

## Examining Equity Theory across Cultures

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### Abstract

In order to better understand culture's role between perceived equity in one's romantic relationship and relationship satisfaction, we sampled two groups from different cultural backgrounds and attempted to answer the question of whether culture would impact the relationship between equity and relationship satisfaction. We interviewed men and women from the University of Hawai'i (UH), a relatively individualist culture, and from the University of the West Indies in Jamaica (UWI), considered a more collectivistic culture. We had them fill out surveys detailing how equitable they saw their relationship, how important they considered equity to be in their relationship, and how satisfied they were in their relationship. A significant interaction was found between culture and equity in predicting relationship satisfaction. As predicted, in both countries participants considered equity to be of critical importance in romantic relationships. However, men and women in Hawai'i generally considered their relationships to be (slightly) more equitable and far more satisfying than did people in Jamaica. There were also cultural differences in how people reacted to existing inequities. The UH sample was more satisfied in their romantic relationships, especially when the relationship was equitable. However, the UWI sample found their relationships to be most satisfying when they were overbenefitting from their relationships. We posit that the collectivist culture of our UWI participants affected the relationship between equity and relationship satisfaction. Considering the emphasis placed on roles and familial kin support in Jamaica, we can deduce that equity may be of less importance in affecting relationship satisfaction.

*Keywords: equity, romance, equity theory, romantic relationships, cross-cultural.*

Since William James inaugurated the first psychology laboratory at Harvard, social scientists have attempted to formulate universal laws of social cognition, emotion, and behavior. Cultural critics point out, however, that until very recently, social psychology has been "made in America" (Markus, 2004). Theories, conceived by Western psychologists, were generally tested in the West with Western participants, and disseminated in Western scientific publications. (The Westerncentric bias has been so pervasive that, as the old joke

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goes, “even the rats were white.”) In the past, when criticized for provincialism, scientists often argued that they were attempting to discover universal principles, that transcend time and place. Ergo: it did not really matter whether studies were run in, say, Normal, Illinois, or Katmandu. Cognition is cognition is cognition . . .

Recently, cultural and cross-cultural researchers have sharply criticized this assumption (Howitt & Owusu-Bempah, 1994; Marsella, 1998; Triandis, 1999.) They argue that cultural differences may have a profound impact on the way people conceptualize the world, the meaning they ascribe to events, and how they react to common life events. Recently, cultural researchers have amassed considerable evidence to document the validity of this critique (see Adams, Anderson, & Adonu, 2004; Cohen, 2001; Nisbett, 2003; Stephan & Stephan, 2003; Tsai & Levenson, 1997).

Many cultural psychologists contend that what is needed is a new social psychology—one in which theorists from a variety of cultural and ethnic groups come together to formulate theories that are more multi-cultural and multi-layered than those existing today. Naturally, these new, multicultural models would be tested in diverse cultural and ethnic settings, with participants from a wide array of backgrounds (Amir & Sharon, 1987). Cultural theorists also argue that psychologists must also critically examine classic social psychological theories and research, in order to determine how universal their findings really are (see Matsumoto & Yoo, 2006; Heine & Norenzaya, 2006; Smith, Spillane, & Annus, 2006, for a discussion of these points).

Ideally, we would hope to participate in such an effort. In this study, however, we planned to start small. We selected a popular social psychological theory, Equity theory, which claims to be a universal theory—applicable to all people in all cultures in all historical eras (Hatfield, Rapson, & Aumer-Ryan, submitted; Hatfield, Walster, & Berscheid, 1976). We then attempted to investigate the extent to which men and women from different cultural backgrounds responded (or did not respond) as Equity theory suggests they should.

### *Equity and Romantic Relationships*

People are often concerned with social justice. “What’s fair is fair!” “She deserves better.” “It’s just not right.” “He can’t get away with that: it’s illegal.” “It’s unethical!” “It’s immoral” are common complaints. In the 11<sup>th</sup> century, St. Anselm of Canterbury argued that the will possesses two competing inclinations: an affection for what is to the person’s own advantage *and* an affection for justice; the first inclination is stronger, but the second matters, too.

In accord, Equity theory (Hatfield, et al., 1976) posited that in personal relationships, two concerns stand out: (1) How rewarding are people’s societal, family,

romantic, and work relationships? (2) How fair and equitable are those relationships? An equitable relationship was said to exist “if the person scrutinizing the relationship (usually the participants themselves) concludes that all participants are receiving equal relative gains from the relationship” (p. 10). Technically, Equity is defined by a complex formula (Traupman, et al., 1981; Walster, 1975). Respondents’ perceptions of the equitableness of their dating relationships or marriages are computed by entering their estimates of Person A and Person B’s Inputs and Outcomes ( $I_A$ ,  $I_B$ ,  $O_A$ , and  $O_B$ ) from a given relationship into the Equity formula:

$$\frac{(O_A - I_A)}{(I_A)^{kA}} = \frac{(O_B - I_B)}{(I_B)^{kB2}}$$

Respondents are classified as “over-benefited” if their relative gains exceed those of their partners. They are classified as “equitably treated” if their relative gains equal their partners, and as “under-benefited” if their relative gains fall short of their partners. (Luckily, as we will see in the Methods section, social psychologists have found simpler ways to assess the equity/inequity of a given relationship.)

Historically, societies have had very different visions as to what constitutes “social justice,” “fairness,” and “equity.” Some dominant views:

- “All men are created equal.”
- “The more time and energy you invest, the more you’re entitled to. (U.S. capitalism.)
- “Each according to his need.” (Communism.)
- “Winner take all.” (Dog-eat-dog capitalism.)

Nonetheless, in all societies (or so Equity theory claims,) fairness and equity are deemed important.

In the United States, couples consider fairness and equity to be so crucial that considerations of equity have been found to determine who falls in love with whom, whom men and women select as mates, whether or not couples get sexually involved on a date, how sexually satisfying couples’ relationships are, how committed couples are to one another, how contented *versus* distressed or guilty men and women feel when contemplating their dating and marital relationships, how willing married couples are to risk extramarital affairs,

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<sup>2</sup> The Equity formulas used by previous researchers, from Aristotle to Stacy Adams, only yield meaningful results if A and B’s Inputs and Outcomes are entirely positive or entirely negative. In mixed cases the formulas yields extremely peculiar results. Thus, we proposed an Equity model designed to transcend these limitations. See Walster (1995) for a discussion of the problems and the mathematical solutions. The superscript k simply “scales” equity problems (by multiplying all inputs and outcomes by a positive constant) such that the minimum of  $I_A$  and  $I_B$  is greater than or equal to 1.

and how long dating and marital relationships last. (For a review of this research, see Hatfield, et al., 1978, and Hatfield, et al., submitted.)

Since the 1970s, scientists have devoted a great deal of time and effort to studying Equity theory and romantic relationships—yet, in this plethora of studies, there are few that cannot be branded with the stamp of “Made in the U.S.A.” Although equity has been found to be important in social interactions among middle class, European-American college students—and even crows, dogs, and capuchin monkeys (see Brosnan & deWaal, 2003,) it has rarely been tested with men and women from a variety of cultural and ethnic groups (for notable exceptions, see Buunk & Van Ypern, 1989; Van Yperen & Buunk, 1990; Mikula, 1998). In this study, we plan to study (1) the extent to which men and women from various cultures consider equity to be important in romantic relationships, (2) how equitable men and women from the United States and the West Indies perceive their relationships to be, and (3) the extent to which culture and considerations of fairness and equity effect romantic and marital satisfaction.

### *Cultural and Ethnic Differences*

Recently scientists have begun to ask: “Is Equity theory applicable to all people in all cultures and all historical eras?” Cross-cultural researchers would say “No.” They argue that men and women in individualistic cultures (such as North America, Western and Northern Europe, Australia, New Zealand) are far more concerned with fairness in close relationships than are people in collectivist cultures (such as Asia, Africa, and Latin America). (There is some sparse support for the contention that Westerners care more about equity than do others [see Ohbuchi, et al., 1999; Orbuch & Eyster, 1997; Williamson & Clark, 1989; Yum & Canary, 2003]). Cultural theorists may talk about “globalization *versus* tribalization,” “affluence or poverty,” “traditionalism or modernism”, or “the possession of independent or interdependent self-construals,” but the argument remains the same: culture matters (Hatfield & Rapson, 2005; Markus & Kitayama, 1991.) Almost universally, cultural theorists agree that cultural values should have a profound impact on: (1) people’s definitions of social justice, and (2) how important they consider fairness and equity to be. Culture is also thought to have an impact on (3) what *types* of allocations are seen to be fair—i.e., should allocations be based on merit? Need? Equality? Proportionality? (4) how fair men and women judge their own close relationships to be, and (5) how content/upset they are when they perceive close relationships to be equitable/inequitable (Triandis & Suh, 2002). (Note: This is simply a review of cultural theorists speculations: we will discuss *our own* hypotheses in a later section.)

*Jamaica and Hawai'i*

To test the applicability to Equity theory in various cultures, we decided to recruit men and women from two very different cultures: Hawai'i (in the United States) and Jamaica (in the West Indies). Cultural theorists have pointed out that these countries differ greatly in culture, cultural values, and customs and attitudes about romantic and marital relationships (Hofstede, 1980; Schwartz & Sagiv, 1995). The United States (and Hawai'i) is a Western, urban, and affluent society.<sup>3</sup> The median household income is \$66,472 a year; over 26% of residents have received a bachelor's degree or higher. Like many parts of the United States, Hawai'i is a multicultural, racially diverse society—more than 70% of Hawai'i citizens marry outside of their own racial group (U. S. Census, 2006).

Jamaica is less Western, more rural, and less affluent society. The household income ranges between \$826-\$3255 a year. Only 19% of the residents have completed a form of tertiary schooling and exogamous marriage occurs at a rate between 24-40% (World Bank, 2006; Sweet, 2005). In Jamaica, the intermarriage rate is far lower than in Hawai'i.

The Jamaican family consists of a close-knit web of parents, grandparents, aunts, uncles and cousins. Families are expected to provide social, emotional, and economic support to members. Families (rather than couples) are often responsible for childcare. Men and women generally feel their primary duty lies with their biological family rather than “to the group formed by sexual union.” (Hodge, 2002, p. 479). In Jamaica, church- and state-sanctioned “traditional” marriages are considered to be less important (and are rarer) than in the United States. “Common-law unions”<sup>4</sup> and “visiting relations” (permanent, but non-residential romantic relations) are more common (Hodge, 2002).

Cultural psychologists point out that these two societies differ in a myriad of other ways: In the United States, for example, people are generally more masculine (as compared to feminine), more individualist (as opposed to collectivist) and more egalitarian than are people in the West Indies (see Braithwaite, 1974; Hofstede, 1980; Mordeci & Mordeci, 2001).

It seemed then, that in contrasting Hawaii and Jamaica, we were able to compare two very different societies.

In this study, we proposed to test two hypotheses and to answer one question:

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<sup>3</sup> When speaking of “Hawai'i,” we are not referring to “native Hawaiians,” which comprise only 2% of the Hawai'i population, but to the general population of Hawai'i, which is fairly typical of the rest of the nation in culture, attitudes, and values.

<sup>4</sup> Couples who consider themselves married, even though they have not been formally wed.

*Hypothesis 1: In both Hawai'i and Jamaica, men and women will consider equity to be important in romantic and marital relationships.*

(Although cultural theorists contend that citizens of the United States are far more considered with fairness than are people from more collectivist societies, Equity theorists argue that in all societies people care deeply about fairness and justice in their love relationships. We found the equity arguments to be the most compelling. Hence our prediction.)

*Hypothesis 2. Men and women in Hawai'i will perceive their romantic relationships to be more fair and equitable than will their peers in Jamaica.*

(In the previous section, cultural theorists argued that in America family relationships are less important and romantic relationships are more important than they are in Jamaica. They also considered America to be a less traditional, less patriarchal, and less collectivist society than is Jamaica (Braithwaite, 1974; Mordeci & Mordeci, 2001.) If these cultural differences in family structure, values, and socioeconomic status do, indeed, exist, we might predict that Americans would be more insistent that their love relationships be rewarding, fair, and equitable than are their Jamaican peers.)

*Question 1: Will culture interact with perceived equity/inequity, in determining how satisfied men and women are with their love relationships?*

(We would predict that in Hawai'i, people will assume relationships must be both rewarding and fair and equitable. Thus, they will feel most satisfied in equitable (as opposed to overbenefitted or underbenefitted relationships.) (This is what has been found again and again in preceding research.) Will men and women in Jamaica show the same, curvilinear, relationship between overbenefit, equitable treatment, and underbenefit? We do not know.

To explore these predictions and questions, we interviewed college men and women in these two divergent societies.

## **Method**

### *Participants and Procedure*

At the University of Hawai'i (UH), 300 students (207 women and 93 men) were recruited to participate in a survey on equity and love relationships. Participants' ages ranged from 18 to 44 ( $M = 21.29$ ,  $SD = 4.05$ ). As is characteristic of Hawai'i, the sample was ethnically diverse: Japanese-Americans (32%), European-Americans (23%), Filipino-Americans (10%), Chinese-Americans (8%), Native Hawaiians (6%), Korean-Americans (4%), Pacific Islanders (3%), African-Americans (1%), Hispanic (1%), mixed race (8%), and other (4%). The majority of participants (82%) were born in the U. S. Most were involved in either a long-term (53%) or a committed relationship (4% were engaged, 10% married, 8% cohabiting). The remaining 25% of participants were in short-term dating relationships.

At the University of the West Indies (UWI), 122 students (108 women and 14 men) volunteered to take the online survey. UWI students were slightly older than UH students, ranging in age from 18-52 ( $M = 25.78$ ,  $SD = 8.36$ .) The vast majority were of African descent (90%); a small minority did not identify with any racial background (9%), and 1% identified themselves as Asian. UH and UWI students were asked to complete the same online survey, with one exception: In accord with traditional survey practices, Jamaican students were allowed to check two categories—"common-law" and "visiting"—when indicating relationship status (Hodge, 2002). The specific relationship breakdown was as follows: long-term (62%), married (13%), common-law (7%), engaged (4%), and visiting (4%).

### *Measures*

#### *Culture.*

The United Nations Educational, Scientific and Cultural Organization (UNESCO) (2002) defines culture as follows:

"... culture should be regarded as the set of distinctive spiritual, material, intellectual and emotional features of society or a social group, and that it encompasses, in addition to art and literature, lifestyles, ways of living together, value systems, traditions and beliefs" (p. 1).

Of course, other theorists have defined the term "culture" in a variety of ways. In this study, "culture" will be used to demarcate our national samples—thus, men and women surveyed at the University of Hawai'i and the University of West Indies will be considered to be of different cultures. These groups are separated by geography, race, and custom (For a discussion of pros and cons of equating "cultural groups" with "national group" and "country", see Matsumoto & Yoo, 2006; Heine & Norenzaya, 2006; Smith, Spillane, & Annus, 2006.)

*Importance of Equity.* In order to assess how important people considered fairness and equity to be, a single question was asked: "How important is it for you that your current

romantic relationship is fair, that is, both of you contribute equally?” Five options were given, with 1 being “Not important at all” to 5 being “Very important.”

*Equity.* Hatfield’s (1978) Global Measure of Equity was used to assess perceptions of relationship equity. The measure asks: “Considering what you put into your relationship, compared to what you get out of it, and what your partner puts in, compared to what (s)he gets out of it, how does your relationship ‘stack up?’”

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

Participants who rated their relationships as +1, +2, or +3 were categorized as overbenefitted; those who rated them as -1, -2, and -3 were categorized as underbenefitted, and those who rated them as 0 were categorized as participating in equitable relationships.

Despite its brevity, this widely used equity measure has been found to possess reasonable reliability and validity (see Canary & Stafford, 1992; Sprecher, 1986, 1988; Traupmann, 1978; Traupmann et al., 1981; VanYperen & Buunk, 1990). In a longer version of the Equity measure, Traupmann, and her colleagues (1981) found that the measure possessed reasonable reliability and validity (Chronbach’s for total inputs = .87; for total outputs scales = .90). The Global measure (which we chose) and the longer version of the Equity measure have been found to be highly correlated (Sprecher, 1986).

*Satisfaction.* To assess satisfaction in the romantic relationship, Hendrick’s (1988) Relationship Assessment Scale (RAS) was selected. Hendrick’s RAS is composed of seven Likert-type items (ranging from 1 to 5) assessing general satisfaction, loving one’s partner, meeting original expectations, problems in the relationship, comparing the relationship to others, and frequency of regret for staying in the relationship. The higher one’s score on the RAS, the more satisfied one is said to be. Hendrick’s RAS has been found to possess good reliability (Chronbach’s = .87) and validity (i.e., it predicts how stable/unstable couples’ romantic relationships will be. The authors found the RAS was able to predict, with 91% accuracy, those couples who would remain “together” and with 86% accuracy, those who would part.) (Hendrick, 1988).

## Results

*H1: In both Hawai'i and Jamaica, men and women will consider equity to be important in romantic and marital relationships.*

The average score for importance of equity in romantic relationships was not significantly different between UH and UWI participants ( $t(420) = .27, p = .79$ ). At both UH ( $M = 4.36, SD = .91$ ) and UWI ( $M = 4.33, SD = 1.17$ ), men and women considered equity in the romantic relationship to be “important” to “very important” in love relationships.

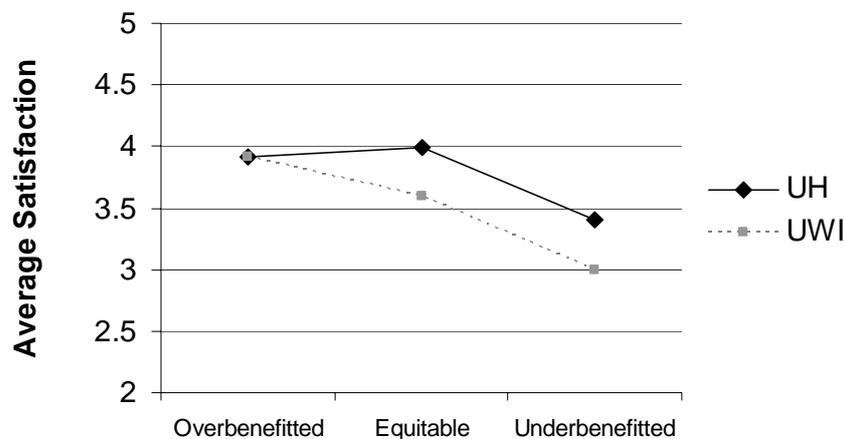
*H2. Men and women in Hawai'i will perceive their romantic relationships to be more fair and equitable than will their peers in Jamaica.*

Men and women from UH and UWI were equally likely to claim to be *overbenefitted* in their love relationships: (UH = 20%, UWI = 20%). As predicted, fewer people in the UWI sample claimed to be in an *equitable* relationship (UWI = 41%) than in the UH sample (UH = 60%). In addition (again as predicted), Chi-square analysis revealed that a higher percentage of the UWI sample (39%) considered themselves to be *underbenefitted* in their romantic relationships than did those in the UH sample (20%). This difference was also statistically significant ( $\chi^2(2, N = 422) = 15.22, p < .001$ .)

*Q1: Will culture interact with perceived equity/inequity, in determining how satisfied men and women are with their love relationships?*

A (2x3) ANOVA was used to predict satisfaction from culture (UH x UWI) and equity (underbenefitted, equitably treated, and overbenefitted). As seen in Figure 1, both UH and UWI men and women were most dissatisfied when underbenefitted. However, (as predicted) the UH sample was most satisfied when equitably treated. The UWI sample was most satisfied when overbenefitted, as is evident in the significant interaction ( $F(2,416) = 2.996, p = .05, \eta^2 = .08$ ). It appears that at least in Jamaica, how rewarding a relationship is, is more important than how fair and equitable it appears to be.

*Figure 1. Average reported satisfaction by sample and equity reported in romantic relationship.*



## Discussion

In this study, we attempted to compare the robustness of Equity theory in two different societies: Oahu, Hawai'i (a Westernized, individualistic, and affluent community) and Jamaica, in the West Indies (a Caribbean and developing country.) Specifically, we examined: (1) the importance men and women in these two cultures placed on equity in dating and marital relationships, (2) how equitable they judged their own romantic relationships to be, and (3) how satisfied they were in those romantic relationships—equitable or not.

People in the two cultures did not differ in how important they considered Equity to be in their love relationships. We did, however, secure cultural differences in how fair and equitable people perceived their relationships to be and in how they reacted to existing equities/inequities.

As predicted in Hypothesis #1, we discovered that (in this limited sample, at least) that people in two very different cultures were profoundly concerned with fairness and equity in their love relationships. In both cultures, however, participants did consider equity to be “important” to “very important” in romantic and marital relations.

To many cross-cultural researchers, such unanimity may come as a surprise. Cultural psychologists have generally assumed that in traditional cultures people care far less about fairness and equity than they do in modern, industrialized nations (Williamson & Clark, 1989). Rosenblatt and Cunningham (1976), for example, observed that equity is of less importance for traditional peoples:

“[regardless of] who has the better life, a man or a woman, they [people of non-U.S. cultures] might argue that the woman has the better life, or they might argue that the lives of men and women are different and not comparable” (from Buunk & VanYperen, 1989, p. 82).

This study fails to support such claims. A culture thought not to care very much about equity turns out to care very much indeed. Is such a concern a “cultural universal?” or simply more common than previously supposed? That we do not know. We only studied two cultures; much more would be required before we could make such a claim (see Smith,

Spillane, & Annus, 2006, for a discussion as to the stringent requirements that must precede scholars claims that a phenomenon is truly a “universal”.)

People do not, of course, always get all that they yearn for. Mate selection always involves trade offs (Li, Bailey, Kenrick, & Linsenmeier, 2002). Some privileged people have the luxury to insist on a fair *and* rewarding relationship; others are forced to settle for what little they can get (Hatfield & Rapson, 1993). In Hypotheses #2 and #3, we speculated that men and women from different cultures may differ markedly in how fair and equitable their relationships are (and, as a consequence, how satisfying they were felt to be.) In this study, we found clear confirmation of that contention. People from the United States claimed to be most equitably treated (and as a consequence were the most satisfied with their relationships). Men and women (and especially women) from Jamaica, in the West Indies, felt less equitably treated (and thus were the least satisfied with their relationships.)

Equity theorists propose that in all cultures people will be the most satisfied when (1) their relationships are fair and equitable, and (2) they are receiving a great deal of reward (as opposed to less reward or even punishment.) Did all men and women in this study react in much the same way when they felt fairly or unfairly treated? When they received more or less reward than they felt they deserve? They did not.

Here we did indeed find some cultural differences. On Oahu—a Western, individualistic, and affluent society—men and women felt the most satisfied when equitably treated. They were happiest when they felt they were getting exactly what they deserved from their love relationships—no more (perhaps) and surely no less. In Jamaica, on the other hand, the more reward men and women reaped from their love relationships, the happier they were. Not surprisingly, in all cultures men and women were least satisfied (and most unhappy) when they felt markedly underbenefitted.

Why is this so? Why were Jamaicans more comfortable when overbenefitted than were their American peers? We do not know. There are several possibilities, however. We know that in Jamaica young couples are more invested in family (blood) relationships than in romantic ones. Thus, they may focus more on the fairness of the former than the latter. One Jamaican woman’s comments provided support for this point: In discussing Jamaican life, she quoted a classic calypso song by Lord Kitchener: “You can always find another wife/but you can never get another mother in your life” (Kitchener, 1963, track 12).

Considering the collectivist nature of Jamaica, where the biological in-group is given priority over romantic partners, it would be understandable if men and women (a) spent more time worrying about their family relationships than their love relationships, and thus (b) were willing to dedicate more time, money, and resources to pleasing their biological families than their romantic partners). When a sacrifice is called for, perhaps it is love relationships that must suffer.

The reverse would be true in the West, where it is assumed that men and women's primary allegiance is to their mates and children; their family and friends are often seen as a duty, of secondary importance.

A note: It is important to note that in the Western equity studies, scientists have found that the overbenefitted feel more guilty and less satisfied in their love relationships than do the fairly treated. Did we replicate this consistent finding? Alas, at this point we are unable to answer "Yes" or "No." Certainly, in this study we found no evidence that the overbenefitted felt the slightest bit of guilt or anxiety about their privileged position. (In the U. S., the overbenefitted felt only slightly less satisfied than did the equitably treated; in Jamaica, the overbenefitted actually felt more satisfied than did their equitably treated peers.)

There may be a simple explanation for this failure to completely replicate earlier research findings. In measuring "satisfaction," we switched from the traditional Austin and Hatfield (1974) measure of satisfaction, which had been used in all previous equity studies, to the more modern Hendrick (1988) RAS measure, which we assumed would be a better measure. Unfortunately, we failed to anticipate that in adopting the RAS scale (which does not ask about guilt and shame), we were precluding the possibility of people indicating they felt guilty and ashamed when thinking about how little they gave (or how little their partners received) from their love relationships.

In future research, using the Austin and Hatfield (1974) satisfaction measure should be considered, as it would provide the most conclusive information as to people's emotional reactions to equity/inequity.

In summary: This study impresses us yet again with the importance of conducting cross-cultural research. Such research would give us a better understanding of which phenomena are cultural universals, which common, and which very much shaped by culture. As communities evolve—either through Westernization or becoming more rooted in their own cultural backgrounds—any existing cultural, psychological, and sociological differences can and should be explored in order to provide a better understanding of the world in which we live.

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Received: 04/02/2007

Accepted: 18/05/2007