

The Mediation Effect of Service Innovation on the Relationship Between Promotional Strategies and Market Share in Medical Schemes, South Africa

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Abstract

Orientation: The dynamic global healthcare landscape requires ongoing adaptation and innovation. Service innovation (SI) is pivotal for healthcare funders and providers, particularly in medical schemes, where it significantly enhances the effectiveness of promotional strategies (PS) and improves market share (MS).

Research Purpose: This study explores the mediating effect of service innovation on the relationship between promotional strategies and market share in the private healthcare sector, focusing on medical scheme beneficiaries in Gauteng, South Africa. It aims to assess how SI amplifies the impact of PS on MS and the implications of outsourcing marketing services.

Motivation for the Study: Rising complexity in the healthcare market and the need for medical schemes to attract and retain members amid growing competition drive this study. Understanding how service innovation mediates the relationship between promotional strategies and market share offers insights into optimising marketing efforts for better market penetration.

Research Approach/Design and Method: A quantitative cross-sectional design was employed, using snowball sampling to gather data from 260 beneficiaries in Gauteng. Baron and Kenny's mediation framework was used for analysis, with validation through STATA software and Zhao, Lynch, and Chen's approach.

Main Findings: Service innovation partially mediates the relationship between promotional strategies and market share, with approximately 12% of the impact being mediated by SI, highlighting its role in enhancing promotional effectiveness.

Practical/Managerial Implications: Integrating service innovation into promotional strategies is crucial for healthcare funders and providers to improve market share. The study also underscores the importance of aligning outsourced marketing services with organisational goals to maximise effectiveness.

Contribution/Value-Add: This research provides empirical evidence on the partial mediation effect of service innovation, offering valuable insights for optimising marketing strategies and addressing challenges in outsourcing marketing services. Thus, it enhances competitive positioning in the healthcare sector.

Keywords:

Healthcare Funders, Market Share, Mediating Effect, Medical Schemes, Outsourcing Marketing Services, Promotional Strategies, Quantitative Analysis, Service Innovation.



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INTRODUCTION

In the evolving global healthcare landscape, organisations must prioritise adaptation and innovation to meet the growing challenges of patient care and rising disease burdens (Berry, 2019). Healthcare funders and providers increasingly seek innovative solutions to address current and emerging healthcare challenges (Kelly & Young, 2017; Filip et al., 2022; Nabyonga-Orem, Christmas,

Addai et al., 2023). Issues such as demographic changes, escalating costs, and the demand for personalised care continuously drive the sector's need for improvement and innovation (Kelly & Young, 2017).

Healthcare funders, including government bodies, private insurers, and health maintenance organisations, play a crucial role in shaping the accessibility and delivery of care (Sriram, Yilmaz, Kaur et al., 2024). Their decisions affect resource allocation, service provision, and the overall fulfilment of patient needs. In this context, service innovation has become a critical strategy for tackling healthcare delivery and financing challenges. Developing and implementing innovative approaches to care enables healthcare funders and providers to enhance patient outcomes, improve operational efficiency, and align services more closely with patient expectations (Clarke, Bourn, Skoufalos et al., 2017).

Service innovation is particularly vital given the strain on global health systems. The rising incidence of chronic illnesses and multi-morbidity necessitates innovative strategies for care delivery (Clarke et al., 2017; Samal, Fu, Camara, et al., 2021). Telemedicine, integrated care models, and digital health solutions exemplify how healthcare providers are adapting to these pressures, aiming to improve service delivery and patient experiences (Mbunge, Batani, Gaobotse & Muchemwa, 2022; Sussex, Smith & Wu, 2024).

Healthcare funders often rely on promotional strategies and service innovation to increase market share and attract new members. Promotional efforts, such as targeted marketing campaigns, help raise awareness and attract new members by emphasising the services' benefits (Alexandrescu & Milandru, 2018; Bondarenko & Vyshnivska, 2023). At the same time, service innovation enhances the appeal and effectiveness of these services, ensuring that organisations meet evolving patient needs while distinguishing themselves in a competitive market (Berry, 2019).

Background

In the highly regulated and competitive environment of medical schemes in South Africa, organisations face the continuous challenge of attracting and retaining members while increasing their market share. Medical schemes and private health insurance organisations that offer coverage for healthcare expenses to their members are integral to the South African healthcare system, especially in facilitating access to private healthcare services (Rammila, 2023). Market share growth is critical for the sustainability and competitiveness of medical schemes, particularly in an industry characterised by stringent regulations, complex consumer needs, and evolving healthcare landscapes (Willie, 2023). Traditional promotional strategies (PS), such as advertising, member engagement campaigns, and partnerships, have been widely used to enhance visibility and attract potential members (Batra & Keller, 2016; Kotler & Keller, 2016). However, the effectiveness of these strategies is increasingly dependent on the extent of innovation embedded within the services offered by the schemes.

Service innovation (SI) refers to introducing new or improved services, processes, or business models that create additional value for members and differentiate the organisation in the marketplace (Snyder, Witell, Gustafsson et al., 2016). In the context of medical schemes, SI can include innovations in digital health services, personalised care packages, and streamlined administrative processes, all of which enhance the overall value proposition of the scheme. Integrating SI within promotional strategies improves the medical scheme's appeal and addresses the dynamic expectations of modern consumers, who demand more flexible, efficient, and customer-centric healthcare solutions. The relationship between PS and SI holds significant relevance in the medical schemes sector, where members are susceptible to both the cost and quality of services. In an increasingly competitive industry, schemes capitalising on innovative services are better positioned to differentiate themselves and gain greater market share.

Literature Review

Service innovation has become increasingly crucial in enhancing the effectiveness of promotional strategies within the healthcare sector (Berry, 2019; Flessa & Huebner, 2021). According to Berry (2019), continuous service innovation is essential, emphasising the need for institutions to foster self-confidence while actively involving patients and families in the innovation process. This is particularly relevant in cancer care, where progressive oncology centres have demonstrated improved patient and family service experiences. Flessa and Huebner (2021) further assert that strategic innovation management in healthcare is necessary to develop and adopt innovations rapidly, ultimately enhancing the quality of life for an ageing population. Consequently, integrating service innovation into

the operational framework of healthcare institutions has become an imperative step for sustaining competitiveness in a challenging industry.

Service innovation introduces new or improved services, processes, or delivery methods that create customer value, enhance efficiency, and foster competitive advantage (Gallouj & Djellal, 2010). This includes the development of novel service concepts, reconfiguring existing services, and implementing innovative approaches to improve user experience and operational performance (Prestes Joly & Teixeira, 2019). For this study, service innovation is conceptualised as integrating innovative service models, customer engagement mechanisms, and technological advancements to address specific challenges in healthcare, particularly improving patient experiences and outcomes while maintaining cost efficiency (Berry, 2019; Flessa & Huebner, 2021).

Adopting service innovation is a critical driver for improving product offerings, fostering growth, and enhancing service delivery, especially in regulated sectors like healthcare (Willie, 2024). Through innovations such as personalised health interventions and digital platforms, healthcare organisations can effectively communicate the value of their services, amplifying marketing efforts' effectiveness. These innovations provide opportunities to differentiate service offerings, improve customer engagement, and build trust by highlighting convenience, accessibility, and enhanced health outcomes (Berry, 2019; Purcarea, 2019). For instance, telehealth platforms, automated patient portals, and remote monitoring tools can serve as key differentiators in marketing campaigns, strengthening an organisation's competitive positioning and catering to consumer needs (Berry, 2019; Flessa & Huebner, 2021). However, challenges such as overreliance on third-party services and misaligned stakeholder objectives hinder the effective integration of service innovation into promotional strategies (CMS, 2006; Willie, 2023). A more strategically aligned approach, where stakeholders' goals are synchronised, is necessary to maximise the impact of service innovation in promotional efforts.

The relationship between service innovation and promotional strategies is essential for driving market growth. Yet, gaps in the literature concerning their integration and long-term effects on market share remain. Research is needed to understand better how service innovation influences promotional success, especially in highly regulated sectors like healthcare, and to identify scalable approaches that optimise innovation and marketing strategies (Porter & Lee, 2013). Service innovation significantly impacts market share by allowing organisations to distinguish their products or services from competitors, gaining a competitive edge (Rodrigues et al., 2012; Nwachukwu & Hieu, 2022). This differentiation opens opportunities to enter new markets and expand customer bases, resulting in market share growth through customer acquisition or superior performance (Varadarajan, 2018; Borowski, 2021). Conversely, a lack of innovation can result in declining market share as customers shift towards competitors offering more innovative solutions (Dumitrescu, Stanciu, Tichindelean & Vinerean, 2011). In medical schemes, market share refers to the percentage of beneficiaries enrolled in a particular scheme relative to the total beneficiaries in a given geographic area or sector. Innovations such as telehealth, electronic health records (EHRs), and automated systems improve service delivery while acting as key differentiators in promotional campaigns (Zhang & Saltman, 2022). These innovations help organisations attract and retain customers by addressing specific healthcare needs, such as chronic disease management, which boosts patient satisfaction and loyalty. However, the lack of empirical studies quantifying the relationship between service innovation, promotional strategies, and market share represents a critical gap in the literature (Greenhalgh et al., 2004; Nwachukwu & Hieu, 2022).

Study Aim

The study aims to analyse how promotional strategies directly impact market share in medical schemes and evaluate the role of service innovation in enhancing these strategies' effectiveness. Additionally, it explores how service innovation mediates the relationship between promotional strategies and market share while assessing the challenges and opportunities associated with outsourcing marketing services and its implications for service innovation.

METHODOLOGY

Research Design

This study adopts a quantitative cross-sectional research design to investigate the mediating effect of service innovation on the relationship between promotional strategies and market share (Medina & Rufin, 2009; Kankam-Kwarteng, Osei, Asante-Gyabaah, & Ferkah, 2022). Kankam-Kwarteng et al. (2022) discovered that service innovation positively and significantly influences

marketing success within the retail sector, underscoring its importance across many industries. The chosen research design allows for the simultaneous examination of relationships between variables, providing a snapshot of the phenomena under investigation. This study is set in the private healthcare sector in South Africa, specifically focusing on medical scheme beneficiaries in the Gauteng Province.

Research Approach

A deductive approach is employed, where theoretical propositions about the relationships between promotional strategies, service innovation, and market share are evaluated using empirical data. The study uses Baron and Kenny's (1986) mediation analysis framework to examine the role of service innovation as a mediator. Statistical analyses are conducted using STATA software, with a significance level set at $\alpha < 0.05$.

Study Population

The study population comprises medical scheme beneficiaries residing in Gauteng Province, South Africa. Respondents who were eligible for the study were 18 years or older. This population is selected to provide insights into the dynamics of promotional strategies and service innovation within the context of private health care.

Sampling Methods

The study utilised snowball sampling to identify and recruit medical scheme beneficiaries within Gauteng Province. Snowball sampling is an effective technique for accessing participants from specific, often hard-to-reach populations, as it relies on referrals from initial subjects to expand the participant pool (Naderifar, Goli & Ghaljaei, 2017). This method is particularly advantageous in contexts where individuals are part of a specialised group, such as healthcare beneficiaries, which may not be easily accessible through traditional sampling methods. The process involves:

1. **Initial Contact:** Starting with a few known medical scheme beneficiaries who meet the study criteria.
2. **Referral Process:** These initial participants are asked to refer other beneficiaries within their network.
3. **Expansion:** This referral process continues, with new participants recruiting additional respondents.

The sampling strategy aimed at 420 medical scheme beneficiaries. 260 valid responses were obtained, yielding a response rate of about 62%. This sample size is sufficient to support the statistical analyses necessary for the study.

Data Collection

Data was gathered via an online survey instrument, enabling the dissemination and completion of the survey by participants. The survey tool was a questionnaire on a 5-point Likert scale, allowing the participants to assess their level of agreement or disagreement with multiple claims about promotional techniques, service innovation, and market share. Using a Likert scale provided a range of responses for each question, enabling a more nuanced understanding of the participants' views and experiences.

Data Analysis

The data obtained from the online questionnaires were analysed utilising Baron and Kenny's mediation framework to evaluate the mediating impact of service innovation. Further validation was conducted utilising the methodology proposed by Zhao, Lynch, and Chen (2010). The statistical analysis was conducted with the help of the STATA program, and the results were interpreted in connection to the study's assumptions and the research objectives.

RESULTS AND DISCUSSION

To investigate the mediating effect of service innovation (SI) on the relationship between promotional strategies (PS) and market share (MS), we applied the Baron and Kenny (1986) approach. The analysis revealed significant results at each step:

- **Step 1:** The effect of PS on SI was significant, with a coefficient (B) of 0.308 ($p=0.000$).

- **Step 2:** The effect of SI on MS was also significant, with a coefficient (B) of 0.165 (p=0.002).
- **Step 3:** The direct effect of PS on MS was significant, with a coefficient (B) of 0.388 (p=0.000).

Given the significance of Steps 1, 2, and 3, corroborated by the Sobel test, the results indicate partial mediation. The Ratio of Indirect to Total effect (RIT) was calculated as 0.116, suggesting that approximately 12% of the effect of PS on MS is mediated by SI. Additionally, the Indirect to Direct effect (RID) ratio was 0.132, indicating that the mediated effect is about 0.1 times the size of the direct effect of PS on MS. To validate these findings further, Zhao, Lynch, and Chen's (2010) approach were employed. The direct effect of PS on MS remained significant (B=0.388, p=0.000), and the Monte Carlo test confirmed complementary mediation. The results were consistent with the Baron and Kenny approach, with an RIT of 0.116 and an RID of 0.132, affirming that SI partially mediates the relationship between PS and MS.

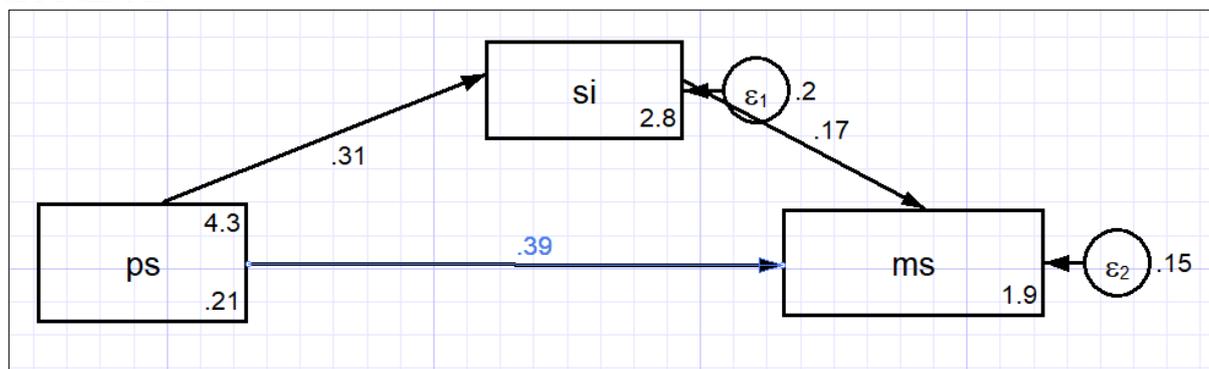


Figure 1: Mediation Analysis of Service Innovation on the Relationship Between Promotional Strategies and Market Share

Discussion

The findings of this study underscore the importance of SI as a mediator in the relationship between PS and MS, aligning with the literature highlighting SI's critical role in enhancing marketing performance in healthcare (Berry, 2019; Flessa & Huebner, 2021). Service innovation has positively impacted marketing effectiveness by improving customer engagement, service delivery, and market share (Rodrigues et al., 2012; Nwachukwu & Hieu, 2022). This study's positive and significant mediating effect of SI is consistent with the assertion that service innovations, such as digital health tools and personalised care models, offer healthcare providers competitive advantages by improving user experience and service outcomes (Berry, 2019; Purcarea, 2019). Furthermore, the findings lend credence to earlier studies investigating the connection between promotional techniques and market share in the hospitality industry.

By differentiating services and increasing consumer trust, Flessa and Huebner (2021) contend that incorporating service innovation into promotional activities increases market position. This is accomplished by strengthening consumer trust. This study's results support these perspectives, revealing that when strengthened by SI, promotional methods have a considerable impact on market share levels. According to prior research findings, businesses that fail to innovate risk losing market share to rivals that provide more technologically sophisticated services focused on the consumer. This study's results support these perspectives, revealing that when strengthened by SI, promotional methods have a considerable impact on market share levels.

Prior research suggests that companies who do not innovate jeopardise their market share to rivals providing more technologically sophisticated and customer-focused services (Dumitrescu et al., 2011; Borowski, 2021). This study shows the function of social influence (SI) in bridging the gap between promotional efforts and market results, highlighting its strategic value in healthcare marketing (Medina & Rufin, 2009). The partial mediation effect that was seen in this study brought to light the significance of SI in this regard.

The literature on service innovation and market share is limited in quantifiable, direct relationships, particularly in highly regulated sectors such as healthcare (Greenhalgh et al., 2004; Porter & Lee, 2013). This study fills that gap by providing empirical evidence of SI's mediating role in healthcare marketing. The results suggest that healthcare organisations can benefit from incorporating innovative service models into their promotional strategies to enhance their market share. Innovations such as telehealth and automated health management systems can serve as strong differentiators, as

Purcarea (2019) emphasised, further reinforcing the importance of service innovation in gaining a competitive edge.

However, challenges identified in the literature, such as the overreliance on third-party services and misaligned stakeholder objectives (CMS, 2002; Willie, 2023), were also observed in this study. These factors may hinder the full integration of service innovation into promotional strategies. A more strategically aligned approach, where stakeholder goals are synchronised, is necessary to maximise the impact of service innovation on promotional success. This finding aligns with the recommendations of Flessa and Huebner (2021), who advocate for a unified strategy that integrates service innovation and promotional tactics to optimise healthcare organisations' competitive positioning and market share growth.

Study Limitations

This study has several limitations. First, snowball sampling may limit the generalizability of the findings, as it relies on referrals from initial participants, potentially introducing selection bias. Second, the cross-sectional design provides only a snapshot of the phenomena and does not account for changes over time or establish causal relationships beyond the immediate context. Additionally, the reliance on self-reported data may introduce response biases and inaccuracies in participants' perceptions. Finally, focusing exclusively on medical scheme beneficiaries in Gauteng, South Africa, may limit the applicability of the findings to other regions or countries with different healthcare systems.

Recommendations

To enhance promotional strategies through SI, healthcare organisations should integrate digital health tools, telehealth platforms, and personalised care models. This integration will differentiate services, improve customer engagement, and provide a competitive edge. Aligning stakeholders, including service providers and marketing teams, is crucial to maximise the impact of these innovations. Regular communication and collaboration can ensure that innovations are fully leveraged to improve service delivery.

To ensure successful implementation, investing in staff training and cultivating an innovative culture is necessary (Berry, 2019). Staff should be empowered with the skills to embrace and use modern technologies to enhance patient outcomes. Additionally, organisations should focus on scalable and sustainable service innovations that adapt to changing needs and regulatory requirements, ensuring long-term cost-efficiency and value (Prestes Joly & Teixeira, 2019). These steps will enhance the effectiveness of promotional strategies and improve market share in the healthcare sector.

CONCLUSION

This study emphasises the critical role of service innovation in mediating the relationship between promotional strategies and market share within South African medical schemes. Integrating innovative service models and leveraging digital tools enables healthcare organisations to differentiate themselves, enhance customer engagement, and gain a competitive edge. The findings highlight the importance of aligning stakeholder objectives, investing in staff training, and ensuring scalable innovations meet evolving healthcare needs. These strategies will improve service delivery and foster sustained growth and competitiveness in an increasingly complex healthcare environment.

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