



Freddy's Coffee Shop: Expanding the Coffee Business in Bangladesh

Case

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Abstract

Management at Freddy's Coffee Shop, a Chicago-themed coffee shop based in Dhaka, Bangladesh, is looking for ways to continue growing as competition from other coffee venues increases. Despite having made a good name in the coffee arena, the café management fears that with proliferation of competition, the coffee business would become commoditized. The management team is pondering alternatives for new revenue streams. Should they expand by opening additional coffee shops and contend with the subsequent increase in overhead costs? Should they open express counters or rent kiosks in the fast-growing modern trades in Dhaka? Should they expand by going upstream in the value chain by supplying bakery items to competitors or selling beans and barista machines? What would be the best growth strategy for the management team of Freddy's Coffee Shop as they navigate various business challenges that their coffee shop and the coffee industry face at large?

Case

Learning Outcomes

By the end of this case study, students should be able to:

1. Apply the brand resonance pyramid for evaluating customer based brand equity.
2. Understand and apply the PESTLE framework and Porter's five forces for industry analysis.
3. Display clear comprehension of each of the elements of SWOT.
4. Utilize the TOWS framework for designing strategies.

Introduction

Karim Chowdhury let out a contemplative sigh. As the Director of Freddy's Coffee Shop, one of the premier coffee shops in Dhaka, Bangladesh, he faced a set of strategic options to expand the coffee business that he ran with his brothers-in-law. His ultimate decision could not only have financial impact on the business but also lead to friction amongst his partners. How could he ensure that the company continued to expand as competition trickled into the market? How could he convince his team to bank on one decision yet continue to operate as a team?

Evolution of the Food Industry in Dhaka

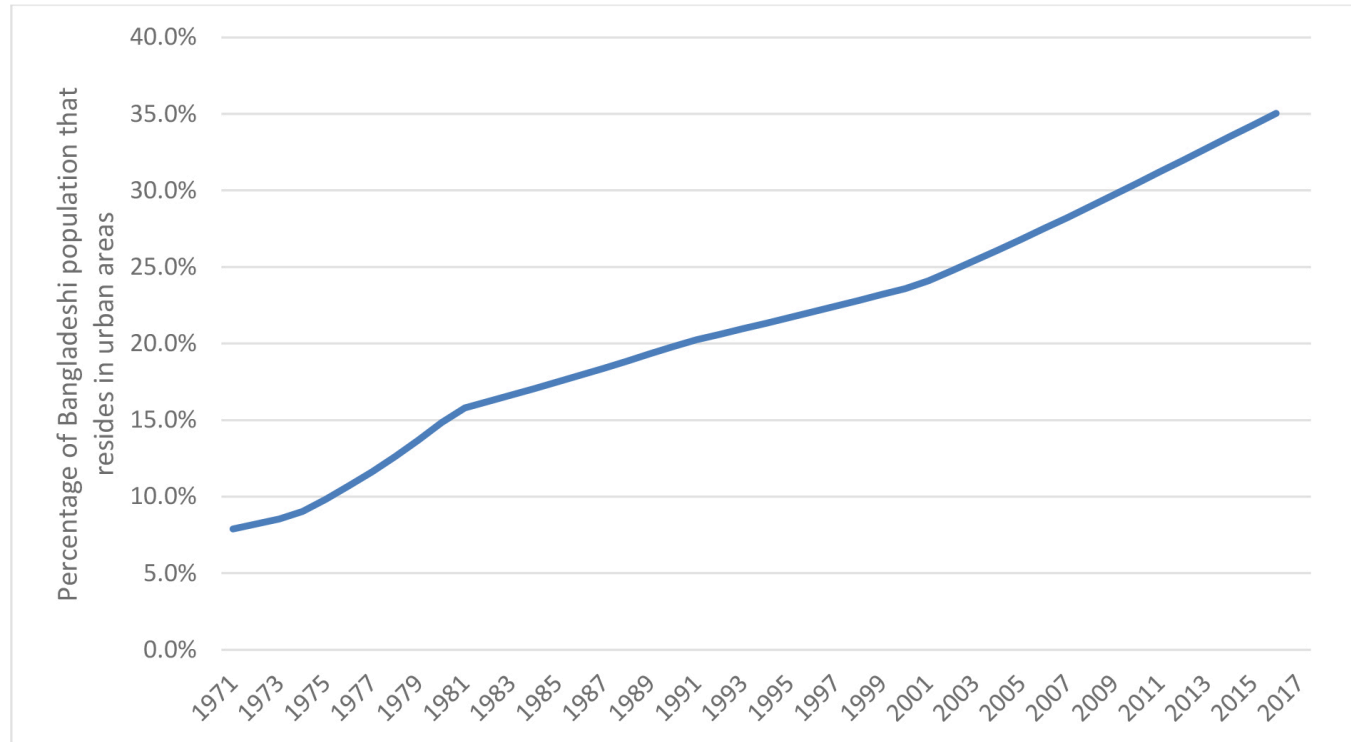
With a fast growing working age population between 16 and 65 years, Bangladesh had been experiencing improving socio-economic conditions for a number of years. In 2014, Bangladesh even upgraded from a low income country to a middle income country status (World Bank, 2016).

In the years after Bangladeshi independence in 1971, the country had a small number of restaurants. "Chinese restaurants," mostly serving a local version of Chinese cuisine, were the only type of out-of-home eateries and they catered to a limited clientele who indulged in eating out occasionally. The 1990s witnessed a slight increase in the number of foreign chains that catered to the diverse palate of the customers who increasingly preferred eating out. This "white collar" culture was led by the 35.035% of population residing in

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the urban areas (Figure 1) as of 2016 (World Bank, 2017) and showed an increasing penchant for fare at chains such as KFC, Pizza Hut, Nandos, and Burger King. These international chains entered the country in the early years of the 2000s (LightCastle, 2014). The momentum continued and Dhaka, the country's capital, witnessed a mushrooming of international fast food and restaurant chains in the decade that followed.

Figure 1: Plot of Bangladeshi Urban Population as a Percentage of Total Population for the Years 1971–2016



Source: Calculated by authors based on World Development Indicators. (2017). Retrieved from <https://data.worldbank.org/data-catalog/world-development-indicators>

Rick Hubbard is the Managing Director of North End Coffee Roasters, the leading coffee roaster in Bangladesh, and a champion of the coffee industry in Dhaka. During an interview with the author, Rick said:

For a while in Dhaka you had street food places which were easily accessible, and there were high end restaurants; there were very few [options] in the middle, the kind of place where there's a nice atmosphere and [food offered at] fairly affordable prices.

The Coffee and Bakery Industry of Bangladesh

In the early 2000s, Dhaka City started teeming with people who sought coffee first thing in the morning. Despite tea being a popular drink in Bangladesh for decades, there was a significant surge in the demand for coffee. The scenario had changed in the early 2000s when Nescafé instant coffee was popularized by Swiss food giant Nestlé, which pioneered in the development of this category of beverage.

In the 2010s the country saw an emergence of coffee culture where coffee shops as a hangout place became popular. The growing population had money to spend in a country experiencing more than 7% GDP growth and unfortunately did not have much in the way of entertainment. So eating out, or hanging out at food estab-

lishments, dominated the entertainment scene in Bangladesh.

The increase in the level of income in the country also ushered in an era of convenience-seeking consumers who preferred easily consumable food such as bread and bakery products, which could be easily purchased from supermarkets in the big cities of the country (Miller Magazine, 2016). Moreover, another trend was the practice of doing grocery shopping in modern supermarkets with air conditioners, offering a comfortable buying experience as opposed to the more traditional wet markets that Bangladeshis were used to.

This trend of altering consumer tastes and preferences and increasing westernization was catalyzed further by the increasing media fragmentation, availability of cheap telephony, roll out of 3G services (Hussain, 2015), and a tech savvy young population. Rising per capita income, increasing globalization, dynamic consumer taste, and evolving lifestyle caused a boost in consumer demand as was obvious by the fast adoption of these fast food chains and restaurants.

The average consumer of coffee in Bangladesh was either a young professional or a college (which in Bangladesh refers to 11th and 12th grades) or university student. Research indicated that more than 90% of the coffee shop patrons fell within the age bracket of 19-32 years (LightCastle, 2014). Coffee shops, with their cozy ambience, including free Wi-Fi facilities, were an ideal place for holding informal business meetings, catching up with family, and even for completing assignments.

Said Rick Hubbard:

What drives coffee in Bangladesh, it's the coffee itself, but also a place to meet, a place to hang out, during on-meal times. Our main customer base is young professionals, people in their 20s or early 30s, [having] a first or second job. They want to hang out with their friends and young families. [We also get] a number of people who lived abroad, experienced the coffee culture there and now they want to experience it here. They don't want to go to a restaurant. They are looking for a place. The explosion of the coffee culture in Bangladesh, yes it's all about experiencing the coffee, but it's also very social at the same time.

Interestingly, the coffee culture spread so quickly that even the smaller food joints selling regular snacks were also investing in coffee machines. Given the lack of entertainment facilities in Dhaka, and given that hanging out over a drink was common place, many new establishments appeared in all parts of Dhaka (LightCastle, 2014). Unfortunately, in the mad rush to set up businesses, many owners set up businesses in residential areas, which was against the somewhat relaxed laws at the time. These illegally sited shops eventually attracted the attention of the government. Despite being registered tax paying legal entities, many of these businesses were forced to shut down in the face of a government-led eviction drive, which closed a variety of businesses, including several residential hotels, restaurants, educational institutions, offices, showrooms, super-shops, stationary shops, grocery stores, fast food outlets, bakeries, community centers, beauty parlors, salons, clinics, pharmacies, and gyms, resulting in a cumulative loss of more than BDT 35 crore (USD 4.2 million) for the business owners (Mahmud, 2016).

Competitive Landscape

For decades, tea was the traditional drink of Bangladeshis. Tea was sweetened with milk and sugar before consumption. In contrast, coffee was a bitter alternative and was limited to a small affluent segment of coffee enthusiasts. Initially, coffee was available in family packs with premium pricing and the coffee market of Bangladesh was dominated by instant coffee marketed by Nestlé. The coffee market in Bangladesh is now worth more than BDT 600 million (USD 7.3 billion) in annual sales (LightCastle, 2014).

Nestlé, with its coffee brand, Nescafé, played a key role in educating the tea-loving Bangladeshi population about coffee. Through a combination of vending machines placed in various institutions, sampling activations, and heavy media presence, Nestlé nurtured the demand for coffee in the early 2000s. Nestlé even introduced coffee in mini packets with lower price points to help consumers overcome the cost barrier of switching from tea to coffee.

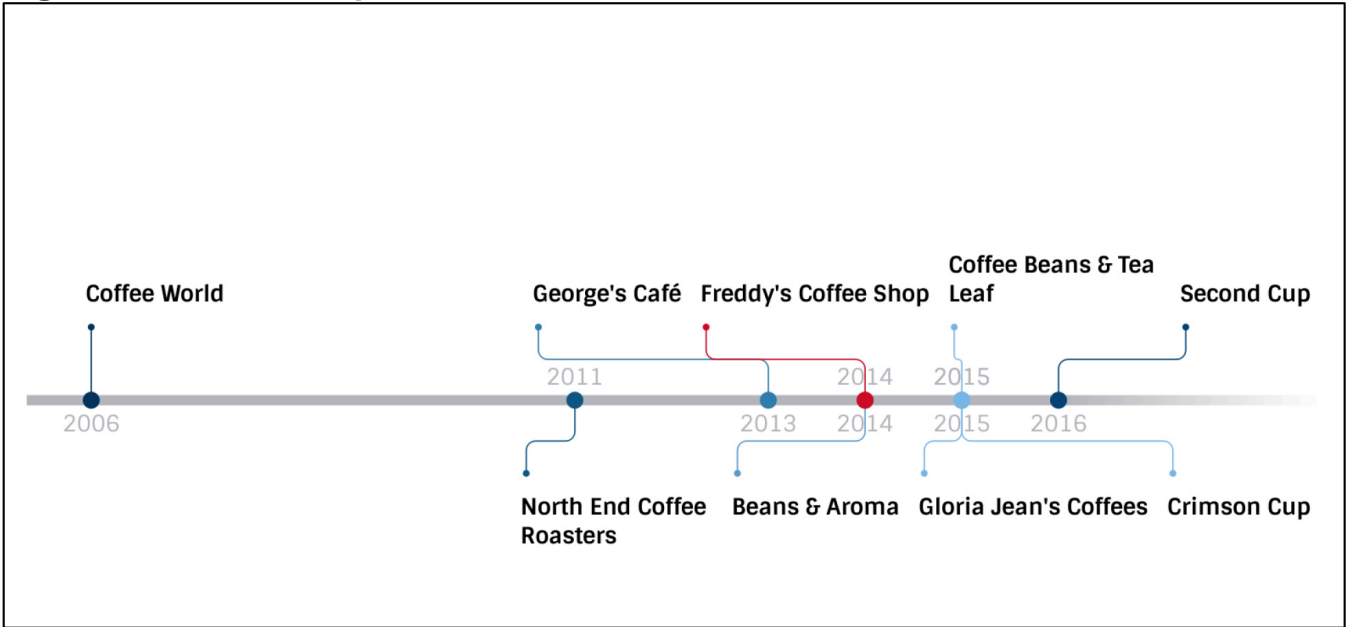
This taste for coffee paved the way for the coffee shops that started appearing in Bangladesh in the mid-2000s, creating a niche for people who both enjoyed coffee and sought a nice hangout. Although priced at a premium over regular tea, the coffee shop culture spread fast.

Said Rick Hubbard:

There’s an expanding middle class [in Bangladesh]. For pricing, a vast percentage of people could not walk through the door to buy a cup of coffee, but we’ve tried to keep our pricing in a way so that university kids could come in and even if they live on a modest income they could at least afford to come in at least once or twice a month. We wanted a place where someone who doesn’t necessarily have a huge income could go ahead and have a nice experience.

In a span of 12 years, between 100 and 120 coffee shops, including 5 international ones, set up in Bangladesh (Figure 2). The coffee beans are imported from Italy, Brazil, and Indonesia, among other countries. Aside from the direct competition (Table 1), various types of other food establishments not specializing in coffee began to include coffee in their menu (Table 2), leading to an increase of indirect competition.

Figure 2: Coffee Shop Timeline in Dhaka



Source: Social media sites of the respective coffee shops.

Table 1: Direct Competition Faced by the Coffee Shops in Bangladesh

International coffee shops	Local coffee shops
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Gloria Jeans	Freddy's Coffee Shop	Coffee Bar
North End	Cofi 11	Coffee Glory
Coffee World	Red shift	Cuppa Coffee Club
Barista Lavazza	Kiva Han	Next Cup
Second Cup	Ajo Café	Café Hollywood
	Moka Coffee Café	

Source: LightCastle (2014).

Table 2: Indirect Competition Faced by the Coffee Shops in Bangladesh

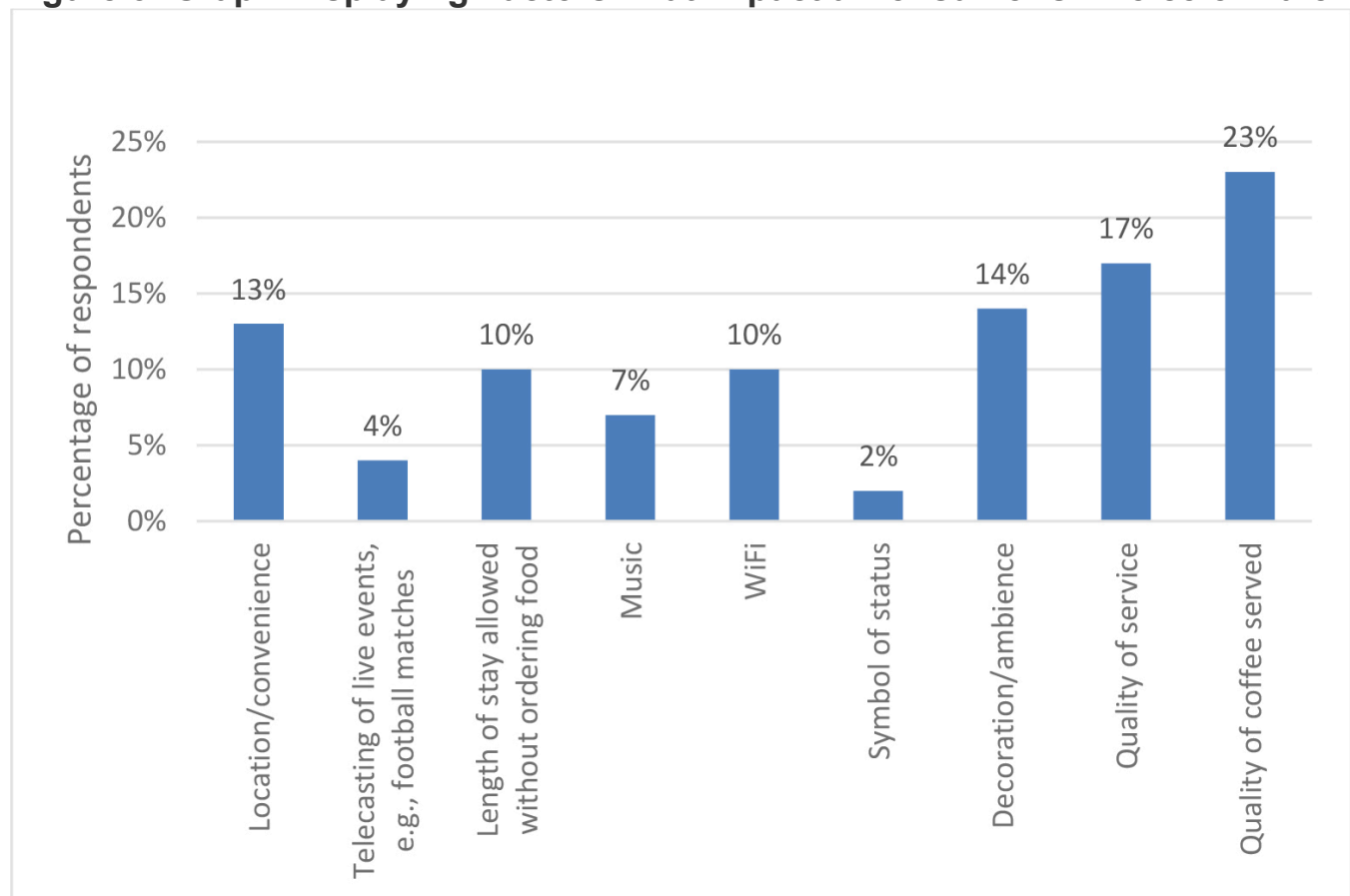
Type of establishment	Examples
Cafés in 5 star hotels	<p>Pan Pacific Sonargaon Hotel—The Pool Café</p> <p>The Westin—The Living Room</p> <p>Ruposhi Bangla Hotel—The Lobby Café</p> <p>Radisson Blu Water Garden Hotel—The Chit Chat Room</p>
Restaurants or shops that provide excellent coffee	<p>Baton Rouge</p> <p>Bittersweet Café</p> <p>Roll Express</p> <p>Shwarma House</p> <p>Captain's World</p> <p>Terra Bistro</p>

International fast food chains that offer excellent coffee	KFC
	Pizza Hut
	Pizza Inn
	Nandos

Source: LightCastle (2014).

Consumers cited *Quality of coffee served* as the most important factor in deciding which café to choose to patronize. *Quality of service*, *decoration/ambience*, and *location/convenience* were also cited as important factors (Figure 3).

Figure 3: Graph Displaying Factors That Impact a Consumer's Choice of Café



Source: LightCastle (2014).

Rick Hubbard reflected the same sentiment:

Service is quite important but the product is bigger. At the end of the day it doesn't matter how nice the staff are, if you don't like what you're eating, you won't come back.

This sudden increase in the number of coffee shops increased the likelihood of commoditizing the beverage

and the coffee shops scuttled to create as clear a niche for themselves as possible. An overview of the top coffee shops in Dhaka and their positioning strategies are given below.

North End

North End Coffee Roasters was originally positioning itself as a coffee roaster targeting other coffee businesses. However, with time North End Coffee Roasters found itself opening up a coffee shop for the coffee loving consumers of Dhaka City. Ever since opening its doors to direct consumers in 2011, the premium coffee roasters became a hit and expanded to seven outlets throughout Dhaka.

With a coffee academy in place, North End conducted trainings for baristas, offered consultation services, and sold machines and coffee beans to coffee shops. A staunch believer in growing the coffee culture in Dhaka, Rick Hubbard, expressed his single-minded focus on serving high quality coffee:

We believe that if we can help people to start coffee shops, then we can sell beans, and that helps our core business. We also feel that Dhaka is a big enough market and a lot of people can be involved.

The limited menu presented by North End, which consists of cookies, pastry items, a handful of sandwiches, and a variety of other desserts, also allowed the company to maintain focus on their coffee business. The coffee offerings include espresso drinks, mochas, flavored lattes, and iced lattes that appeal to a wide range of customers (Rahman, 2011).

Said Rick:

People reinvent themselves too much—new Cafés want to do everything. Real estate costs are exorbitant so they want to maximize. We try to really, really stay away from that. We don't have a huge menu. Moreover, I tell smaller coffee shops to choose their identity—what do they want to be known for. I typically give an example: "Get a small oven and have fresh baked cookies. People can smell it. Twice a day, three times a day. And that's what you'll be known for. Come up with your own ideas and don't just copy—you need to do something unique."

The brand also believed in maintaining the high quality image in the minds of customers and refrained from offering any simple discounts. Rick further added:

We don't give simple discounts. The reason is I am not interested in trying to beg people to come to my café. When you are always giving discounts, it comes across that your product is not good enough. Discounting in the food industry, you really have to be careful. If you're constantly giving percentages off, you can cheapen your brand value.

Gloria Jeans

Gloria Jeans, an Australian coffee brand, was introduced in 2015 in Bangladesh. Their first store was located in Gulshan, one of the most high-priced locations in the country. They offered an array of hot and cold beverages, ranging from lattes, cappuccinos, ice blended chillers, fruit smoothies, and specialty teas. They also diversified the menu by adding lunch and dinner options such as starters, salads, pasta, burgers, steaks, and lasagna. There were also gourmet dessert options such as cheesecakes, red velvet cakes, and tiramisu cakes. Gloria Jeans provides a great ambience with facilities such as Wi-Fi, an outdoor seating zone, computer facilities, television facilities, conference rooms, and a spacious atmosphere (Nazmul, 2015). These reasons make Gloria Jeans the perfect place for foodies, intellectuals, friends, and colleagues (Rahman, 2014).

The Gloria Jeans located in Gulshan 2 was the largest café in Dhaka (Nazmul, 2015).

The Coffee Bean and Tea Leaf

The Coffee Bean & Tea Leaf is a California-based coffee chain that opened its flagship store in Bangladesh in a premium location, Gulshan. The coffee flavored drinks include flavored coffees, blended coffees, flavored lattes, and a range of flavored teas. They further diversified the menu by adding gourmet breakfast, lunch, dinner, and bakery options (Bengal Brands Management Bangladesh Ltd, 2015).

Second Cup

Second Cup is the largest specialty coffee retailer in Canada. It was introduced in Dhaka in 2016 at a premium location, Banani, and in a satellite city, Uttara. Positioned as a premium global café, Second Cup has a diversified menu with premium coffees, teas, frozen yogurt, pastry, and other savory options. The café also offered various deals such as the *super saver midday deal* and a *student deal* to attract consumers (Independent Publications Ltd, 2016).

The Birth of Freddy's Coffee Shop

The idea of Freddy's Coffee Shop was first conceived in 2013 during a family dinner when Karim Chowdhury and Mahmud Ahmed were discussing the fast evolution of Uttara, Dhaka's satellite city, into a mega-town. They both agreed that despite Uttara's rapid growth, the town lacked a good place to hangout such as a proper coffee shop. Karim and Mahmud, both serial entrepreneurs, had experience in the hospitality industry and liked the possibility of launching a coffee shop themselves. They eventually recruited several relatives as investors, experts, and real estate providers and within a year of the discussion, Freddy's Coffee Shop opened its doors.

Since opening in 2014, Freddy's Coffee Shop expanded to three outlets. The original one, situated in Dhaka's satellite city Uttara, continued to be the most vibrant one, experiencing the largest number of customers. The outlet stood at the ground floor of a five-story boutique hotel a kilometer from the only international airport in Dhaka City. Within a five minute walk of the Uttara location stood one of the largest and most expensive English-medium schools in the city, a number of corporate offices, as well as several shopping malls.

Within the first year of its operation, Freddy's Coffee Shop created a clear niche for itself. The interior of Freddy's Coffee Shop consisted of cozy seating layout with regular coffee chairs and tables, sofas, and bar-style seating arrangements. Warm lights ensured a softly lit interior. Posters of the iconic Chicago skyline together with softly played Chicago blues in the background made the setting quite relaxing. Moreover, an ample number of power sockets throughout the café ensured that all the customers, most of whom were students or office executives, could peacefully charge their electronic devices while working or socializing.

Karim and Mahmud's team generated quirky posts on social media with reference to trending pop cultural elements. This presence on social media created a loyal following of young urban professionals and students. Although priced higher than similar food from regular local bakeries, Freddy's Coffee Shop food items became popular nonetheless due to its clear positioning of "a sliver of Chicago in Dhaka."

It was a matter of time before Freddy's Coffee Shop became a popular place for the young population of Dha-

ka who had acquired a taste for coffee, fusion food, and relaxing in a place with a good ambience. The range of items on the menu, freshly prepared in their state of the art kitchen, consisted of several types of burgers, sandwiches, wraps and hot dogs that satisfied both light and heavy eaters. The imported coffee beans, blended in-house, offered excellent coffee that people returned for on a regular basis.

The impeccable service garnered awards from Trip Advisor and was yet another reason for customers to return to the café. Customers profusely praised the wait staff at Freddy's Coffee Shop. Waiters knew most of the regular customers and remembered their regular orders.

Said one customer about an item she liked:

The cupcakes are amazing. I travel all the way from Dhanmondi to Uttara (a two-hour journey by car in traffic) just for those cupcakes.

Freddy's had a reputation for treating customers well. Said another customer about his experience:

I ordered a chicken wrap. It came late and had too much salt in it. When I spoke to the waiters, they not only replaced it, but also didn't charge me for the wrap.

Not surprisingly, patrons also lavishly recommended Freddy's Coffee Shop on social media whenever anyone inquired about the best coffee shop in Uttara.

Expansion of Freddy's Coffee Shop

The positive reception of the first outlet propelled the team to open a second store in Dhanmondi at the end of the second year. The theme and the setup of the original café were replicated and the second location of Freddy's Coffee Shop opened its doors in a thriving shopping mall. Dhanmondi is a much older town than Uttara and is revered for its legacy of food culture; thus, it was a promising investment for Freddy's Coffee Shop.

Unfortunately, Freddy's Coffee Shop did not fare well at the Dhanmondi location. Although the management team initially estimated a higher foot traffic at this new outlet, given that the mall housing this café experienced significant traffic, in reality the scenario was different than at Uttara. Given that the café was located on the third floor at one end of the building, customers had to make an effort to find the store. Moreover, the building housed a number of other food shops offering items at competitive price points.

Despite the disappointment of the Dhanmondi location, a Freddy's Coffee Shop was opened in Banani, a premium town in Dhaka whose food legacy was similar to that of Dhanmondi's. The residential area had transformed into a commercial zone during the past decade. Wealthy urbanites resided in the handful of residential buildings that had not been commercialized, and the plethora of commercial buildings housed hundreds of offices, universities, hospitals, shopping malls, and food joints.

At the Dhanmondi location, Freddy's Coffee Shop is located at the ground floor of a high rise building and has at least three other neighboring food establishments on the same street. Again, the same model was replicated here. While the café enjoyed substantial traction, surpassing its Dhanmondi counterpart by a large margin, it did not outdo the Uttara outlet.

Future Direction

Mahmud Ahmed, one of the partners, argued that Freddy's Coffee Shop should expand further and open

more outlets in and around the city. The demand for a good quality coffee establishment existed and clearly the Dhaka market was big enough to accommodate more coffee players. Also, this expansion would not only enhance the brand's equity but also consolidate its position as a key player in the coffee scene.

However, Ridwan Rahman, yet another partner, countered that the overhead expenses of opening an outlet, were too high to justify outlet expansion. The rising operating costs gnawing away at the profit margin were not easy to control. Moreover, with increasing competition, coffee was increasingly becoming commoditized. Prices were likely to be driven down, which would not help the financials of running the physical outlets.

On the other hand, setting up express counters in super markets, the number of which is rapidly increasing, could be beneficial to Freddy's financial outlook. Express counters typically occupy a corner of superstores, manage only a handful of seating arrangements, and offer a brief menu. Despite the seemingly limited potential for sales, this type of setup has tremendous visibility amongst a captive customer base (i.e., the shoppers at the super markets) and ensures greater sales at comparatively lower overhead than from a full-fledged outlet, Ridwan argued.

Ridwan Rahman further proposed that distributing barista coffee machines should be explored as the next source of revenue. Given the rising culture of coffee consumption and search for good quality coffee, this market had its potential. Nestlé's vast distribution network included instant coffee machines in a large number of locations, including corporate offices and educational institutions, a phenomenon that had long primed the target population towards coffee consumption from such kiosks. However, many coffee drinkers prefer better quality coffee than that delivered by instant coffee machines. Increasing demand for good quality, freshly brewed coffee provided an opportunity for pushing the high-end barista coffee machines that offered just that sort of a combination.

Ridwan Rahman speculated that the offering can be designed in one of two ways: (1) sell the machine and provide periodic servicing such as re-filling and maintenance; and (2) rent a space in a location, set up the machine with an on-site barista, and offer coffee to customers. He argued that either of these options would translate to higher profit margins than opening new Freddy's locations given that overhead expenses would be much lower than operating new full-service coffee stores.

Yet another avenue for growth existed in the ready-made bakery items and local fast food sector, a market in which Freddy's Coffee Shop could explore. Imtiaz Rahman, yet another partner, proposed that renting shelves in modern trade outlets (known as *gondolas*) would offer an additional window for sale without a surge in overhead expenses. Mahmud argued that this posed a threat to dilution of brand image as ready-made bakery items included a wide variety of local savory snacks which were not in tandem with the premium positioning of Freddy's Coffee Shop.

Now the question facing Karim Chowdhury was simple. Should he open a new branch of Freddy's Coffee Shop? Should he consider getting into the business of selling coffee machines and coffee beans? Or should he explore opportunities to sell products through the modern trade channels? He not only had to make the decision but he also had to convince his partners that this was indeed the best decision to grow the business.

Discussion Questions

1. What are some of the critical factors leading to the success of Freddy's Coffee Shop? Utilize the brand resonance pyramid to answer your question.
2. Briefly discuss the macro environmental factors that played a vital role in driving growth of the industry? Use the PESTLE framework to augment your response.
3. Conduct an industry analysis from the point of view of the coffee shops, and identify which forces are playing a key role in shaping this industry. Apply Porter's five forces for your

analysis.

4. What should Karim Chowdhury do? Conduct a SWOT analysis for Freddy's Coffee Shop and develop a set of strategies utilizing the TOWS framework to illustrate your answer.

Further Reading

For clarifying concepts further, students may read:

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