

Beyond Zero-Sum: Market Expansion Effects of Inter-Organizational Data Exchange

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Abstract — Data sharing among rival firms via data brokers is widespread in the digital economy, yet its effects on market dynamics remain unclear. Our study examines how customer data sharing influences charitable donations using a proprietary dataset from a data broker, covering solicitation and donation records for 63 charities over 14 years. The staggered entry of charities into the database creates a natural experiment to evaluate how new competitors affect donations to incumbents. A stacked DiD approach estimates the impact of new charity entries on incumbent donations. To address selection bias, we develop a novel deep-learning-based matching method to construct treatment-control pairs. Preliminary findings suggest that new charity solicitations increase overall donations to existing charities, indicating positive spillover effects rather than cannibalization. Our research contributes to understanding how inter-organizational data exchange shapes market expansion and competition.

Keywords — *Information Sharing, Causal Inference, Deep Learning*

Track — *Methods, Modelling & Marketing Analytics*