RORY M. WAISMAN

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EDUCATION

Ph.D.   Marketing (Minor: Psychology), University of Alberta   2024 (expected)

Dissertation: *Default Dynamics: How Choice Architecture Affects Downstream Consumer Behavior*
Committee: Gerald Häubl (Chair), Sarah G. Moore, Kyle Murray, Eric Johnson (External)

B.A. (Honors) Psychology, University of Manitoba   2017

Thesis: *Moving the Subject Pool Online: Reliable, Efficient Judgment and Decision Making Research*
Supervisor: Randall K. Jamieson

RESEARCH

Primary Areas of Research Interest

Consumer Decision Making, Choice Architecture, Maladaptive Decision Making, Memorial Basis of Preference and Choice, Consumption Appraisal, Computational and Quantitative Methods

Peer-Reviewed Journal Articles

Li, Johnson C-H., Marcello Nesca, **Rory M. Waisman**, Yongtian Cheng, Virginia Man Chung Tze (2021), "A Robust Effect Size Measure *Aw* for MANOVA with Non-Normal and Non-Homogenous Data," *Methodological Innovations,* 14(*3*), 1-12.

Donkers, Bas, Benedict G.C. Dellaert, **Rory M. Waisman**, and Gerald Häubl (2020), "Preference Dynamics in Sequential Consumer Choice with Defaults," *Journal of Marketing Research*, 57(6), 1096-1112.

Li, Johnson C-H. and **Rory M. Waisman** (2019), "Probability of Bivariate Superiority: A Non-Parametric Common-Language Statistic for Detecting Bivariate Relationships," *Behavior Research Methods*. 51(1), 258-279.
Canadian Psychological Association 2020 Quantitative Methods Research Award Runner Up

Selected Working Papers and Research in Progress

Waisman, Rory M., Gerald Häubl, D. Matthew Godfrey, and Benedict G.C. Dellaert, "Carryover of Default Effects: The Interplay of Nudges, Prior Preferences, and Experienced Choice Consequences," data collection completed, manuscript in preparation for submission to *Journal of Marketing Research*.

Shiri, Amin, Gerald Häubl, and **Rory M. Waisman**, "Mind Over Body in Gambling Behavior," in preparation for submission to *Psychological Science*.

Waisman, Rory M., Tim Derksen, and Gerald Häubl, "Understanding How Default Choice Architecture Impacts Downstream Behavior: A Scoping Review and Research Agenda," review in progress, target: *Psychological Bulletin*.

Waisman, Rory M. and Gerald Häubl, "The Interplay of Prior Preferences and Cognitive Dynamics in Decision Making with Defaults: Implications for Later Behavior," 3 studies completed, target: *Psychological Science*.

Brigden, Neil, Gerald Häubl, and **Rory M. Waisman**, "Hold'em or Fold'em: The Dynamics of Inaction in the Disposition of Under-Performing Investments," 4 studies completed, target: *Journal of Consumer Research*.

Ibrahim, Nahid, Gerald Häubl, and **Rory M. Waisman**, "The Rating Effect: Does Rating a Consumption Experience Change Consumers' Retrospective Evaluation?" 4 studies completed, target: *Journal of Consumer Research*.

Waisman, Rory M., and Gerald Häubl, "How Uncertainty Boosts Confidence in Consumption Decisions," 3 studies completed, target: *Journal of Consumer Research*.

Waisman, Rory M., Mohammed El Hazzouri, Kelley Main, and Gerald Häubl, "Magically Relieved or Taking Control? The Surprising Influence of Messages Aimed at Debt Distressed Consumers," 3 studies completed, target: *Journal of Marketing*.

Waisman, Rory M. and Gerald Häubl, "EPIC Memory: Understanding Evaluation, Preference, Intention, and Choice as Retrieval from Episodic Memory," simulations in progress, target: *Journal of Consumer Research*.

Conference Presentations (*presenter)

Mind Over Body in Gambling Behavior
    with Amin Shiri and Gerald Häubl
Association for Consumer Research, Denver, Colorado, USA, 2022.

The Downstream Impact of Defaults: Enduring Behavior Change vs. Backfire Effects
    with Gerald Häubl, Matthew Godfrey, and Benedict Dellaert
***Society for Personality and Social Psychology*, JDM Virtual Pre-Conference*, 2022. [Video Link](#)
***Society for Judgment and Decision Making*, San Diego, California, USA, 2022 [poster]

Insights from a Process Model of Retrospective Evaluation
***Association for Consumer Research*, Virtual Conference, 2020.

How Uncertainty Boosts Confidence in Consumption Decisions
    with Gerald Häubl
***Association for Consumer Research*, Virtual Conference, 2020;
***Society for Consumer Psychology*, Huntington Beach, CA, 2020*;
***Society for Judgment and Decision Making*, Montreal, Canada, 2019 [poster].

Good Gets Better, Bad Gets Worse: The Polarizing Effect of Rating a Consumption Experience
    with Nahid Ibrahim and Gerald Häubl
***Association for Consumer Research*, Dallas, Texas, USA, 2018.

Magically Rescued or Taking Control? An Examination of Messaging Aimed at Debt Distressed Consumers
    with Mohammed El Hazzouri and Kelley Main
***Association for Consumer Research*, Virtual Conference, 2020 [poster];
AMA Marketing & Public Policy, Columbus, Ohio, 2018 [poster].

Bootstrapping – Enhancing Successful Replication of Effect Size Estimates
with Yongtian Cheng and Johnson Li
    International Meeting of the Psychometric Society, Zurich, Switzerland, 2017.

The Probability of Replicating Effect Size: Can We (partly) Blame Inappropriate Statistical Methods for the Replication Crisis?
    with Yongtian Cheng and Johnson C-H. Li
Canadian Psychological Association, Toronto, Canada, 2017.

Bootstrap Confidence Intervals in Meta-Analysis
    with Yongtian Cheng and Johnson Li
Canadian Psychological Association, Toronto, Canada, 2017.

Meta-Analysis of Omega Composite Reliability: An Overestimation Problem Revealed?
    with Johnson Li
**International Meeting of the Psychometric Society*, Asheville, NC, 2016 [poster].

A Probability-Based Effect Size (A_G) Robust to Multivariate Non-Normality and Heterogeneity of Covariance Matrices in One-Way MANOVA
    with Marcelo Nesca, Yongtian Cheng, and Johnson Li
International Meeting of the Psychometric Society, Beijing, China, 2015.

A Precise Computational Description of the Availability Heuristic: Minerva-DM Revised
    with Randall K. Jamieson
**Canadian Psychological Association*, Toronto, Canada, 2015, [poster].

Modelling Word-Specific False Recognition Rates in the DRM Test
    with Randall K. Jamieson and Brendan T. Johns
**Canadian Society for Brain, Behaviour and Cognitive Science,* Toronto, Canada, 2015, [poster].

Chaired Symposia

New Insights from Computational Models of Cognition in Consumer Research
Association for Consumer Research, Oct. 2020.

Persuasive Uncertainty: Toward Understanding How Uncertainty Influences the Formulation of Beliefs
Association for Consumer Research, Oct. 2020.

On Certain Mechanism of Uncertainty in the Formulation of Beliefs
Society for Consumer Psychology, March 2020.

Invited Talks

Concordia University, John Molson School of Business (2022)
Deakin University, Deakin Business School (2022)
University of Guelph, Gordon S. Lang School of Business and Economics (2022)
Indiana University (Indianapolis), Kelley School of Business (2022)

Public Presentations

Confidence from Uncertainty. Three Minute Thesis Presentation, University of Alberta, Edmonton, Canada, April 2020. Video Link

Nudging Sustained Behaviour Change. Three Minute Thesis Presentation, University of Alberta, Edmonton, Canada, April 2018. Video Link

RESEARCH COLLABORATORS

Neil Brigden, Assistant Professor of Marketing, Mount Royal University
Benedict Dellaert, Professor of Marketing, Erasmus University Rotterdam
Tim Derksen, Ph.D. Student, University of Alberta
Bas Donkers, Professor of Marketing, Erasmus University Rotterdam
Mohammed El Hazzouri, Associate Professor of Marketing, Dalhousie University
Matthew Godfrey, Assistant Professor of Marketing, University of Massachusetts Amherst
Gerald Häubl, Professor of Marketing, University of Alberta
Nahid Ibrahim, Assistant Professor of Marketing, University of Leeds
Johnson Li, Associate Professor of Psychology, University of Manitoba

Kelley Main, Professor of Marketing, University of Manitoba
Virginia Man Chung Tze , Assistant Professor of Counselling Psychology, University of Manitoba
Qiao Liu, Ph.D. Student, University of Alberta
Amin Shiri, Ph.D. Student, Texas A&M University
Sarah Wei, Assistant Professor of Marketing, University of Warwick

HONORS AND AWARDS

Research Grants

Alberta Gambling Research Institute, Small Grants Program ($9,979)   2020 to 2021
The Cognitive Operations of Predictive Agents: How Mental Simulation Generates Cognitive Biases

SSHRC, Insight Development Grant ($36,639; student co-author of grant application)   2016 to 2019
What Learning Skills are Most Canadian Students Missing? A Cognitive Assessment of the PISA Data
Ranked 4th out of 53 successful applications

Research Based Awards, Prizes, and Scholarships

SSHRC Joseph Armand Bombardier Canada Graduate Scholarship-Doctoral ($105,000)   2019 to 2021
President's Doctoral Prize of Distinction, University of Alberta ($21,600)   2019 to 2021
Andrew Stewart Memorial Graduate Prize, University of Alberta ($5,000)   2021
SSHRC Joseph Armand Bombardier Canada Graduate Scholarship-Master's ($17,500)   2017
Walter H. Johns Graduate Fellowship, University of Alberta ($5,800)   2017
University of Manitoba 2016 Undergraduate Research Poster Competition, 1st Prize ($500 prize) 2016
Psychology Undergraduate Research Experience Award, University of Manitoba ($6,000) 2015
Psychology Undergraduate Research Experience Award, University of Manitoba ($6,000) 2014
Peter Graf Student Research Award, Canadian Psychological Association ($250 prize)   2015
NSERC Undergraduate Student Research Award ($5,625)   2014

Other Scholarships and Fellowships

Graduate Research Assistant Fellowship, University of Alberta ($133,300)   2017 to 2022
The Leo LeClerc Memorial Scholarship, University of Alberta ($1,000)   2019
University of Manitoba Students Union Scholarship ($2,850)   2013 to 2016
University of Manitoba Faculty of Arts Endowment Fund ($750)   2015
University of Manitoba Financial Aid & Awards Merit Scholarship ($500)   2014

Other Awards and Honors

AMA-Sheth Foundation Doctoral Consortium Fellow   2022
Three Minute Thesis Competition, Alberta School of Business, First Place ($300 prize) 2021
Three Minute Thesis Competition, University of Alberta, Finalist   2020
Three Minute Thesis Competition, Alberta School of Business, First Place ($300 prize) 2018
    and Finalist - University of Alberta
Students' Teacher Recognition Award, Faculty of Arts, University of Manitoba   2017
Dean's Honor List, Faculty of Arts, University of Manitoba   2014
University 1 Honor Roll, University of Manitoba   2013

TEACHING

Primary Teaching Interests

Marketing Research and Analytics, Consumer Behavior, Judgment and Decision Making, Principles of Marketing, Marketing Management

Experience as Principal Instructor

Alberta School of Business, University of Alberta
   Marketing Research (USRI Score: 4.4/5)   Winter 2021
   Marketing Research (USRI Score: 4.6/5)   Spring 2020

Research Supervision

Alberta School of Business, University of Alberta, Undergraduate Research Initiative   Summer 2021
   Student: Tru Hamilton
   Project: *The Influence of Pro-Environmental Nudge Interventions on Consumers' Later Sustainability-Relevant Behaviors*

Guest Lectures

Alberta School of Business, University of Alberta
   Research Ethics, *Experimental Methods for Behavioral Science*   2020 & 2021
   Consumer Decision Making, *Marketing Research*   Fall 2019
   Online Data Collection, *Marketing Research*   Fall 2019
   Advertising Strategy and Design, *Introduction to Marketing*   Fall 2019
   Retail Advertising Principles, *Retailing and Channel Management*   Fall 2017 & 2018

Experience as Teaching Assistant, Tutor, Grader

Alberta School of Business, University of Alberta
   Teaching Assistant, *Marketing Research* (Principle Instructor: Kangkang Wang)   Fall 2019
   Teaching Assistant, *Introduction to Marketing* (Principle Instructor: Paul Messinger)   Fall 2019
   Teaching Assistant, *Retailing and Channel Management* (Principle Instructor: Paul Messinger) Fall 2017

Asper School of Business, University of Manitoba
   Teaching Assistant/Tutor, *Indigenous Business Education Partners* (calculus, statistics)   2015 to 2017

Department of Psychology University of Manitoba
   Marker/Grader, *Cognitive Processes* (4 sections)   2014 to 2017
   Marker/Grader, *Design and Analysis for Psychological Experiments* (1 section)   2016
   Marker/Grader, *Thinking Critically About Psychological Research* (1 section)   2016

PROFESSIONAL DEVELOPMENT

Canadian Centre for Diversity and Inclusion (4 Workshops)   2022
   Diversity, Equity, and Inclusion Fundamentals
   Intersectionality in the Workplace
   Neurodiversity: Strategies for Creating a Neurodiverse Organization
   Gender Equality Through an Intersectional Lens

Graduate Teaching and Learning Program, University of Alberta (Workshops)   2017 to 2019
   Leading Discussions
   Ethical Principles in Teaching
   Your First Class: How to Make it First Class
   Teaching Presentation Skills: Performance Under Pressure
   Social Location and Unconscious Bias in the Classroom
   Lesson Planning
   Copyright and Graduate Studies: What You Need to Know
   Applied Improvisation in Teaching
   Free and Open Teaching Materials
   Active Learning – Creating Excitement in the Classroom
   Teaching and Learning: Context Matters

Dealing with Difficult Situations and Students
The Fundamentals of Grading and Assessment
Identifying, Helping, and Referring Students in Distress
The Code of Student Behavior in Teaching
Student Motivation
Learning Objectives and Outcomes
Building Relationships with Students
Multimedia Assessments and Inquiry Based Learning
Transitioning from TA to Principal Instructor

Ontario Consortium for Graduate Professional Skills (Online Courses)   2017 to 2018
Lesson Planning
Teaching Online - Basic Skills for TAs
Teaching Online – Advanced Skills for Graduate Students

Graduate Ethics Training Course, University of Alberta   2018

Constructing the Syllabus, Community Service-Learning, University of Alberta   2017

PROFESSIONAL AFFILIATIONS

Association for Consumer Research
Society for Judgment and Decision Making
Society for Consumer Psychology
Society for Personality and Social Psychology
Psychonomic Society

SERVICE

Peer Review

Society for Consumer Psychology Annual Conference   2020 to 2022
American Marketing Association, Marketing & Public Policy Conference   2019 to 2022
Association for Consumer Research Annual Conference   2019 to 2021

University of Alberta

Research Server Administrator, Alberta School of Business   2018 to 2022
Planning Committee Chair, Alberta School of Business Doctoral Research Conference   2020
Research Lab Coordinator, Marketing PhD Program, Alberta School of Business   2018 to 2019
Judge, Festival of Undergraduate Research & Creative Activities   2018

University of Manitoba

Student Representative, Executive Committee, Department of Psychology   2016 to 2017
Student Representative, Department Council, Department of Psychology   2015 to 2017
Student Representative, Search Advisory Committee, Department of Psychology   2014 to 2015

GRADUATE COURSEWORK

Buyer Behavior   Gerald Häubl
Marketing Theory   Robert Fisher
Experimental Methods for Behavioral Science   Gerald Häubl
Human Judgment and Decision Making   John Pracejus

Marketing Models	Paul Messinger
Research Methodology in Marketing	Paul Messinger
Advanced Social and Cultural Psychology	Jeff Schimel
Applied Cognitive Psychology	Norman Brown
Design and Analysis in Psychological Research 1	Sandra Wiebe
Design and Analysis in Psychological Research 2	John Lind
Group Processes	David Rast
Topic in Quantitative Methods	Peter Dixon

Industry Experience

Marketing & Special Projects Associate, Alcom Electronic Communications	2012 to 2017
Public Safety Communications Specialist, Alcom Electronic Communications	2009 to 2011
Advertising Consultant, DirectWest Canada	2006 to 2008
Sales Executive, Initial Security	2005 to 2006
General Manager, Keenan's Silk Screen Supplies	2003 to 2005
Sales Manager, Crown Renovations	2000 to 2003
General Manager, RM Communications	1993 to 1999
Advertising Sales Representative, Jewish Post & News	1991 to 1992

Community Service

Volunteer Facilitator for Addiction Recovery Programs, Correctional Service of Canada	2012 to 2020
Judge, Skills Alberta Public Speaking Competition	2018 to 2019
Volunteer Escort for Unsecured Temporary Absences, Correctional Service of Canada	2014 to 2017
Foster Parent, Southeast Child and Family Services	2015 to 2017
Respite Provider, Southeast Child and Family Services	2013 to 2015
Member of the Board of Directors, Pregnancy and Family Support Services	2015
Hospice Volunteer, Hospice & Palliative Care Manitoba	2012/13
Member of the Board of Directors, Manitoba Association of Fire Chiefs	2011/12

References

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University of Manitoba
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Email: Johnson.Li@umanitoba.ca

ABSTRACTS OF SELECTED PAPERS

Waisman, Rory M., Gerald Häubl, D. Matthew Godfrey, and Benedict G.C. Dellaert, "Carryover of
    Default Effects: The Interplay of Nudges, Prior Preferences, and Experienced Choice
    Consequences," manuscript in preparation for submission to *Journal of Marketing Research*.

Evidence for the carryover of default effects is sparse. Most previous studies investigating the downstream effects of defaults have yielded null results or revealed backfire effects that boost subsequent behavior in the opposite direction of earlier defaults. The present work introduces a framework for understanding how the immediate effects of defaults carry over to preference and subsequent choice behavior aligned with the earlier defaults. This framework identifies circumstances under which carryover of default effects is likely to occur, proposing that carryover is more likely when (1) defaults are preference-inconsistent, (2) the consequences of nudged choices have been experienced, and (3) those consequences are not aversive. In contrast to prior research, we theorize that, under these enabling conditions, the perception of choice consequences as more favorable than expected increases in incidence and intensity resulting in amplification of preference updating in favor of the default. Five experiments (N=7006) in the domain of experiential consumption show that carryover of default effects is attenuated when defaults are preference-consistent and when choice consequences are not experienced through immediate consumption of the chosen alternatives. This research helps reconcile past findings and offers a roadmap for choice architects to avoid backfire effects while maximizing the benefits of using default nudges to encourage behavior change.

Shiri, Amin, Gerald Häubl, and **Rory M. Waisman**, "Mind Over Body in Gambling Behavior,"
    manuscript in preparation for submission to *Science*.

We offer a cognitive account of biased optimism in the context of gambling. We propose that the way in which gamblers interact with games of chance systematically influences the focus of their cognitive activity, with implications for the generation of biased optimism. The cognitive representations associated with one's role in a game could focus either on doing (i.e., the *physical* actions required) or on thinking (i.e., the *mental* actions required), and the extent to which representations of a favorable outcome are activated depends on this role-based focus. We propose that gambling roles that focus on thinking are more likely to activate favorable outcome representations than roles that focus on doing and, as a consequence, lead to greater optimism. Evidence from 7 studies (N = 4975) supports this theorizing. The findings show that mental roles in games of chance promote greater optimism, which manifests in a preference for a mental role over a physical role when people have a choice between them, and results in greater willingness to take financial risk when gambling in a mental role compared to a physical role.

Waisman, Rory M., and Gerald Häubl, "How Uncertainty Boosts Confidence in Consumption
    Decisions," 3 studies completed, target: *Journal of Consumer Research*.

Can consumers gain confidence from uncertainty? Three studies reveal that consumers' confidence in subjective decisions is boosted by incidental uncertainty. However, prior research showed negative effects of uncertainty on confidence. We reconcile these conflicting results in light of different effects of uncertainty on decision processing depending on the subjectivity (vs. objectivity) of the decision. Analysis of unstructured textual data from a thought listing protocol reveals that uncertain decision-makers engage in more structured thinking and they generate thoughts that are more favorable to their chosen alternative when making subjective decisions. Consequently, metacognitive monitoring of decision processing— experienced as faster, more fluent, and less conflicted—signals greater confidence.

Donkers, Bas, Benedict G.C. Dellaert, **Rory M. Waisman**, and Gerald Häubl (2020), "Preference Dynamics in Sequential Consumer Choice with Defaults," *Journal of Marketing Research*, 57(6), 1096-1112.

This research examines the impact of defaults on product choice in sequential-decision settings. While prior research has shown that a default can affect what consumers purchase by promoting choice of the preselected option, the influence of defaults is more nuanced when consumers make a *series* of related choices. In such a setting, consumer preferences may evolve across choices due to "spillover" effects from one choice to subsequent choices. The authors hypothesize that defaults systematically *attenuate* choice spillover effects because accepting a default is a more passive process than either choosing a non-default option in the presence of a default or making a choice in the absence of a default. Three experiments and a field study provide compelling evidence for such default-induced changes in choice spillover effects. The findings show that firms' setting of high-price defaults with the aim of influencing consumers to choose more expensive products can backfire through the attenuation of spillover. In addition to advancing our understanding of the interplay between defaults and preference dynamics, insights from this research have important practical implications for firms applying defaults in sequential choices.

Li, Johnson C-H. and **Rory M. Waisman** (2019), "Probability of Bivariate Superiority: A Non-Parametric Common-Language Statistic for Detecting Bivariate Relationships," *Behavior Research Methods*. 51(1), 258-279.

Researchers often focus on bivariate normal correlation (r) to evaluate bivariate relationships. However, these techniques assume linearity and depend on parametric assumptions. We propose a new nonparametric statistical model that can be more intuitively understood than the conventional r: probability of bivariate superiority (PBS). Our development of Bp, the estimator of a PBS relationship, extends Dunlap's (1994) common-language transformation of r (CLr) by providing a method to directly estimate PBS—the probability that when x is above (or below) the mean of all X, its paired y score will also be above (or below) the mean of all Y. Probability of superiority is an important form of bivariate relationship that until now could only be accurately estimated when data met the parametric assumptions for r. We specify the copula that forms the theoretical basis for PBS, provide an algorithm for estimating PBS from a sample, and describe the results of a Monte Carlo experiment that evaluated our algorithm across 448 data conditions. The PBS estimate, Bp, is robust to violations of parametric assumptions and offers a useful method for evaluating the significance of probability-of-superiority relationships in bivariate data. It is critical to note that Bp estimates a different form of bivariate relationship than does r. Our working examples show that a PBS effect can be significant in the absence of a significant correlation, and vice versa. In addition to utilizing the PBS model in future research, we suggest that this new statistical procedure be used to find theoretically important but previously overlooked effects from past studies.