

FROM PRODUCT INNOVATION TO COMPETITIVE ADVANTAGE: EVIDENCE FROM THE CASE OF TURRI & BOARI

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ABSTRACT

The objective of this paper is to demonstrate how a company can differentiate itself in the market for the long term through its initial product innovation. By employing qualitative analysis through in-depth interviews, we investigate the organisational and strategic factors that are useful for maintaining long-term competitive advantage that results from product innovation.

The originality and significance of this study lies in its investigation of an entire sector observed through 100 per cent of its (national) businesses and its highlighting of distinctive features of individual companies.

Turri & Boari snc's brand Wingamm is a product-innovation case that demonstrates rather radical change in the company's production process that led to organisational innovation. Turri & Boari operates in a niche that arose independently in the early 1980s, and has maintained its position in the market over time thanks to careful management of almost every aspect of production, and its organisational and commercial strategies.

The conclusions of this case study can be applied to companies from different sectors working under the same conditions, that is, innovative companies that offer specialty and experience goods in a niche market.

Keywords: *Product Innovation; Competitive Advantage; Niche Market; Motorcaravan Sector; Motorhome; Recreational Vehicles; Drive Tourism; Wingamm.*

INTRODUCTION

Innovation can be described as 'the first reduction to practice of an idea in cultures' (Mintzberg *et al.*, 1995). The case study analysed in this paper, the birth of Turri & Boari snc and its evolution, may be read in terms of its innovation.

Turri & Boari is part of the motorcaravan (or motorhome¹) industry, which is composed of a set of enterprises that produce recreational vehicles (RVs) (motorcaravans and caravans) aimed at 'drive tourism'. The motorcaravans sector in Italy has only eight small and medium enterprises (SMEs), but despite its small size, it is one of the most relevant in Europe (Associazione Produttori Caravan e Camper [APC], 2014), and Europe is the leader in this sector worldwide (Caravan Industrie-Verbandes Deutschland [CIVD], 2012).

It is interesting to note that motorcaravans are usually perceived as specialty goods, that is, goods for which consumers are willing to make a special purchasing effort (Holton, 1958). In addition, a motorcaravan can be considered an experience good, that is, it can only be completely evaluated after purchase (Nakayama *et al.*, 2010). Therefore, this product usually requires a complex purchasing process (Goossen, 2000; Voss *et al.*, 2003; Pallas *et al.*, 2014).

As such, the context of motorcaravan production is a special case. Within this specialised context, Turri & Boari created an exceedingly innovative product, the Monocoque cabin in a fibreglass for Wingamm Motorcaravan, upon which it has based its development. Schumpeter (1977) argues that innovation was the introduction 'of a new production function' and a 'new combination of the factors of production' (cited in Baccarani, 1985). The Wingamm Motorcaravan demonstrates not only product innovation, but also provides an example of rather radical change in the production process and in organisational innovation (Mintzberg, 1995).

The objective of this paper is to demonstrate how, 30 years after birth, Turri & Boari is still able to differentiate itself in the market thanks to this initial innovation. As such, this study employed qualitative analysis through in-depth interviews to investigate the organisational and strategic aspects useful for maintaining long-term competitive advantage, and resulting in product innovation. This study is original and significant, as it observes an entire sector in Italy to highlight distinctive features of individual businesses.

LITERATURE REVIEW

The theoretical and empirical contributions in the context of Italian and international management literature concerning the RV sector are extremely few and dated (Guinn, 1980; Fidgeon, 1983; Davies, 1993). Excluding research that is not strictly scientific (Galassetti, 2002, 2008), only two recent studies emerge as significant from a strategic perspective. Lynch *et al.*'s (2012) study connects

¹ These vehicles are referred to using several terms, some of which are misleading, particularly if translated into Italian. The Italian Highway Code (art. 54) generically defines 'motorcaravans' ('autocaravan') as 'motor vehicles equipped with special bodywork to be used permanently for the transport and accommodation of people'. The term 'camper' is used exclusively in the Italian context. The use of the term 'motorhome' is misleading because the same term also defines a specific category of motorcaravan.

the theme of business orientation to analyse the sector in the United Kingdom (UK). Lynch *et al.*'s study notes that in a dynamic and turbulent environment such as that of the two years following the spread of the Global Financial Crisis that erupted in 2007/2008, companies should adopt more strategic guidelines to respond effectively to changes. Simeoni (2013) analysed the structure of the Italian motorcaravan sector, highlighting the competitive dynamics, interactions that individual enterprises can develop to find competitive advantage, and the threats and opportunities for motorcaravan manufacturers.

Some reflections on this sector can be also deduced from an analysis of the drive-tourism industry of which caravanning (understood to describe caravans, motorcaravans and RVs in general) is a subset (McClymont *et al.*, 2011; Hardy and Gretzel, 2011). While there also seems to be scant research on the drive-tourism industry (Connel and Page, 2008), there are some data that demonstrate an expected increase in consumer interest in drive tourism (Carson and Prideaux, 2011). The RV-production sector and drive tourism are closely related. Timothy (2011) states that the increase of vehicle owners is a 'push factor behind the high demand for drive tourism experiences'.

The peculiarities of the caravanning sector and the drive-tourism industry serve to frame and analyse the Turri & Boari case study from the perspective of the analysis of radical innovation. This paper contributes to the literature on innovation, not particularly by proposing new theories, but rather by demonstrating the importance and relevance of a new and original description of the characteristics necessary to identify a radical innovation (Mintzberg *et al.*, 1995). This description will emphasise the importance of process or organisational innovation as a source to achieve and sustain competitive advantage (Schumpeter, 1977; Mintzberg, 1995). Teece (1997, 515) argues that "winners in the global marketplace have been firms that can demonstrate timely responsiveness and rapid and flexible product innovation, coupled with the management capability to effectively coordinate and redeploy internal and external competences".

The paper also contributes to the literature by demonstrating through the case study how it is possible to reinforce the effects of an innovation when it operates in a niche market (Kotler, 1993; Mattiacci, 2008, Louart and Martin, 2012). The findings suggest that to maintain competitive advantage through managing innovation firms need, not only a good research and development on the product that "can lead to a systematic erosion of competitive advantage, resulting in firms within an industry looking more similar to each other over time (Sawhney, Wolcott and Arroniz, 2006, p. 30), but a strong market orientation (Jawoeski and Kohli, 1993; Lukas and Ferrell, 2000; Küster and Vila, 2011, Quinn, 1995).

RESEARCH DESIGN AND DATA COLLECTION

This study adopted a qualitative approach (Cassel and Buehring, 2006; Bluhm *et al.*, 2011) based on McCracken's (1988) long-interview technique for data collection. Open-ended questions were developed, and the information was collected through in-depth two-hour interviews.

The research strategy consists of a longitudinal multiple case study (Van De Ven e Huber, 1990; Gibbert *et al.*, 2008) on the entire universe of eight Italian businesses of motorcaravan industry (Arca Camper, Autocaravans Rimor, ESA, Industrie Giottiline, Laika Caravans, P.L.A., Trigano, Turri & Boari). Even other operators were interviewed as key witnesses to present the industry, its results, problems and opportunities. The first contacts with all these subjects have occurred since 2010, while the interviews were carried out mainly between 2012 and 2013. During this period the interviewees have also made available the use of corporate balance sheets and other relevant documentation for the current research.

Interviews with all other Italian businesses in the motorcaravan sector were also used for analysis, interpretation and discussion of the case study; however, these interviews are not provided explicitly in this paper. The interviews were recorded and transcribed. Sections relating directly to the analysis are reported in this paper.

To present information about the sector in general, the data collected through the interviews were combined with a secondary data analysis, which principally included industry reports (APC, 2014; European Caravan Federation - ECF, 2014). As the interviews were conducted in Italian, the relevant quotations included in the findings section were translated into English and then translated back into Italian to ensure that the original intent/meaning was preserved.

FINDINGS

Turri & Boari is a small family business founded in 1977 as a furniture manufacturer. Some of the many customers of the business were also caravan companies. The interactions between Turri & Boari's and these companies led to the idea for Turri & Boari to create a completely new product in the market, a monocoque fibreglass motorhome. This radical product innovation of 1982 redefined the core business of Turri & Boari, and created the production and sale of a medium-high range RV line that still has no competitors in the European market.

It is of particular interest to investigate the factors that have made it possible for Turri & Boari to maintain competitive advantage. It is not only the radical innovation of the product, but a set of factors that affect the entire business model, as Sawhney, Wolcott and Arroniz (2006) argues "the creation of substantial new value for customers and the firm by creatively changing one or more dimensions of the business system" (p. 29).

The first factor identified is the choice of product. This has been very well defined and maintained over time, and allowed the small business to make the most of every investment without dispersing capital throughout different projects. The interviewee stated:

Even today, we are distinguished by the production of a medium-high range motorhome (we do not produce other categories of RVs), which is of fibreglass monocoque and branded Wingam. In addition to the motorhomes, we also produce caravans, but with the same production philosophy.

Turri & Boari also given a choice of almost complete vertical integration, which maintains internal-design vitality and the ability to check the finished product to ensure that the innovation of the business continues:

Ours is a fully vertically integrated company. The only production that is outsourced is the moulding of the bodies, which requires a completely different production process and, in each case, the design and the mould are internally produced.

This innovative product owes much to a production process that is craft and labour intensive. However, the innovation of Turri & Boari did not arise merely from product innovation, but also from an innovation process that reversed the sequence of steps of the production process. The barriers to market entry for potential competitors are particularly difficult to overcome because the modifications required for the production of a similar product would result in the need for reorganisation of a factory that is not outfitted for the same production process. The interviewee stated:

I consider myself a 'great craftsman' because although the company is industrial (for some years, it has been an SME), the production process is very labour intensive and still very artisanal. Ours is a reverse process to that of the other manufacturers of motorcaravans because we first assemble the body to the chassis and only later assemble all extensions (obviously having a monocoque means it would be impossible to do otherwise).

The product that emerges from this process is very particular and caters to a tourist with the following specific characteristics:

- preference for drive tourism
- rather high spending power
- strong knowledge of RVs

- clear awareness of their needs.

The interviewee describes their clients as follows:

Our clients are generally very knowledgeable RV users who have already had at least one RV, and are very decided on the choice they are making. Our clients are not very sensitive to the selling price and therefore, there is not much sense in us having aggressive pricing policies, either to a list or offer special discounts in the dealership.

The Wingamm Motorhome is therefore aimed at a niche market that covers only 0.5 per cent of the market, but is not served by any other company:

The Wingamm is so special that I do not consider there are any direct competitors in Italy if comparing ourselves with the products of small 'pure' outfitters like Aiesistem or AZ System. In any case, the competition is relative because these small fitters do not produce in series, but only on request of the customer, thus providing a different product every time, and responding to the requests of the personal client. If this production process gives them a distinctive feature for achieving a competitive advantage, it is also true that the market for a product of this type is so small that it is of particular concern from the point of view of the competition. Even looking beyond the [Italian] border, the situation does not change. Only in France is there a similar producer in terms of the vehicle offered, but the production process is still different because it is a 'pure' body builder with a custom process.

The potential competition that offers high-quality products and that is aimed at a target customer similar to that of the Wingamm RV cannot really compete with Turri & Boari because of the difference of the product itself created by the fibreglass monocoque (the original radical innovation).

The interviewee stated:

Analysis of competition for us is 'reduced', so even against manufacturers of compact vehicles with a medium to high price range, we enjoy a significant difference because of the monocoque.

The competitive advantage has been maintained over time thanks to Turri & Boari's distribution choices. The company has selected several dealerships, of which a single brand, with which it maintains constructive dialogue:

We try to maintain a relationship of cooperation and confrontation with the dealerships, with some involvement in the choices. In fact, we do not have many dealers, which means we can effectively communicate with them all. In addition to those in Italy, the brand is present in some Wingamm dealerships in Switzerland, France, Belgium and Germany. In Berlin, we also have a single-brand dealership.

The same choice was also made for suppliers for manufacturing the main chassis. This choice allows Turri & Boari to have real support in the design of vehicles and thus to maintain the innovative nature of the product. The close relationship with the main supplier also allowed review of the contract terms (during the years of the economic crisis) to maintain a sufficient margin to avoid company collapse:

With the side suppliers, mainly Fiat, which covers about 80 per cent of the mechanics used (the rest is Volkswagen), we have a very strong working relationship and mutual trust. I recognise Fiat's dedication and ability to adapt the chassis to this type of vehicle. Mercedes-Benz, our former supplier of part of the chassis, was not able to adapt the chassis enough to make a reliable recreational vehicle from the point of view of safety on the road. Fiat also has competence not only in the design phase of the chassis dedicated to motorhomes, but also at any other time we need the supplier company to solve particular problems. In all such situations, we have always found available a dedicated and highly competent staff. Last but not least, Fiat was willing to review the contracts despite the fact that the required numbers had decreased.

In addition to dialogue with dealers and suppliers, to stay updated on news in the field and to dialogue with many different stakeholders, Turri & Boari always participate in the work of the Italian APC and the trade fair organisation of Parma, which organises the most important national-industry exhibition (the second largest exhibition of its type in Europe). The interviewee stated:

I think things are working well the APC, which we joined a short time ago, especially with the project for the opening of parking areas, which involves the municipalities (which I hope will become even stronger). [Things are also working well] with the trade fair organisation of Parma for the promotion of the Salone del Camper.

Although it is not geographically located within the Valley, Camper believes it can benefit from the possible advantages of the motorcaravan district. In any case, the firm invests in promotion

and information campaigns throughout the year and not just in times that are institutionally organised (e.g., by the APC):

A promotion campaign and communication would also be useful, and maybe even education in all possible directions. Some years ago, for example, Promocamp (Businessmen Association of Open Air Tourism) promoted a series of meetings at schools with the aim of transmitting the educational values of this type of tourism, values such as respect for the environment, attention to consumption, and the pleasure of the journey to discover the hidden beauty and cultures of countries.

Encouraging factory visits could be another initiative that could exploit our production, and would show the value of what we offer on the market. In this sense, I really appreciate the initiative Terre di Siena Plein Air, but this initiative should also be extended to the factories not just the Camper Valley, and it should take place at all times of the year.

In terms of the motorcaravan district, I do not see any particular difficulties in not being part of it from a geographical point of view.

DISCUSSION

The case study demonstrates that the business under analysis operates in a true niche market through a strategy of focus (Aquilani, 2008). The conditions in discriminating effects are all present, there is indeed greater homogeneity in the function of use than other products on the market, and there is a market share of approximately 0.5 per cent.

Turri & Boari manages to remain on the market and differentiate its product through the initial innovation because it operates in a niche that arose independently in the early 1980s. This is one of the four cases identified by Louart and Martin (2006, p. 22) "technological innovations with a view to adjustment and adaptation, or aiming to secure international niche markets, which interact with the internationalization process". Turri & Boari has maintained its market position over time thanks to careful management of (almost) every aspect of production, organisation and commercial. As Teece (1997, 524) argues "competences can provide competitive advantage and generate rents only if they are based on a collection of routines, skills, and complementary assets that are difficult to imitate".

The success of Turri & Boari lies in several factors:

- important choice of the products offered,
- choices concerning the production process favoured the internalisation of most stages of the production chain,

- decisions and the resulting investments in terms of collaborations with suppliers, distributors and other stakeholders, and the efforts for the promotion and external communication of its offer.

The strength of the strategies of focus is principally in the strategic design of Turri & Boari. However, there is evidence of a weak point in the management of customer relations. This weakness could become a threat to the company when the barriers to entry in the market are overcome by a big competitor.

A 'niche-ideal' is one in which 'the company can defend against a bigger competitor that attacks using the rating that is built from the customers' (Kotler, 1993). Given that Turri & Boari are mainly a niche company that has high-quality product and image (Dringoli, 2008), it is important that the company invests in promotion, communication and advertising to support and strengthen the brand. However, the interview indicates that this is a weak point of the business:

There is a direct relationship with the end customer, either in the showroom or through a few phone calls or emails; however, there is no structured dialogue.

Given the number of customers is not very high and that the type of customer is very particular, the business not speaking directly to them represents a missed opportunity to create loyalty and further develop the market. This dialogue would make it possible to listen to the changing needs of customers to ensure that the business maintains a level of technical innovation in line with market expectations (Quinn, 1995) and thus avoids entry of new competitors into the niche. Some Authors show that more market-oriented businesses are also those most innovative (Damanpour, 1991; O'Cass and Weeravardena, 2009).

The case-study analysis revealed the following further weaknesses relating to the business' future growth:

- relations with the suppliers of the various components of the vehicle
- communication
- influence on national policy decisions
- search for unexplored markets.

Achieving better results than those obtained to date with respect to the issues listed above will enable Turri & Boari to continue innovating into the future with competitive advantage. However, it must be emphasised that not all the items listed are necessarily and exclusively dependent on the choices of the case-study business.

For example, in relation to the first point 'relations with the suppliers of the various components of the vehicle', for the supply of all the different components of the vehicle (excluding the chassis) that are not produced in-house, all the companies in the sector are facing a near monopoly in the market with all the consequences that entails. For example, for heating systems and appliances, suppliers are unique or at worst, there is an oligopoly; however, the second or third producer typically offers a product with some fundamental characteristic not up market demands final, or by the RV users that evaluate the equipment on the vehicle. Each firm could favour activating new partnerships with supplier companies that could consider the RV a possible outlet for their products; however, there would certainly be better results if they sought new collaborations through the APC with all producers of motorhomes.

Even considering communication in the realm of the single-business sector, especially the smallest of the eight, can do little if not encouraging when those associative communication investments deemed more effective and efficient. Only a combined movement could lead to having influence on national policy decisions. For example, the APC is promoting a dialogue with the institutions to approve a proposed scrapping of older vehicles in circulation to stimulate demand and free the yards (and capital) of dealerships from old vehicles.

On the last point listed, the individual firm can also make a difference by creating partnerships in the tourism sector, presenting the potential of itinerant tourism, and investing in more technical and commercial staff within their organisation, particularly considering the necessary and increasing internationalisation of the company.

CONCLUSIONS AND FURTHER RESEARCH

The case study confirms several theories in the literature and has managerial implications. First, the case study demonstrated that radical innovation of a product allows the creation of a market niche. This market niche has been strengthened with an innovative production process. The market niche that these factors can create is sufficient to create a competitive advantage for the business. Although the relationship between innovation and economic performance is still an open question in the international literature (Garcia and Calantone, 2002), if the product and production-process innovation are accompanied by a careful strategy of focus, the business will be able to maintain its competitive advantage in the long term (Hall and Mairesse, 1995; Adams and Jaffe, 1996; Chesbrough, 2007).

However, the case study has also revealed the importance of the business ensuring full adoption of all necessary investments in all business functions. For example, the danger (threat) of the lack of attention paid to direct dialogue with the customer before and after purchase.

The conclusions of this case study can also be applied to companies from different sectors if they operate under the same basic conditions, which would be as innovative companies that offer specialty and experience goods in a niche market.

Future research should analyse the future behaviour of firms and the consequent results. It would be interesting to investigate Turri & Boari's ability to maintain its competitive advantage focusing on any future desirable investments in vertical integration, or in on any changes in the dialogue it creates with its customers. It will be interesting to analyse how long and under what economic conditions the business will succeed in maintaining such high barriers to entry through their own innovation.

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