, & Walster, 1970).

We define an "equitable relationship" to exist when the person scrutinizing the relationship (i.e., the scrutineer—who could be Participant A, Participant B, or an outside observer) perceives that all participants are receiving equal relative outcomes from the relationship (i.e., $\frac{\text{Outcomes}_A}{\text{Inputs}_A} = \frac{\text{Outcomes}_B}{\text{Inputs}_B}$).

Definition of Terms

Outcomes (O) are defined as the positive and negative consequences that a scrutineer perceives a participant has incurred as a consequence of his relationship with another. Following Homans (1961), we shall refer to positive outcomes as "rewards" and negative outcomes as "costs." The participant's total outcomes in a relationship are equal to the rewards he obtains from the relationship minus the costs he incurs.

We defined inputs (I) as "the participant's contributions to the exchange, which are seen (by a scrutineer) as entitling him to rewards or costs." The inputs that a participant contributes to a relationship can be either assets—entitling him to rewards—or liabilities—entitling him to costs.

In different settings, different inputs are seen as entitling one to rewards or costs. In industrial settings, assets such as "capital" or "manual labor" are seen as relevant inputs—inputs that legitimately entitle the contributor to reward. In social settings, assets such as physical beauty or kindness are generally seen as assets entitling the possessor to social reward. Social liabilities such as boorishness or cruelty are seen as liabilities entitling one to costs.

Definitional Formula

Adams proposed the simple formula $\frac{O_A}{I_A} = \frac{O_B}{I_B}$ for designating an equitable relationship, where O_A and O_B are A's and B's outcomes from the relationship, and I_A and I_B are A's and B's inputs to the relationship. Unfortunately, this simple notation is adequate only so long as all participants have positive inputs. This formula is *not* suitable in social relations where inputs may be negative as well as positive. For example, according to the preceding formula, a

relationship would be calculated as equitable if $I_A = 5$, $O_A = -10$, $I_B = -5$, and $O_B = 10$.

Substituting in the formula: $\frac{O_A}{I_A} = \frac{-10}{5} = -2$

and $\frac{O_B}{I_B} = \frac{10}{-5} = -2$. Obviously neither Adams nor we would feel such a relationship was, in fact, equitable.

In place of Adams's formula, we have chosen the following formula for calculating whether or not a relationship is equitable:

$$\frac{O_A - I_A}{|I_A|} = \frac{O_B - I_B}{|I_B|},^3$$

where O designates a scrutineer's perception of A's and B's outcomes, I designates his perception of A's and B's inputs, and $|I|$ designates the *absolute value* of A's and B's inputs (i.e., the perceived value of A's and B's inputs, disregarding sign). A participant's relative outcomes will be zero if his outcomes equal his inputs. His relative outcomes will be positive if his $O > I$, and negative if his $O < I$. Thus, the sign and the magnitude of this measure indicates how "profitable" the relationship has been to each of the participants.

Recall the preceding example, where $I_A = 5$, $O_A = -10$, $I_B = -5$ and $O_B = 10$. Substituting in our formula $\frac{O_A - I_A}{|I_A|} = \frac{-15}{5} = -3$; $\frac{O_B - I_B}{|I_B|} = \frac{15}{5} = 3$. Unlike Adams's formula, our formula properly reveals that B is reaping undeservedly large outcomes from his relationship with A.

Who Decides Whether a Relationship Is Equitable?

In Propositions IIA and IIB we argued that societies develop norms of equity and teach these systems to their members. Thus, in any society there will be a general consensus as to what constitutes an equitable relationship. However, the preceding formulation makes it clear that ultimately, equity is in the eye of the beholder. An individual's perception of how equitable a relationship is will depend on *his* assessment of the value and relevance of the various participants' inputs and outcomes.

³ The restriction of this formula is that $|I| > 0$.

Participants themselves, even after prolonged negotiation with one another, will not always agree completely as to the value and relevance of various inputs and outcomes. One person may feel that a distinguished family name is a relevant input, entitling him to positive outcomes. His partner might disagree. Aesop acidly observed that "The injuries we do and those we suffer are seldom weighted on the same scales." If participants do calculate inputs and outcomes differently—and it is likely that they will—it is inevitable that participants will differ in their perceptions of whether or not a given relationship is equitable. Moreover, "objective" outside observers are likely to evaluate the equitableness of a relationship quite differently than do participants.

Do People Generally Behave Equitably?

Proposition I states that individuals will try to maximize their outcomes. We might rephrase this proposition as:

Corollary I.1: So long as individuals perceive that they can maximize their outcomes by behaving equitably, they will do so. Should they perceive that they can maximize their outcomes by behaving inequitably, they will do so.

In Propositions IIA and IIB we observed that society will try to insure that members recognize that they can maximize their outcomes by behaving equitably. There is some evidence that individuals do generally behave equitably. A number of experiments demonstrate that individuals will spontaneously share rewards with others. Individuals who are given more than their share of reward voluntarily surrender some benefit to their deprived partners. Deprived individuals, on the other hand, are quick to demand the reward they deserve (see, e.g., Leventhal, Allen, & Kemelgor, 1969; Marwell, Ratcliffe, & Schmitt, 1969; Schmitt & Marwell, 1970⁴).

In spite of the consistent evidence that individuals do behave equitably, we must remember that individuals will behave inequitably with some regularity⁵ (Corollary I.1).

⁴ Unpublished study entitled "Cooperation and Inequity: Behavioral Effects," 1971. Address requests to D. R. Schmitt, Department of Psychology, University of Washington, Seattle, Washington 98106.

⁵ There are two reasons why we would expect a participant in a relationship to behave in a way that

We have just argued that individuals now and then treat others in ways they perceive to be *inequitable*. How should the socialized individual react when he finds himself in an inequitable relationship?

We have argued that individuals are often punished when they treat their colleagues inequitably. We pointed out that the person who extorts greater outcomes than he deserves will be punished. Conversely, the person who acquiesces in receiving fewer outcomes than he deserves will be punished—by deprivation (and possibly by his peers as well). Thus, individuals should quickly come to associate "participating in an *inequitable* relationship" with punishment.

As a consequence of these inevitable socialization experiences, we propose Proposition III.

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

Experimental evidence supports both our Proposition III and Homan's contention that individuals participating in inequitable relationships do feel distress regardless of whether they are the victims or the beneficiaries of the inequity. Experiments by Walster et al. (1970), Leventhal et al. (1969), Jacques (1961), and Thibaut (1950) indicated that those who receive less than they deserve feel distress (usually in the form of anger). Experiments by Jacques (1961), Adams and Rosenbaum (1962), Adams (1963), and Leventhal et al. (1969) demonstrated that those who receive more than they deserve feel distress (usually in the form of guilt).

Evidence also exists to support the contention that the greater the inequity, the more distress participants feel (see Leventhal et al. 1969; Leventhal & Bergman, 1969).

Proposition IV: Individuals who discover he acknowledges is inequitable. First, an individual should behave inequitably whenever he is confident that in a given instance he can maximize his outcomes by doing so. Second, it is to the individual's long-range benefit to behave inequitably now and then. Only by varying the equitableness of his behavior can a participant ascertain whether or not sanctions against inequity are still operating. (Only by testing limits occasionally can one adapt to a changing world.) Thus, an individual can maximize his total outcomes if he tests equity norms now and then.

they are in an inequitable relationship attempt to eliminate their distress by restoring equity. The greater the inequity that exists, the more distress they feel, and the harder they try to restore equity.

There are two ways that a participant can restore equity to an inequitable relationship: He can restore actual equity to the relationship, or he can restore psychological equity.

A participant can restore "actual equity" by appropriately altering his own outcomes or inputs or the outcomes or inputs of the other participants. For example, the ghetto black who feels his boss underpays him can re-establish actual equity by becoming a slacker (thus lowering his inputs), by forcing his employer to work harder (thus raising his employer's inputs), by demanding a raise or stealing from the company (thus raising his own outcomes), or by sabotaging company equipment (thus lowering his employer's outcomes). The ingenious ways individuals contrive to bring equity to inequitable relationships are documented by Adams (1963).

A participant can restore "psychological equity" by appropriately distorting his perception of his own or his partner's outcomes and inputs.⁶ For example, an exploitative employer may convince himself that his inequitable relationship with his underpaid and overworked secretary is in fact equitable by appropriately distorting reality. He can restore psychological equity to their relationship if he can sufficiently minimize her inputs ("You wouldn't believe how stupid she is."), exaggerate her outcomes ("Work gives her a chance to see her friends."), exaggerate his own inputs ("Without my creative genius the company would fall apart."), or minimize his outcomes ("The tension on this job is giving me an ulcer.").

Equity theorists concur that people try to maximize their outcomes (Proposition I). A group of individuals can maximize their total

outcomes by agreeing on some equitable system for sharing resources. (A relationship is defined as equitable when a scrutineer perceives that all participants are securing equal relative

outcomes $\left(\frac{O - I}{|I|} \right)$ from the relationship, that is, $\frac{O_A - I_A}{|I_A|} = \frac{O_B - I_B}{|I_B|}$.

Groups try to insure that members can maximize their outcomes by behaving equitably; they reward members who behave equitably and punish members who behave inequitably. When individuals socialized by this system participate in inequitable relationships, they experience distress. Participants reduce their distress either by restoring actual equity or by restoring psychological equity to the relationship.

Applications of Equity Theory

Researchers have applied the equity framework to four major areas of human interaction: (a) business relationships, (b) exploitative relationships, (c) helping relationships, and (d) intimate relationships.

Equity Theory and Business Relationships

The vast majority of equity research has been conducted in industrial settings. Since excellent and recent summaries of this material are available elsewhere (see Adams, 1965; Lawler, 1968; Opsahl & Dunnette, 1966; Pritchard, 1969; Weick & Nessel, 1969), we will not review this literature here.

Equity Theory and Exploitative Relationships

At first researchers were preoccupied with testing equity theory in industrial settings. Eventually they realized that the theory could be applied to social as well as to business exchanges. The first social relationships to come under their scrutiny were "exploitative" relationships—relationships in which one participant received far greater relative outcomes than did another.

The decision to focus on exploitative relations was a natural one. It is easy to analyze exploitative relations within the equity framework. We can reasonably define a "harm-doer" as "one who commits an act which causes his partner's relative outcomes to fall short of his

⁶ We can, of course, detect whether or not participants are "distorting" by (a) examining how participants' assessments of relevant inputs and outcomes compare to those of observers, who are not so motivated to distort their perceptions of participants' relative outcomes, or (b) by examining whether or not the perceptions of participants suddenly shift in predictable ways as soon as they discover they are participating in an inequitable relationship.

own." The participant whose relative outcomes are reduced is the "victim" of the inequitable action.

Let us first consider how harm-doers have been found to respond after treating another inequitably.

Reactions of the Harm-Doer

According to our theory (Proposition III), an individual who receives higher outcomes than he knows he deserves will feel distress. Compelling evidence exists to support the contention that individuals do feel intense distress after injuring another. Theorists have labeled this distress as "guilt," "fear of retaliation," "dissonance," "empathy," or "conditioned anxiety." Basically, however, a harm-doer's distress is presumed to arise from two sources: fear of retaliation and threatened self-esteem. Presumably, both retaliation distress and self-concept distress have their roots in the socialization process.

Retaliation Distress

Children are usually punished if they are caught injuring others. Soon they come to experience conditioned anxiety when they harm another or even contemplate doing so. (Aronfreed, 1964, provides a description of the development of conditioned anxiety in children.) By the time the normal individual reaches adulthood, he experiences some distress whenever he harms another. How much anxiety he experiences in a given harm-doing situation depends first on how similar the stimuli associated with harm-doing are to those stimuli previously associated with punishment, and second on the magnitude and timing of previous punishment.

The conditioned anxiety that one experiences when he harms others may be labeled by the harm-doer as fear that the victim, the victim's sympathizers, legal agencies, or even God will restore equity to the harm-doer/victim relationship by punishing the exploiter.

Self-Concept Distress

Harm-doing often generates a second kind of discomfort: self-concept distress. In most societies, nearly everyone accepts the ethical principle that "one should be fair and equitable

in his dealings with others" (cf. Fromm, 1956, for an interesting discussion of the pervasiveness of the "fairness" principle). Harming another violates a normal individual's ethical principles and conflicts with his self-expectations. When the normal individual violates his own standards, he experiences self-concept distress.

In arguing that the "normal" individual accepts norms of "fairness," we are *not* arguing that everyone internalizes exactly the same code, or internalizes it to the same extent and follows that code without deviation. Juvenile delinquents and confidence men, for example, often *seem* to behave as if the exploitation of others was completely consonant with their self-expectations. Evidence suggests, however, that even deviants do internalize standards of fairness, at least to some extent. It is true that they may repeatedly violate such standards for financial or social gain, but such violations do seem to cause at least minimal distress. Exploitation evidently causes deviants enough discomfort that they spend time and effort trying to convince others that their behavior is "fair." Anecdotal evidence on these points comes from interviews with confidence men (see Goffman, 1952) and delinquents (see Sykes & Matza, 1957).

The distress that arises when one performs unethical or dissonant acts has been discussed in great detail by guilt theorists and by cognitive dissonance theorists. See, for example, Maher (1966), Arnold (1960), and Bramel (1969) for these two points of view.

The Greater the Inequity, the Greater the Distress

In Propositions III and IV we proposed that the more inequitable a relationship, the more distress the participants will feel, and the harder they will try to restore equity. There is some indirect evidence to support the notion that the more one harms another, the more distressed he will be. Brock and Buss (1962, 1964) recruited student assistants to shock other students each time the students made a learning error. The authors discovered that the more painfully one required the assistant to shock his fellow student, the more the student tried to foist responsibility for administering the shock onto the supervisor. Lerner and Simmons (1966) found that the more one

allows another to suffer, the more one will derogate the hapless victim. Lerner and Matthews (1967) concluded that the more responsible subjects feel for another's suffering, the more they will derogate the victim. If we assume that a harm-doer will be especially distressed when his victim suffers a great deal or when the harm-doer is obviously responsible for the victim's suffering, these findings are consistent with Propositions III and IV.

There is also much compelling evidence available to support the contention (Proposition IV) that participants involved in inequitable relations will try to eliminate their distress by restoring either actual equity or psychological equity to their relationship.

Restoration of Actual Equity

Harm-doers can restore equity in a straightforward way: They can *compensate* their victims. When we think of "compensation," we usually envision acts designed to increase the victim's outcomes. However, one can also compensate the victim by allowing him to lower his inputs. The underpaid and overworked secretary, for example, may be encouraged to "take Monday off" by her uneasy boss.

Cynics such as Junius have acidly observed that even "a death bed repentance seldom reaches to restitution." This pessimism is not always warranted. Recent studies verify the fact that harm-doers do commonly compensate their victims: Walster, Walster, Abrahams, and Brown (1966), Walster and Prestholdt (1966), Brock and Becker (1966), Berscheid and Walster (1967), Freedman, Wallington, and Bless (1967), Carlsmith and Gross (1969), and Berscheid, Walster, and Barclay (1969).

Theoretically, a harm-doer can restore actual equity to his relationship with the victim by using a second strategy—*self-deprivation*. The harm-doer could voluntarily reduce his own relative outcomes to the victim's level; one could curtail his own outcomes from the relationship or increase his inputs.

The anecdotal and clinical literature provide support for the notion that individuals sometimes do react to the commission of harmful acts by administering punishment to themselves or by seeking punishment from others. Indeed, Sarnoff (1962) has suggested that

"punishment is the only kind of response that is sufficient to reduce the tension of guilt [p. 351]." Attempts to demonstrate self-punishment in the laboratory have been uniformly unsuccessful, however. In the view of our assumption that individuals prefer to maximize their rewards whenever possible (Proposition I), we would expect individuals to restore equity by employing self-punishment only as a last resort. The data indicate that self-deprivation is not a popular strategy for equilibrating our relations with others.

Restoration of Psychological Equity

As we noted earlier, by distorting reality, one can restore psychological equity to his relationship with another. If the harm-doer can aggrandize the victim's relative outcomes or minimize his own, he can convince himself that his inequitable relationship is, in fact, equitable. Some distortions which harm-doers have been detected using include derogation of the victim, minimization of the victim's suffering, or denial of one's own responsibility for the victim's suffering.

Derogation of the Victim

An act which injures another is not inequitable if the victim deserves to be harmed. Thus, an obvious way in which a person who has harmed another can persuade himself that his act was equitable is by devaluating the victim's inputs.

That harm-doers will often derogate their victims has been demonstrated by Sykes and Matza (1957), Davis and Jones (1960), Berkowitz (1962), Davidson (1964), Glass (1964), and Walster and Prestholdt (1966). In a typical experiment, Davis and Jones (1960) found that students who were hired to humiliate other students (as part of a research project) generally ended up convincing themselves that the student deserved to be ridiculed. Sykes and Matza (1957) found that juvenile delinquents often defend their victimization of others by arguing that their victims are really homosexuals, bums, or possess other traits which 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 a harm-doer can deny that the victim was harmed, he can convince himself that his relationship with the victim is an equitable one. Sykes and Matza (1957) and Brock and Buss (1962) demonstrated that harm-doers 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 markedly underestimate the painfulness of the shock they are delivering.

Denial of Responsibility for the Act

If the harm-doer can perceive that it was not his behavior but rather the action of someone else (e.g., the experimenter or fate) that caused the victim's suffering, then *his* 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 *his* relationship with the victim, not the harm-doer's relationship, that is perceived as inequitable.)

That harm-doers often deny their responsibility for harm-doing has been documented by Sykes and Matza (1957) and by Brock and Buss (1962, 1964). In daily life, denial of responsibility seems to be a favorite strategy of those who are made to feel guilty about exploiting others. War criminals protest vehemently they were "only following orders."

The research results enumerated in this section document the eagerness with which harm-doers restore equity after injuring others. Equity theory provides an orderly framework for cataloguing the possible reactions of harm-doers. But this is not enough. Researchers are more interested in prediction than in description.

PREDICTION OF A HARM-DOER'S RESPONSE

To predict which of many potential techniques harm-doers will use, researchers adopted a simple strategy. They tried to (a) condense the multitude of potentially equity-restoring responses into a few meaningful categories and (b) isolate variables which determine which class of responses a harm-doer will choose.

Condensation of Responses into a Few Categories

Prediction was facilitated when researchers eventually realized that harm-doers' responses generally fall into two distinct categories: Harm-doers tend either to *compensate* their victims (and to restore actual equity) or to *justify* the victims' deprivation (and restore psychological equity). Harm-doers rarely use both techniques in concert; compensation and justification seem to be alternative, rather than supplementary, techniques for restoring equity.⁷

Logically, it should be difficult for a harm-doer to use compensation and justification techniques in concert. It should be difficult for the harm-doer to simultaneously acknowledge on the one hand that he is at fault for the victim's undeserved suffering and thus exert himself in an attempt to assist the victim while on the other hand convincing himself that his victim deserves to suffer, that he is not really injured, or that the harm-doer is not responsible for the victim's suffering.⁸

There is empirical evidence that individuals generally *do not* use compensation and justification in concert. Walster and Prestholdt (1966) led social work trainees to inadvertently harm their clients. Subsequently trainees were asked to evaluate the clients and asked to volunteer their free time to help them. Compensation and justification responses were found to be negatively related; the more trainees derogated their clients, the *less* time they volunteered to help them. Lerner and Simmons (1966) found that observers only derogated a victim when they were powerless to aid him in any way. When it was clear that

⁷ It is possible, of course, for individuals to use compensation and justification techniques *in sequence*. For example, a harm-doer may attempt to make compensation, find it impossible, and then resort to justification. Or he may attempt to justify his behavior, have his rationalizations challenged, and then accede to demands for compensation. However, individuals do not generally use compensation and justification techniques simultaneously.

⁸ Although victims generally do not use compensation and justification techniques in concert, it is, of course, possible for them to do so. For example, a harm-doer could inadequately compensate the victim (thus partially restoring actual equity) and minimize the harm he had done the victim. Distorting the victim's outcomes would allow the harm-doer to deceive himself that this inadequate compensation had completely restored equity.

compensation would occur, no derogation was detected. Thus, we can conclude:

Conclusion I: The harm-doer will avoid using justification techniques and compensation techniques in concert.

Isolating Variables Which Influence a Harm-Doer's Response

Once researchers discovered that (a) a hodge-podge of equity-restoring techniques could be classified into two distinct categories—compensation or justification—and (b) compensation and justification tend to be mutually exclusive techniques for restoring equity, their task was vastly simplified. It is easier to detect the antecedents of two alternative responses—compensation or justification—than to ferret out the antecedents of a multitude of disorganized responses.

In addition, the recognition that harm-doers generally compensate or justify made it evident that it is practically, as well as theoretically, important to identify the variables which push harm-doers toward one or another response.

Any society has a vested interest in encouraging harm-doers to voluntarily compensate their victims rather than derogating them. If a harm-doer refuses to make restitution, the victim is left in sad straits. Not only has he been deprived of material benefits which he deserves, but he must face both the indignity of derogation and the added difficulty that the harm-doer, because of his derogation, may *continue* to treat him unjustly (see Berscheid, Boye, & Darley, 1968). Societies should naturally prefer that its citizens restore actual equity after committing injustices rather than engaging in a series of justifications which end in shared bitterness and possible further harm-doing. For theoretical and practical reasons, then, we are interested in identifying those variables that encourage harm-doers to make voluntary compensation and those variables which encourage justification.

Two situational variables have been found to be important: (a) the adequacy of the existing techniques for restoring equity and (b) the cost of the existing techniques for restoring equity. We would expect people to prefer techniques that *completely* restore equity to techniques that only *partially* restore equity,

and to prefer techniques with little material or psychological cost to techniques with greater cost. More precisely we would expect:

Corollary IV.1: Other things being equal, the more adequate a harm-doer perceives an available equity-restoring technique to be, the more likely he is to use this technique to restore equity.

Corollary I.2: Other things being equal, the more costly a harm-doer perceives an available equity-restoring technique to be, the less likely he is to use this technique to restore equity.

Adequacy of Equity-Restoring Techniques

The "adequacy" of a technique is defined as the extent to which that technique will *exactly* restore equity to the harm-doer/victim relationship. As we pointed out in Proposition III, participants in inequitable relations feel uncomfortable and the more inequitable the relationship, the worse participants feel. Harm-doers thus have a vested interest in reestablishing as equitable a relationship as possible.

Data support the contention (Corollary IV.1) that individuals are more likely to compensate their victim if adequate compensation is available than if it is not.

Adequacy of Compensation

By definition, an adequate compensation is one that can exactly balance the harm done. Both *insufficient* compensations and *excessive* compensations lack adequacy; thus, harm-doers should be reluctant to make such compensations.

Why should a harm-doer be reluctant to make an insufficient compensation? (Certainly his victim would prefer insufficient compensation to no compensation at all.) If insufficient compensation is the *only* way by which a harm-doer can reduce his distress, rather than do nothing, he will probably choose to restore at least partial equity to his relationship with the victim. But insufficient compensation is *not* the only equity-restoring technique open to the harm-doer. A technique incompatible with compensation is available to him. The harm-doer can always completely eliminate his distress by *completely* justifying the victim's suffering. Thus, as available compensations become increasingly insufficient, justification

techniques should become increasingly appealing to the harm-doer.

Making an excessive compensation is also an unsatisfactory way to restore equity. An excessive compensation eliminates one kind of inequity by producing another. The harm-doer who compensates his victim excessively does not restore equity; he simply becomes a victim instead of a harm-doer—a most undesirable transformation.

Berscheid and Walster (1967) tested the hypothesis that a harm-doer's tendency to compensate his victim will be an increasing function of the adequacy of the compensations available to him. Their results provide support for Corollary IV.1. In this experiment, women from various church groups were led to cheat fellow parishioners out of trading stamps in a vain attempt to win additional stamps for themselves. When the women were subsequently given an opportunity to compensate the victim (at no cost to themselves), it was found that adequacy of compensation was crucial in determining whether or not the women chose to compensate. Women who could compensate with an adequate compensation (exactly restoring the number of books the partner had lost) were much more likely to make restitution than were women limited to insufficient compensation (a few stamps) or to excessive compensation (a great many stamp books). This finding was replicated by Berscheid et al. (1969).

The hypothesis that individuals are predisposed to make adequate compensation and to resist making inadequate or excessive compensations has some interesting implications. In life, exploited individuals sometimes try to impress on those in a position to make restitution how much they have suffered in the hope of eliciting increased restitution. It is natural to assume that the better a case one makes for his claim, the more likely it is that he will be compensated. The preceding research, however, indicates that in some instances, it might be a more effective strategy for a victim to minimize his suffering than to aggrandize it.

The greater the inequity a victim documents, the more restitution the harm-doer should be willing to make—up to a point. However, at some point, the described inequity will become so large that the harm-doer will despair of

ever being able to make complete restitution. Once this point is reached, it is no longer profitable for the victim to exaggerate his suffering. Further exaggeration will *not* elicit increased restitution—the harm-doer has already reached his limit. In fact, the more additional suffering the victim describes, the more inadequate the compensations available to the harm-doer become, and thus the more unwilling he should become to provide any compensation at all.

The preceding reasoning may provide some insight into the public reaction to demands for compensation. Most Americans probably feel that no matter how hard they try they cannot make adequate restitution to blacks for their centuries of exploitation. Black leaders have argued that citizens should at least take some step toward restoring equity. However, the idea of making a small step toward restoring equity, making a small compensation, is not very attractive to many citizens. The effort to make a partial compensation mocks their rationalizations that no harm was done or that blacks deserved their treatment. If one cannot compensate enough to reduce his own distress, he is perhaps happier with his rationalizations. If we generalize shamelessly from the preceding findings, we might speculate that an effective strategy for deprived minorities may be to *minimize* their description of their suffering and to make it clear that if *available* compensations are extended, it will completely *eliminate* the debt owed to them. While this is not true, it may be a profitable strategy since it would insure that blacks would receive at least minimal compensation.

Adequacy of Justifications

To restore complete psychological equity in his relationship with a victim, a harm-doer must be able to conceive of justifications that (a) adequately justify the harm done and (b) are plausible to himself, the victim, and to others. (Only if the harm-doer believes his own distortions will he be able to eliminate self-concept distress; only if he imagines that the victim accepts his justifications will he be able to eliminate fear of retaliation.)

Little is known about what causes an excuse to be seen as “adequate justification” for a harmful act. Once a harm-doer conceives of an

adequate justification, however, we know a great deal about the factors which determine how plausible or *credible* a given justification is (see McGuire, 1968). For a delightful and extensive account of excuses that work, see Scott and Lyman (1968).

In this article we describe only two factors that have been found to determine how plausible, and thus how readily used, various justifications are.

1. A harm-doer will perceive a potential justification to be more credible when it requires little distortion of reality than when it requires a great deal of reality distortion. The more serious or extensive a distortion of reality required by a justification, the less credible these justifications should be to the victim, the harm-doer, and others. A justification that no one believes is not very effective in restoring equity. Some tangential support for this proposition comes from Rosenberg and Abelson (1960), who provide evidence that individuals prefer to distort reality as little as possible.

2. The more contact the harm-doer has had (or anticipates having) with the victim or the victim's sympathizers, the less likely he will be to justify his harm-doing.

There are two reasons why one should be more reluctant to distort an intimate's relative outcomes than to distort those of a stranger: First, the more intimate we are with someone, the more likely we are to have voluminous information about that person. Thus, when one tries to distort an intimate's characteristics, he will soon find himself in trouble. The harm-doer's fine rationalizations will keep bumping up against recalcitrant facts. However, it will be easy for one's fantasies about a stranger to proliferate boundlessly.

Virtually all of the cognitive consistency theorists (Abelson & Rosenberg, 1958; Cartwright & Harary, 1956; Festinger, 1957; Rosenberg, 1960; Zajonc, 1960) acknowledge it is easier to change beliefs that exist in isolation. Walster, Berscheid, and Barclay (1967) demonstrated that one is more likely to avoid distortions when future objective evidence may contradict these distortions than when objective evidence will be unavailable. Both these observations are consistent with the expecta-

tion that it is harder to distort the familiar than the unknown.

There is a second reason why one should be more reluctant to distort an intimate's relative outcomes than those of a stranger. One should expect more difficulty *maintaining* an adequate distortion when the distortion involves an intimate than when it involves a stranger. If one engages in a massive distortion of an intimate's character, he must anticipate that his friend will have more opportunities (than a stranger would) to confront him, challenge his rationalizations, and perhaps retaliate against him.

For two reasons, then, familiarity with the victim should breed accuracy and discourage justification as a distress-reducing technique. Data are available to support this hypothesis. Davis and Jones (1960) found that subjects who ridicule another student, derogate him more when they do not expect to see him again than when a meeting is expected. Davis and Jones assumed that they secured this result because subjects who anticipate future contact plan to "neutralize their harm-doing" by explaining that their negative evaluation does not represent their true feelings. However, since the victim has already suffered by the time neutralization occurs, this explanation is not totally satisfactory. An equally plausible interpretation is that distortion becomes more difficult and less likely to occur when future interaction is anticipated.

Ross (1965) conducted an experiment in which students were led to choose to consign their partner to electric shock to avoid painful shock themselves. In some conditions, the students believed they would work with their partner only once. In other cases they believed they would work with him on many tasks. Ross discovered that when the student allowed the other to be injured, derogation occurred more often when subsequent contact was not anticipated. This finding is, of course, satisfactorily explained by the hypothesis that we only distort the characteristics of those individuals who can be kept "out of sight and out of mind."

This conclusion suggests that the exploited might do well to harass their exploiters. For example, so long as exploited minorities are geographically and socially segregated, an exploiter can conveniently reduce whatever vague feelings of guilt he might have by

justifying his exploitation. It is easy for him to maintain that minority members deserve their exploitation ("The poor are shiftless and lazy and don't want a steady job.") or that they are not really suffering ("A Chicano can live better on a dollar than a white man can on five dollars."). We might expect that integrated housing and forced association will make use of such rationalizations more difficult. Until such integration occurs, however, minority members could arrange "symbolic integration." Welfare mothers who feel that suburban whites reinforce one another's "preposterous rationalizations," could arrange to expose the taxpayers to reality. They might travel to the suburbs, talk to suburbanites about their plight, confront shoppers, speak up in suburban Parents Teachers Associations, etc.

We proposed that two variables determine how a harm-doer chooses to restore equity to his relationship with the victim: (a) the adequacy of existing techniques for restoring equity (Corollary IV.1), and (b) the cost of the existing techniques for restoring equity (Corollary I.2). In the last section we provided data showing that adequate compensations and justifications are preferred to inadequate ones. In the next section, we present evidence that the greater the cost of an equity-restoring technique, the less likely a harm-doer is to use that technique to restore equity.

Cost of Equity-Restoring Techniques

In Proposition I, we stated that individuals try to maximize their outcomes. In Proposition II, we stated that groups try to arrange things so that individuals can maximize their outcomes by behaving equitably, that is, by insuring that their partner receives relative outcomes equal to their own.

On the basis of these two propositions, we can make the following derivation:

Derivation I: Other things being equal, the harm-doer will use that equity-restoring technique that allows the pair to maintain the highest possible relative outcomes.

This conclusion is similar to Adams's (1956) assumption that a person "will reduce inequity, insofar as possible, in a manner that will yield him the largest outcomes [p. 284]." Adams presented evidence supporting the validity of his hypothesis (Adams, 1963; Adams &

Rosenbaum, 1962). This hypothesis is also supported by the results of an experiment concerning preferences among forms of equity resolution in fictitious work situations (see Weick & Nessel, 1969).

Derivation I is consistent with the observation that self-punishment seems to be an unpopular way for harm-doers to restore equity to a relationship. Theoretically, both compensation to the victim and self-punishment are equally adequate techniques for restoring actual equity to a relationship. In practice, however, one rarely finds harm-doers restoring equity by self-punishment. Derivation I reminds us of the reason for the aversion to this equity-restoring technique; harm-doers resist lowering their outcomes unnecessarily.

Anecdotal evidence (Jon Freedman, personal communication, 1970) supports the proposition that subjects in laboratory experiments energetically resist restoring equity by self-punishment. A very few experiments have demonstrated that individuals are more willing to perform unpleasant altruistic acts following commitment of harmful acts (e.g., Darlington & Macker, 1966; Freedman et al. 1967). However, in these experiments the experimenters have made it difficult or impossible for the harm-doer to compensate the victim. In addition, the guilt-inducing procedures used in these experiments are such that justifications (denial of responsibility for the harm, denial that the harm was done, or perception that the act was just) were difficult, if not impossible. Thus, evidence of self-punishment following harm-doing has been restricted to situations in which compensation and justification techniques are almost totally unavailable. The frequency with which use of self-punishment is found, if either compensation or justification is available and perceived as adequate, is unanswered.

Restoration of Equity by the Victim and Outside Agencies

The preceding discussion has focused on the means by which the harm-doer may restore equity to his relationship with the victim. However, the harm-doer is not the only possible agent of equity restoration. The victim, the victim's sympathizers, social workers, the courts, etc., may all intervene to improve the victim's lot. What effect does such intervention

have on the harm-doer's perception of the equitableness of his relationship with the victim? The following conclusion seems most reasonable:

Conclusion II: When the victim or an external agency restores equity to a relationship, the harm-doer's distress is reduced, and he is less likely to use additional equity-restoring techniques.

Evidence for this conclusion comes from diverse sources:

Retaliation

Victims do not always sit placidly by, waiting for the harm-doer to decide how to react. Sometimes victims take matters into their own hands and restore equity to the relationship. They may restore equity by seizing that portion of reward they deserve. They could provide the exploiter with ready-made excuses for his behavior (as some Uncle Toms have been known to do), or they can "get even" with the harm-doer by retaliating against him. How does a harm-doer respond under such conditions?

The data available support Conclusion II. When the victim restores equity, it eliminates the harm-doer's need to do so.

Berscheid, Boye, and Walster (1968) conducted an experiment designed to assess the effect that a victim's retaliation has on the exploiter's tendency to justify the victim's suffering by derogating him. The results of this study indicate that a victim can indeed restore equity through retaliation against the exploiter. In this experiment, individuals were hired to administer severe electric shocks to another person. If the victim could not retaliate against the harm-doer, the harm-doer subsequently derogated the victim. However, when the exploiter expected retaliation for his harmful act, the derogation process was arrested; the harm-doer did not derogate the victim.

It is also interesting that the relationship between retaliation and derogation was diametrically opposed for control subjects who merely observed the victim's suffering; those observers who expected to be hurt by the victim in the future liked him less than did those who did not expect to be hurt.

The insight that a victim can restore equity

to a victim/harm-doer relationship simply by retaliating has interesting implications: The victim naturally prefers that equity be restored by receiving compensation. Frequently, however, it becomes obvious to the victim that compensation is unlikely to be forthcoming. In such circumstances the victim must realize that the harm-doer is likely to justify the victim's suffering. This is not a pleasant prospect. The exploiter's justifications are potentially dangerous to the victim. The harm-doer who justifies his actions will end up with a distorted and unreal assessment of his own actions. If he distorts the extent to which the victim deserved to be hurt, for example, or minimizes the victim's suffering as a consequence of the act, he may commit further acts based on these distortions (Berscheid, Boye, & Darley, 1968). When a harm-doer uses justification technique, then the victim is left in sad straits. Not only has he been hurt, but as a result of the harm-doer's justification, the probability has increased that he will be hurt again. Thus, speculating from the little we know, one could argue that once it becomes obvious that the harm-doer is not about to compensate the victim, the victim might well retaliate against the harm-doer before he justifies what he has done.

Civil rights leaders have sometimes made similar speculations. James Baldwin (1964), in a statement concerning the blacks' struggle for minority rights in this country, argued that "Neither civilized reason or Christian love would cause any of these people to treat you as they presumably wanted to be treated; only fear of your power to retaliate will cause them to do that, or seem to do it, which was (and is) good enough [p. 34]." Black militants have taken an even stronger position. They have argued that widespread black violence is necessary to restore blacks to full citizenship. The variables they discuss sound much like those we have considered. They talk of the "white devil," his guilt, his denial of racial injustices, and the equity-establishing effects of violence. However, if extrapolation from our findings is relevant, we might suggest that retaliation, or the anticipation of retaliation, will be beneficial *only* if the recipient of the violence feels that he is in some way directly responsible for blacks' suffering. Retaliation

against those who feel themselves to be innocent observers of injustices would seem to be a disastrous strategy.

Forgiveness

The victim can restore equity to the harm-doer/victim relationship in a second way: He can "forgive" the apologetic harm-doer.

Harm-doers often apologize to their victim in the hope that the victim will forgive him. If the victim forgives him, this implies that their relationship can proceed again on an equitable basis.

An "apology" is not a single strategy for restoring equity but comprises several quite different strategies.

1. An apology is often a persuasive communication designed to convince the victim that the harm-doer's justifications are plausible. (The harm-doer may point out "You hit me first"; "I didn't mean it"; or "He made me do it.") If the victim agrees that these justifications are plausible, the relationship becomes a *psychologically* equitable one and can proceed as before. (Scott & Lyman, 1968, provide a devastating description of how one goes about devising a compelling excuse.)

2. An apology may be designed to *convince* the victim that their relationship is actually equitable. For example, a harm-doer may profusely verbalize how much personal suffering and guilt he has endured as a consequence of his unjust treatment of the victim. If his description is heart-rending enough, the victim may conclude that his score with the harm-doer is settled.

The common television scenario of the careless driver rushing to the hospital room of his victim to express his anguish and remorse becomes explicable through this reasoning. A person not familiar with the common "I'm sorry"—"You're forgiven" sequence might wonder what benefit is conferred upon a dying victim or what wrong is righted by such a demonstration of the harm-doer's personal suffering as a consequence of his act. The answer is none. The act is performed not for the victim's benefit but for the harm-doer's. To say "I'm sorry" is to imply personal suffering and to beg for forgiveness to end one's distress.

The notion that a description of one's remorse and suffering, if convincing, may, in fact, attenuate the wrath and retaliatory intentions of the victim and others has been supported by an experiment conducted by Bramel, Taub, and Blum (1968).

An effusive apology may make a relationship *actually* more equitable in another way. During his apology the harm-doer may humble himself and exalt the victim. This redistribution of esteem may provide a valuable reward to the victim and thus even his score with the harm-doer.

When apologies, self-derogation, and exaltation of the victim do not elicit forgiveness, it is interesting that harm-doers often switch with ease to another technique—often justification techniques.

3. Finally, an apology may be a way in which a harm-doer can acknowledge that the participants' relationship has been inequitable but point out that nothing can be done to remedy the preceding injustice. The harm-doer may ask that the victim "forgive and forget" the injustice so that the relationship can begin anew.

Intervention by Outside Agencies

Outside agencies often intervene when relationships become disturbingly inequitable (see Baker, 1969). Legal and religious agencies sometimes insist that clients make restitution to their victims or punish them when they do not. Social welfare agencies and insurance companies compensate the disadvantaged. What are the effects of such intervention? Undoubtedly, they depend on whether the intervening agency encourages harm-doers to compensate, punishes them, preempts their plans to compensate, or simply provides a residual source of compensation for neglected victims.

Society's first intervention attempts are usually directed toward inducing harm-doers to voluntarily compensate their victims. This is a wise policy. Everyone benefits when individuals are motivated to voluntarily compensate those they have injured. The harm-doer who voluntarily decides to compensate becomes a stauncher advocate of the equity norm (see Mills, 1958). The voluntary compensator also serves as a behavioral model for others; observers should be likely to imitate

his equitable behavior when they find themselves in a similar situation (see Bandura, 1965).

If it becomes evident that an agency is not going to be able to induce the harm-doer to behave equitably, it probably is beneficial for it to escalate and to force him to make restitution. The person who is forced to compensate at least is dissuaded from justifying his inequitable behavior and is prevented from serving as a negative model for others.

A state can prod an individual into making restitution in a variety of ways. For example, in the Hungarian and Norwegian legal systems, whether or not harm-doers have made restitution is taken into account when determining sentences and granting paroles. When a prisoner's freedom is contingent on whether or not he makes restitution, restitution is obviously not really voluntary. However, the Hungarians consider it better, from a rehabilitative point of view, to elicit semivoluntary restitution than none at all.

Macaulay and Walster (1971) pointed out that in the United States both formal and informal techniques are used to induce restitution:

the common-law of torts consists of rules which say a wrong-doer must compensate his victim. In addition, the legal system in operation has more avenues to restitution than merely its formal rules. There is a wide variety of procedures which may encourage compensation.... Some criminal sanctions are used as leverage to induce restitution: A police officer may decide not to arrest a shoplifter if the wrong-doer is not a professional thief and if the stolen items are returned; a district attorney may decide not to prosecute if the amounts embezzled are returned [p. 179].

In other systems, restitution is simply extracted from the harm-doer (i.e., money may be deducted from his prison earnings).

The psychological literature (i.e., Brehm & Cohen, 1962) and the observations of penal theorists (e.g., Del Vecchio, 1959; Schafer, 1960; Spencer, 1874) provide some support for the contention that if one induces "fair" behavior, "fair" attitudes will follow.

Sometimes restitution cannot be elicited. (For example, those who injure others are often unknown or are indigent.) In such cases, it may be wise for the community to reconcile itself to the fact that an injustice has occurred and simply intervene to alleviate the victim's suffering. Such intervention is consistent with

our notion of fairness (the innocent victim is recompensed) and is expedient (the legitimacy of equity norms is affirmed by society).

Some legal theorists (i.e., see Fry, 1956) have proposed that, in the interests of justice and efficiency, the state should *routinely* assume responsibility for compensating victims of criminal violence. They argue that the state could save time and money if instead of tracking down harm-doers and prodding them into making restitution, it simply provided automatic compensation to the disadvantaged.

We argue that a society should be wary of introducing a compensation procedure that erodes individuals' responsibility for restoring equity, thus weakening their adherence to equity norms. If the harm-doer knows that the outside agency will reestablish equity at no cost to himself, he should have little motivation to initiate his own equity-restoring responses. In addition, it is probable that an agency set up to "right all wrongs" would soon find that it was incapable of fulfilling this mandate. Agencies set up to provide social justice are always meagerly funded. Although citizens may be unanimous in their agreement that social justice is desirable, they seldom agree that society ought to pursue this goal at all costs. Inevitably, agencies are forced to do the best they can with limited funds. Social welfare agencies thus soon evolve into agencies of "social compromise" rather than agencies of perfect "social justice" (see Macaulay & Walster, 1971, for a lengthy discussion of this problem).

For these reasons, public compensation is seen as a residual source of equity restoration, resorted to only when attempts to induce the exploiter to compensate have failed.

Personality

Throughout the previous section we have taken the nomothetic approach and have attempted to provide a framework to guide prediction of how the average individual will respond following his commission of a harmful act.

In spite of the fact that equity researchers have focused on the nomothetic approach, we should not assume that personality differences are unimportant. It is clear that personality variables will affect how participants evaluate

both their own and their partner's inputs and outcomes, how much distress harm-doers feel after injuring another, and how the harm-doer and the victim respond to their shared distress.

For example, we have proposed that after injuring another, a normal harm-doer experiences distress from two sources: (a) He experiences self-concept distress, since his harmful act is inconsistent both with his own good opinion of himself and with his moral principles; and (b) he experiences fear of retaliation distress. Interest in individual differences leads to the obvious conclusion that harm-doers who have high self-esteem (e.g., harm-doers who think they are foresightful, kind, non-exploitative people), and who have strongly internalized ethical standards will feel more self-concept distress after harming another than will individuals who have low self-esteem and poorly internalized ethical standards. A high-self-esteem individual, then, will be expected to make a greater effort to restore equity—either actual or psychological—after harming another than a low-self-esteem individual.

There is some experimental evidence to support this derivation. In an experiment by Glass (1964), an individual's self-esteem was experimentally raised or lowered by providing him with "authoritative" information about his own personality. After harming another, high-self-esteem subjects justified their harm-doing (by derogating their victims) more than did low-self-esteem subjects.

Profitable and interesting attempts to identify some of the individual difference variables that are related to or affect a harm-doer's reaction have been made by Aronfreed (1961), Weinstein, De Vaughan, and Wiley (1969), Lawler and O'Gara (1967), Blumstein and Weinstein (1969), Schwartz (1968), Glass and Wood (1969), and Tornow (1970). Such studies may be expected to considerably sharpen prediction in individual situations.

REACTIONS OF THE EXPLOITED

Distress

If an inequitable relationship is distressing to the exploiter, it is doubly distressing for the exploited. Although an exploiter must endure the discomfort of knowing he is participating

in an inequitable relationship, he at least has the consolation that he is benefiting materially from his discomfort. The victim has no such comfort—he is losing in every way from the inequity. He is deprived of deserved outcomes, he must endure the discomfort of participating in an inequitable relationship, and he is faced with the unsettling realization that unless he can force the harm-doer to provide compensation, he is likely to justify the inequity by derogating him.

Propositions I, II, and III lead to the following derivation:

Derivation II: A participant will be more distressed by inequity when he is a victim than when he is a harm-doer.

Several theorists have noticed that those who materially benefit from inequity are more tolerant of inequity than are those who materially suffer from it (see Adams, 1965; Blumstein & Weinstein, 1969; Homans, 1961; Lawler, 1968).

Researchers have also documented that those who materially suffer from inequity are quicker to demand a fair distribution of resources than are those who do not (see, e.g., Andrews, 1967; Leventhal & Anderson, 1970; Leventhal & Lane, 1970; Leventhal, Weiss, & Long, 1969).

Demands for Compensation

Undoubtedly the victim's first response to exploitation is to seek restitution (see Leventhal & Bergman, 1969; G. Marwell, D. P. Schmitt, & R. Shotola; 1970⁹). If the victim secures compensation, he has restored the relationship to equity, and he has benefited materially. It is easy to see why this is a popular response.

Retaliation

A second way a victim can restore equity is by retaliating against the harm-doer (and thereby reducing the harm-doer's outcomes to the level he deserves). Ross, Thibaut, and Evenbeck (1971) demonstrate that when given the opportunity, victims will retaliate against

⁹ Unpublished study entitled "Cooperation and Interpersonal Risk," 1970. Requests should be sent to G. Marwell, Department of Sociology, University of Wisconsin, Madison, Wisconsin.

those who have treated them inequitably.

The more inequitably they perceive they were treated, the more they will retaliate. Evidence from Berscheid, Boye, and Walster (1968) suggests that appropriate retaliation will cause the harm-doer (as well as the victim) to perceive that the relationship is again an equitable one.

Justification of the Inequity

Sometimes a victim finds that it is impossible either to elicit restitution or to retaliate against the harm-doer. The impotent victim is then left with only two options: He can acknowledge that he is exploited and that he is too weak to do anything about it, or he can justify his 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 (Lerner & Matthews, 1967).

Victimized individuals have been found to restore psychological equity in several ways: Victims sometimes console themselves by imagining that their exploitation has brought compensating benefits ("suffering brings wisdom and purity"), or they console themselves by thinking 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."). Victims may also convince themselves that their exploiter actually deserves the enormous benefits he receives because he possesses previously unrecognized inputs. Recent data demonstrate that the exploited will justify the excessive benefits of others. Jecker and Landy (1969), Walster and Prestholdt (1966), and A. Hastorf and D. Regan (personal communication, February 1962) pressured individuals into performing a difficult favor for an unworthy recipient. They found that the abashed favor-doer tries to justify the inequity by convincing himself that the recipient is especially needy or worthy.

Reformers who have worked to alleviate social injustices, at great personal sacrifice, are often enraged to discover that the exploited themselves sometimes vehemently defend the status quo. Black militants encounter "Uncle Toms," who defend white supremacy. Women's liberation groups must face angry housewives

who threaten to defend to the death the current status of women. Reformers might have more sympathy for such Uncle Toms and "Doris Days" if they understood the psychological underpinnings of such reactions. When one is treated inequitably but has no hope of altering his situation, it is often less degrading to deny reality than to face up to one's humiliating position.

Equity Theory and Helping Relationships

In spite of the fact that social observers reproach individuals for not helping others as much as they "ought" to help, the fact remains that individuals do help one another to a remarkable extent. Public assistance agencies help welfare recipients, parents care for children and elderly parents, Boy Scouts help little old ladies across the street, Congress aids underdeveloped nations, and eager suitors urge gifts on overdeveloped maidens.

On the surface, relationships between benefactors and recipients seem quite different from relationships between victims and exploiters. Conceptually, however, both relationships can be analyzed in the same terms. Let us assume that initially participants are in an equitable relationship. Then the benefactor helps the recipient. Now the previously equitable relationship becomes an inequitable one. The benefactor, like the victim, is now a participant in an inequitable—and unprofitable—relationship. The recipient, like the exploiter, is now a participant in an inequitable—and profitable—relationship. Equity theory leads us to expect that benefactor and recipient, like harm-doer and victim, should experience vague discomfort when they discover they are participating in an inequitable relationship. As Proposition IV indicates, they should alleviate their distress by restoring either actual equity or psychological equity to their relationship.

Research indicates that those in philanthropic relations do respond much as do those in harm-doing relations (see, e.g., Leventhal et al., 1969).

Much of the research investigating the impact of helpful acts on the gift giver and his recipient has been conducted by "action psychologists." The research of these psychologists was generally not designed to test

theoretical propositions but to enable practitioners to devise better welfare programs, construct better foreign aid programs, etc. As a consequence of their practical orientation, helping researchers focused on very different variables than have harm-doing researchers. This difference in focus has produced unusual theoretical benefits. Helping researchers enable us to document the importance of variables which harm-doing theorists have contended were theoretically important but which they had totally neglected to investigate empirically. Let us consider two variables which helping theorists have found to be important determinants of participants' responses: intentionality and ability to repay.

Intentionality

Proposition III stated that when individuals find themselves participating in inequitable relationships, they will become distressed. It seems plausible to argue that an individual who feels *responsible* for creating an inequity should feel more distressed than an individual who *inadvertently* finds himself in an inequitable relationship. The intentional harm-doer should experience both self-concept distress and fear of retaliation distress. At most, the inadvertent harm-doer should experience only retaliation distress.

A few harm-doing theorists observed that the person who deliberately provokes an inequity *should* become more distressed than the person who accidentally behaves inequitably (see, e.g., Davis & Jones, 1960; Glass, 1964). Unfortunately, harm-doing researchers can call up little evidence to document this contention. Few studies have investigated the reactions of voluntary harm-doers. Instead of focusing on the reactions of voluntary harm-doers, researchers have focused on the reactions of individuals who were prodded into injuring others. The reason for this is simple. Laboratory researchers found it almost impossible to induce subjects to voluntarily harm others. Even intensely provoked subjects would refuse to treat another inequitably. To induce subjects to harm another, the experimenters had to practically force them to behave inequitably. By necessity, then, rather than by design, harm-doing researchers were confined

to studying the reactions of inadvertent and reluctant harm-doers.

Helping researchers, on the other hand, have not encountered such problems. Their research finally enables us to document the importance of intentionality in determining how a benefactor and a recipient respond to inequity. The data they provide lead to the following conclusion:

Conclusion III: When the inequity is intentionally produced, participants in an inequitable relationship will experience more distress and will have stronger desires to restore equity to the relationship than if the inequity occurs inadvertently.

Some support for Conclusion III comes from Thibaut and Riecken (1955), Goldner (1960), Goranson and Berkowitz (1966), Greenberg (1968), and Greenberg and Frisch (in press). Their research demonstrates that when one is intentionally helped, he has a much stronger desire to reciprocate (and thus to restore equity to his relationship with the benefactor) than when he is helped accidentally.

A typical experiment was conducted by Greenberg and Frisch (in press) in which they recruited subjects to participate in an experiment ostensibly designed "to identify personality characteristics associated with success in the business world." Subjects were promised extra credit if they were successful on a task. During the course of the experiment, the subjects discovered that they had little chance of succeeding unless they received help from their partners. (Their partners possessed graph cards which the subjects needed to successfully complete their tasks.) In all cases the partner helped the subject: In some cases this help was intentional; in other cases it was not. In the high-intentionality condition, the partner sent the subject the graph cards he needed along with a note: "I have some duplicates that probably belong to you. I'm sending them over since you can probably use them." In the low-intentionality condition, the partner sent the needed graph cards, but they were accompanied by a note which made it clear that the partner did not realize that he was helping the subject. The note said: "Some of my cards don't have the month on them. Can you help me and identify them for me?" Before the subjects could reply, however, the

inadvertent benefactor sent him another note saying: "Forget it. I found the cards I was missing."

The subject's eagerness to restore equity to his relationship with the partner (by repaying the help he had received) was then assessed. As predicted, subjects were more eager to pay back the intentional helper than the inadvertent helper.

Ability to Repay

A second variable has an important impact on how an altruistic act affects the benefactor and his recipient, that is, the beneficiary's ability to make restitution. Earlier (see Corollaries IV.1 and I.2) we argued that the adequacy and the cost of available equity-restoring techniques would determine how individuals would restore equity. The same rationale is applicable here: If a recipient has *no* ability to repay his benefactor or has the ability to make only a most *inadequate* compensation, he is unlikely to try to restore equity via compensation techniques. He is more likely to justify his windfall instead. On these grounds, we would expect ability to make restitution to be a theoretically important variable.

A variety of researchers have testified that ability to repay is a potent determinant of how helping affects the benefactor-recipient relationship. Those researchers who have investigated the reactions to help on the part of welfare clients, underdeveloped nations, and the physically handicapped have dealt with recipients who know they will never be able to repay their benefactors. Researchers who have investigated the reactions to help of receivers of holiday gifts, members of the *kula* ring (a complex institution of international ceremonial exchange), and the kindness of neighbors have dealt with donors and recipients who know that each helpful act will be reciprocated in kind. The differing reactions of participants in reciprocal versus nonreciprocal relations underscore the importance of the recipient's "ability to repay" in determining how help affects a relationship. Ability to repay seems to determine whether favor-doing generates pleasant social interactions or discomfort and reationalization.

Research supports *Conclusion IV*: Underserved gifts produce inequity in a relationship.

If the participants know the recipient can and will reciprocate, the inequity is viewed as temporary, and thus it produces little distress and little need to justify the inequity. If the participants know the recipient cannot or will not reciprocate, however, a real inequity is produced; the participants will experience distress and will therefore need to restore actual or psychological equity to the relationship.

Evidence in support of Conclusion IV comes from three diverse sources:

1. On the basis of ethnographic data, Mauss (1954) concluded that three types of obligations are widely distributed in human societies in both time and space: (a) the obligation to give, (b) the obligation to receive, and (c) the obligation to repay. Mauss (1954) and Dillon (1968) agreed that when individuals are prevented from discharging their obligations, mutual distress is the result. They noted that while reciprocal exchanges breed cooperation and good feelings, gifts that cannot be reciprocated breed discomfort, distress, and dislike. The authors observed that some societies have worked out exchange systems in which everyone can be both a donor and a receiver. (The *kula* ring is an example.) Harmonious stable relations are said to be the result. They contrasted these societies with those in which no mechanisms for getting rid of obligations by returning gifts is provided. For example, Dillon (1968) noted:

Instead of the *kula* principle operating in the Marshall Plan, the aid effort unwittingly took on some of the characteristics of the potlatch ceremony of the 19th Century among North Pacific Coast Indians in which property was destroyed in rivalry, and the poor humiliated [p. 15].

Volatile and unpleasant relations are said to be the result of such continuing inequities. These authors, along with Blau (1955) and Smith (1892), agreed that the ability to reciprocate is an important determinant of how nations will respond to help from their neighbors.

2. There is evidence that individuals are more likely to *accept* gifts that can be reciprocated than gifts that cannot.

Greenberg (1968), Berkowitz (1968), and Berkowitz and Friedman (1967) demonstrated that people are reluctant to ask for help if they cannot repay it.

Greenberg (1968) told subjects that they would be participating in a study of the effects of physical disability on work performance. Subjects were told that on the first task they would have restricted ability to use their arms. It was obvious to them that this restriction would make it difficult for them to perform the task they had been assigned. If the incapacitated subject wished, however, he knew he could solicit help from another subject on this task. Half of the subjects believed that the fellow subject would need their help on a second task and that they would be able to provide assistance. The remaining subjects believed that the fellow subject would *not* need their help and that, in any case, they would be unable to provide much help. The subjects' expectations about whether or not they could reciprocate any help provided to them strongly effected their willingness to request help. Subjects in the no-reciprocity condition waited significantly longer before requesting help than did those in the reciprocity condition. Greenberg and Shapiro (1971) replicated these findings.

There are three reasons why individuals may be reluctant to accept help when they are unable to reciprocate in kind: (a) Individuals probably avoid accepting undeserved benefits because such benefits place them in an inequitable relationship with the benefactor. As we indicated in Proposition III, inequitable relationships are unpleasant relationships, and individuals avoid unpleasantness. (b) Individuals may avoid accepting help which they cannot repay in kind, because to accept such help means one is obligated for an indefinite period to repay the benefactor in unspecified ways. The recipient might reasonably be worried that his benefactor may attempt to extract greater repayment than the recipient would have been willing to give, had the conditions of the exchange been known ahead of time. Democritus (in the Fourth Century B.C.) said: "Accept favors in the foreknowledge that you will have to give a greater return for them." The recipient may be unwilling to extend such unlimited blanket credit to his benefactor. (See Blau, 1967, for a discussion of this point.) (c) Or, the recipient may have more specific fears. He may worry that the benefactor will demand excessive gratitude or

constant acknowledgement of his social or moral superiority from the recipient.

Homans (1961) observed that "anyone who accepts from another a service he cannot repay in kind incurs inferiority as a cost of receiving the service. The esteem he gives the other he foregoes himself [p. 320]." The recipient may be unwilling to risk being assigned so menial a status as a consequence of accepting help. (See Blau, 1967, for further discussion of this point.)

3. Research also demonstrates that gifts that can be reciprocated are *preferred* to gifts that cannot be repaid. Gergen (1968) questioned citizens in countries that had received United States aid as to how they felt about the assistance their country received. Gergen noted that international gifts, when they are accompanied by clearly stated obligations, are preferred either to gifts that are not accompanied by obligations or gifts that are accompanied by excessive "strings." Presumably, gifts that can be exactly reciprocated (by fulfilling clearly stated obligations) are preferred to gifts that cannot be reciprocated or to gifts which require excessive reciprocation.

In laboratory research, Gergen (1968) found additional support for the conclusion that individuals like a benefactor more when they know they can reciprocate his help than when they know they cannot return his generosity.

Gergen investigated the reactions of male college-age students in the United States, Japan, and Sweden to inequitable situations. Students were recruited to participate in an experiment on group competition. Things were arranged so that during the course of the game, the subject discovered that he was losing badly. At a critical stage (when the student was just about to be eliminated from the game), one of the "luckier" players in the game sent him an envelope. The envelope contained a supply of chips and a note. For one-third of the subjects (low-obligation-condition subjects), the note explained that the chips were theirs to keep, that the giver did not need them, and that they need not be returned. One-third of the subjects (equal-obligation-condition subjects) received a similar note, except that the giver of the chips asked the subject to return an equal number of chips later in the proceedings. The remaining sub-

jects (high-obligation-condition subjects) received a note from the giver in which he asked for the chips to be returned with interest and for the subject to help him out later in the game.

At the end of the game, subjects were queried about their attraction toward various partners. The results support Conclusion IV: Those partners who provided benefits without ostensible obligation or who asked for excessive benefits were both judged to be less attractive than were partners who proposed that the student make exact restitution later in the game.

J. Gergen, P. Diebald, and M. Seipel¹⁰ conducted a variation of the preceding study. Just as subjects were about to be eliminated from a game because of their consistent losses, another "player" in the game loaned the subject some resources. The donor loaned the chips with the expectation that they would be paid back. However, in subsequent play, only half of the subjects managed to retain their chips. Thus, half of the subjects were unable to return the gift; half were able to do so. In subsequent evaluations of the donor, recipients that were unable to repay the donor evaluated him less positively than did recipients that were able to repay. These results were replicated in both Sweden and the United States. These results are consistent with Tacitus's observation that "Benefits are only acceptable so far as they seem capable of being requited: Beyond that point, they excite hatred instead of gratitude."

Equity Theory and Intimate Relations

When equity theorists argue that business or neighborly relationships will endure only so long as they are profitable to both participants, few demur. Yet, when one argues that intimate relations—relations between husband and wife, parent and child, or best friends—might be similarly dependent on the exchange of rewards, objections are quickly voiced. People insist their intimate relations are "special" relations—relations untainted by crass considerations of social exchange.

For example, Liebow (1967) reported the sentiments of Tally, a black "streetcorner man":

The pursuit of security and self-esteem push him to romanticize his perception of his friends and friendships. . . . He prefers to see the movement of money, goods, services and emotional support between friends as flowing freely out of loyalty and generosity and according to need rather than a mutual exchange resting securely on a quid pro quo basis. . . [p. 34].

Yet, in spite of Tally's insistence that his relationship with Wee Tom transcended selfish considerations, an outsider would be skeptical of this contention. Liebow, for example, pointed out that Tally and Wee Tom's relationship quickly disintegrated when mutual reinforcement faltered. When Tally won \$135 on numbers and refused to lend his "walking buddy" any more than \$5, their friendship began to disintegrate (Liebow, 1967, pp. 176–177).

Anticipating inevitable opposition, then, we still contend that even in the most intimate relations, considerations of equity will influence strongly the viability and pleasantness of a relationship.

A variety of equity theorists have voiced similar conclusions: Blau (1967) argued it is inevitable that people generally end up paired with those partners they "deserve." He pointed out that if one wants to reap the benefits of associating with another, he must offer his partner enough to make it worthwhile for him to stay in the relationship. The more the partner has to offer, the more demand there will be for the partner's company, and the more one will have to offer before he can hope to win the other's friendship. Thus, market principles insure each person will get as desirable a friend as he "deserves."

On the basis of such reasoning, Backman and Secord (1966), Homans (1961), and Blau (1968) proposed a "matching hypothesis"—they predicted that the more equitable a relationship is, the more viable it will be.¹¹

Backman and Secord (1966) argued that (in groups) "The final structure that emerges is always a compromise. The group structure moves toward an equilibrium in which each person's position in the affect structure is the best he can obtain in terms of his reward-cost

¹⁰ Study in preparation entitled "Intentionality and Ability to Reciprocate as Determinants of Reactions to Aid."

¹¹ In previous sections, we discussed established relationships which are disturbed by an inequitable act. We then examined various techniques by which participants can restore equity to their relationships. Now we are suggesting that equity considerations may have a strong impact on whether or not a group will even form and whether or not it will disintegrate once formed.

outcomes [p. 190]." Thus, they proposed that partners of similar value tend to pair up.

Homans (1961) argued that people choose intimates who are about equal to them in status.

Theorists have even suggested that equity considerations affect one's most intimate choices—one's choice of a romantic and marriage partner.

A number of experimenters have investigated this proposition. Their data lead to the following conclusion:

Conclusion V: (a) Individuals' romantic choices are influenced by equity considerations. They tend to choose and prefer partners of approximately their own "social worth." (b) There is a constant upward bias in one's choices. Individuals persist in trying to form relations with partners who are somewhat more desirable than themselves.

One's romantic choices thus seem to be a delicate compromise between the realization that one must accept what he deserves and the insistent demand for an ideal partner.

Evidence for Conclusion V comes from several sources: Walster, Aronson, Abrahams, and Rottman (1966) found evidence that dating preferences are sometimes influenced by equity considerations and are sometimes determined by the unlimited aspirations of participants.

The authors had predicted that equity considerations would affect *all* dating choices. They initially proposed two hypotheses: (a) The more "socially desirable" an individual is (i.e., the more physically attractive, personable, famous, or rich, etc., he is), the more socially desirable he or she will expect a "suitable" romantic partner to be; (b) couples who are similar in social desirability will more often continue to date one another and will better like one another than will couples who are markedly mismatched.

Figure 1 depicts graphically the prediction that participants will prefer dates of approximately their own attractiveness.

The authors' hypotheses were tested in a field study. College freshman were invited to attend a dance. They were told that their partner would be assigned by computer.

Physical attractiveness was chosen as the indicant of participants' social desirability. (Data indicate that physical attractiveness is strongly correlated with popularity, self-

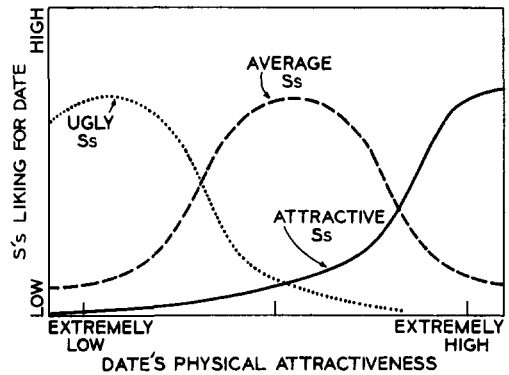


FIG. 1. Amount of liking predicted for dates of various attractiveness by ugly, average, and attractive subjects.

esteem, and other indexes which comprise "social desirability.") The freshman's physical attractiveness was then evaluated by four students while he or she was purchasing a ticket. Whether or not students expected and preferred partners of approximately their own social desirability was assessed in the following ways.

First, when freshmen signed up for the dance, they were asked how socially desirable they expected their date to be. (They were asked how physically attractive, how personally attractive, and how considerate they expected their date to be.) Equity theory predicts that the more attractive the freshman, the more desirable his date should be expected to be. This prediction was confirmed.

Second, freshmen were randomly assigned to dates, whom they met for the first time at the dance. Equity theory predicts that the more similar the dates are in attractiveness, the more viable their relationship will be. The validity of the relationship was assessed in three ways: First, during intermission, students were asked how much they liked their partner and, second, how eager they were to continue the dating relationship. Third, whether or not couples actually continued to date was determined by interviewing all participants 6 months after the dance.

Once partners had met one another, equity theory predictions were not supported. Everyone, regardless of his or her own social desirability, best liked and most often attempted to continue to date the most desirable dates available. Equity considerations seemed not

to limit the participants' aspirations in any way.

To make things even worse for the theory, these findings were replicated by Brislin and Lewis (1968). Walster (1970) secured additional support which further weakens the conclusion that equity considerations influence romantic preferences. In accord with equity theory, she predicted that when an individual's self-esteem is lowered, he lowers his romantic aspirations. When his self-esteem is raised, he raises his romantic aspirations. Two studies failed to find any support for this contention.

Kiesler and Baral (1970) did find support for the equity theory predictions. The authors recruited male college students for a study on intelligence tests. The experimenter told the men that he was perfecting a new intelligence test that had already been successfully used on hundreds of students. Men were then given a difficult test. Men in the high-self-esteem condition were led to believe that they were doing extremely well on the test. (The experimenter nodded and smiled at their answers and mentioned that other men had much more trouble with the questions.) Men in the low-self-esteem condition were led to believe that they were doing badly on the test. (The experimenter made it apparent that he was displeased with their performance. He frowned, looked away, and mentioned that other subjects had performed better.)

During a break in testing, the experimenter and the subject visited a nearby canteen. When they entered the canteen, the experimenter recognized a girl (actually an experimental confederate). In one condition (the attractive condition), the confederate was made-up to be very physically attractive. She wore becoming make-up and fashionable clothing. In the unattractive condition, she was far less attractive. She wore no make-up, heavy glasses, and had her hair pulled back with a rubber band. Her skirt and blouse clashed and were arranged sloppily.

The girl sat down and chatted with the experimenter and the subject. After a minute, the experimenter excused himself to make a phone call. While he was gone, the confederate continued to engage the subject in conversation for $\frac{1}{2}$ hour. She acted in a friendly and interesting way toward all subjects.

The dependent variable was the extent to which the male indicated to the female con-

federate that he was romantically interested in her and the extent to which he attempted to prolong their relationship. The confederate kept track of whether the man asked her for a date, asked for her phone number, offered to buy her a snack or coffee, offered her a cigarette, complimented her, or, finally, ignored her when at the end of the prescribed time she said that she should get back to work.

Kiesler and Baral found strong support for the matching hypothesis. When the man's self-esteem had been lowered, he behaved most romantically with the moderately attractive confederate. When the man's self-esteem had been raised, he behaved in a far more romantic way with the attractive confederate than with the unattractive one.

Other support for the matching hypothesis comes from Berscheid, Dion, Walster, and Walster (1971).

At the present time, then, data do not consistently support either equity theory *or* the notion that individuals' intimate social choices are unchecked by reality. Thus, Conclusion V can merely state that individuals' social choices are a compromise between two conflicting pressures.

The conclusion that one's social choices are a compromise between fantasy and reality seems to be consistent with our own observations in the daily world.

Sometimes individuals talk and act as if they have unlimited social inputs and thus are deserving of perfection. They talk as if the fact that they had to compromise in selecting a marriage partner is an inequity. For example, we can all think of prestigious but aging professors who leave their wives and marry beautiful, young, graduate students. Often, within a short time, our professor may begin to lament his protegee's shortcomings. "If only she were more intelligent and more considerate," he complains. Observers sometimes smile, because they are more attuned to the operation of exchange processes in determining social pairings than is the participant in the relationship. They are smugly aware that if his lady were smarter, she would not have to settle for the company of the aging professor.

Sometimes, however, individuals are aware of equity considerations. The man with the undeservedly beautiful wife often manifests vague uneasiness—whether the uneasiness is generated by his own recognition that he has

married a better woman than he deserves, or whether his uneasiness is generated by the fact that she constantly reminds him that he has married too well, we do not know.

Intimate relations, then, seem to be influenced in part by equity considerations and in part by fantasy.

EQUITY THEORY AND SOCIAL PSYCHOLOGY

Social psychological theory is generally acknowledged to be in a chaotic state. A number of mini-theories exist. Rigorous research supports all of them, at least some of the time. Yet, the relationships between these theories are vague. Thus, when we wish to predict how people in a given situation will respond, we often discover that several mini-theories can make predictions—and often they make different predictions. We are often left in the embarrassing state of being able to predict anything, anytime.

Obviously, what is needed is a general comprehensive theory and rules of transformation which tell us how the various mini-theories fit into the general framework. In equity theory we have made an effort to synthesize various theoretical approaches rather than follow the more usual (and more entertaining) procedure of setting up crucial confrontations between the mini-theories.

For example, equity theory proposes that individuals enmeshed in inequitable relationships feel distress. When discussing the genesis of this distress, we tried to synthesize the insights of learning theory, cognitive consistency theory, and Freudian theory. In the future, we must try to continue this process of synthesis. We must try to formally relate existing social psychological theory to equity theory. (Two areas of research which could be profitably related to equity theory may have already occurred to the reader.)

On Establishing the Relationship

Equity theory describes how individuals enmeshed in inequitable relationships respond. To predict how an individual will respond, one merely has to ascertain whether the scrutinizer perceives participants to be in a relationship and how he calculates the participants' relative outcomes.

The theory has no need to know *why* the scrutineer perceives individuals to be in a rela-

tionship; it is enough to know that he does. Yet, a mini-theory, telling us *when* individuals will perceive participants to be in a *relationship* and when they will not, could be a useful addition to the theory.

A body of literature exists which tells us *when* individuals perceive themselves in a relationship with, and compare their outcomes with, others. In the future, it would be profitable to attempt to formally relate this mini-theory to equity theory.

Theorists such as Stouffer, Suckman, Devinney, Star, and Williams (1949), Festinger (1954), Merton (1957), Homans (1961), Gurr (1970), and Latané (1966) provide us with some insights as to when people compare individual's (or group's) outcomes and when they do not.

Homans (1961) said that when "Person" is trying to decide whether or not distributive justice prevails, he goes through the following mental procedures:

Am I getting as much as other men in some respect like me would get in circumstances in some respect like mine? And is Other giving me as much as other men, in some respect like Other, would give? When it comes, moreover, to comparisons with other men, the most important other man is the particular one with whom exchange is now taking place [p. 76].

Festinger (1954) in discussing the question of whom a person chooses to compare his own opinions with said:

Given a range of possible persons for comparison, someone close to one's own ability or opinion will be chosen for comparison [p. 121].

The more attractive a group is to a member, the more important that group will be as a comparison group for him [p. 131].

Merton (1957) argued that soldiers compare themselves with [*a*] "Others with whom they were in actual association, in sustained social relations. . . ." [*b*] "Men who are in some pertinent respect of the same status or in the same social category." [*c*] "Men who are in some pertinent respect of different status or in a different social category. . . ."

Merton argued that

some similarity in status attributes between the individual and the reference group must be perceived or imagined, in order for the comparison to occur at all. Once this minimal similarity is obtained, other similarities and differences pertinent to the situation will provide the context for shaping evaluations [p. 242].

He also suggested that people compare themselves with those they admire.

Finally, Merton argued that structural variables determine with whom one compares himself:

If the structure of a rigid system of stratification, for example, is generally defined as legitimate, if the rights, prerequisites and obligations of each stratum are generally held to be morally right, then the individuals within each stratum will be the less likely to take the situation of the other strata as a context for appraisal of their own lot. They will, presumably, tend to confine their comparisons to other members of their own or neighboring social stratum. If, however, the system of stratification is under wide dispute, then members of some strata are more likely to contrast their own situation with that of others, and shape their self-appraisals accordingly... the range of groups taken as effective bases of comparison in different social systems may well turn out to be closely connected with the degree to which legitimacy is ascribed to the prevailing social structure [p. 267].

In brief, these writers suggest that comparisons take place with those who are (a) in an actual physical relationship with Person at the time, (b) perceived as similar to Person along salient dimension, or (c) attractive, looked up to, or admired in some way. There is the further suggestion that the less structured the situation, the broader the spectrum of individuals with whom it is possible to make a comparison.

In the future, it might be valuable to restate these insights into a propositional form which is consistent with equity theory. This set of propositions could then be used to tell us when the scrutineer is likely to see participants as being "in a relationship."

On Evaluating Rewards and Costs

A second important element in equity theory is the scrutineer's perceptions of the *rewards* and *costs* that participants are securing as a consequence of interacting with one another. In experiments one can manipulate the scrutinizer's perception of the rewards and costs participants are incurring, and then determine the effect these manipulations have on his behavior. In field studies, one can measure participants' perceptions of the outcomes they are receiving as a consequence of their relationship with another. Such procedures work well when one is testing a theory. But what about applying the theory? How does one calculate inputs and outcomes then?

Once again, an impressive body of research already exists to guide us in calculating how costly or rewarding various stimuli will be perceived to be (see Homans, 1961; Thibaut &

Kelley, 1959). This formulation could be valuably incorporated into equity theory.

Given the relevance of many social psychological findings to equity theory, the next step in equity research should be to integrate these social psychological findings into equity theory in a formal way, in the hope of further increasing the breadth of the equity theory predictions.

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