Investigation

Whether competing CPG manufacturers are converging on similar promotional strategies in ways that suggest coordination. Specifically through a company called Eversight (now owned by Instacart).

Key context: DOJ prosecuted RealPage for helping landlords coordinate rents through algorithmic intermediary. We're examining whether similar infrastructure exists in grocery promotions.

Burden of Proof: Not proving coordination definitively, but showing enough patterns to justify investigation by prosecutors with subpoena power.

Note: To show convergence, I will pull circular data from 2020, 2021, 2022, 2023, 2024 for key retailers/items that may show it

The Core Questions

Question 1: Are Deals Getting Worse?

From 2019 to 2025, have promotions degraded across the board?

What to measure:

- BOGO FREE decline vs. BOGO 40% increase
- Digital coupon requirement proliferation
- Shift from simple deals to complex multibuy structures
- Any other structural changes in promotional mechanics
- Did Fixed Price Deals get more expensive than general inflation? E.g., Clorox spray was on sale for $2.25 in 2019, it's now $7.99.

Purpose: Establishes consumer harm for story intro.

Question 2: Are Competing Brands Converging?

This is the main investigation.

Do competing manufacturers show convergence in:

- **Promotional type/structure** (e.g., both Coke and Dr Pepper shift from BOGO FREE to BOGO 40% in same timeframe)
- **Deal timing** (e.g., both running same promotion structures in same week across multiple retailers)

- **Discount depth** (where we have straight prices or 2/$4 deals - do competitors cluster around the same price points?)
- **Digital requirements** (do competitors adopt app-required deals in parallel?)

If Coca-Cola and Dr Pepper (both Eversight clients) start offering similar promotional structures at similar times across multiple retailers, that's newsworthy. Same for Pampers and Huggies.

What makes it interesting:

- Competitor convergence (Coke vs Pepsi, not just all soda)
- Across multiple retailers (pattern holds at Kroger, Giant, Albertsons)
- Among known Eversight clients (see client list below
- Major candy brands (Most of market with eversight) are running similar campaigns and prices

Question 3: Are Eversight Retailers Different?

Secondary research question - not definitive.

Do retailers suspected of using Eversight show different patterns than non-Eversight retailers? This is exploratory - we don't have confirmed retailer clients, so findings here are suggestive, not conclusive.

Known Eversight Clients

Manufacturers (Source: POI Lightning Round 2019)

1. MillerCoors
2. Coca-Cola
3. Mars Candy
4. Mars Petcare
5. Frito-Lay
6. General Mills
7. Hershey
8. Ocean Spray
9. McCormick
10. Keurig Dr Pepper
11. Listerine
12. Neutrogena
13. Johnson & Johnson
14. Georgia-Pacific
15. Ferrero
16. Johnson's Baby
17. Advil

Note: This list is from 2019. Client roster is likely larger now, but this is a start.

Question: I did not code parent company into the data. What's the best way to do so?

Retailers (Suspected - Not Confirmed)

1. Raley's
2. Schnucks
3. The Giant Company
4. Kroger
5. Ahold Delhaize (eric to provide full list)
6. Publix

Important caveat: Instacart offers a full suite of services (website, pick technology, ads). These retailers are in Instacart marketing materials but NOT confirmed users of Eversight's promotion optimization system specifically. Transactional data flows through Instacart shopping + loyalty programs regardless.

Analysis approach: Treat retailer analysis as exploratory. If patterns emerge, interesting. If not, that's okay - our main focus is brands.

The Dataset

What We Have

Retailers: Albertsons, Food Lion, Giant, HEB, Kroger, Meijer, Publix, Safeway, Schnucks, ShopRite, Sprouts, Stop n Shop, Sprouts, WinnDixie

Time periods: Thanksgiving 2019 (a few are 2020) vs. Thanksgiving 2025. The idea is pre-or-start of COVID.

Fields extracted:

- Year, Page, Brand, Product, Size
- Base_Price (often missing)
- Promo_Price (present for straight price and multibuy deals)
- Promo_Type (BOGO_FREE, BOGO_40%, MULTIBUY, etc.)
- Promo_Details
- Digital_Req (YES/NO)
- Non_Digital_Price (price without app, where applicable)
- Member_Req (requires loyalty card)
- Savings, Discount_Depth, Net_Price
- Core_Item (Thanksgiving basket items flag)

Data Limitations

We do NOT have base prices for most items.

If we find some interesting findings, i may try to pull favors and get base prices. It's a big ask, so I'm trying to limit it

Key Analysis Questions

On Promotional Structure

1. How have promotion types shifted 2019→2025?
2. Is there uniformity in these shifts across brands/retailers?
3. Are competing brands (Coke vs Pepsi) making similar structural changes?

On Digital Requirements

1. How much have digital-only deals increased?
2. Which brands/retailers drove this shift?
3. Do Eversight client brands show different patterns?

On Price Clustering (Where We Have Data)

For straight price promotions and multibuy deals:

1. Are certain products converging on specific price points?
2. Do competitors cluster around same prices? (e.g., both Coke and Pepsi at 2/$4)
3. Is this clustering more pronounced among Eversight clients?

On Core vs. Non-Core Items

Question for you: Should we segment the analysis by Core Thanksgiving items vs. everything else in the ads?

Reasoning: We'd EXPECT competitive convergence on turkey, cranberry sauce, stuffing (holiday competitive pressure). Less expected convergence on snacks, beverages, household goods would be more interesting.

Your call: Is this segmentation useful or overcomplicating?

On Parent Company Mapping

Question for you: The dataset has individual brands, but we need to map to parent companies for competitor analysis.

Example: "Coke," "Sprite," "Fanta" → Coca-Cola Company

Do you have an efficient way to do this parent company mapping?