

**RORY M. WAISMAN**

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**EDUCATION**

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- 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, Memorial Basis of Preference and Choice, Consumption Appraisal, Maladaptive Decision Making, 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  $A_w$  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, "Default Carryover Effects: The Interplay of Choice Architecture, Prior Preferences, and Experienced Choice Consequences," manuscript in preparation for submission to *Journal of Marketing Research*.
- Shiri, Amin, Gerald Häubl, and **Rory M. Waisman**, "Mind Over Body in Games of Chance," manuscript in preparation for submission to *Journal of Personality and Social Psychology*
- Waisman, Rory M.**, Tim Derksen, and Gerald Häubl, "Understanding How Default Choice Architecture Impacts Downstream Behavior: A Scoping Review and Research Agenda," manuscript in preparation for submission to *Psychological Bulletin*.
- Waisman, Rory M.** and Gerald Häubl, "Cognitive Dynamics in Decision Making with Defaults: Implications for Later Behavior," manuscript in preparation for submission to *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*.

**Conference Presentations (\*presenter)**

Mind Over Body in Gambling Behavior  
with Amin Shiri and Gerald Häubl

\**Association for Consumer Research*, Denver, Colorado, 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](#)

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

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*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.

### **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**

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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**

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#### **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, 1 <sup>st</sup> 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) and Finalist - University of Alberta	2018
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**

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***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: <i>The Influence of Pro-Environmental Nudge Interventions on Consumers' Later Sustainability-Relevant Behaviors</i>	

***Guest Lectures***

Alberta School of Business, University of Alberta	
Research Ethics, <i>Experimental Methods for Behavioral Science</i>	2020 & 2021
Consumer Decision Making, <i>Marketing Research</i>	Fall 2019
Online Data Collection, <i>Marketing Research</i>	Fall 2019
Advertising Strategy and Design, <i>Introduction to Marketing</i>	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**

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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

**PROFESSIONAL AFFILIATIONS**

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

**SERVICE**

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***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**

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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**

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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

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General Manager, RM Communications	1993 to 1999
Advertising Sales Representative, Jewish Post & News	1991 to 1992

### COMMUNITY SERVICE

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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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**Gerald Häubl**, Ronald K. Banister Chair in Business and Professor of Marketing  
University of Alberta, Alberta School of Business  
Phone: 780 492 6886  
Email: [ghaeubl@ualberta.ca](mailto:ghaeubl@ualberta.ca)

**Sarah G. Moore**, Professor of Marketing and Thornton A. Graham Chair  
Associate Dean (Research and PhD Program)  
University of Alberta, Alberta School of Business  
Phone: 780 492 3664  
Email: [sgmoore1@ualberta.ca](mailto:sgmoore1@ualberta.ca)

**Benedict G.C. Dellaert**, Professor of Marketing  
Erasmus University Rotterdam, Erasmus School of Economics  
Phone: +31 10 4081353  
Email: [dellaert@ese.eur.nl](mailto:dellaert@ese.eur.nl)

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

The premier tool of choice architecture is to make one option a *default* that is obtained unless the consumer actively selects another option. While the immediate effects of default choice architecture (promoting choice of the default option) are well documented, little is known about potential *downstream* effects. A default’s immediate effects might carry over to future preferences and choices—promoting subsequent behavior aligned with the default—or it might be nullified by subsequent backfire effects. This research introduces and tests a theory of *default carryover* effects. It posits that a greater shift in downstream preferences and behavior in line with the default occurs when the default is *more inconsistent* with a consumer’s prior preference and when the experience of the initial choice’s consequences is *more immediate*. The intersection of these conditions facilitates preference updating in favor of the default due to experienced choice consequences that disconfirm expectations. Critically, this implies that carryover effects are suppressed when the default is preference consistent and/or when the experience of choice consequences is delayed. Evidence from five experiments supports this theorizing. The insights from this research help resolve seemingly contradictory earlier findings and advance our understanding of the nuanced interplay between choice architecture, prior preferences, choices, and consumption experiences over time.

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.