



ADDIS ABABA UNIVERSITY

College of Business and Economics

Department of Management

SCHOOL OF GRADUATE STUDIES

Assessment of Service Delivery Quality of Addis Ababa Abattoirs Enterprise

A Thesis Submitted to College of Business and Economics, Department of Management, Addis Ababa University in Partial Fulfillment of the Requirements for the Degree of Masters in Management, Specialized in Quality Management and Organizational Excellence

By

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Advisor: - Jemal Mohammed (PhD)

January, 2020

Addis Ababa, Ethiopia

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APPROVED BY BOARD OF EXAMINERS

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DECLARATION

I, the under signed, declare that this thesis is my original work, prepared under the guidance of **Jemal Mohammed (PhD)**. Sources of materials used for the thesis have been duly acknowledged. I further confirm that the thesis has not been submitted either in part or in full to any other higher learning institution for the purpose of earning any degree.

Name

Signature & Date

ENDORSEMENT

This is to certify that this thesis work “**Assessment of Service Delivery Quality of Addis Ababa Abattoirs Enterprise**” undertaken byshewalefa Yitbarek for the partial fulfillment of MSC In Management specialization in Quality Management & Organizational Excellence at Addis Ababa University, is an original work and not submitted earlier for any degree either at this University or any other University.

Advisors Name: Jemal Mohammed (PhD)

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Date

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Acronyms/Abbreviations

AAAE	Addis Ababa Abattoirs Enterprise
AACA	Addis Ababa City Administration
AACCSA	Addis Ababa chamber of comers sect oral association
EMDIDI	Ethiopian Meat and Dairy Industry Development Institute
AACG	Addis Ababa City Government
AFD	France Development Agency
CBACC	Community Based Awareness Creation Committee
CRGE	Climate Resilience Green Economy Policy
CSA	Central Statistics Agency of Ethiopia
EMS	Environmental Management System
EPE	Environmental Policy of Ethiopia
FAO	Food and Agriculture Organization
FVI	French Veterinary International
FDRE	Federal Democratic Republic of Ethiopia
GTP	Growth and Transformation Plan
HACCP	Hazard Analysis Critical Control Point
ISO	International Standard Organization
MOFEC	Ministry of Finance and Economic Cooperation
SHOATs	Sheep and Goats (small ruminants)
SMEs	Small and Medium Enterprises
TQM	Total Quality Management
B2BSERVQUAL	Business-to-Business customer service

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Abstract

The primary objective of this study is to assess service quality and customers' satisfaction pertaining to quality of Service of Addis Ababa Abattoirs Enterprise and to give an insight for the abattoir's management regarding to the level of service quality of the service they rendered. The Specific objectives of the study are to assess the service delivery quality of Addis Ababa Abattoirs Enterprise and to assess level of customer satisfaction in Abattoirs service from five quality perspective. Descriptive statistics such as frequency mean, variance, standard deviation analysis techniques are applied to analyze background information of the respondents. Service quality dimensions and customers satisfaction are also analyzed using descriptive statistics.

This Research will discuss the analysis of slaughtering service view of customer satisfaction in Addis Ababa abattoirs Enterprise using Both B2BSERVQUAL method and importance performance analysis. The finding on the base of correlation analysis also implies that the relationship between service quality dimensions and customer satisfaction is analyzed and the result shows all service quality dimensions have positive and significant relation with customer satisfaction. The finding also confirms the service quality dimensions have an impact on customers' satisfaction implying that the higher the quality of service, the higher is the level of customers' satisfaction. The finding of the study shows that customers are dissatisfied on the slaughtering and meat distribution service quality reliability, empathy, responsiveness, assurance and tangibility. Customer satisfaction is analyzed and the result shows that all service quality dimensions have low customer satisfaction. Therefore on the bases of the finding it can be summarized that Addis Ababa Abattoirs can improve its service by mostly focusing on responsiveness and tangibility of service quality dimensions.

Keywords: services, slaughtering, quality, customer satisfaction

Chapter One

Introduction

1.1. Background of the study

The success factor in sustaining competitive advantage in service industries is Service quality. Which has become one of the key driving forces for business sustainability and vital for firms' accomplishment (Palmer, 2001). Service quality implies consistently anticipating and satisfying the needs and expectations of customers (Parasuraman, 1985& Zeithaml,1990). The key strategy for the success and survival of any business firm is the deliverance of quality services to customers. Provisions of high quality service results in higher customer satisfaction and enhance customer loyalty. Customers are the sole judge of service quality. an organization can build strong reputation for quality service when it can constantly meet customer service expectations (Berry,1990& (Gefan, 2002). Service quality is the subjective comparison that customers make between the quality of the service that they want to receive and what they actually get. Similarly, customer satisfaction is crucial. in the Meat Sub sector because of the special nature of the slaughtering service which are characterized by intensive contacts with customers who have different needs and require customized solutions (Molina, 2007).

Satisfaction is an overall customer attitude towards a service provider, or an emotional reaction to the difference between what customers anticipate and what they receive. Customer satisfaction is a collective outcome of perception, evaluation and psychological reactions to the consumption experience with a product/service (Hansemark&Albinson, 2004). Customer's perception takes the major share towards customers' satisfaction because satisfaction is the result of what is perceived towards the specific service. For example, if the quality of service delivered is beyond expectation then customers will be delighted and if customer's perception is equal or under their expectation level with the delivered service quality the customers are satisfied and dissatisfied respectively.

Customer satisfaction leads to repeat purchases, loyalty and to customer retention (Zairi, 2000). However, dissatisfied customers may try to reduce the dissonance by abandoning or returning the product, or they may try to reduce the dissonance by seeking information that might confirm its

high value (Kotler, 2000). Service quality is an important antecedent of customer satisfaction which is the result of the customer's perception and the quality of the service and it is a significant predictor of customer satisfaction using B2B SERVQUAL instruments. Service quality and customer satisfaction have been identified as key elements of the service-profit chain (Heskett, 1997). This newly developed scale called the B2B SERVQUAL scale are applied in this study. The SERVQUAL scale developed by Parasuraman, Zeithaml and Berry (1988) it is occasionally be called the B2C SERVQUAL scale to avoid confusion.

As the perceived service quality is the key driver of perceived value, one of determinants of success of a firm is how the customers perceive the resulting service quality (Collart, 2000). It is the perceived value, which determines customer satisfaction. Many firms including Meat industries begin to track customers' satisfaction through measuring level of service quality perceived by their customers. Customer satisfaction or dissatisfaction is considered to be the result of a comparison between the pre-use expectations that a customer has about the product or service and the post-use perception of product or service performance. The most widely used model to measure perceived service quality known as SERVQUAL was developed by Parasuraman. (1988). Excellent service quality is vital to business profitability and survival (Newman, and Cowling, 1996). from the finding of Newman and Cowling, the researcher understands that if service quality is going down in the organization doesn't meet the expectation of its customers. it will have negative effects on the organization's profitability. Thus, this study, therefore, had assessed customers' satisfaction on the service quality of slaughtering service and meat distribution of Abattoirs in Addis Ababa.(B2BSERVQUAL).

B2BSERVQUAL model is intended for business-to business market service provider and consider the quality of service as a function of the gap between the perception and expectation of the user and as well as leads to addressing the needs and desire of the user and accuracy of delivering to composite for the user's expectation, while comparison between expectation and performance, in measuring the customer satisfaction the researcher using importance performance analysis method called B2BSERVQUAL model, moreover it can also know which attribute that has poor quality and which attribute that need more attention to improve.

On Ethiopian context mostly meat consumption is cultural in terms of fresh meat demand habits and the need of short time meat distribution demand and the lack of modern facility

of slaughtering. Different abattoirs vary in size and sophistication depending on location and local government ordinance; loading and unloading Lairage, Isolation block, Slaughter Hall, Cooling Hall, Hide and Skin Store, Guttery and Tripery, Offices, Condemned meat room or apartment, Laboratory and Lavatory, dressing accommodation with lockers, laundry. Similarly in Ethiopia different abattoirs have different management and facilities. Particularly between private and municipality abattoirs. Conversely, the Ethiopian standard prepared under the direction of Agricultural and Food Technology Technical Committee and published by the Quality and Standard Authority of Ethiopia (QSAE,2005).

However, application of this regulation was not under practical especially in municipality abattoir in Ethiopia. However, some application was observed in private abattoirs. This indicated that different abattoirs had different management and operational practices due to not periodically monitoring and evaluation from higher administrative office at federal, regional and fewer researches were design on. The study was conducted with the objectives to assess physical condition, functional infrastructure. Addis Ababa Abattoirs Enterprise is the only biggest Abattoirs responsible for slaughtering animals and distribution of meat to customers or meat retailers in the city (B2BSERVQUAL). It is common to see poor handling of meat during loading and unloading by working personnel of the enterprise and the meat distribution process is also affected by the traffic congestion in the city especially during peak traffic hours.

Beside the location of the Abattoir, route choice and choice of delivery order during meat distribution are additional factors for increased distribution costs and on time delivery of fresh products to the customer (Beshada Gudeta,2012). According to Beshada study the location of abattoir in the city that affected the meat distribution service and transportation due to traffic jam during the delivery time; the expansion of Illegal animal slaughtering assessment in 2019 has been carried out by Addis Ababa Abattoirs Enterprise shows that 20-30% cattle and 90-96% sheep and goats are slaughtering out of abattoirs. Therefore, assessing the customers' satisfaction on Abattoirs in Addis Ababa service quality will provide the Customer satisfaction or dissatisfaction as a result of a comparison between the pre-use expectations of Abattoirs service has product or service and the post-use perception of product or service performance of Abattoirs in Addis Ababa.

1.2. Background of Addis Ababa Abattoirs Enterprise

The history of Addis Ababa Abattoirs Enterprise had been start by provide slaughter service in Addis Ababa as title of "Ethiopians Abattoirs Share Company" which established in November 1957 with an initial capital of Birr 1,367,000.00. At the time the share holder were Addis Ababa Municipality 41.6%, Local Investor 42.4%, then the Royal Family 12% and Foreign investor 4%. The Share Company's objective of opening of meat processing business in 10 towns of the country was failed and its service restricted for Addis Ababa City Dwellers. The abattoir had been started to be administered under the city municipality, while it was fully nationalized in January 1975 and In August 1998 as a result of adoption of a new market economy policy of the Federal Democratic Republic of Ethiopia. The Abattoirs was Re-established as a public enterprise and named as "Addis Ababa Abattoirs Enterprise. It provides, animal slaughtering service; Meat distribution; preparing & selling and by product processing & selling;

Service Types of AAAE

Animal Slaughtering & meat distribution Service for butchers(meat retailers)

Animal by product processing & selling for consumers for peat animals

Delivering raw Hide & skin for tanneries

Vision

Provide an international standard slaughtering services and value-added products in 2025.

Mission

Provide multispecies animals slaughtering service hygienic and healthiness is medically ascertained, Supply meat products to domestic and foreign markets after having them processed, Supply other products to domestic market by processing and manufacturing them, in quality and quality, out of essential elements extracted from products of meal, Determine and receive charges for the service it provides and given all the processing in the abattoirs, it is essential that Quality Assurance is maintained. Especially in Addis Ababa Abattoirs processes are in keeping

with hygienic and sanitary monitoring, and testing of the pre mortem and postmortem inspection is done daily at meat dispatching. .

1.3. Statement of the Problem

The unique characteristics of service contribute to the complexities involved in assessing and managing service quality. Quality can be several things at the same time and may have various meanings, depending on the person. This complicates both the consumer's assessment of service quality and the provider's ability to control it. Most services involve a direct contact between the customers and the service provider. This means that, in addition to task proficiency, interpersonal skills like courtesy, friendliness, tolerance and pleasantness are important dimensions of quality, particularly in high contact service where frontline employees are the key to customer satisfactions (Mersha and Abdlakha, 1990). The abattoir services, particularly Animal Slaughtering, compete in the marketplace with generally undifferentiated products; therefore service quality becomes a primary competitive weapon (Stafford, 1996).

Satisfaction and dissatisfaction information are important because understanding them leads to the right improvements that can create satisfied customers who reward the company with loyalty, repeat business, and positive referrals. Creating satisfied customers includes prompt and effective response and solutions to their needs and desires as well as building and maintaining good relationships. A business can achieve success only by understanding and fulfilling the needs of customers. From a total quality perspective, all strategic decisions accompany makes are "customer-driven." In other words, the company must show constant sensitivity to emerging customer and market requirements. According to the study by Collart, (2000).one of the determinants of success of a firm is how the customers perceive the resulting service quality. As this key driver of perceived value, It is the value which determines customer satisfaction. Many firms including Meat industries begin to track their customers' satisfaction through measuring their level of service quality perceived by their customers. The most widely used model to measure perceived service quality was developed by Parasuraman,(1985).known as SERVQUAL. According to this model, the five dimensions of service quality are: Tangibility, Reliability, Responsiveness, Assurance and Empathy.

The meat industry is one of the back bone of the country economy. Modern Animal Slaughtering are playing lots of new roles and making life of common consumer as well as business men easy(B2B). In the past decade, the Meat Sub Sector has undergone radical changes, resulting in a market place, which is characterized by intense competition, little growth in primary demand and increased deregulation. The government of Ethiopia increased deregulation, in order to encourage the investors to participate in the Meat Sub sectors.

The numbers of Slaughterhouse has been increased which further raises the competition and difficulty among the slaughterhouses. In this competitive environment, each slaughterhouse wants to attract new potential customers and retain the existing ones to ensure its survival and keep its own competitiveness in the market. This can be achieved through providing quality services to customers. Failure to do so will lead to bankruptcy or will make organizations out of competition.

Several studies have been done on service quality and customers' satisfaction which results to measure the satisfaction level of the customers on service organization in Ethiopia and all the studies used SERVQUAL to measure the service quality. However, most of these studies were conducted on non - animal meat processing service organization (Electric Power Corporation, insurance, hotels). This newly developed scale will be called the B2B SERVQUAL scale which developed by Vandaele & Gemmel in 2004 uses to measure service quality and the gap between the perception and expectations. The SERVQUAL scale developed by Parasuraman, Zeithaml and Berry (1988) will occasionally be called the B2C SERVQUAL scale to avoid confusion.

What makes this research unique is that it assesses the service quality and customers' satisfaction of customers of one government slaughterhouse named Addis Ababa Abattoirs Enterprise and different private slaughterhouses found around Addis Ababa. As the preliminary observation showed customers are not happy with the slaughterhouse's service despite its years of services is long in the market. Thus, it strives for the researcher to assess customers' satisfaction and the service quality of the slaughtering and give an insight for the management about customers' satisfaction on the service quality of the slaughterhouse.

1.4. Research Questions

1.4.1. Main Questions

The general research question is ‘‘what is the level of customer satisfaction with Abattoirs in Addis Ababa services quality provided?’’

1.4.2. Specifically, the following research questions were used as a guide:

What is level of customer satisfaction in Abattoirs service from Tangibility perspective?

What is level of customer satisfaction in Abattoirs service from Assurance Perspective?

What is level of customer satisfaction in Abattoirs service from Responsiveness Perspective?

What is level of customer satisfaction in Abattoirs service from Reliability Perspective?

What is level of customer satisfaction in Abattoirs service from Empathy Perspective?

1.5. Objectives of the study

1.5.1. General Objectives

The general objective of this study is to assess customers’ satisfaction pertaining to quality of Service at Abattoirs on Addis Ababa and to give an insight for the City Administration and abattoirs management regarding to the level of service quality of abattoir in Addis Ababa.

1.5.2. Specific Objectives

- To assess the service delivery quality of Addis Ababa Abattoirs Enterprise
- To measure customers’ satisfaction with each of the five dimensions of service quality using B2BSERVQUAL model elements.
- To examine & demonstrate the meat trading challenges in meeting quality standards and expectations in Addis Ababa.

1.6. Scope of the Study

The scope of the study is to make Assessment of the Service Delivery Quality of Abattoirs in Addis Ababa against customers' satisfaction.

1.7. Significance of the Study

The research provides important insight about the meat demand abattoir facilities; and indicates abattoir or slaughter house service delivery quality in Addis Ababa with respect to butchers and meat traders; consumers need and their expectation. That is the demonstrator for city administration and abattoirs manager to identify the gap between their perception of service delivery quality and that their customer and to take remedial action to close the gaps and also to support abattoir leader ship to consider the level of abattoir service quality according to customer need and view, to make alteration the perception& attitudes of all stakeholders on abattoirs importance regarding to social, economic and environmental issues.

Providing understanding on existing abattoir capacity and standard according to meat demand in Addis Ababa based up on customer feedback and create insight as well as changing the attention of city administration to focus on the importance of meat industry and expansion of abattoirs including facilities to fulfill abattoir service demand in Addis Ababa.

The research will provide the following understanding.

- The result of this study will providing the city administration, city manager and abattoir managers on the relation between culture; norms; needs of meat business and slaughter house as well as meat product feature.
- It helps to obtain information and understanding to develop abattoir infrastructure to fulfill abattoir service with respect to cities economic growth and potential quality meet demand.
- It provides literature on the meat industry sector and abattoir quality service.
- It support to future researchers who need to deal further study on the concept.

The study provides solutions and comments on abattoir slaughtering and meat distribution service quality problem

1.8. Definition of key Terms

- **Illegal Slaughtering:** The activity of slaughtering of animals out of slaughterhouses for illegal business without license.
- **Livestock:** The collective name for meat animals such as cattle, sheep, goat, camel and pig.
- **Abattoirs:** They are facilities to slaughter animals in order to produce standardized animal meat to domestic users.
- **Meat Retailers:** They are business men whose objective is to distribute animal meat for consumers at households, cafeteria and hotels.
- **Meat commercialization:** A large business activity in animal meat supply system.
- **Slaughterhouse:** They are advanced facilities to slaughter animals in order to produce standardized animal meat to export markets.
- **Butchers:** A small to medium shops which are meant to sale and retail animal fresh meat to their nearby consumers.
- **Slaughtered Animal by-products:** Are edible parts of animal meat which are used as raw materials to produce food for other dissimilar domestic animals. Examples are blood, meat, offal, and bones. Offal is organs like liver, lungs, stomach and the likes.
- **Finished products:** Meat and bone meals as well as pet food for dissimilar domestic animals tallow is an input material for soap factories to produce soap. All are produced by Addis Ababa Abattoirs Enterprise as import substitutes.
- **Rendering:** The process of production of animal by-products by rendering plant of Addis Ababa Abattoirs Enterprise.
- **Market share:** The sharing of animal slaughter services between legal abattoirs and illegal actors.
- **Competent capacity:** The ability of abattoirs in terms of resources and skill in the meat industry sector.

Chapter Two

Literature Review

2.1. Customers' Quality Service

The primary purpose of this chapter is to investigate theoretical and empirical literatures related to service quality, characteristics of service quality, dimensions of quality, what customer service and satisfaction means, and what Quality management is. The researcher believes that this part of the research gives a clear insight for readers about the components of service quality management and customers' satisfaction. In addition, in this chapter, literatures that are related and important for this research are reviewed and presented the Global, National and Addis Ababa Meat Industry and slaughtering practice is reviewed.

2.1.1. Customer Service

In the context of abattoirs service customer service is the reception of slaughtering animals in the compound of Addis Ababa Abattoirs enterprise, register them & inspect before and after slaughtering & dispatch the meat as well as deliver on time. According to Davidow and Uttal (1989) customer service means all features, acts and information that augment the customer's ability to realize the potential value of a core product or service. Customer service is concerned with establishing, maintaining and enhancing relationships between and/or among relevant business parties in order to achieve the objective of the relevant parties Osuagwu (2002). According to W.L. Robert (2005) customer service is defined as the ability of knowledgeable, capable and enthusiastic employees to deliver products and services to their internal and external customers in a manner that satisfies identified and unidentified needs and ultimately result in positive word-of-mouth publicity and return business.

2.1.2. Service Quality

The abattoir industry in international level, protects the disease which transmitting form animal to human being by applied animal handling & slaughter house technology & Haccp beyond animal & meat inspection before distribute for consumption. Though quality is a much studied subject in manufacturing, as well as service sectors, there is no universally accepted definition to

define quality. The definition of quality is subjective, personal and changes from person-to-person, place-to-place, organization- to- organization, situation- to situation and time-to-time. However, "Conformance to Standards" and "Fitness for Use" is the classic definitions of quality, International Encyclopedia of Information and Library Science, 2nd ed. Eds. John Feather and Paul Sturges. London and New York: Routledge, (2003). Quality research in the goods sector was established long before it was established in the service sector “According to A Bandyopadhyay, S Choubey, R Gandhi, S Goswami Physics Letters B, 2003 claimed that quality in goods sectors is commonly defined as the product’s fitness for its intended use, which means how well the products meet the needs and the expectations of its customer. However, understanding quality in the goods sector is inadequate for understanding service quality because of the fundamental difference between the two terms. Service quality is performance based rather than objects, therefore precise manufacturing specifications concerning uniform quality can rarely be set (Parasuraman, et al., 1985, 42). Service quality is more difficult for consumers to evaluate than product quality; this is due to a lack of tangible evidence associated with the service (Hong and Goo, 2004).

However in the above definitions, the concepts of quality were mainly applied to tangible products in the manufacturing sector. Due awakening of consumerism in 1980s, the quality of service as a subject of academic interest caught the attention of marketing professionals and they attempted to define service quality from customers' perspective. Experts like Kotler, Levitt, Grönroos, Garvin, Cronin, Taylor, Teas, Rust, Parasuraman, Zeithaml, and Berry have contributed to the growth of the subject and many models were developed on its measurement.

In the past decades, researchers (Carman 1990; Garvin 1983; Parasuraman, 1985, 1988) have defined and measured service quality by examining the attributes of service quality, while others (Bitner and Hubbert 1994; Iacobucci, Grayson, and Ostrom, 1994; Oliver, 1993; Oliver and DeSarbo, 1988; focused on the application in services to conceptualize the relationship between service quality and customer satisfaction.

Therefore, a combination of the service quality and customer satisfaction literature has formed the foundation of service quality theory (Clemes et al., 2007; as cited in Wei 2010). The conceptualization and measurement of service quality is one of the most debated topics in service marketing literature. Several researchers pointed out that service quality is difficult to measure

as it is an elusive and abstract construct (Carman 1990). Parasuraman (1985) argue that service quality involves not only the outcome but also the delivery process. And also, service quality relates to satisfaction but the two are not the same. In addition, different researchers defined service quality in different ways. Lovelock and Wright (1999) define quality as the degree to which a service satisfies customers by meeting their needs, wants and expectations. On the other hand, other researchers like Bitner and Hubbert (1994) describe that the service quality as the customers' overall impression of the relative inferiority or superiority of the organization and its services.

It is the evaluation process outcome, in which customers are involved and where a certain experience is always compared to the perceived service received. It cannot be objectively measured according to some technical standards but is subjectively felt by customers and measured relative to customer determined standards as per Kwortnik, 2005. Berry. (1990) also defined service quality as the discrepancy between customers' expectations or desire and their perceptions.

The previous literature suggests that the evaluation of quality in services is more difficult than goods and that delivering quality services is increasingly recognized as the key to success for service providers (Cronin and Taylor, 1992 as cited in Wei 2010). But, perceived service quality has confirmed to be a complex concept to understand as per (Brady and Cronin, 2001, pp.34). Therefore, Rust and Oliver (1994) propose that it is essential for companies to develop the awareness of customers' perceptions of service quality. Parasuraman, Zeithaml and Berry (hereafter PZB, 1990).had conducted several research studies to define service quality and identify the criteria that customers use while evaluating the service quality in service organizations.

They define service quality as "the extent of discrepancy between customers' expectations or desires and their perception of what is delivered". In other words, it is the comparison of what customers expect before the use of product/ service with their experience of what is delivered. This definition has been widely quoted and referred in service marketing literature and the researcher chooses this definition as more appropriate for this study.

2.1.3. Total Quality Management

Total quality management (TQM) is different from the old concept of quality because its focus is on serving customers, identifying the causes of quality problems, and building quality into the production process. According to Heizer and Render (2006) TQM stress a commitment by management to have a continuing companywide drive towards excellence in all aspects of products and service that are important to the customer. Heizer and Render (2006) have also developed seven concepts for effective Quality Improvement (QI) program by modifying the 14 points developed by Deming as follow: Continuous Improvement, Six Sigma, Employee empowerment, Benchmarking, Just-in-Time, Taguchi concept, and Knowledge of TQM.

Gurus of Quality Management

The concept of quality has existed for many years, though it's meaning has changed and evolved over time. In the early twentieth century, quality management meant inspecting products to ensure that they met specifications. In the 1940s, during World War II, quality became more statistical in nature. Statistical sampling techniques were used to evaluate quality, and quality control charts were used to monitor the production process. In the 1960s, with the help of so-called "quality gurus," the concept took on a broader meaning. Quality began to be viewed as something that encompassed for product quality and all shared the costs of poor quality, quality was seen as a concept that affected the entire organization. Quality gurus have put forth several approaches to improve company performance. These approaches are embodied in a set of quality management practices, known as total quality

2.1.4 Characteristics of Services

According to Bitner (1993) service has four characteristics: intangibility, inseparability, Heterogeneity and perish ability.

2.1.4.1.Intangibility of Services

The idea of services being activities, benefits or satisfactions which are offered for sale, or are provided in connection with the sale of goods the degree of tangibility has been suggested as a means of differentiating tangible products with services (Levitt, 1981). Most of the time, services are explained as being intangible since their outcome is considered to be an action rather

than a physical product (Johns, 1999). Darby and Kami (1973) and Zeithaml (1981) highlight the fact that the degree of tangibility has implications for the ease with which consumers can evaluate services and products. Other researchers propose that intangibility cannot be used to differentiate clearly services with all products. Bowen (1990) and Wyckham, Fitzroy and Mandry (1975) suggest that the intangible-tangible concept is difficult for people to grasp. Bowen, (1990) provides empirical evidence to support this view feel that the importance of intangibility is over- emphasized.

2.1.4.2.Inseparability of Services

Inseparability is taken to reflect the simultaneous delivery and consumption of services and it is believed to enable consumers to affect or shape the performance and quality of the service (Grönroos, 1978; Zeithaml, 1981)

2.1.4.3.Heterogeneity of Services

Heterogeneity reflects the potential for high variability in service delivery. This is a particular problem for services with high labor content. as the service performance is delivered by different people and the performance of people can vary from day to day and from time to time (Rathmell 1966 Heterogeneity to offer the opportunity to provide a degree of flexibility and customization of the service. Heterogeneity can be introduced as a benefit and point of differentiation as per Wyckham, (1975).

2.1.4.4.Perish ability of Services

In general, services cannot be stored and carried forward to a future time period (Rathmell, 1966; Donnelly, 1976; and Zeithaml,1985). Services are “time dependent” and “time important” which make them very perishable. Hartman and Lindgren (1993) also claim that the issue ofperish ability is primarily the concern of the service producer and that the consumer only becomes aware of the issue when there is insufficient supply and they have to wait for the service.

2.1.5. Service Quality Dimensions

Service's unique characteristics of intangibility, heterogeneity, and inseparability lead them to possess high levels of experience and credence properties, which, in turn, make them more

difficult to evaluate than tangible goods (Bitner 1990; Zeithaml 1981). Identification of the determinants of service quality is necessary in order to be able to specify measure, control and improve customer perceived service quality. The SERVQUAL is a concise multiple-item scale with good reliability and validity that researcher can use to better understand the service expectations and perceptions of consumers and, as a result, improve service. SERVQUAL was also selected since it is important when it is used occasionally to track the service quality trends, and when it is used in combination with other forms of service quality instrument identify ten determinants for measuring service quality which are tangibility, reliability, responsiveness, communication, access, competence, courtesy, credibility, security, and understanding/knowledge of customers. Later “these ten dimensions were further purified and developed into five dimensions i.e. tangibility, reliability, responsiveness, assurance and empathy to measure service quality, SERVQUAL (Parasuraman, 1988). These five dimensions identified as follows:

2.1.5.1.Tangibility

It refers to physical facilities, equipment, and appearance of personnel. Jabnoun and Al Tamimi, (2003) indicated that customers choose tangibility factor of service quality in the industry. Companies'could build customer relationships by delivering added tangible and intangibility elements of the core products. According to Ananth, (2011) tangibility is measured by modern looking equipment, physical facility, employees are well dressed and materials are visually appealing.

2.1.5.2.Responsiveness

Responsiveness means willingness to help customers and provide prompt service. Customers are very sensitive to employees' working environment in service organizations (Brown and Mitchell, 1993). It involves timeliness of services.Parasuraman, (1985). It is also involves understanding needs and wants of the customers, convenient operating hours, individual attention given by the staff, attention to problems and customers safety in their transaction (Kumar, 2009).

2.1.5.3. Reliability

Reliability means ability to perform the promised service dependency and accurately. Reliability is a significant factor of product quality in addition to good personal service, staff attitude, knowledge and skills (Walker, 1990). It is found that service reliability is the service “core” to most customers and managers should use every opportunity to build a “do-it-right-first” attitude (Berry et al., 1990).

2.1.5.4. Empathy

Empathy refers to caring, individualized attention the firm provides its customers (ibid). Jabnoun and Al-Tamimi, (2003) found that bank customers believed empathy as an essential factor of service quality. It is suggested that employees' commitment to deliver quality services, skillfully handling of conflicts and efficient delivery of services resulted in satisfied customers for long term benefits (Nelson and Chan, 2005).

2.1.5.5. Assurance

Assurance indicates knowledge and courtesy of employees and their ability to inspire trust and confidence. (Parasuraman, 1988) found that assurance is an important factor of service quality next to reliability and responsiveness towards customer satisfaction.

2.1.5.6. Customer Perception

The other item that is highly correlated with customer satisfaction is perception. Perception is the process by which people select, organize, and interpret information, to form a meaningful picture of the world (Kotler & Armstrong, 2010). Customers perceive the quality of the service in these two dimensions, what they get and how they get it (Gronroos, 1982).

Perceived quality is considered as good when the expectation becomes realistic. The perception level should be higher than the expectation level to create the positive perception and satisfaction. If the difference between expectation and perception is very significant, it can be said that the customers are satisfied highly. In the moderate level, the gap becomes zero which refers that the expectation level and perception level are the same. On the contrary, if the expectation becomes higher than the perception, the negative results come to show that the

customers are not satisfied and the company should improve their service more than before (Gronroos, 1990).

2.1.6. Relation between Customers' perception & Customer Satisfaction

The principal purpose of a business is to create satisfied customers Drucker, (1954). Increasing customer satisfaction has been found to lead to higher future profitability (Anderson, Fornell, and Lehmann 1994), lower costs related to defective goods and services increased buyer willingness to pay price premiums, provide referrals, and use more of the product (Reichheld,1996; Anderson and Mittal, (2000). and higher levels of customer retention and loyalty. Increasing loyalty, in turn, has been found to lead to increases in future revenue and reductions in the cost of future transactions (Anderson, Fornell, and Lehmann, (1994).

A firm's future profitability depends on satisfying customers in the present – retained customers should be viewed as revenue producing assets for the firm (Anderson and Sullivan 1993; Reichheld, (1996; Anderson and Mittal,(20000 as cited in Malthouse , 2003).

Empirical studies have found evidence that improved customer satisfaction need not entail higher costs, in fact, improved customer satisfaction may lower costs due to a reduction in defective goods, product re-work, etc. (Fornell, 1992; Anderson, Fornell, and Rust 1997 as cited in Malthouse, 2003). Customer satisfaction and retention that are bought through price promotions, rebates, switching barriers, and other such means are unlikely to have the same long-run impact on profitability as when such attitudes and behaviors are won through superior products and services (Anderson and Mittal 2000).

Furthermore, Lin (2003) defined customer satisfaction as the outcome of a cognitive and affective evaluation of the comparison between expected and actually perceived performance, which is based on how customers appraise delivery of goods or services. Jamal and Kamal, (2002) describes customer satisfaction as “a feeling or attitude of a customer towards a product or service after it has been used.” Therefore, any business, service or manufacturing industry's main motive is increasing profit from time to time and all the industries know that profit is generated only and only if they can satisfy their customer. Customer's satisfaction is the positive result of conformance to a specific service/product of their customers' perception. Hence customer satisfaction is the positive end result of customers' perception.

2.1.7. Distinction between Service Quality And Customer Satisfaction

The literature on services has made a distinction between service quality and customer satisfaction (Bitner, 1990; Bolton & Drew, 1991; Parasuraman, 1988). This differentiation is important for firms to concentrate on enhancing their capability to satisfy customers through providing high service quality. The position of scholars is that service quality involves an attitude and is an evaluation over several service encounters over time. It is also thought to be an overall assessment about a service category or an organization. In support of this, respondents in Parasuraman, (1988)'s study demonstrated satisfaction with specific service encounters but were not happy with the service quality of the firm.

Conversely, recent thoughts on customer satisfaction is summarized in the following definition of satisfaction by Oliver, (1981) as a psychological state resulting when the emotion surrounding disconfirmed expectations is coupled with the consumer's prior feelings about the consumption experience. Furthermore, definitions by other scholars (Howard & Sheth 1969; Hunt, 1979 as cited in Harr, (2008) Support the thinking that it relates to a specific service encounter.

Moreover, Oliver, (1981) distinguished customer satisfaction from service quality in his definition of attitude as the consumer's relatively enduring affective orientation for a product, store, or process while satisfaction is the emotional reaction following a disconfirmation experience which acts on the base attitude level and is consumption-specific Therefore, service quality is "more stable and is situational oriented (Oliver, 1981, p. 42).

The two constructs are related in that service encounters of customer satisfaction over time result in perceptions of service quality (Oliver, 1981; Parasuraman, (1988). There is also a lot of argument regarding whether customer satisfaction is the antecedent of service quality or the outcome of service quality. Initially, scholars take the position that satisfaction is an antecedent of service quality since to reach an overall attitude (service quality) implies an accumulation of satisfactory encounters (Bitner, 1990; Bolton & Drew, 1991). However, other scholars take the opposite view that service quality is the antecedent of customer satisfaction (Cronin & Taylor, 1992; Ekinci, 2004; Rust & Oliver, 1994; Swan & Bowers, 1998 as cited in Harr, 2008).

Empirical research by Cronin & Taylor (1992) showed that service quality has a significant effect on customer satisfaction. Similarly, recent studies by (González & Brea, 2005; & Ekinci

2004 using recursive structural models provided empirical support that service quality results in customer satisfaction. According to Zeithaml et al., (2006), customer satisfaction is a broader concept than service quality which focuses specifically on dimensions of service.

Satisfaction is an overall customer attitude towards a service provider, or an emotional reaction to the difference between what customers anticipate and what they receive, Hansemark and Albinson (2004). Regarding the fulfillment of some needs, goals or desire customer satisfaction is a collective outcome of perception, evaluation and psychological reactions to the consumption experience with a product/service (Yi, 1990). Here customers' perception takes the major share towards customers' satisfaction because their satisfaction is the result of their perception towards the specific service. For example, if the quality of service delivered is beyond their expectation then the customers will be delighted and if customer's perception is equal to their expectation level or under their expectation with the delivered service quality the customers will be satisfied and dissatisfied respectively. Customer satisfaction leads to repeat purchases, loyalty and to customer retention (Zairi, 2000). However, dissatisfied customers may try to reduce the dissonance by abandoning or returning the product, or they may try to reduce the dissonance by seeking information that might confirm its high value (Kotler, 2000).

2.2. The Meat Industry Global Context

2.2.1. International Variations in Modern Slaughterhouse

The standards and regulations governing slaughterhouses vary considerably around the world. In many countries the slaughter of animals is regulated by custom and tradition rather than by law. In the non-Western world, including the Arab world, the Indian sub-continent, etc., both forms of meat are available: one which is produced in modern mechanized slaughterhouses, and the other from local butcher shops. In some communities animal slaughter and permitted species may be controlled by religious laws, most notably halal for Muslims and kashrut for Jewish communities. This can cause conflicts with national regulations when a slaughterhouse adhering to the rules of religious preparation is located in some Western countries.

In Jewish law, captive bolts and other methods of pre-slaughter paralysis are generally not permissible, due to it being forbidden for an animal to be stunned prior to slaughter. Various halal food authorities have more recently permitted the use of a recently developed fail-safe

system of head-only stunning where the shock is non-fatal, and where it is possible to reverse the procedure and revive the animal after the shock. The use of electro narcosis and other methods of dulling the sensing have been approved by the Egyptian Fatwa Committee. This allows these entities to continue their religious techniques while keeping accordance to the national regulations. In some societies, traditional cultural and religious aversion to slaughter led to prejudice against the people involved. In Japan, where the ban on slaughter of livestock for food was lifted in the late 19th century, the newly found slaughter industry drew workers primarily from villages of burakumin, who traditionally worked in occupations relating to death (such as executioners and undertakers). In some parts of western Japan, prejudice faced by current and former residents of such areas (burakumin "hamlet people") is still a sensitive issue. Because of this, even the Japanese word for "slaughter" (tosatsu) is deemed politically incorrect by some pressure groups as its inclusion of the kanji for "kill" supposedly portrays those who practice it in a negative manner. Some countries have laws that exclude specific animal species or grades of animal from being slaughtered for human consumption, especially those that are taboo food. The former Indian Prime Minister Atal Bihari Vajpayee suggested in 2004 introducing legislation banning the slaughter of cows throughout India, as Hinduism holds cows as sacred and considers their slaughter unthinkable and offensive. This was often opposed on grounds of religious freedom. The slaughter of cows and the importation of beef into the nation of Nepal are strictly forbidden.

2.2.2. Layout and Design of Modern Slaughterhouse

In the latter part of the 20th century, the layout and design of most U.S. slaughterhouses was influenced by the work of Dr. Temple Grandin. She suggested that reducing the stress of animals being led to slaughter may help slaughterhouse operators improve efficiency and profit. In particular she applied an understanding of animal psychology to design pens and corrals which funnel a herd of animals arriving at a slaughterhouse into a single file ready for slaughter. Her corrals employ long sweeping curves so that each animal is prevented from seeing what lies ahead and just concentrates on the hind quarters of the animal in front of it. This design – along with the design elements of solid sides, solid crowd gate, and reduced noise at the end point – work together to encourage animals forward in the chute and to not reverse direction. As of

2011, Grandin claimed to have designed over 54% of the slaughterhouses in the United States as well as many others around the world.

2.2.3. Emerging of Robotic and 3D Slaughtering Technology and Non Animal Meat

In reality, things have changed greatly: the sector has gradually been taken over by robots and machines. Robots raised the slaughtering capacity to roughly 300–400 carcasses per hour, compared to the 100 carcasses that human workers could process. The 3D deriding robot was developed and installed at the Tican abattoir in Thisted, and Danish Crown is currently installing machines in their abattoirs throughout Denmark. The robot has also received widespread international recognition. Source: <https://www.dti.dk/projects/state-of-the-art-3d-abattoir-technology-produces-meat-of-better-quality/34345>.

Genetically Designed food: - The creation of entirely new strains of food animals and plants in order to better address biological and physiological needs. A departure from genetically modified food, genetically designed food would be engineered from the ground up. From the 50 billion hamburgers sold in America each year to the billion chicken wings consumed on Super Bowl Sunday alone, our culture revolves around meat “The story of human evolution is one that is intimately tied to meat,” said Richard Wrangham, Professor of Biological Anthropology at Harvard University. “We are a species designed to love meat.” But what if instead of biting into a juicy burger produced from traditional livestock methods, your patty was grown inside a lab Cultured, shmeat, lab grown, test-tube meat however you prefer to reference it, in vitro meat has gone from a sci-fi fantasy concept to near-reality. Multiple teams of researchers and scientists around the world are perfecting the process of creating real meat products by using just an animal’s stem cells.

2.3. Country Context and Ethiopian Meat Industry

2.3.1. General Overview

The agro-processing industry in general plays a critical role for development, especially in The agro-processing industry in general plays a critical role for development, especially in developing countries. The agro-processing sector on average contributes 52%, 36% and 32% of the total manufacturing value added for Low, Middle and Upper Middle income countries,

respectively. Furthermore, the contribution could reach 66% for agriculture-based countries and 38% and 37% for the transforming and urbanized countries, respectively, Agribusiness can stimulate growth in the agricultural sector and reduce rural poverty. Similarly, the agro-processing industry has been identified by the New Growth Path as a key candidate. Generally the growing demand for food of animal origin in developing countries, stimulated by population growth, gains in real per capita income, and urbanization, represents a major opportunity for poverty reduction and economic growth. (Source: World Development Report 2008 - Wilkinson and Rocha, 2009).

For centuries, the Ethiopian economy is highly characterized as agricultural based with subsistence dominance level, low input-low output, rain-fed farming system. Currently, Ethiopia where aggregate economic growth of over 11 percent per year over the period 2002–2007 EC has exceeded growth rates in many other world regions due to consolidated macroeconomic and political stability throughout the country. Robust economic growth in Ethiopia has been and is anticipated to translate into a growing demand for animal-source foods, the economy structure is dominated by service sector with the average GDP share of nearly 45% followed by Agriculture with the share of 44%. The industry sector contribution is the least of all with only 11% of the real GDP (Source:-MOFED, 2013).

In the meat industry there is an attempt to establish modern abattoirs but almost all are not constructed with the art of modern slaughterhouse with an integrated byproduct and waste management plant. The drainage system, process lay out, slaughter equipment, facilities are not available in an adequate manner and also substandard. Above all the industry lacks technical and managerial capability. Therefore the slaughter house serves their limited substandard service to local municipal dwellers. Due to this reason Illegal and informal slaughter has enjoying a great market share. Generally, Ethiopia has the tenth largest livestock inventory in the world. However, the country's current share in the global export market for meat is quite small.

In 2011, the volume of global meat exports was estimated at USD 105 billion, and Ethiopia accounted for less than one percent of this total, of which most is chilled sheep and goat carcasses. This ranked Ethiopia as the 43rd largest meat exporter, which shows that we have a chance to expand our share of margin in the international market. Above all, if the current technological problems solve out there exist a feasible an export market customer for the meat

industry specifically targeted in Africa, and Middle East Countries. Source: Feasibility Study of New Abattoir Construction for Addis Ababa Abattoirs Enterprise by Meateng Consortium 2016)

2.3.2. The Meat Industry Products and Production

The Ethiopian meat products are characterized by beef, sheep and goats carcass without any further value addition. In terms of local meat product there is only carcass meat products produced from different municipal slabs distributed by the end users by butchers, hotels, restaurants and supermarkets, the Addis Ababa Abattoir Enterprise is the largest abattoir serving the local market. However, it is estimated that approximately 40% of the cattle and the 80% of the small remittent are slaughtered outside of the abattoirs in Addis Ababa by illegal slaughtering practices. (Source: Meat Technology Road Map by Ministry of Science and Technology 2017)

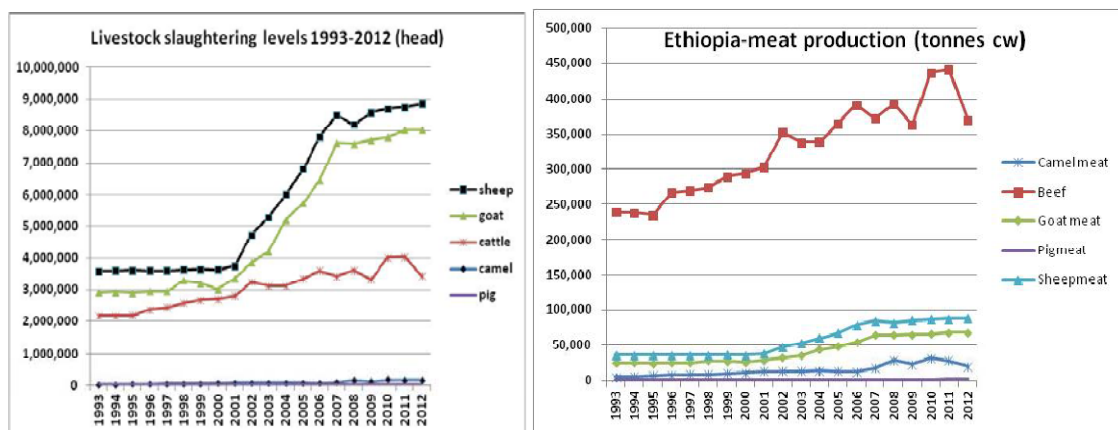


Figure 1: Livestock slaughter levels for Ethiopia in the period since 1993 as reported to FAO from official Ethiopian government statistics and Ethiopia meat production trends since 1993 Source: Meateng Consortium Consulting Firm, Feasibility Study for AAAE – 2014

Almost all exports are in the form of chilled bone-in carcasses which are air freighted from Addis Ababa. Therefore, there is no value addition practice of meat process and not take the advantage of the industry from local market as well from export market. Due to this reason some star hotels and caterings import considerable amount of meat from abroad.

The beef meat export sector appears to operate intermittently for example the volumes exported in 2012 approximately 60% were in bone as quarters and the remaining in deboned hindquarter and forequarter cuts. The abattoirs processing sheep and goats seem to be operating relatively

well and this sub-set is currently responsible for approximately 80% of exports by volume in 2013. The meat quality is also influenced by lack of proper Pre slaughter handling of animals and poor post mortem handling. Furthermore, most factories don't have sufficient chilling; freezing facilities, Poor Storing, Packaging and labeling technologies that can assure effective preservation to keep for long time. Hence, comparatively, Ethiopian meat didn't have a brand in international market like other meat exporting countries like Namibia, South Africa, Brazil, etc. Some of the reasons for low demand of Ethiopian product abroad might be poor quality, internationally unrecognized, limited promotional campaign etc. Meat production per head of livestock in Ethiopia is low by standards of other significant livestock-producing African countries: just 8.5 kg per head of cattle per year, significantly lower than in Kenya and Senegal (21 and 16 kg respectively). Off-take in Ethiopia is low compared with that in other East African countries. Source: Meateng Consortium Consulting Firm – Feasibility Study for AAAE – 2014

2.3.3. The Ethiopian Meat Consumption Culture and Customers

A declining rate of growth was then applied to the following years beginning at 2.5 percent in 2013/14 and reducing to less than 1.6 percent in 2036/37, to arrive at a forecast of 136.7 million people by the year 2037. CSA also forecast significant change in the urban/rural composition of the population over the coming decades to the effect that by 2037 over 31 percent of the population will live in urban areas. Therefore, it is forecasted that in regard to Addis Ababa, CSA forecast its population to swell from 2.7 million people, indicated earlier, to be almost 10 million by 2037. The time series for Ethiopia indicated that a slight increase in per capita consumption levels has occurred over the past decade. The meat consumption will be predominantly beef and veal (67%), mutton and lamb (13%), goat (12%), poultry (5%) camel or other meats (3%). Pork consumption is effectively nil. This shows that there exist high meat demands in the domestic market. (Source:-Meateng Consortium – Feasibility Study for AAAE – 2014.) The great majority of sheep and goats (90%) and most of cattle (70%) are slaughtered informally in homesteads for consumption by the owner or in a small community where no formal slaughtering facilities exist (MOARD, 2007).The Ethiopian meat products are characterized by beef, sheep and goats' carcass without any further value addition.

In terms of local meat product, there is only carcass meat products produced from different municipal slabs distributed by the end users by butchers, hotels, restaurants and supermarkets.

The AAAE is the largest abattoir serving the local market. However, it is estimated that approximately 40% of cattle and 80% of small ruminants (shoats) are slaughtered outside of the abattoirs in Addis Ababa by illegal slaughtering practices. (AAAE market study 2005). It is customary in Ethiopia that a cow or an ox can be butchered for the sole purpose of selling within the community. In special occasions and holidays, people have a cultural ceremony for slaughtering cows or oxen, not any other animals and sharing among the group called kircha, which is a very common option of the rural areas where access of meat is challenging. Commonly, a group of 10 to 20 people buy alive animal, slaughter and divide the meat among them. Kircha is a form of people's organization and sharing meat among themselves (butchering live animal and sharing the meat in group). Kircha is considered by Ethiopians as their social capital (KoreanJ Food SciAnimResour. 2014). The style is also common in some of Ethiopian towns' people by which the elders especially enjoy being involved in the activity. Neighbors on holidays join together into kircha to buy a large ox and equally divide it then draw lots to decide which pile they get. It is cheaper than going to the butcher (Janet et al., 2013). According to Kifleyesus (2007) the meat is divided on the basis of equal portions comprising a package of every internal organs, muscle meat and bone of the slaughtered animal. Size of the package is determined by the number of divisions (Pankhurst, 1988). The greater the number of divisions, the smaller will be the size of a package of meat. With regard to Ethiopian meat consumption behavior, the consumption of meat was one of the factors that the society of antiquity experienced. Cultural and religious aspects have played major roles in the processing of meat and their consumption (Kim et al., 2004).

2.3.4. The Meat Industry Supply and Value Chain

In the eye of the main target of this document, it is worthwhile to highlight some facts about livestock sector which is number one supportive and basis of the meat industry. Ethiopia has the largest livestock herd in sub-Saharan Africa, with an estimated cattle population of 56.7 million, sheep population of 29.33 million, and goat population of 29 million (Source:-CSA, 2014). According to FAO statistics, comprising both official data and its own estimates for missing years, Ethiopia has large numbers of cattle and shoats, with 2014 shown in Table 1. Camels and pig numbers are however much lower. According to the table, Ethiopia holds a prominent position with regards to ruminant numbers, however much less so for poultry (mainly chicken in

Ethiopia) and is definitely not a pig farming country, only ranking 37th in Africa and 137th at world level.

Table 1: Ethiopian livestock numbers with Africa comparisons, FAO 2014

M=million	Ethiopia Herd/flock Size (mio)	Africa comparison			
		Major herd/flock		Ethiopia in Africa	
		Country	Size	Rank	% of Africa
Cattle & buffaloes	56.7	Ethiopia		1 st	18.05%
Sheep & goats	58.4	Nigeria	111.6 m	3 rd	8.29%
Camels	1.2	Somalia	7.2 m	7 th	4.94%
Pigs	0.03	Nigeria	6.9 m	37 th	0.10%
Chicken	56.9	S. Africa	200.0 m	9 th	3.05%

(Source:-French Veterinary International – Feasibility Study for AAAE – 2016)

Livestock holdings are intrinsically tied to the objective and purpose of the region’s agricultural output. The national cattle herd structure reflects these functions with 40 percent males and 60 percent females, designed to maximize herd replacement. (Source:-CSA, 2014). Livestock production as supply for meat industry is highly fragmented and geographically dispersed, and limited large commercial operations. Meat cattle productivity is much below potential (one of the lowest) and characterized by low birth weight, sub-optimal growth rate, average age at first calving (4.5 years), Boran cows under pastoral management (4 years), Boran cows at Abernosa ranch (22 months), long calving interval (2 years), delayed age to reach market or slaughter weight, low power output of draught animals, average meat production/slaughtered animal (110 kg beef and 10 kg mutton).

This is merely due to very low off-take rates, large numbers of animals that by-pass abattoirs and are exported live, producers who are not commercially oriented and sell only in need of cash or when draught animals get too old, lack of certifications and acceptable international standards by

meat processors. Average carcass yields per animal slaughtered are estimated by the federal government's agriculture department to be 110 kg for cattle, 130 kg for camels, 10 kg for sheep and 8 kg for goat. Livestock production growth rates have been low until recently and lag behind population growth, which is increasing at a higher rate.

Average carcass weights have not changed over two decades, it underscores the underdeveloped nature of the livestock sector in which traction, milk and fiber production is more important drivers than meat production. In the absence of other data the FAO estimates are included as part of the total supply assessment considered here.

Despite its large livestock inventory, Ethiopia's cattle and sheep holdings are currently underdeveloped and not part of an integrated commercial chain with demand drivers determining the volumes and categories of livestock that come through the marketing system. At smallholder level, livestock are retained for as long as possible, they represent cash in the bank and are in overall terms probably kept beyond their prime meat production stage. This has a flow-on effect in terms of the age, condition and musculature of the animals that are turned off and it is a major inhibitor in the short term development of a commercially focused meat production industry as distinct from livestock production system.

2.3.5. Legal frame Work of the Meat Industry

The 1995 Federal Democratic Republic of Ethiopia constitution sets out the principles and guidelines for environmental protection and management. The Constitution specifically states that everyone has the right to live in a clean and healthy environment and the government will make every effort to provide such an environment (Art.44). Policies, legal and regulatory frameworks shape the role of the actors in the value chain. A broad range of policies can facilitate or hinder the productivity of a given value chain. In Ethiopia, a number of policies and legal and regulatory issues were issued. Among others, the legal and regulatory documents relevant to the value chain include: The Growth and Transformation Plan, Livestock Development Policy which issued in 2014, Climate Resilience Green Economy strategy, Cooperative Proclamations, Ethiopian labor law, Proclamation No. 274/1970 a quality totally fit for human consumption, Investment Proclamations, Animal Diseases Prevention and Control Proclamation (No.267/2002), Animal Trade Control Regulation Proclamation (No. 819/2006),

Legal Notice No. 428 of 1972. Meat Inspection Regulations, Directive in relation to meat distributions by Food Medicine Health Care Administration and Control Authority (FMHACA)The Slaughtering, Meat Processing and Rendering Environmental Standard,

Animals and Animal Products Import And Export Regulations, Public Health Proclamation No. 200/2000, Domestic Standard Regulations (ES 1109:2005: Mutton and Goat meat curried and canned – Specification, and ES 1110:2005:- Chilled and frozen mutton and goat meat-specification, ES 1111:2005:- Chilled and Frozen Beef-Specification, ES 1118:2005:- Abattoirs-Basic requirements Meat inspection) Legal notice No. 25/1943 and legal notice No.145/147/1950, which deal with the production, distribution and sale of food and food products produced domestically, are applied.

The Livestock Marketing Authority (LMA) was set up in 1998 with the objective of promoting domestic and export markets by initiating policies, laws and regulations, issuing quality control directives on exportable and importable materials, encouraging and establishing staging points and quarantine stations for domestic and export trade, promoting the organization of livestock markets, abattoirs, skins and hides shed, encourage the condition of research on the marketing of animal and animal by-products. The goal of the Environmental Policy of Ethiopia is to improve and enhance the health and quality of life of all Ethiopians.

2.3.6. Major Stakeholders of the Meat Industry

The major stakeholders in the industry structure include: Ministry of Agriculture, Ministry of Industry, Ministry of Trade, abattoirs and processing companies, hotels and exporters. These stakeholders are linked to one another and expected to work together for the competitiveness of the sector. There are a number of industry-wide institutional actors and legal and regulatory factors that contribute politically, in governance, advocacy and marketing related activities without which the successfulness of the industry may not be possible. These include:

Ministry of Agriculture and Natural Resources Development (MoANRD): is responsible for the developing of policies and strategies and supervising the performance in to the development of the Meat Industry.

- Ministry of Finance and Economic Cooperation (MoFEC): for the settlement of foreign loan and interest.
- Ministry of Industry (MoI): develops policies and strategies for the expansion of the Meat Industry.
- Ministry of Trade (MoT): responsible for the fair trade
- Environment Protection Agency (EPA): responsible for the sustainability and Health Environment
- Food Medicine Health Care Administration and Control Authority (FMHACA): responsible for products control
- Regional Administrations: Closely works with both the Meat Industry by way of not only providing the necessary areas but also by way of creating awareness and mobilization the necessary resources for the operators.
- Cooperatives and Unions: these institutions are significantly important for the close and actively engagement of operators on the Meat production process
- Research Institutions: Introduction and adaptation of improved varieties.

2.3.7. Meat Distribution in Addis Ababa

Most of butchers and meat traders are registered as permanent customer of Addis Ababa Abattoirs Enterprise and provided customer identification number and they are beneficial of slaughtering and meat distribution service only, according to (International Livestock Research Institute Addis Ababa, Ethiopia June – August 2004), the cost at markets of the 34 butcherries interviewed in the Addis Ababa area, only one live animals directly from a farmer. The remaining 33 bought live animals, priced per kilogram, from a trader at a live market. The Addis butcherries typically sold only beef. Only 5.8 percent sold sheep meat and 2.9 percent sold poultry, in addition to beef. No butcherries reportedly sold goat meat. At an average live weight of 160kg and an average carcass weight of 114kg (error of 54.65kg), these Zebu type cattle reportedly brought an average price of 16.5ETB/kg (error 732ETB/kg) at the live terminal market. The seven supermarkets interviewed followed a similar trend. All beef, sheep, and goat were also purchased at a live terminal market from a trader and sent to the Addis Ababa Abattoirs.



Figure 2: Fresh meat distribution tracks with Vance in AAAE

Ante-mortem and post mortem inspection are critically mandatory to approve for food consumption of human based on meat quality and safety the price of meat can set as per International Livestock Research Institute Addis Ababa, Ethiopia June – August 2004. Illustration, meat prices can vary, the quality usually remains low, compared to developed country’s standards. From slaughter to resale, there is no formal classification of carcass quality. The export abattoirs are required to inspect all meat prior to shipment in regards to a 1976 proclamation, clarified by a set of guidelines developed by the Ministry of Agriculture. Many of the guidelines, however, are not enforced by abattoirs that produce meat for local consumption. For example, during a tour of the Addis Abattoir facilities that slaughters animals for local consumption,



Figure 3: AAAE’s finished fresh meat which inspected; ready to distribution. (Source AAAE-2019)

2.3.8. Addis Ababa Abattoirs’ Meat Production Quality

Quality defined in deferent perspectives. Quality meat is classified hygienic handling and proper handling and chilling facility during slaughtering and meat distribution for the consumers.that is

Business-to-Business(B2BSERVQUAL) relationship , as per International Livestock Research Institute (ILRI)-2004.illustration, there is no system of grading or naming meat. A few butcheries and several supermarkets reported that the beef round was the highest quality of meat, but there was no price differentiation except for one supermarket case. Butcheries also reported that kitfo was classified as the highest quality, with still no price differentiation. The supermarkets butcher and package meat similar to supermarkets in developed countries. Butcheries, however, cut off random pieces of meat, bone, and fat and sell only per kilogram as retailer. Thus the higher quality meat is purchased in the supermarkets.

2.3.9. Addis Ababa Abattoirs Market Share and Butchers Meat Market

In Addis Ababa there are over 2000 butchers which are retailing meat to end consumers. These butchers buy fattened animals mainly cattle from secondary markets and get abattoir service from Addis Ababa Abattoirs Enterprise. Addis Ababa Abattoirs Enterprise gives the service of checking the health of the animals, slaughter and gives distribution service to the butcheries retail outlets.



Figure 4: prepared cattle's fresh beef at butcher on shelf for selling.

Table 2; market share of Abattoirs in Addis Ababa

Years	Sheep and Goat						
	A.A Main	Akaki	Burayu	Karalo	Legedadi	Sululta	Total Sum
2014	156,291	9,755	102,604	1,972	500	7,524	278,646
2015	141,068	8,679	102,269	1,293	500	9,702	263,511
2016	114,527	9,249	227,457	1,973	500	13,860	397,566
2017	120,839	8,535	206,084	2,159	500	8,514	346,631
2018	112,230	7,212	191,595	1,410	500	9,504	322,451
Grand Total	644,955	43,430	830,009	8,807	2,500	49,104	1,608,805
Mark Share %	40%	2.7%	51.6%	0.5%	0.15%	3%	100%

(Source AAAE customers)

2.4. Relationship of Quality and Customer Satisfaction

Oliver (1993) first suggested that service quality would be antecedent to customer satisfaction whether these constructs were cumulative or transaction-specific. Some researchers have found empirical justification for this view where customer satisfaction came as a result of service quality (Anderson & Sullivan, 1993; Fornell 1996; Spreng & Macky1996).

Despite the fact that factors such as price, product quality, delivery etc. can affect customer satisfaction, perceived service quality is a component of customer satisfaction (Zeithaml, 2006). Satisfaction and service quality have certain things in common, but satisfaction generally is a broader concept, whereas service quality focuses specifically on dimensions of service (Wilson, 2008). This theory conforms to the idea of Wilson (2008) and has been confirmed by the definition of customer satisfaction presented by other researchers.

More evidence has been proved that the service quality acted as one of the factors that influence satisfaction. Parasuraman (1985) in their study confirmed that when perceived service quality is high, then it will lead to increase in customer satisfaction. Some other authors also acknowledged

that customer satisfaction is based on the level of service quality being provided by the service entities (Saravana & Rao, 2007).

Cronin & Taylor (1992) has view of customer satisfaction to be base itself on the customers experience on a particular service encounter implying that service quality is a determinant of customer satisfaction. Another author stated that definitions of consumer satisfaction relate to a specific transaction (the difference between predicted service and perceived service) in contrast with „attitudes“, which are more enduring and less situational-oriented, (Lewis, 1983). This is in line with the idea of Zeithaml (2006).

2.5.B2BSERVQUAL MODEL

B2B SERVQUAL model which developed by vandaele &Gemmel in 2004,is intended for business-to- business market services provider and considers the quality of services as a function of the gap between the perception and expectations of the user and as well as leads to addressing the needs and desires of the users and accuracy of delivering to compensate for the user's expectations.

Researchers used the approach of SERVQUAL method, and B2BSERVQUAL method,which there are five dimensions of service quality in SERVQUAL method and 10 dimensions of service quality in B2BSERVQUAL method. This approach is suitable to measure customer satisfaction level based on business and not the end customer, according to (Zagloel &prameswari,2009). The dimension of perceived service quality could be used either on the market or business customer market(Holmlund, kock, & vanyushyn, 2007). Service quality is a critical concern in B2B marketing of service because of its impact on the organizational customers' own service to their customers.This newly developed scale will be called the B2B SERVQUAL scale. The SERVQUAL scale developed by Parasuraman, levels based on business and not the end customer, After consultation with several stakeholders who are competent, also look at some of the pervious study. B2B SERVQUAL dimensions can be used to measure the service quality of business customer and consumer costomerZeithaml and Berry (1988) will occasionally be called the B2C SERVQUAL scale.The SERVQUAL scale developed by Parasuraman, Zeithaml and Berry (1988) will occasionally be called the B2C SERVQUAL scale.The aspects of competence dimension in the form of skills and knowledge already are

represented in responsiveness and reliability. Then the service attributes developed into 10 dimensions of B2B SERVQUAL model. The attributes are as follows:

Definitions of Service Dimension Of B2BSERVQUAL

Service Dimension	
Responsiveness	Willingness and ability of the employees to help customers and respond to their request, and inform any time will be provided and then provide quality service.
Reliability	The company's ability to provide service accurately for the first time with out making any mistakes and deliver appropriate service on time as agreed
Tangible	The ability of a company to demonstrate its existence to external parties such as physical attractiveness facilities, equipment, and material used by the company, and employee appearance.
Competence	Skills and knowledge required to provide services
Consultative selling	The company's ability to provide advice and understanding the customer's business
Price	Rationality selling price of the service provided
Accessibility	Ease to be contacted and obtained
Credibility	The ability to trusted by the customer as they want
Interpersonal skill	Those essential skills involve in dealing with and relating to other people, largely on a one –to-one bases
Product offering	The ability to provide a wide and varied product that can be an option for the customer product
Geographical presence	Ability to provide service outside the marketing area
Market clout	Ability to provide the best service at low price (market power) and the ability of the company to be a market leader

priorstudies

Prior Studies

No	Researcher	Research Title	Method	Result
1	Muhammad Arif Fadillah (2012)	Analisis Kinerja Perusahaan Dilihat Dari Kepuasan pelanggan Pada Perusahaan Kontraktor Telekomunikasi Dengan Menggunakan Pendekatan Metode B2B SERVQUAL dan Importance Performance Analysis (IPA).	B2B Servqual and Importance Performance Analysis	All service attributes, which amounts, thirty-five of with the ten of B2B SERVQUAL dimensions, all of which gained gap has a negative value. This negative gap ranged from -0.44 to -2.19. This proves that the activation service company PT. Synergy partners Adhitama still does not meet customer expectations.
2	Marlin Yuvina Tileng, Wiranto Herry Utomo, and Rudy Latuperissa (2013)	Analysis of Service Quality using SERVQUAL Method and Importance Performance Analysis (IPA) in Population Department, Tomohon City that done.	SERVQUAL Method and Importance Performance Analysis (IPA)	Quadrant A, the public was dissatisfied with the existing attributes, so that need to be improved. Quadrant B, the society was satisfied, Quadrant C have low satisfaction levels and considered did not too important for society. Quadrant D respondents considered that there are factors which are not

				important but they were pleased with the performance
3	DR. Ir. T. Yuri M. Zagloel, MEngSc dan Dian Esti Prameswari (2009)	Peningkatan Kualitas Pelayanan Pada Perusahaan Kontraktor Pameran Dengan Metode B2B Servqual dan Quality Function Deployment	B2B SERVQU AL Method and Quality Function Deployme Nt	27 attributes of service quality, there are 17 attributes of service quality still does not meet the expectations of customers, there are 7 attributes of service quality that are in accordance with customer expectations and service quality are three attributes that have exceeded customer expectations.
4	Krisana Kitcharoen (2004)	This Importance Performance Analysis of Service Quality in Administrative Departmenta of Private Universitas in Thailand	SERVQU AL and Importanc E Performan Ce	Students had higher perception about the Importance attributes of a service quality than staff members but lower perception about the Performance attributes than staff members

Source: Self-Construction

2.6. Conceptual Frame Work

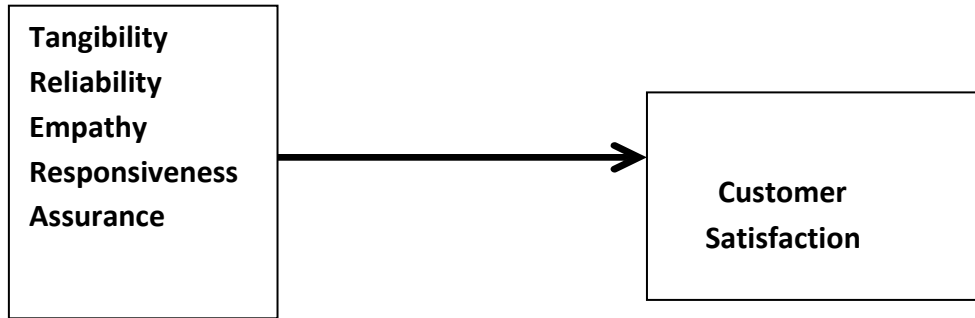
The conceptual framework is the blue print of the research work that guides the researcher to conceptually understand the research and outline and operationalize the dependent and the interpretation of the result been easy and meaningful. Customer satisfaction is believed to affect post-purchase perception and future decisions of customers. According to Cronin and Taylor (1992) service to customers and quality service are a vital antecedent of customer's satisfaction.

From the above discussion of literature review, it is clear that there is a relationship between service quality and customer's satisfaction where the former eventually leads to customer's satisfaction. Literature availed a number of models to measuring service quality.

B2BSERVQUAL are models which researcher are using most Both models use five service quality dimensions. The empirical studies also shows that service quality dimensions have relations with service quality. It is evident that service quality dimensions have impact on customer satisfaction as various articles and journals show though with varying degree. SERVPERF model is an improvised model of Parasurman's SERVQUAL. While SERVPERF mainstay is perceived service quality, B2BSERVQUAL approach integrates the service quality and satisfaction.

Having reviewed both theories and empirical studies on service quality on the one hand and the Addis Ababa Abattoirs service delivery scenario on the other hand, the following conceptual frame work is drawn for this study. So that, Addis Ababa Abattoirs Enterprise providing slaughtering meat distribution service (B2B)&B2C methods, as characteristics of meat product processing, meat handling. Personal hygiene Quality of the product and delivery time is critical regarding to slaughtering standard. The standard guides the researcher. Ten dimensions of

Figure 5: Conceptual Framework



B2BSERVQUAL and five dimensions of servqual are adopted in measuring the quality of the service. Once the measuring is don, next counting the score of B2Bservqual that is the difference between perceived performance variable and expected performance variable.

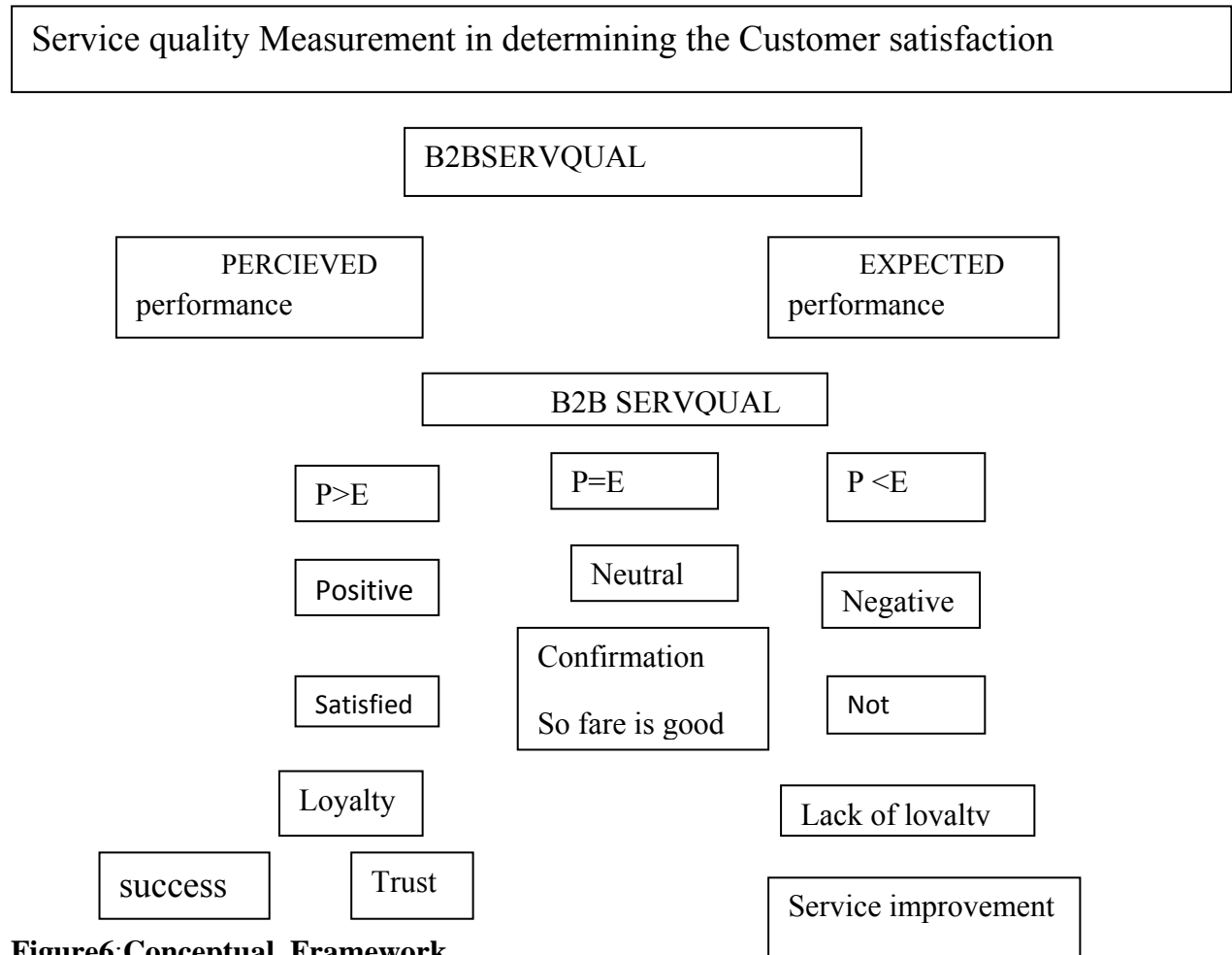


Figure6: Conceptual Framework

Source:(Fadhillah,2012)

2.7. Theoretical framework

Prior to measuring the service quality of customer satisfaction, researchers must determine the attributes of service quality first. Therefore, the researcher determine what service attributes that can affect customer satisfaction towards the performance of the companies that will be tasted the level of interest and satisfaction, in this research, the researcher's approach of SERVQUAL method and B2BSERVQUAL method, which there are five dimensions for SERVQUAL method and 10 dimensions in B2B SERVQUAL method. This approach is appropriate to measure customer satisfaction level based on business and not the end customer, according to (Zagloel & parmeswari, 2009). B2BSERVQUAL dimensions can be used to measure the level of customer satisfaction of butchers or meat traders in the form of retailers with combining the dimension on B2BSERVQUAL to existing dimensions in SERVQUAL.

The aspects of competence dimension in the form of skill and knowledge already are presented in responsiveness and reliability. Then the service attributes developed in to ten dimensions B2BSERVQUAL. The frame work aims to facilitate the process of research. The effect of applying the consumer satisfaction B2BSERVQUAL can be used as a benchmark of capacity performance of the company's success in service of the organization and also the hard work to improve the quality of service quality and management enterprises are expected to increase consumer loyalty.

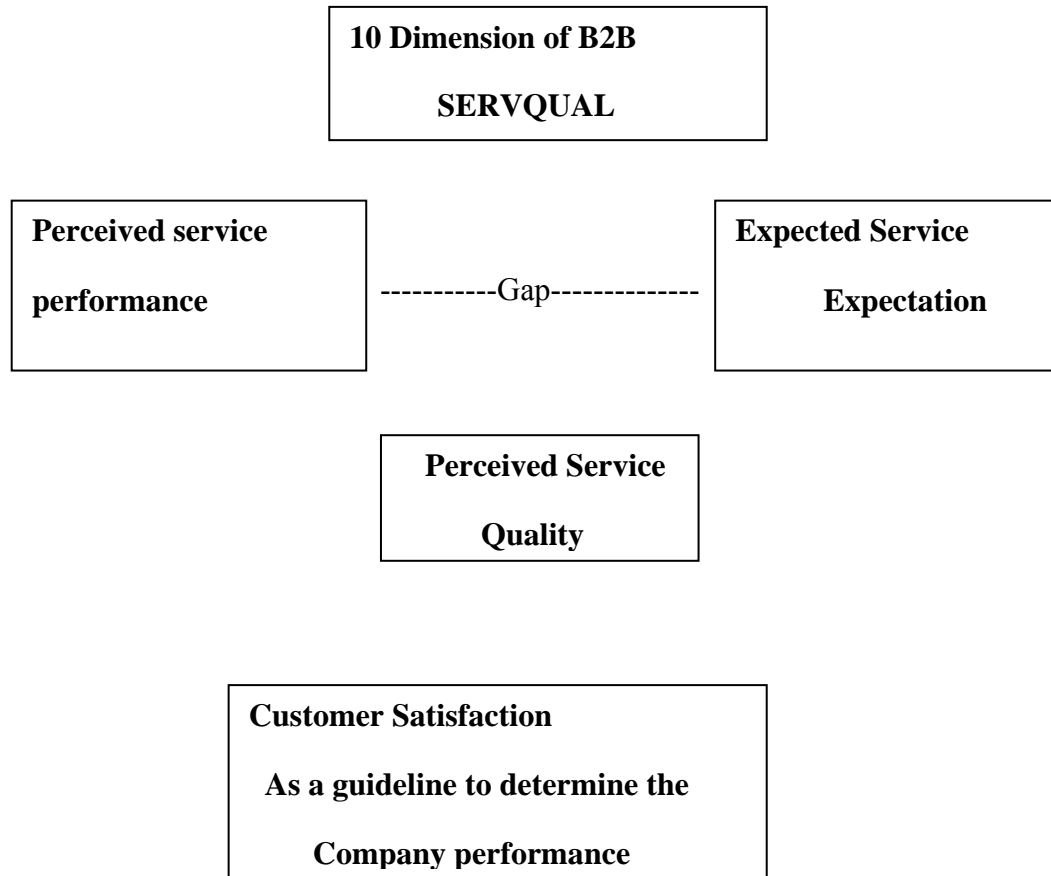


Figure7: Theoretical Framework Study

Source; self- constructed

Hypotheses of the Study

The service in general and service in particular, must have the quality that meets the customers’ requirements in order to attract and retain the customer and ultimately win the competition. It is also well established that satisfied customers are key to long-term business success (Kristensen et al. as cited in Munusamy, Chelliah and Mun, 2010)). Companies that have a more satisfied customer base also experience higher economic returns (Aker and Jacobsson et al. as cited in Munusamy, Chelliah and Mun, 2010).

But delivering service of quality that matches to the expectation of the customers and ultimately satisfying them is not coming without challenge. So, Abattoirs has to make sure that it is meeting

customers" requirements (quality) and satisfy them without which it is difficult to keep on the momentum of its current business success.

To gain competitive and fulfill the firm's aspiration for high slaughtering service, Abattoirs has to make sure that it is delivering service with quality which eventually secures customer satisfaction regarding to animal slaughtering ;meat distribution ; keep desired delivery time and cost effectiveness.

Therefore, to assess the slaughtering& meat distribution service quality and hence customer (meat retailers & consumers) satisfaction, the following research hypothesis is proposed:-

Hypothesis

Service quality dimensions contribute positively and significantly to customers' satisfaction.

Chapter Three

Research Methods

3.1. Study Area and Research Design

Research design constitutes the blue print for the collection, measurement and analysis of data. It helps the researcher in the allocation of limited resources by posing crucial choices. It is used as the plan and structure of investigation so conceived as to obtain answers to research questions. The plan is the overall scheme or program of the research (cooper, 2003). This study has conducted based on descriptive research design using qualitative approach by gathering respondent 'data. This method is used to analyze B2B SERVQUAL attributes through questionnaire. The objective of descriptive research is 'to portray an accurate profile of persons, events or situations' (Saunders, 2009). The descriptive research describes data and characteristics about the population or phenomenon being studied. Descriptive research answers the questions who, what, where, when and how. It is mainly concerned with describing the nature or condition and the degree in detail of the present situation. In addition Creswell, (1994) also states descriptive research design is a technique of gathering information about the existing condition. Descriptive studies are usually the best methods for collecting information that will demonstrate relationships and describe the world as it exists. So, this study used descriptive research approach to describe the customers' satisfaction towards the service quality of Addis Ababa Abattoirs. It will also use descriptive analysis to assess the service quality dimensions and the satisfaction level of the customers. In addition, it will help obtain an accurate profile of the situation under this study and thus the study will consist of some quantitative and qualitative data types and sources which are helpful for properly analyzing and describing the Idea of the research topic. Schwandt (2007) the study has conducted in ten sub cities of the Addis Ababa City Administration of 2,233 butchers (meat sealers). those organized by 15 meat distribution areas according to Addis Ababa Abattoirs Enterprise (AAAE) in Addis Ababa including Addis Ketema, Kolfie, Lideta, Arada, Fitawrari, Kechenie, AratKillo, Teklehaimanot, Meshualekia, Kebena, Bole, Saris, Supermarkets and Muslim Religions butchers for halale service.(B2BSERVQUAL) A cross-sectional study design will be employed to conduct the study in various selected sites. The study that Abattoirs found in Addis Ababa and Surrounding Addis Ababa with their respective market share for Cattle and Sheep and Goats are presented for the last five years.

3.2. Sampling Technique and Sample Size

The sampling frame of this study is at all butcher customers of AAAE. Participants will be selected randomly from the sample frame based on random numbers from the 15 meat distribution zones (locations) in Addis Ababa. There are 2,233 current customers as updated by AAAE (2019) who were used as sampling frame (Table 2). The number of participants (sample size) for each study site will be proportionally allocated based on 15% sampling fraction for all sites as described here: Sampling fraction. Yamane,(1967) provides a simplified formula to calculate sample adopted by Solving Model by considering 95% confidence interval and 5% margin of error. However, the samples will be selected randomly within the sample frame by using nonprobability and probability sampling method to select the final sample. The sample size has been determined quantitatively using Solvin's formula which is presented below. to figure out what sample size we needed to take, Which is written as $n = N / (1 + Ne^2)$ Where n = Number of samples, N = Total population and e = Error tolerance (level). Sample question: Use Solvin's formula to find out what sample of 2,233 of population of 2,233 meat retailers in Addis Ababa, those are the customers of Addis Ababa Abattoirs Enterprise,were take survey from that abattoir. Hence,

$$n = N / (1 + Ne^2)$$

$$n = 2,233 / [1 + 2,233 (0.05)^2] = 339.$$

Table 3: Sample frame of study participants from 15 meat distribution areas In Addis Ababa

S/No	Distribution Zone	Total Population - Sampling Frame	Presentation Percentage	Participants
1	Addis Ketema	182	8.15%	28
2	KolfieKeraniyo	142	6.36%	22
3	Lideta	396	17.73%	60
4	Arada	66	2.96%	10

5	Fitawrari	68	3.05%	10
6	Kechenie	35	1.57%	5
7	AratKillo	75	3.36%	11
8	Teklehaimanot	64	2.87%	10
9	Meshualekia	111	4.97%	17
10	Kebena	112	5.02%	17
11	Bole	170	7.61%	26
12	Saris	330	14.78%	50
13	Woleta (Alemgena)	59	2.64%	9
14	Supermarkets	47	2.10%	7
15	Muslim hallal service customers in Addis	376	16.6	57
	Total	2,233	100	339

(Source AAAE customers)

3.3.Methods of Data Collection

There are several methodological approaches available to gather data and for the proper achievement of the objectives of the study; the researcher used primary and secondary data sources. Primary data was collected using questionnaires. Primary data is a data collected on source which has not been subjected to processing or any other manipulation which are collected by the investigator conducting the research. Secondary data is collected by someone other than the user. According to Saunders (2009) the use of two or more independent sources of data or data collection methods helps to confirm findings in the study. Therefore, primary sources of data will be collected through the in-depth interviews and questionnaires. Secondary data will be obtained from different documents of the slaughterhouses service strategy documents, quality

service control results and different literatures will be referred. In this research the original SERVQUAL model of Parasurama, (1985), (five dimensions, namely Tangibility, Reliability, Responsiveness, Assurance and Empathy) and B2BSERVQUAL model are used.

Questionnaire:

The questionnaires are used as a primary data source for qualitative and quantitative data gathering. It was designed to enable the researcher obtain as detailed information as possible. A total of 332 questionnaires was prepared and distributed to 332 butcher participants + 7 supermarkets to be 339 customers for each of the service provider customers of slaughterhouse. The numbers of respondents were determined proportionately using the number of customers from each service, Slaughtering, byproduct buying, governmental slaughterhouse, nongovernmental slaughterhouse user customers of the abattoirs service. The questionnaires consist of open ended questions (qualitative data) where the questions provide a guideline for the respondent but it does not have to be followed strictly and closed - ended questions (quantitative data). The aim of the questionnaire was to research and gather information on the service quality of the Abattoirs in Addis Ababa and their level their customers' satisfaction. The questionnaires are used as a primary data source for qualitative and quantitative data gathering. It is designed to enable the researcher obtain as detailed information as possible. A total of 339 questionnaires was prepared and distributed to fifteen customers for each of the 15 meat distribution areas. The numbers of respondents were determined proportionately using the number of butchers from each areas of Addis Ababa, Anima slaughtering and meat distribution service customers of the Abattoir. The questionnaires consist of open ended questions (qualitative data) where the questions provide a guideline for the respondent but it does not have to be followed strictly and closed - ended questions (quantitative data). The aim of the questionnaire was to research and gather information on the service quality delivery of the abattoir and their level of satisfaction.

3.4. Method of Data Analysis

After collecting the data, the data was analyzed using a descriptive data analysis technique which was presented by tables, frequency distributions and percentages to give a condensed picture of the data. This will be achieved through summary of simple statistics, which includes the mean,

mode, median and standard deviation values which are computed for each variable in this study. The researcher used Statistical Package for Social Sciences (SPSS), which helps to process, analyze and tabulate the data that enables to provide frequency table along with percentage employed to analyze the responses of customers.

3.5. Reliability

After collected the questionnaire I used Cronbach's alpha (reliability analysis) to compute the internal consistency of the data, of a test and calculate the same variable (quality and satisfaction), The coefficient has to be between 0 and 1 to label as reliable. The internal consistency of the item is better, as the outcome leads to 1, which means all the items compute the same, confirm by (Lee cronbach,1951) that the instruments can be accepted as a reliable when reliability coefficient is greater than 0.5.

3.6. Ethical considerations

All the information was treated and holds seriously exclusive confession and also no information is altered or personalized, therefore the information is offered as gathered accordingly the literatures collected for the intention of this study. The questionnaire was unnamed and high level of confidentiality is considered. The information gained during questionnaire using only for the fulfilling of this research objective of study.

Chapter Four

Results and Discussion

This chapter of the research illustrates the result of the fieldwork conducted by the researcher. It is prepared based on the research questions. The results are obtained from questionnaires administered to customers of Abattoir in Addis Ababa, who are found in the fifteen areas of Addis Ababa. The chapter presents the data collected and their findings. Analysis is also made based upon the findings in collaboration with the literature reviewed. A total of 339 questionnaires were administered with fully co-operation on the return of 100 percent questionnaire of the all respondents.

4.1. General Information and Profile of the Respondents

The distribution of customers or butchers of the abattoir in Addis Ababa, mostly covered at the Nefaslik Lafto sub city; Lideta sub city; Yeka sub city; kolfe keraneo and Bole sub cities that indicates the customers of the abattoirs concentrated at the border or expansion area of the city, 64 percent of the respondents are highly far away from the abattoir so called Addis Ababa Abattoirs Enterprise and close to other abattoirs out of the city. That is one of the factor of the delay of delivery of meat distribution service time that the long distance of abattoir from the butchers and meat consumers indicates, low convenience of location of abattoir for timely distribute the animal meat for the consumers. The rest of 36 percent of participants are closer to the abattoirs.

Most of the customers who participated in the study have attended formal school. More than 56percents of customer have Certificate and below, The rest of those who have professional qualification , around 26 percent have diploma, 17 percent have fist degree and 0.9 percent have second degree and above. This study shows that more meat business men are not high education. All of the study participants had experienced using the abattoir service most of the customers (around 35 percent) have spent 6-1 years with abattoirs, 23 percent have spent 19 and above and 22 percent have spent 1-5 years . 20 percent customer have spent 12-17 years This study shows more than 75 percent participants have spent more than 6 years with abattoirs, that indicates those most respondents are experienced in meat business and butchering, as well as loyal of this service sector.

Table 4: General Information and Profile of Respondents

Category	No of respondents (n=339)	%
Age		
<25Years	24	7.07%
25-34 Yeas	104	30.7%
35-45 Years	120	35.3%
45-64 Years	76	22.4%
64 and Above	15	4.4%
Total	339	100%
Customers duration with Addis Ababa Abattoirs Enterprise		
1-5 Years	76	22.4%
6-11 Years	119	35.1%
12-17 Years	67	19.8%
19 Years and above	77	22.7%
Total	339	100
Type of Service delivered to customer by Addis Ababa Abattoirs Enterprise		
Slaughtering service	311	91.7%
Buying by –product	20	5.9%
Buying Hide & Skin	8	2.4%
Total	339	100%

Educational Level of the respondents		
Certificate and below	189	55.78%
Diploma	88	26%
Degree	59	17.4%
Masters & Above	3	0.88%
Total	339	100%
Type of customer		
Private abattoir customer	46	13.6%
Government abattoir customer	209	61.6%
Both	84	24.8%
Total	339	100%

Source (Own Survey, 2019)

All of the study participants had experience to deal with abattoir industry in different demands and using abattoir service in Addis Ababa. Most of customers or around 92 percent of participant obtained animal slaughtering service from abattoir, 6 percents of customers are purchasing animal by products and the rest of 2 percent customers are animal Hide and skin buyers. This study shows most participants are meat traders and butchers in Addis Ababa.

All of the customers who participated in the study have attended formal school. More than 56percents of customer have Certificate and below, The rest of those who have professional qualification , around 26 percent have diploma, 17 percent have fist degree and 0.9 percent have second degree and above. This study shows that more meat business men are not high education.In the study all private and government and both abattoirs customer were considered and the majority of 209 (62percent) of the study participants were government abattoir customers, around46 (14 percent) are obtaining the service from private abattoirs, the remaining 84(25 percent) were obtaining from both government and private abattoir's customers.

Most of the customers (In government, private and both abattoirs) are in the age groups of 24-34 and 35-45, comprising around 30.7 and 35.30 percent of the study participants respectively, followed by the age group of 45-64 years (22 percent) on the other side, those in age category of below 25 and 64 and above were 7 percent and 4 percent respectively. Based on this research scope and significant amount of customer I focused on 209(62 percent) and 84(25 percent) of participants because the objective this research is to assess the abattoir service quality customer satisfaction level. the inclusive of other abattoir in this research is to understand the more needing area of abattoir service and experience of customers whose live in Addis Ababa. Abattoirs out and surrounding of Addis Ababa have not even minimum standard in terms of capacity and technology.

Table 5: Location Distribution of Respondents in Addis Ababa

Sub Cities	Frequency	Percent
Nefas silk sub city	96	28
Lideta sub city	42	12
Yeka sub city	22	6.4
Kolfe keraneo sub city	30	8.8
Addis ketema sub city	22	6.4
Kerqos sub city	28	8
Arada sub city	24	7
Gulela sub city	20	6
Akaki sub city	25	7
Bole sub city	30	8.8
Total	339	100

Source (Own Survey, 2019)

4.2. Reliability Test

Reliability test is important to measure internal consistency of scale i.e, the extent to which respondents rate the items in a similar pattern. Cronbach's alpha coefficient is important measurement of reliability which is discussed below in relation to this study.

Table 6: Cronbach's Alpha (Reliability analysis) Source: survey result (2019)

Dimensions	Cronbach's Alpha value	Number of items
Tangibility	0.915	5
Reliability	0.94	5
Responsiveness	0.961	4
Assurance	0.945	4
Empathy	0.972	4
Overall scale reliability	0.95	22

Cronbach's Alpha coefficient can be between 0 and 1. As a number come close to 1 means internal consistency of the items stronger implication that all items calculate the same variable (quality and satisfaction). Lee cronbach,(1951).it can be accepted as a reliable when reliability coefficient is greater than 0.5. As a result of the overall reliability of the scale is acceptable as its coefficient (0.946) is greater than 0.5. Moreover, the scale consistency of each dimensions are also good enough for the reliability coefficient of tangibility, reliability, responsiveness, assurance and empathy are of value 0.915, 0.940, 0.961, 0.945 and 0.972 respectively which are more than 0.5 and closer to 1.

4.3. Descriptive Analysis

As it has been noted in the previous portion of this paper, SEVQUAL model is used in this paper to measuring respondent's report towards abattoir's service delivery quality by using five service quality dimensions having 22 items. The paper also uses mean score to measuring respondent's report of Addis Ababa Abattoirs Enterprise ever all service quality and their satisfaction level

4.3.1. Assessment of the Service quality Using SERVQUAL 5 Dimensions

The mean score of the overall level of quality by the tangibility domain was 1.9(SD=0.9).This illustrates as the customer satisfaction on abattoir service delivery regarding to tangibility is not good as the mean is dispersed from the highest point on the scale.

The calculation of the mean of the dimension of tangibility show that materials associated with the service are visually appealing (M=2,SD=1) and convenience location of abattoir for animal delivery and meat distribution(M=2,SD=1) somehow good rather than others elements of tangibility, and modern looking slaughtering equipments(M=1.9,SD=0.9); visually appealing abattoirs compound facilities (M=1.6, SD=0.6) and neat appearance of meat distribution staff

(M=1.9,SD=1) are comparing to other mean scores and respondents satisfaction is very low in relative to the dimension appear to be key dissatisfaction drivers in relation to the domain.

Table 7: Tangibility analysis

Items	Frequency	Minimum	M	SD
		Maximum		
Modern looking slaughtering equipment	339	1-5	1.89	0.94
Visually Appealing Abattoirs compound facilities	339	1-5	1.61	0.60
Neat appearance of meat distribution staff	339	1-5	1.86	0.97
Materials associated with the service are visually appealing	339	1-5	2.15	1
Convenience location of Abattoirs' for animal delivery and meat distribution	339	1-5	2.21	1.12

Source (Own Survey, 2019)

Regarding to abattoir service quality reliability is somehow satisfactory. The mean score of the scale as rated by customers participated in the study was (M=2,SD=1)sincere interest in solving

customers is(M=2,SD=1) and staff performing service quality on meat hygiene(M=2,SD=1) were minimum level of reliability of customer satisfaction was reported. The next customers satisfaction driver was noting performed .next to staff performing service quality is providing service at the time they promise to do specially in meat distribution(M=2, SD=1) and low reliability of customer satisfaction.

It needs high improvement according to customer reaction, convenience location of abattoirs for animal delivery and meat distribution (M=2, SD=0.95) also low reliability of satisfaction of abattoirs customers. According to the analysis of customers report on the on the reliability dimension of abattoir service delivery satisfaction is needed yet, high level effort and improvement relative and against the rating scale.

Table 8: Reliability analysis

Items	Frequency	Minimum	M	SD
		Maximum		
Reliability of abattoirs service delivery capacity	339	1-5	2.36	1.01
Sincere interest in solving customers' problems	339	1-5	2.11	1.16
Staff performing service quality on meat hygiene	339	1-5	2.34	1.05
Provide services at the time they promise to do so specially in meat distribution	339	1-5	2.22	1
Convenience location of Abattoirs' for animal delivery and meat distribution	339	1-5	2.02	0.95

Source (Own Survey, 2019)

Responsiveness willingness and the commitment of firms; institution and organizations staff is becoming critical in the competitive business and industrial world especially in pursuable and timely demanded product or service, A firm is known to be responsive when it communicates to its customers how long it would take to get answers or have their problems deal with (Zeithaml ,2006). Regarding to the abattoirs responsiveness to customers was not sufficient.

The satisfaction level of the customer who participated in the research reported is not sufficiently happy by the responsiveness of the abattoirs staff delivery process. The mean score of the scale was (M=2, SD=1). As can be seen from the table below the scale was below 4, that the customers are low satisfied by the responsiveness of staff. That includes the staff telling customers exactly when service will performed; prompt service to customers; staff willingness to help and staffs are never be too busy to respond to customer request.

Table 9: Responsiveness; analysis

Items	Frequency	Min Max	M	SD
Staff telling customers exactly when services will be performed	339	1-5	1.95	1.10
Prompt service to Customers	339	1-5	2.01	1.11
Staff willingness to help	339	1-5	2.10	1.17
Staffs are never be too busy to respond to customers' requests	339	1-5	1.88	1.12

Source (Own Survey, 2019)

As assurance explained by Zeithaml , (2006) is knowledge and courtesy of employees and their ability to inspire trust and confidence. This dimension includes willingness to instill confidence in customers, being consistently courteous with customers, knowledgeable to answer customers' questions and feel safe confidence with the abattoir. The customers who participated in the study demonstrated low level of satisfaction by the staff knowledge, courtesy, as well as their ability to instill trust and confidence in the employees of the abattoir. The score of the domain was 2.1(SD=1.1). The key driver of satisfaction for the domain was the staff knowledge in addressing the concerns and questions of the customers followed by the degree of security (safety) the customers are not happy in their transaction. The customers also stated their low level of satisfaction by the friendliness and courtesy of the staff as well as the behaviors of the staff that yet not instill confidence. Table 12 shows the score of each of the elements of the sub scale. As

can be inferred from the score in the table, staff knowledge to answer the customers question and the degree of safety the customers are not stands as the two major satisfaction drivers for assurance.

Table 10: Assurance Analysis

Items	Frequency	Min / Max	M	SD
Behaviors of staff instill confidence in customers	339	1-5	1.83	0.99
Customers feel safe in their animal slaughtering at abattoirs	339	1-5	2.14	1.15
Friendliness and courtesy of staff	339	1-5	2.24	1.16
Staff having knowledge to answer questions	339	1-5	2.24	1.15

Source (Own Survey, 2019)

Among the five domains of the constructs of customer satisfaction, empathy was found to be the major driver of the customers' satisfaction. Zeithaml , (2006) described empathy as caring individualized attention of the abattoir to its customers and the customer is treated as if he is unique and special. The mean score of the sub scale was 2.1 (SD=1.08), which is lower than from most sub scales. The level of the customers' satisfaction by the individual attention they are given by the staff (M=2, SD=1.1), the individual attention they get from the staff (M=2, SD=1), as well as the understanding the specific slaughtering service needs of customer (M=1, SD=1) were found to be lower. Moreover, the customers are lower satisfied by the convenience slaughtering operating hours of the abattoirs (M=1, SD=1). On the basis of the level of satisfaction by the dimension of the domain, it is possible to note that getting personal attention from the staff and convenience of the operating hours are the primary drivers of customer satisfaction for the sub scale.

Table 11: Empathy Analysis

Items	Frequency	Min / Max	M	SD
Individual attention given by staff	339	1-5	2.06	1.14
Convenient slaughtering operating hours	339	1-5	2.20	1.06
Understand the specific slaughtering service needs of customers	339	1-5	2.12	1.05
Staff giving customers personal attention	339	1-5	2.06	1.09

Source (Own Survey, 2019)

4.3.2. Ranking the Five Quality Dimensions

The intention of this analysis is to demonstrate and identify the level of the abattoir service quality by analyze the respondents report from the questionnaire. Based on five quality dimensions and ranking them to emphasis on the identified gape even if all dimensions have lower satisfaction level, Tangibility & Responsiveness are needed higher attention. The issue of customer satisfaction whether being antecedent of service quality or the outcome of service quality is widely debated across existing literatures. Recent studies by (González & Brea, 2005; & Ekinci 2004 using recursive structural models provided empirical support that service quality results in customer satisfaction.

The overall customer satisfaction of the abattoirs service customers was found to be low (M=2, SD=1). This was measured as the mean of all the five domains indicated below. Even if from the five domains reliability, assurance and empathy of the abattoir were found to be somehow drivers of the customer satisfaction those are need high improvement. On the other hand, tangibility and responsiveness were identified an area that needs series improvement with particular emphasis on the drivers of customers satisfaction for the sub scales.

Table 12: Analysis of five quality Dimensions

Dimensions	Frequency	Min/ Max	M	SD
Tangibility	339	1-5	1.944	0.926
Reliability	339	1-5	2.21	1.034
Responsiveness	339	1-5	1.985	1.125
Assurance	339	1-5	2.1125	1.1125
Empathy	339	1-5	2.11	1.085
Overall service quality	339	1-5	2.39	1.00
Customer satisfaction	339	1-5	2.00	1.051

Source (own survey, 2019)

The above table shows respondents' perception towards service quality dimensions, over all service quality and customer satisfaction. As clearly seen in the table 17, the perception of respondents on Reliability is 2.21 in terms of mean score which is better than other service quality dimensions. On the other hand, Empathy and assurance have moderate perception with mean score of 2.11, and 2.1125 respectively. However, customers' perception on tangibility and responsiveness are relatively the least perceived value from the services quality dimensions with mean score of 1.944 and 1.985 respectively.

The mean perception of the customers on the Reliability is good (2.21) which show that the customers are being getting the promised thing on time, solving problems to the services immediately and efficiently. Similarly, the service quality perception of respondents on Assurance and Empathy rated as good (2.11 and 2.1125 respectively) and both are the second better dimensions which reflects in the first place concerning assurance it reflected in the form of having good information on the services, inspiring confidence and being courteous in providing the services, and secondly concerning empathy it reflects that the abattoirs measures the state of knowing the best interest of the clients. While tangibility reflects the responsiveness of the service providers physical facilities and deployment of modern equipment, and responsiveness

informed the exact time of service delivery, the employees of the service provider abattoir are willing and quick in their response to customers queries and performed perform poor as compared to the other dimensions.

In summary of the above table the mean perception of respondents with over all service quality and customer satisfaction are moderate with a mean value of 2.4 and 2.0 respectively. When we see these mean figures in light of Anton (1997) three zones of perception of service performance, abattoirs customer satisfaction index is between 50 and 84 which are under tolerance (acceptance) zone.

4.3.3. Assessment of service quality in respect with technology and waiting time

The evaluation of the service quality of the abattoir in terms of the utilization of modern technologies like slaughtering pre-mortem and postmortem inspection, hygiene, meat healthiness, neatness rated by the participated (20.6 percent) consider it as good. Looking at the degree of the customers' appreciation of the abattoir using modern technologies, around 18 percent rated it as satisfactory, 14.4 percent rated it as very good and excellent. On the other hand, around 47.2 percent of the respondents indicated as the service quality of abattoir with regard to use of technological advancements is poor.

Table 13: Rating modern slaughtering system of the abattoir

Description	Rating	Frequency	Percent	Valid Percent
How do you rate Abattoirs slaughtering service in relation with technology like, slaughtering pre-mortem and postmortem inspection, hygiene, meat healthiness, neatness?	Poor	160	47.2	47.2
	Satisfactory	60	17.7	17.7
	Good	70	20.6	20.6
	Very Good	31	9.1	9.1
	Excellent	18	5.3	5.3
	Total	339	100.0	100.0

Source (Own Survey, 2019)

The evaluation of the service quality of the abattoir in terms of the believing customers of abattoirs in Addis Ababa service is advanced in modern technology utilization. As perceived by the customer is not good. Around 41.3 percent of the customers who took part in the study reported as the position of the abattoir is poor (20 percent rated it as satisfactory while 21.8 percent rated as good) in comparison of abattoir with other practical their knowledge in the abattoir industry, around 17 percent of the customers indicated as the abattoir is very good and excellent in this regard.

Table 14: Abattoirs service in Addis Ababa is advanced in modern technology utilization

Description	Rating	Frequency	Percent
Respondents believing that abattoirs in Addis Ababa service is advanced in modern technology utilization	Poor	140	41.3
	Satisfactory	68	20
	Good	74	21.8
	Very Good	36	10.6
	Excellent	21	6.2
	Total	339	100.0

Source (Own Survey, 2019)

The evaluation of the service quality of the abattoir in terms of the waiting time of abattoirs meat distribution service is very low, around 16.8 percent of participants are rated as poor, 26.5 percents of respondents consider it as satisfactory, 36.9 percent of participants consider as good, 20 percent of respondents reported as very good and excellent for the waiting time of meat distribution of abattoir.

Table 15: Respondents distribution on rating the waiting time of meat distribution service

Description	Rating	Frequency	Percent
Rating the waiting time of abattoirs meat distribution service	Poor	57	16.8
	Satisfactory	90	26.5
	Good	125	36.9
	Very Good	49	14.5
	Excellent	18	5.3
	Total	339	100.0

Source (Own Survey, 2019)

In view of the respect to customer needs of slaughter service, 44.8 of the respondents are recognized that the abattoir respect their needs, the respect of as they do so while a significant percentage of the customers (55.2 percent) indicated as they did not recognize the abattoir respect their need on slaughter service, Their satisfaction to abattoir is low level dissatisfaction by the customers to the may influence the customers' satisfaction negatively.

Table 16: Distribution on satisfaction of abattoirs in respect to slaughter service demand

Respondents

	Frequency	Percent
YES	152	44.8
NO	187	55.2
Total	339	100.0

Source (Own Survey, 2019)

4.3.4. Assessing Customers Expectation towards Abattoirs Service

As it is discussed in the literature review the perception level should be higher than the expectation level to create the positive perception. As to the responses of the customers participated in study, the gap between the expectation of the customers while considering to be the customers of the abattoir and the extent to which their expectations were realized was found to be wide. The majority of the study participants indicated as there degree of the difference between their expectations and the reality was low (31 percent) and 40 percent as moderate. On the other hand, around 30 percent of the study participants reported that the gap was also wide.

Table 17: Gap between customers’ expectation and the actual performance of the Abattoirs

Description	Rating	Frequency	Valid Percent
Respondents distribution on rating of the gap between their expectation and the actual performance of the Abattoirs	High deviation	101	29.8
	Moderate Deviation	134	39.5
	Low deviation	75	22.1
	Very Low deviation	29	8.6
	Total	339	100.0

Source (Own Survey, 2019)

Regarding the effect of the variation, more than half of the participants reported the difference in their expectation and quality of service affect them negatively. While around 4 percent expressed as they were not affected by the difference, around 35 percent reported as they were stayed positive. On the contrary, 61 percent reported as the gap did affect them negatively. This will have a negative effect on the abattoir image and customers base in the long term and needs to be tackled early.

Table 18; Customer handling effect of the Abattoirs

Description	Rating	Frequency	Valid Percent
Respondents affect their relationship with the abattoirs	Yes, it affects negatively	207	61
	Yes, it affect positively	118	34.8
	No, I stayed neutral	14	4.1
	Total	339	100.0

Source (Own Survey, 2019)

In view of the above, the respondents were asked whether they had presented their complaints to the abattoir in relation to their expectations. Around 61.4 percent responded as they do so while a significant percentage of the customers (38.6percent) indicated as they did not report their complaints to the management. The low level dissatisfaction and complaint by the customers to the abattoirs may influence the customers' satisfaction negatively and hinders the abattoir capacity to improve the quality of the service they rendered.

Table 19; Distribution on step to put any complaints with management for any dissatisfaction

Description	Rating	Frequency	Valid Percent
Respondent's distribution on step to put any complaints with management for any dissatisfaction.	Yes	208	61.4
	No	131	38.6
	Total	339	100

Source (Own Survey, 2019)

Complaint is one way of getting feedback for firm management and handling complaints on time very wisely is one of the company management responsibilities. In view of this, around 20 percent of the study participants expressed as they did not get response in time. Moreover, most of those who are not gets the responses reported as the response were dissatisfactory, in late

response. In connection to this, 0.9 percent of the customers indicated as the response was quick and positive, and 3 percent indicated as the response was quick. Nevertheless, around 24 percent of the customers reported as they did not get response while around 53 percent complain about the delay in giving the response from the abattoir.

Table 20;rating the response of the abattoirs’ management for their complaint

Description	Rating	Frequency	Percent
Rating the response of the abattoirs’ management for their complaint	Not response at all.	80	23.6
	Late response	180	53
	Respond at reasonable time	67	19.8
	Quick response	9	2.7
	Quick & Positive response	3	0.9
	Total	339	100.0

Source (Own Survey, 2019)

The total service quality of the firm is very critical to sustain in the competitive environment and customer satisfaction, regarding to the total service quality of abattoirs’ in Addis Ababa, 38 percent of participants reported as poor of service quality of Abattoir, around 23 percent of respondents reported as satisfactory, 29 percent customers reported as good and 9 percent of participants had report as very good and excellent. The data below indicates those most of customers have considered the service quality as low.

Table 21; rating the total service quality of abattoirs' in Addis Ababa

Description	Rating	Frequency	Valid Percent
Respondents rating the total service quality of abattoirs' in Addis Ababa	Poor	130	38.3
	Satisfactory	79	23.3
	Good	98	28.9
	Very Good	20	5.9
	Excellent	12	3.5
	Total	339	100.0

Source (Own Survey, 2019)

Customer satisfaction is the primary out of quality service, around 26 percent of the study participants are reported their high unsatisfied, around 38 percent of participants are unsatisfied, and 23 percent participants are neutral, around 13 percent of respondents has satisfied and also only 0.6 percent of participants have very satisfied, regarding to the satisfaction level with overall service of abattoirs in Addis Ababa, most of customers have not satisfied.

Table 22; Distribution on their satisfaction level with overall service of the Abattoirs Service

Description	Rating	Frequency	Valid Percent
Respondent's distribution on their satisfaction level with overall service of the Abattoirs in Addis Ababa.	Highly unsatisfied	87	25.7
	Unsatisfied	127	37.5
	Neutral	78	23
	satisfied	45	13.3
	Very satisfied	2	0.6
	Total	339	100.0

Source (Own Survey, 2019)

From the result of analysis of respondents' report which indicated on above table fatherly describe the findings on the distribution on their satisfaction level with overall service of the Abattoirs in Addis Ababa by the following graph which presented in percent.

Customer evaluation and comment is an input to service quality improvement. 29 percent of participants have measuring the abattoir service quality as poor, 16 percent participants measure as satisfactory, around 29 percent of respondents have measure as good, and also 15 percent of customers have measure as very good, 10 percent of participants measure as excellent, most of the study participants have measure as lower.

Table 23; Abattoirs' service quality against illegal slaughtering practices as service option

Description	Rating	Frequency	Valid Percent
Respondent's distribution on their measurement on abattoirs' service quality.	Poor	98	28.9
	Satisfactory	55	16.2
	Good	99	29.2
	Very Good	52	15.3
	Excellent	35	10.3
	Total	339	100.0

Source (Own Survey, 2019)

As a proxy indicator of the customers' satisfaction as well as a measure of the customers' commitment, the customers who participated in the study were asked if they are intending to continue being the abattoirs customers. Most of the study participants (82 percent) asserted as they will continue being the customers of abattoirs in Addis Ababa. 32 percent of the respondent declared their loyalty for abattoir and 50 percent declared that they will stay with abattoir and wait for changes in the service quality aspect, and 18 percent of the respondents confirm that they will be moving to other options to get the service that they are looking for future.

Table 24; willingness to continue being customer of the abattoirs of Addis Ababa

Description	Rating	Frequency	Valid Percent
Respondents willingness to continue being customer of the abattoirs of Addis Ababa	NO, No other options	61	17.99
	Yes, I will stay as a customer.	109	32.2
	Yes, I will wait for changes	169	49.9
	Total	339	100.0

Source (Own Survey, 2019)

Around 109 respondents(32 percent) of respondents have willingness to continue with abattoirs 61(18percent) of respondents have reported that they need other options to leaf from the Addis Ababa Abattoirs and the rest of 169(50 percent) of respondents have reported that, even if they are dissatisfied they will stay with Addis Ababa Abattoir for future change and improvement.

4.4. Correlation Analysis of Service Quality Dimensions, Service Quality and Addis Ababa Abattoirs Services Level of Satisfaction

Correlation analysis is used to check the strength of the relationship among various variables. In this paper, the correlation of service quality dimensions, over all service quality and level of customers' satisfaction will be analyzed. The value of correlation coefficient could take values between -1 and 1 which means the coefficient is ranging from being negatively correlated (-1) to uncorrelated (0) and to positively correlated (1). The Pearson correlation result $r(\rho)$ indicates the magnitude of relationships in the following categorization (DANCEY & REIDY, 2004): the

relationship is weak if the coefficient is between 0.10 and 0.3, moderate when it is between 0.40 and 0.6 and strong when it is between 0.70 and 1.00. When correlation analysis coefficient is equal to 1, Pearson result consider it as perfect correlation.

Table 25; Correlation (Relationship among Service Quality Dimension, Overall Service Quality and Customer's Satisfaction)

Correlations							
	Level of customer satisfaction	Over all service quality	Tangibility	Reliability	Responsiveness	Assurance	Empathy
customer satisfaction	1						
Over all service quality	.893**	1					
Tangibility	.731**	.729**	1				
Reliability	.749**	.742**	.642**	1			
Responsiveness	.382**	.572**	.419**	.489**	1		
Assurance	.516**	.549**	.417**	.499**	.229**	1	
Empathy	.826**	.864	.518**	.689**	.475**	.584**	1

** .correlation is significant at the 0.05 level (2-tailed).

As it can be seen from the above table, all service quality dimensions, tangibility, responsiveness, reliability, assurance and empathy have positive relationship with over all Source (Own Survey, 2019) service quality and customer satisfaction though the magnitude of the relationship differ among service quality dimensions.

Empathy, reliability and tangibility have a high coefficient value of 0.864, 0.742 and 0.729 respectively showing the existence of significant and strong relationship with over all service quality. However, responsiveness and assurance with the correlation coefficient value of 0.572 and 0.549 exhibit moderate relationship with the overall services quality of the company.

On the other hand, all service quality dimensions have positive relationship with the level of customer satisfaction albeit with varying degree. In light of this, empathy, reliability and tangibility have a correlation coefficient value of 0.826, 0.749 and 0.731 respectively showing the existence of significant and strong relationship with customer satisfaction. Whereas

assurance and responsiveness have weak correlation coefficient with value of 0.49 and 0.38 respectively confirming that their relation with customer satisfaction is weak. The implication of the analysis result is that the better the quality of service with service quality dimensions items of empathy, reliability and tangibility, the higher the level of Abattoir's customer satisfaction

Finally, the relationship between the overall service quality and customers' satisfaction is also analyzed using a correlation analysis. The result shows that, overall service quality and customer satisfaction have both positive and significant relationship with a correlation coefficient value of 0.49. In effect this confirms the statements:

- By Parasuraman, Zeithmal and Berry (1985, 1988) who point out that service quality and customer satisfaction are closely related.

By Cronin and Taylor (1992) explaining service quality is an antecedent of satisfaction.

Table 26: Multicollinearity for overall service quality

Dimensions	Unstandardized Coefficient		Standardized Coefficient	T	Sig.
	B	Std. Error	Beta		
Tangibility	0.045	.160	.055	1.25	.335
Reliability	0.61	.053	0.115	2.85	.145
Responsiveness	0.140	.050	.142	3.89	.025
Assurance	0.244	.072	.215	4.845	.008
Empathy	0.452	.053	.0380	4.244	.000

Source; Survey(2019)

Tolerance is an indicator of how much of the variability of the specified independent variable is not explained by the other independent variables in the model and is calculated using the formula $1 - R^2$ for each variable. If this value is very small (less than .10) it indicates that the multiple correlation with the other variables is high. Suggesting the possibility of multicollinearity. The other value given is the VIF (variance inflation factor), which is just the inverse of the Tolerance value.

VIF value above 10 would be a concern here. indicating multicollinearity. Multicollinearity can be detected with the tolerance value and variance inflation factor (VIF).as shows the tolerance value of all independent variable are above 0.1 and the significance value statistics all b2bservqual models are less than 0.05 showing that there is relatively significant relationship between the dependent and independent variables.

4.5. Summary of Hypotheses Testing

The conceptual frame work developed under the literature review of this paper is tested by using tools in both descriptive and inferential analysis like mean, standard deviation, Pearson correlation. The test result is summarized as follows

Table 27: Summary of Hypothesis Testing

Hypothesis	Hypothesis Test	Result
H1: Service quality dimensions contribute positively and significantly to the level of customer satisfaction	Mean; standard deviation and Pearson correlation Multicollinearity	Supported

4.5.1.Descriptive Statistics on B2BSERVQUAL model dimensions

Description of variables used in the descriptive statistics in this study include the minimum, maximum, range, mean and standard deviation of the dependent variable, The dependent variable is customer satisfaction and ten independent variables are tangible, reliability, assurance, responsiveness and empathy, price, accessibility, credibility, market forces, and geographical presence (region). Descriptive statistics related to the collection and ranking of data. Descriptive statistics describe the character of the samples used in this study. More about Descriptive statistics in this study is shown in Table below.

Table28: Descriptive Statistics ofB2BSERVQUAL Dimensions

Dimensions	Frequency	Range	Mini.	Maxi.	Mean	Std.deviation
Tangibility	339	0.62	3.53	4.15	1.94	0.97
Reliability	339	0.05	5.13	5.18	2.21	1.04
Responsiveness	339	0.48	4.12	4.6	1.99	1.13
Assurance	339	0.91	4.01	4.92	2.11	1.12
Empathy	339	0.31	4.51	4.82	2.06	1.09
price	339	1.31	2.44	3.75	3.2351	.18249
Accessibility	339	1.01	2.67	3.71	3.5274	.17517
Credibility	339	1.04	2.52	3.56	3.6421	.18516
Market clout	339	1.08	2.46	3.54	3.5041	.1841
Geographical Presence	339	1.14	2.54	3.68	3.3414	.19345

Source: SPSS

The table above shows the gap on the maximum and minimum values of variables that are tangible, reliability, assurance, responsiveness, assurance, empathy, price, accessibility, credibility, market forces and geographical presence.

4.5.2. Description of Tangible

From Table 28, it can be explained that the lowest scores (minimum) is at 3.53 and highest scores (maximum) is at 4.15 with range of 0.62. The average score of the answer of variable is 1.94 and a standard deviation is 0.21, which is smaller than the average value. This indicates that the distribution of respondents towards Tangible Dimensions data on abattoirs service is good.

4.5.3. Description of Reliability

From Table 28, can be explained that the lowest scores (minimum) is at 5.13 and highest scores (maximum) is at 5.18 with range at 1.2. The average score of the answer of variable is 1.94 and a standard deviation is 0.9, which is smaller than the average value. This indicates that the distribution of respondents towards tangible Dimensions data on the abattoirs service is good.

4.5.4. Description of Responsiveness

From Table 28, can be explained that the lowest scores (minimum) is at 4.12 and highest scores (maximum) is at 4.6 with range at 0.48. The average score of the answer of variable is 1.99 and a standard deviation is 1.13, which is smaller than the average value. This indicates that the distribution of respondents towards Responsiveness Dimensions data on the abattoirs service is moderate.

4.5.5. Description of Assurance

From Table 28, can be explained that the lowest scores (minimum) is at 4.01 and highest scores (maximum) is at 4.92 with range at 0.91. The average score of the answer of variable is 2.11 and a standard deviation is 1.0, which is smaller than the average value. This indicates that the distribution of respondents towards Assurance Dimensions data on the abattoirs is not good.

4.5.6. Description of Empathy

From Table 28, can be explained that the lowest scores (minimum) is at 4.51 and highest scores (maximum) is at 4.82 with range at 0.31. The average score of the answer of variable is 2.06 and a standard deviation is 1.09, which is smaller than the average value. This indicates that the distribution of respondents towards Empathy Dimensions data on the abattoirs service quality is not good.

4.5.7. Description of Price

From Table 28, can be explained that the lowest scores (minimum) is at 2.44 and highest scores (maximum) is at 3.75 with range at 1.31. The average score of the answer of variable is 3.2 and a standard deviation is 0.18, which is smaller than the average value. This indicates that the distribution of respondents towards Price Dimensions data on the abattoirs service is not satisfactory.

4.5.8. Description of Accessibility

From Table 28, can be explained that the lowest scores (minimum) is at 2.67 and highest scores (maximum) is at 3.71 with range at 1.01. The average score of the answer of variable is 3.52 and a standard deviation is 0.17, which is smaller than the average value. This indicates that the distribution of respondents towards Accessibility Dimensions data on the abattoirs service is not satisfactory.

4.5.9. Description of Credibility

From Table 28, can be explained that the lowest scores (minimum) is at 2.52 and highest scores (maximum) is at 3.56 with range at 1.04. The average score of the answer of variable is 3.6 and a standard deviation is 0.18, which is smaller than the average value. This indicates that the distribution of respondents towards Tangible Dimensions data on the abattoir service is not good

4.5.10. Description of Market Clout

From Table 28, can be explained that the lowest scores (minimum) is at 2.46 and highest scores (maximum) is at 3.56 with range at 1.08. The average score of the answer of variable is 3.5 and a standard deviation is 0.18, which is smaller than the average value. This indicates that the distribution of respondents towards Market Clout Dimensions data on the abattoirs service is poor.

4.5.11. Description of Geographical Presence

From Table 28, can be explained that the lowest scores (minimum) is at 2.54 and

highest scores (maximum) is at 3.68 with range at 0.91. The average score of the answer of variable is 3.3 and a standard deviation is 0.19, which is smaller than the average value. This indicates that the distribution of respondents towards Geographical Presence Dimensions data on the abattoirs service is low satisfaction.

Table29:B2BSERVQUAL gap scores related to each dimension

Dimension	Performance	Expected	Gap Score
Tangible	2.13	4.35	2.22
Reliability	2.27	4.38	2.11
Responsiveness	2.21	4.40	2.19
Assurance	2.20	4.36	2.16
Empathy	2.43	4.75	2.5
Price	2.26	4.80	2.54
Accessibility	2.45	4.54	2.09
Credibility	2.47	4.72	2.25
Market Clout	2.38	4.65	2.27
Geographical Presence	2.42	4.48	2.06
Average	2.22	4.964	2.744

Source: Self-Construction

Based on the data, service quality gap represent butchers' expectation is less than their perception of a specific clause. According to the table, the organization has had the weak service

delivery performance and has got the largest gap score on tangibility at is quality of the service (2.22), Reliability that is sincerity of the employees (2.11), and The deepest gaps belongs to service delivery with the ability to respond to the clients' request even when that are busy that is significant gap, The Price that is the price offered has the gap with the customer expectation (2.54), that is the ability to provides slaughtering and meat distribution service by determine price of the service. the ability of employees to respond to the customer' request and complaints immediately, As it has shown in the table below, the biggest gap between dimensions belongs to reliability that is the ability to respond to the customer' request even when that is busy On the other hand the organization has had the some lack of performance in tangible of service dimensions are really close to each other and the abattoir has to pay attention to improve the satisfaction level.

Chapter Five

Summary, Conclusion and Recommendation

The chapter presents summary of findings, the conclusion finally drawn and recommendations based on the presented data, analysis made and reviewed literatures.

5.1. Summary

Assessing the overall service delivery quality of abattoir in Addis Ababa from the data collected, analysis made and reviewed literatures in order to meet the objective of the study which was to assess quality of service at Abattoirs on Addis Ababa and to give an insight for the City Administration regarding the level of quality of the service they rendered and to provide recommendation for their future actions. using service quality parameters, The paper adopted qualitative research strategy and used self administered questionnaire to collect data from the customer, Descriptive statistics like frequency, mean and standard deviation analysis techniques were applied to analyze background information of respondents, respondents' perception on abattoir service quality as well as relationship between service quality dimensions and customers' satisfaction. To clearly assess the gap between abattoir service quality and customer perception in Addis Ababa and other related objectives mentioned earlier, the study put the following as its summary abattoir service customer findings. After analyzing the information gathered through structured questionnaires, the following major findings are presented the total 100 percent of 339 respondents have returned the questionnaires.

According to this study survey data and the interview, around 69 percent of market share hold by Addis Ababa Abattoirs Enterprise(AAAE) and the rest of 31 percent market share were others small 4abattoirs those located at surrounding Addis Ababa city Administration in Oromia Region; Majority of 189 (56 percents) of respondents have Certificate and below.

This study shows that more meat business men are not high educated the majority of the respondents are within the age range of 35-45 which accounts 35 percent (120) of the total respondents. Next big proportion goes to respondents with the age between 25-34 accounting 31 percent (104). This indicates that majority of the respondents are in active workable age.

In terms of types of service demand Most of customers or around 92 percent of participant obtained animal slaughtering service from abattoir ,the remain customers have demanded to purchasing animal by products and hide and skin. That indicates most study participants are butchers or meat traders in Addis Ababa.Major 61 percent of respondents have reported, that they located at remote area from the Addis Ababa Abattoir .that consider as one challenges on time delivery. Regarding to the number of years the customers have stayed with Addis Ababa Abattoirs,119 respondents (35 percent) and 77 respondents (23 Percent) have been 6-11 and19years and above , that means more than 15 years working experiences respectively.

This statistic confirms that the respondents have better work experience and knowledge about meat trading and meat industry revealed in the analysis customers ranked, Even if from the five domains reliability, assurance and empathy of the abattoir were found to be some how drivers of the customer satisfaction those are need high improvement. On the other hand, tangibility and responsiveness were identified an area that needs series improvement with particular emphasis on the drivers of customers satisfaction .and the abattoir should work more on tangibility and responsiveness dimensions respectively.

The gap analysis of the five dimensions were rated as satisfactory, But improvement in all the five dimensions is needed, especially on the two service quality dimensions: While tangibility and responsiveness have shown up to be less; thus requiring concentrated effort for improvement from the abattoir management. On the modern looking of the abattoir service, 140(41percent) of study participants had reported as poor. The majority of the study participants indicated as there degree of the difference between their expectations and the reality was low the customers of the abattoir have higher expectations than what they actually receive from the abattoir even though the gap is not very high.

As seen from the analysis around 62 percent of the respondents are government abattoir customers and 14 percent of respondents are private abattoir customers, the rest of 25 percent of respondent are both government and private abattoir customers, so that they can compare the service of one abattoir from the other. Majority of the study participants (82 percent) asserted as they will continue being the customers of abattoirs in Addis Ababa, 32 percent of the respondent declared their loyalty for abattoir and 50 percent declared that they will stay with abattoir for

changes in the service quality aspect, and 18 percent of the respondents confirm that they will be moving to other options to get the service, that most respondents are loyal and looking for future.

In general most of responds had reported that they have not satisfaction in terms of animal slaughtering process, the quality of meat cutting, hygiene and Caracas separation and delaine of meat distribution for their selling to consumers.

5.2. Conclusion

One of integral part of agriculture sector of the country's economy is agro-processing and abattoir industry, abattoir is organized as public or private entity to deliver animal ante-mortem and post-mortem meat inspection by aim of preventing and realization on diseases infected meat which transferring from animal to human being through meat consumption and providing animal slaughtering & meat distribution service to meat retailers as well as meat consumers.

Butchers located at Addis Ababa and surrounding it are normally buying animals from traders and get slaughtering and transport services at nearby abattoir, Service quality has become one of the key driving forces for business sustainability and is vital for firms' accomplishment. Service quality in Slaughtering implies consistently anticipating and satisfying the needs and meets expectations of customers. Meat traders have different challenges regarding to constantly incremental of value chain actors, good and quality abattoir slaughtering and meat distribution service and healthy animal meat, create customer and butchers satisfaction regarding to profitability, competitiveness in the market, consumers satisfaction and sustain in meat business environment. Addis Ababa Abattoirs Enterprise is the main central Abattoirs which had responsible for slaughtering animals and distribution of meat service to butchers and customers in Addis Ababa.

According to the respondents of study, abattoirs in Addis Ababa have so many constraints, in terms of capacity, lack of facility modernization. Convenience of location and on time addressing of the service, customer handling and employee's knowledge to understand their needs and high price of service charge The overall customer satisfaction of the abattoirs service customers was found to be low ($M=2$, $SD=1$). This was measured as the mean of all the five domains indicated below the five domains reliability, assurance and empathy of the abattoir were found to be somehow drivers of the customer satisfaction those are need high improvement.

On the other hand, tangibility and responsiveness were identified an area that needs series improvement with particular emphasis on the drivers of customers satisfaction for the sub scales. The evaluation of the service quality of the abattoir in terms of the utilization of modern technologies like slaughtering pre-mortem and postmortem inspection, hygiene, meat healthiness, neatness rated by the participated (20.6 percent) consider it as good. Looking at the

degree of the customers' appreciation of the abattoir using modern technologies, around 18 percent rated it as satisfactory, 14.4 percent rated it as very good and excellent.

Besides around 47.2 percent of the respondents indicated as the service quality of abattoir with regard to use of technological advancements is poor. The evaluation of the service quality of the abattoir in terms of the believing customers of abattoirs in Addis Ababa service is advanced in modern technology utilization. As perceived by the customers are not good. Around 41.3 percent of the customers who took part in the study reported as the position of the abattoir is poor (20 percent rated it as satisfactory while 21.8 percent rated as good) in comparison of abattoir with other practical their knowledge in the abattoir industry, around 17 percent of the customers indicated as the abattoir is very good and excellent in this regard.

The evaluation of the service quality of the abattoir in terms of the waiting time of abattoirs meat distribution service is very low, around 16.8 percent of participants are rated as poor, 26.5 percent of respondents consider it as satisfactory, 36.9 percent of participants consider as good, 20 percent of respondents reported as very good and excellent for the waiting time of meat distribution of abattoir.

As to the responses of the customers participated in study, the gap between the expectation of the customers while considering to be the customers of the abattoir and the extent to which their expectations were realized was found to be wide. The majority of the study participants indicated as there degree of the difference between their expectations and the reality was low and 40 percent respondents reported as moderate deviation. On the other hand, around 30 percent of the study participants reported as high deviation the rest of 31 presents reported as low and very low deviation. That the gap was also wide. 61.6 percent of the respondents are prefer government abattoir rather than private and both types of abattoir and 50 percent respondents are committed to wait with the government abattoir the change of slaughtering service. That indicates more of customers are loyal customers of Abattoir in Addis Ababa.

To conclude from analysis of the study, regarding to service quality delivery of abattoir in Addis Ababa is not satisfactory and it needs high and series improvement on modernization capacity expansion of slaughter house activities of abattoir to deliver quality service in Addis Ababa Administration.

5.3. Recommendations

From the finding and Resulting of the study analysis and the conclusion the recommendation has mentioned below the city administration give an attention and acknowledgment for meat processing industry sector and significances of abattoir service, social., economic and environmental benefits and impact. The city administration should be initiate the engagement of the private sector to expand and modernizing the abattoir or meat processing industry to fulfill the growing meat demand of Addis Ababa and substitute the import cattle meat for star hotels and supermarkets.

To equitable meat market competition and protect legal butchers. The city administration of Addis Ababa should protect against illegal slaughtering out of Abattoirs and on street marketing of livestock and should put and/or enforce legal punishments for doing so.

To address the slaughtering and fast meat distribution ,The city administration should be built more number of satellite abattoirs at all directions of the city in Addis Ababa to meet satisfaction and the increasing demand of meat consumption of meat which processed from the slaughter house in the city.

The abattoir in Addis Ababa should be establish abattoirs training center to operate abattoir facility and modernize slaughtering service by develop employs knowledge and skill to fulfill quality service delivery of abattoir based on international standard in Addis .

The city administration should be implement mobile abattoir service by benchmarking from other nations cities, to improve slaughtering service and increase butchers satisfaction and to diversify abattoir service.The current public; Addis Ababa Abattoirs Enterprise should initiate the engagement and co-operate with the stakeholders and private sector to improve its whole process in a modern way giving attention on upgrading current semi- machine and manual slaughtering operations to full machine based facilities as well as child and hygiene meat distributing in the city.

The Addis Ababa abattoirs Enterprise and other small slaughter houses surrounding the city should be re-design the meat distribution routs in the city to facilitate meat distribution service to customers and minimize distribution cost and on time delivery regarding to the growth of the city

and urbanization. The Addis Ababa Abattoirs Enterprise should be improve the current one shift working hours to 24 working hours to address the service on needed time.

5.3.1. Government policy and legislation revision and enforcement

The conversion of livestock into meat at the abattoir stage can be linked to various health and environmental hazards. Fortunately, these hazards can be contained if abattoirs function properly and produce meat according to stringent hygiene and environmental rules and regulations. In this context, one key responsibility of governments is to develop and provide for abattoirs and for the meat sector as a whole the necessary hygiene and environmental legislative frameworks. These need to be supplemented by regulatory systems (“directives”) to be issued by governments and designed to implement and strictly enforce the laws. The abattoir sector in Ethiopia has been neglected compared to other sectors of national and regional livestock development. Consequently governments should, on the basis of effective hygiene laws and regulations, encourage and facilitate the construction of good standard abattoirs by the private or public sector, e.g. through the removal of bureaucratic obstacles, the provision of sound technical advice, and the identification of possible state financial incentives or subsidies

5.3.2. Enhance ensuring public health standards and consumer protection

One principle of modern meat hygiene is the sharing of responsibilities for consumer protection between the meat business operator and the government official health and hygiene control entities. Meat business operators must be prepared to accept the primary responsibility for the hygienic quality and safety of meat and meat products. They are supervised in this task by the official government control authorities. In order to enhance the viability and safety of current consumer protection systems in the Addis Ababa, a significant increase of investment by abattoir/meat business operators in suitable equipment for hygienic slaughtering and proper meat inspection as well as in waste treatment facilities is an urgent requirement. In addition, governments must participate in complementary investments focused on capacity building in Good Hygiene Practices and sanitary control of meat.

Cooperation between the meat business operators and the supervising Government personnel, usually official veterinarians, must be improved to ensure that those officials have unrestricted access to the meat plants and are provided with all necessary documentation regarding food

chain information and internal hygiene process control. Effective process control in abattoir operations on the basis of Good Hygiene Practices (GHP) and Hazard Analysis and Critical Control Point Schemes must be the ultimate target to be achieved in the necessary closer cooperation between meat business operators and veterinary authorities.

Ensuring efficient and comprehensive consumer protection requires that GHP measures do not focus exclusively on sanitary abattoir operations, but also on the handling of live animals at the pre-abattoir and of the meat produced at the post-abattoir stage.

Government initiated public health measures in this respect comprise efficient ante-mortem inspection by official veterinarians, assessment of the risk of residues in meat caused by illegal or inadequate feeding practices as well as hygiene control during the handling of meat post-abattoir, including transport/distribution through the meat supply chain. It is clear that the benefits achieved by hygienic abattoir operations/management will be negated by severe meat contamination occurring during the various meat retail operations

5.3.3. Improving meat inspection practices

Consumer protection can only be assured by the implementation of internationally accepted meat inspection practices required to prevent the spread of zoonotic and/or food-borne diseases. Current practices in Addis Ababa Abattoirs are very deficient and in some private Abattoirs the situation has even deteriorated. This necessitates urgent and immediate improvements, both in terms of available personnel and efficient meat inspection practices. It is the role and responsibility of governments to provide sufficient inspection personnel.

To facilitate this process in the context of scaled down resources, the closing down of a number of inefficient and unhygienic small slaughterhouses and concentrating resources (both financial and human) on fewer but good standard abattoirs would be a rational move towards ensuring existing plants with more effective official inspection services.

Governments must also invest in human capacity by laying more emphasis on improving the proficiency of meat inspection personnel Supporting the meat inspection services includes ensuring the availability of laboratory facilities in each Abattoirs for diagnosing parasitic or infectious diseases.

Concurrently the hygienic status of meat and meat products produced for the Addis Ababa markets as well as the hygiene of equipment and premises used in the slaughterhouses and meat chain including bluchers should be tested in such laboratories.

5.3.4. Promote local abattoir engineering companies/equipment manufacturers

The poor functioning and hygiene of many abattoirs in Addis Ababa is linked to the fact that efficient and good quality slaughter equipment is practically only available from developed countries, at costs not readily affordable by local Abattoirs. The majority of most locally produced abattoir equipments are typically deficient in terms of material quality and functionality. This results in difficulties in operating such equipment properly, breakdowns, corrosion and short productive life. Local companies engaged in the manufacture of abattoir equipment should be promoted by technical assistance programmers. Their access to internationally developed technologies should be facilitated; this could include the import of locally not available machinery and materials.

5.3.5. Set up a representative range of pilot equipment for abattoir operations

The establishment of pilot and demonstration facilities, featuring recommended equipment for abattoirs for replication would be one initial step in technically and hygienically upgrading abattoirs. Preferably the demonstration units should be built in connection with an existing meat training institution where also routine slaughtering at a daily basis is carried out to support practical demonstrations/training. The demonstration equipment should not only be limited to genuine slaughter facilities but also include equipment for humane killing of slaughter animals as well as treatment plants for solid abattoir wastes and abattoir effluents in order to address the much needed improvement of the environmental impact of abattoirs.

5.3.6. Continues Abattoir sector Technology and Hygiene training

Training in the abattoir sector is urgently needed for personnel at abattoirs carrying out sanitary, meat hygiene and technical operations. Training in abattoir technology and hygiene should primarily be conducted at the organizational level, with the assistance of national and possibly international experts. In this case the principle of “training of trainers” could be applied, but also the slaughter personnel in individual abattoirs directly be targeted by using on the training. The training should not only refer to correct slaughter techniques but should always be linked with practices indispensable for efficient slaughter hygiene.

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Annexes

Annex 1: Questionnaire

Addis Ababa University

College of Business and Economics of Management

Questionnaire to be filled by butchers in the 10 sub city of Addis Ababa

Dear Respondents

This questionnaire is prepared to gather data to be used as an input for the research entitled **Assessment of the Service Delivery Quality of Abattoirs in Addis Ababa**. The questionnaire is prepared to the fulfillment of "Master of Science (MSC) in Management specialization in Total Quality management (TQM) and Organizational Excellence" at Addis Ababa University.

According to the responses of the customers the Abattoirs management and staff would have an opportunity to improve the service quality provided in order to meet your expectations in a better way.

The expected respondents of this questionnaire will be actual customers of the Abattoirs in Addis Ababa. The study focuses on the customer service quality so that all of my respondents are expected to give an accurate data to make a proper analysis. The data will be kept confidential and will be used only for research purpose

I would like to thank you in advance for your kind cooperation

Shewalefa Yitbarek

+251 9 13 63 66 78

Part I. General Information - General Profile

1.1.Type of Customer

Private Abattoirs Customer Government Abattoirs Customer Both

1.2.Sub CityWoredaLocality.....

Age (years) <25 25-34 35-44 45-64 >64

1.3.Educational Background

Certificate and below Diploma Degree Masters & Above

1.4.What type of services are you frequently using from the Abattoirs?

Slaughtering service Buying by - product Buying Hide & Skin

1.5.How long have you been the customer of Abattoirs?

6-11 years 12-17 years 19 years & above

Part II. Information Related to Assessment of the Service Quality of Addis Ababa Abattoirs Enterprise Using SERVQUAL five dimensions

2.1. Tangibility

2.1.1. Modern looking slaughtering equipment

Poor Satisfactory Good Very Good Excellent

2.1.2. Visually Appealing Abattoirs compound facilities

Poor Satisfactory Good Very Good Excellent

1.1.3. Neat appearance of meat distribution staff

Poor Satisfactory Good Very Good Excellent

1.1.4. Materials associated with the service are visually appealing

Poor Satisfactory Good Very Good Excellent

1.1.5. Convenience location of Abattoirs' for animal delivery and meat distribution

Poor Satisfactory Good Very Good Excellent

2.2. Reliability

2.2.1. Reliability of abattoirs service delivery capacity

Poor Satisfactory Good Very Good Excellent

2.2.2.b Sincere interest in solving customers' problems

Poor Satisfactory Good Very Good Excellent

2.2.3. Staff performing service quality on meat hygiene

Poor Satisfactory Good Very Good Excellent

2.2.4. Provide services at the time they promise to do so specially in meat distribution

Poor Satisfactory Good Very Good Excellent

2.2.5. Insists on error free records

Poor Satisfactory Good Very Good Excellent

2.3. Responsiveness

2.3.1. Staff telling customers exactly when services will be performed

Poor Satisfactory Good Very Good Excellent

2.3.2. Prompt service to Customers

Poor Satisfactory Good Very Good Excellent

2.3.3. Staff willingness to help

Poor Satisfactory Good Very Good Excellent

2.3.4. Staffs are never be too busy to respond to customers' requests

Poor Satisfactory Good Very Good Excellent

2.4. Assurance

2.4.1. Behaviors of staff instill confidence in customers

Poor Satisfactory Good Very Good Excellent

2.4.2. Customers feel safe in their animal slaughtering at abattoirs

Poor Satisfactory Good Very Good Excellent

2.4.3. Friendliness and courtesy of staff

Poor Satisfactory Good Very Good Excellent

2.4.4. Staff having knowledge to answer questions

Poor Satisfactory Good Very Good Excellent

2.5. Empathy

2.5.1. Individual attention given by staff

Poor Satisfactory Good Very Good Excellent

2.5.2. Convenient slaughtering operating hours

Poor Satisfactory Good Very Good Excellent

2.5.3. Staff giving customers personal attention

Poor Satisfactory Good Very Good Excellent

2.5.4. Staff giving customers best interest at heart

Poor Satisfactory Good Very Good Excellent

2.5.5. Understand the specific slaughtering service needs of customers

Poor Satisfactory Good Very Good Excellent

III. Assessment of service quality in respect with technological advancement, waiting time and responsiveness

3.1.How do you rate Abattoirs slaughtering service in relation with technology like, slaughtering pre-mortem and postmortem inspection, hygiene, meat healthiness, neatness etc?

Poor Satisfactory Good Very Good Excellent

3.2.To what extent do you believe that Abattoirs in Addis Ababa service is advanced in modern technology utilization compared with other Municipal Abattoirs in the country?

Poor Satisfactory Good Very Good Excellent

3.3.How do you rate the waiting time of Abattoirs Meat distribution service?

Poor Satisfactory Good Very Good Excellent

3.4.Are you satisfied with the service of the Abattoirs in respect to your specific needs of slaughtering service, like animal reception service, slaughtering service, meat distribution service, documentation and information services?

Yes No

3.4.1. If your answer is ‘YES’ for the previous questions (3.4) how do you explain its quality?
You can measure the quality in terms of its speed, employee’s manner, technology usage, internal policy, terms & service fee and others, if any.

3.4.2. If your answer is ‘No’ what makes you dissatisfied?

3.4.3. How do you think that Abattoirs in Addis Ababa can bring change their service quality?

IV. Assessing customers expectation towards Abattoirs service

4.1.What was your expectation/perception towards Abattoir’s service quality before you became customer of the Abattoirs?

4.2.If there is a deviation, how do you rate the gap between your expectation and the actual performance of Abattoirs’?

High deviation Moderatedeviation Low deviation Very low deviation

4.3.Based on your answer for Question (4.1) does it affect your relationship with the Abattoirs?

Yes, it affects negatively Yes, it affects positively No, I stayed neutral

4.4.If your answer for the above question (4.3) is yes, it affects negatively, where do you think that the gap lies between your expectation and Abattoirs’ performance? Like technology, waiting time, employees manner and others if any,

4.4.1. Did you take any step to put in complaints with management for any dissatisfaction?

Yes No

4.4.2. If your answer is ‘Yes’ for the previous question what was the response?

4.5. How do you rate the response of the Abattoirs’ management for your complaint?

No response at all Late response Respond at reasonable time

Quick response Quick & positive response

4.6. How do you rate the total service quality of Abattoirs’ in Addis Ababa?

Poor Satisfactory Good Very Good Excellent

4.7. How do you rate your satisfaction level with the overall service of the Abattoirs in Addis Ababa?

Highly Unsatisfied Unsatisfied Neutral Satisfied Very Satisfied

4.8. How do you measure Abattoirs’ service quality compared to other options including illegal slaughtering practice observed in the city as service option?

Poor Satisfactory Good Very Good Excellent

4.9. Are you willing to continue being customer of the Abattoirs of Addis Ababa?

No, No other options

Yes, I will stay as a customer

Yes, I will wait for changes

4.10. Other comment if any,

Thank you for your willingness and precious time

አዲስአበባዩኒቨርሲቲቢዝነስናአኮኖሚክስኮሌጅማናጂመንትዲፓርትመንትመጠይቅ፤

(Questionnaires)

እኔበአሁኑውቅትበአዲስአበባዩኒቨርሲቲየቢዝነስናአኮኖሚክስየማናጂመንት-ትምህርት-ክፍልየሁለተኛ ዲግሪተማሪስሆንዎመመረቂያጥናቴንበአዲስአበባየቁራዎችድርጅትአገልግሎትአሰጣጥጥራትበእንግሊዘኛው (Assessment on service delivery quality of Abattoirs in Addis Ababa)በሚልርዕስእየሰራሁእገኛለሁ።

የዚህመጠይቅአላማምበአዲስአበባየቁራአገልግሎትአሰጣጥጥራትጉድለትናጥንካሬያለበትንመረጃለመሰብሰብየተዘጋጀመጠይቅሲሆን፤ ይህንንክግብለማድረስየአርስዎትብብርእጅግበጣምያስፈልገኛል።በዚህመጠይቅስምዎትንመጥቀስእንደማያስፈልግናበመጠይቁየሚሰጡትምላሽበሚስጥርየሚጠበቅመሆኑንለመግለፅእወዳለሁ።ዚህምመሰረትበመጠይቁመልስዎትንበመስጠትእንዲተባበሩኝበአክብሮትእጠይቃለሁማናኛውምጥያቄካለዎትባድራሻዬሊያገኙኝይችላለሁ።

ሽዎለፋይትባረክ -የስልክቁጥር 09 13 63 66 78

ስለትብብርዎአመሰግናለሁ!!

ክፍልአንድ፤ አጠቃላይመረጃ፤

በሚፈልጉትአማራጭሳጥንውስጥ () ይህንምልክትያስቀምጡ፤

1.1. የደንበኝነትሁኔታ፤

የግልቁራደንበኝነትየመጠን ትቁራደንበኝነትየሁለቱምደንበኝነት

1.2.ክፍለከተማ-----ወራዳ-----አካባቢ/ልዩስም-----

1.3.እድሜ፤ <25 25-34 35-45 45-64 >64

1.4.የትምህርትሁኔታ፤

ሰርተፍኬትናበታችዲ ግድግሪማስተርስናበላ

1.5.በመደበኛነትከቁራዎችየሚያገኙትየአገልግሎትግንኙነትየትኛውነው?

የእርድአገልግሎትየተረፈ ትግኝቆዳናሌጠግኝ

1.6. ከቁራዎች ጋር ምን ያህል የደንበኝነት እድሜ ቆይታ አለዎት?

1-5 ዓመት 6-11 ዓመት 12-17 ዓመት ከ18 ዓመት በላይ

ክፍል ሁለት ፣ በአዲስ አበባ ቁራዎች ድርጅት የአገልግሎት ጥራት ነባራዊ

ሁኔታዳሰባዊ አምስት የእይታ እቅጣጫዎች ፣

2.1. ተጨባጭነት (Tangibility) ፣

2.1.1. የእርድመሳሪያዎች ይዘትና ዘመናዊነት ፣

ዝቅተኛ መካከለኛ ጥሩ በጣም ጥሩ እጅግ ጥሩ

2.1.2. በቁራው ስጥ የሚታዩ የመሟላት የሚገባቸው መሳሪያዎች ፣

ጎረቤት በከፊል ተሟልቷል ለጊዜ ለጊዜ ተሟልቷል

በጥሩ ሁኔታ ተሟልቷል እጅግ በጣም ተሟልቷል

2.1.3 የስጋ ስርጭት ሠራተኞች የአልባሳትና አጠቃላይ የንጽቅ ሁኔታ ፣

ዝቅተኛ መካከለኛ ጥሩ በጣም ጥሩ እጅግ ጥሩ

2.1.4. ለአገልግሎት የሚውሉ መሳሪያዎች ግልፅና የሚታዩ ስለመሆኑ ፣

ዝቅተኛ መካከለኛ ጥሩ በጣም ጥሩ እጅግ ጥሩ ለእንሰላት አቅርቦት ግልፅና የቁራዎች ስርጭት የቁራዎች ስርጭት

ዝቅተኛ መካከለኛ ጥሩ በጣም ጥሩ እጅግ ጥሩ

2.2. አስተማማኝነት (Reliability) ፣

2.2.1. የቁራዎች አገልግሎት የማቅረብ አቅም በተመለከተ ፣

ዝቅተኛ መካከለኛ ጥሩ በጣም ጥሩ እጅግ ጥሩ

2.2.2. ሠራተኞች የደንበኞችን ግርሎት ለመቅረፍ ያላቸው ፍላጎት ፣

ዝቅተኛ ለኛ ጥሩ በጣም እጅግ በጣም ጥሩ

2.2.3. የሠራተኞች የአገልግሎት አሰጣጥ ጥራት፤ በስጋ የምግብ ደህንነትና ጤና ማነት ላይ ያለው ውጤት፤

ዝቅተኛ ለኛ ጥሩ በጣም እጅግ በጣም ጥሩ

2.2.4. አገልግሎቱን በተገባው የበተፈለገው ጊዜ ማቅረብ በተለይም በስጋ ስር ጭት ላይ፤

ዝቅተኛ ለኛ ጥሩ በጣም ጥሩ እጅግ በጣም ጥሩ

2.2.5. ስህተት የለሽ የመረጃና የኢንፎርሜሽን አገልግሎት ያዘና የስጋ ስር ጭት፤

ዝቅተኛ ለኛ ጥሩ በጣም እጅግ በጣም ጥሩ

2.3. ምላሽ ስጭነት (Responsiveness)

2.3.1. ሠራተኞች ለ ደንበኞች የሚሰጡትን አገልግሎት በወቅቱ የሰጡ መሆኑን መፈጸም፤

ዝቅተኛ ለኛ ጥሩ በጣም እጅግ በጣም ጥሩ

2.3.2. ክብርና ትኩረት የሰጠ የደንበኞች አገልግሎት አሰጣጥ፤

አነስተኛ ለኛ ጥሩ በጣም ጥሩ እጅግ በጣም ጥሩ

2.3.3. ሠራተኞች ደንበኞችን ለማገልገል ያላቸው ተነሳሽነት፤

አነስተኛ ለኛ ጥሩ በጣም እጅግ በጣም ጥሩ

2.3.4. ሠራተኞች በምንኛም ሁኔታ ለደንበኞች ምላሽ መስጠት፤

አነስተኛ ለኛ ጥሩ በጣም ጥሩ እጅግ በጣም ጥሩ

2.4. እርግጠኝነት (Assurance)፤

2.4.1. ደንበኞች በሠራተኞች ባህሪ ላይ ያላቸው እምነት፤

አነስተኛ ለኛ ጥሩ በጣም እጅግ በጣም ጥሩ

2.4.2. ደንበኞች በቁራዎች የእርድ አገልግሎት ላይ ያላቸው የደህንነትና እምነት ስሜት፤

አነስተኛ እንደ ሲጥሩ በጣም አይገባኝም ጥሩ

2.4.3. የቁራዎች ሠራተኞች ለደንበኛው የሚያሳዩትን ደኛዎች እና አጋዥ ባህሪ ያሉት፤

አነስተኛ እንደ ሲጥሩ በጣም አይገባኝም ጥሩ

2.4.4. የቁራዎች ሠራተኞች ለደንበኛው ምላሽ ለመስጠት ያላቸው የእውቀት ብቃት፤

አነስተኛ እንደ ሲጥሩ በጣም አይገባኝም ጥሩ

2.5. የሠራተኞች የደንበኞች ፍላጎትና ግርመረዳት (Empathy)፤

2.5.1. በቁራዎች ሠራተኛው ለደንበኛው የሚሰጠው ትኩረትና ክብር፤

አነስተኛ እንደ ሲጥሩ በጣም አይገባኝም ጥሩ

2.5.2. የእርዳታ አገልግሎት የሚሰጥበት ሰዓት ለደንበኛው ያለው አመቺነት፤

አነስተኛ እንደ ሲጥሩ በጣም አይገባኝም ጥሩ

2.5.3. የቁራዎች ሠራተኞች ለደንበኛው የሚሰጡት ልባዊ አገልግሎት፤

አነስተኛ እንደ ሲጥሩ በጣም አይገባኝም ጥሩ

2.5.4. የደንበኞችን ልዩ ልዩ አገልግሎት ፍላጎት ማወቅ፤

አነስተኛ እንደ ሲጥሩ በጣም አይገባኝም ጥሩ

ክፍል ሦስት -

አዲስ አበባ ቁራዎች ድርጅት የአገልግሎት ዳሰሳ ከቴክኖሎጂ፣ አገልግሎት አቅርቦት ወቅታዊነት እና ምላሽ ጭነት፤

3.1.

የቁራዎች የእርዳታ አገልግሎት ከቴክኖሎጂ አንጻር እንደ ቅድመ እርዳታና ድህረ እርዳታ ምርመራ ጤንነት፣ ንፅ ህጻንና ጥራት ጋር በተያያዘ እንዴት ያዩታል፤

አነስተኛ እንደ ሲጥሩ በጣም አይገባኝም ጥሩ

4.2. የቁራድርጅቶችደንበኛከሆኑብኋላየቁራዎችአገልግሎትነባራዊየጥራትሁኔታበፊትከነበረዎትአ መለካከትአንገርየገጠመዎትንክፍተትእንዴትያዩታል?

ከፍተኛክፍተትአለመካ ክፍተትአለዝቅተኛክፍተት

በጣምዝቅተኛክፍተትአለ

4.3. የገጠመዎትየአገልግሎትፍላጎትናያለውአገልግሎትክፍተትምንፈጥሮብዎታል?

አዎቅሬታፈጠሮብኛልአዎ ታዲያምስምንምአልፈጠረብ

4.4. ቅሬታዎችለቁራዎችድርጅትክፍተኛለሀላፊዎችአቅርቦዋል

አዎአቅርቢያለሁአላ ቢኩም

4.4.1. ተራቁጥር4.4 አዎቅሬታአቅርቢያለሁከሆነበጥያቄዎትናበአቤቱታዎትምንምላሽተስጥዎት?

4.5. በአጠቃላይየቁራዎችድርጅትለቅሬታምላሽአሰጣጥእንዴትይመዘኑታል?

ምንምምላሽየለም የ ምላሽስጭነውያለው

ምላሽበሰዓቱነውበጣምፈ ምላሽነው

ፈጣንናአወንታዊምላሽነው

4.6. በአጠቃላይአዲስአበባያሉቁራዎችአገልግሎትጥራትእንዴትይለኩታል?

አነስተኛአገ ጥሩበጣምጥ ግበጣም

4.7. አጠቃላይበአዲስአበባየሉቁራዎችአገልግሎትእርካታእንዴትይመዘኑሉ?

ምንምአያረካም ሀሳብአል እረካለሁበጣምእረካ

4.8. የዲስክበባቂራዎች አገልግሎት ንበከተማዎ አለበት ልዩ ሚና ስላለው ከህገወጥ እርድብ አማራጭ ከማ የት አንጻር እንዴት ያወዳድሩታል?

አነስተኛ አ ቢጥሩ በጣም ጅምር ጣም

4.9. በሁኔታዎች ሁሉ በአዲስ አበባ ከተማ አስተዳደር ይገኙት ጋር ለመቀጠል ፍላጎት አለዎት? ደንበኝነት ያን መቀጠል ይፈልጋሉ

አልቀጥልም ሌላ አማራጭ እፈልጋለሁ

አዎ በደንበኝነቴ አቀጥላለሁ

አዎ ለውጥ እጠብቃለሁ

4.10. ሌላ ማንኛውም አስተያየት ካለዎት _____

መጠይቁን ለመመለስ ለላይኛው ፍላጎትና ውድደታዎች ምስጋና ይላቀቀዋል