

Inside the Machine

by *Paco Underhill*

I am called a retail anthropologist, which makes me uncomfortable, especially around my colleagues in academia who have many more degrees than I do. For whatever combination of reasons, I've spent my adult life studying people while they shop. I watch how they move through stores and other commercial environments—restaurants, banks, fast-food joints, movie theaters, car dealerships, post offices, concert halls, malls.

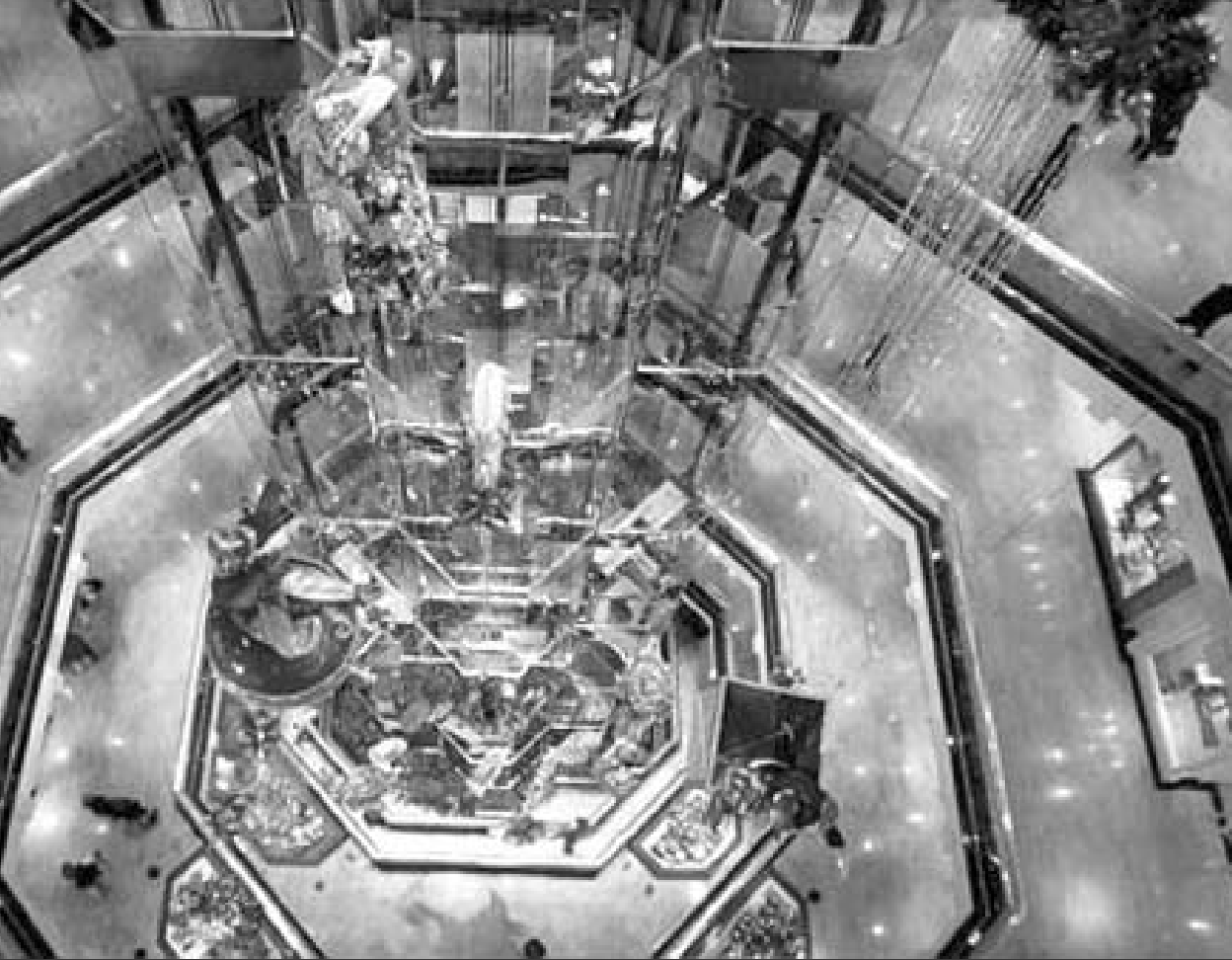
In fact, you can observe a lot of a community's life in its mall. Families especially tend not to be on display in many public spaces nowadays. You can find them in places of worship, but they're on their best behavior, and mostly just standing or sitting. Increasingly, cities are becoming the province of the rich, the childless, or the poor; I love cities, but America hasn't lived in them for a long time. The retail arena is the best place I know to learn what people wear and eat and how they interact with their parents, friends, lovers, and kids.

We tend to think of the mall as a recent, primarily American phenomenon, and a rather banal one at that. But the mall has always been with us, in different guises and under other names. Since virtually the dawn of civilization, we've organized our world in part around the function of shopping. Even the simplest agrarian societies needed places where they might assemble to exchange goods, and from that basic impulse came everything else—marketplaces, villages, towns, cities.

Many otherwise fair-minded, intelligent people scorn and despise malls. Some still end up shopping in them on a regular basis. But they're not proud of it. They may not be swayed by arguments about how the mall is a contemporary version of the souks, bazaars, arcades, bourses, and markets of old. It's true that malls can harm vulnerable downtowns by drawing shoppers away, and that they could be much better places—more imaginative, more alive with the human quest for art and beauty—than they are. But by studying the shopping mall and what goes on there, we can learn quite a bit about ourselves from a variety of perspectives: economic, aesthetic, geographic, spiritual, emotional, psychological, sartorial. Just step inside.

You might think, for example, that retailers would fight to be near the entrances. But take a look at what's just inside the doorway of this mall: a hair





Walk toward the light: Atria and other features are meant to draw shoppers to a mall's interior.

salon on one side and a store that sells exercise equipment on the other. The beauty parlor is nearly full, although you can bet these are regular customers, not mall shoppers who have decided on impulse to get a cut and some color. The exercise store is empty, which makes sense—how many treadmills does the average consumer buy? If the shop sells one, it's a good day. You'll sometimes find banks, another low-profile tenant, in these entrance locations. Post offices. Video game arcades. Why do the least attractive tenants get these prominent high-traffic positions?

Call this entrance space the mall's decompression zone. When you enter any building, you need a series of steps just to make the adjustment between "out there" and "in here." You need to slow your walk a little, allow your eyes to adjust to the change in lighting, give your senses a chance to detect changes in temperature. Walk through any door, and your brain has to take in a load of new information and process it so that you'll feel oriented. You're really not ready to make any buying decisions for the first 10 or 15 feet of a mall. The existence of this transition stage is one of the most critical things I've learned in two decades of studying how shoppers move through retail environments. Nothing too close to the door really registers. If there's a sign, you probably won't read it. If there's a display of merchandise, you'll barely notice it.

Because of the transition zone, the best stores in the mall are never near the entrance. The reason is simple: The mall owner charges every tenant a flat rent based on space plus a percentage of sales. So it's in the mall's own interest to have

the hottest stores in the prime locations. Because the doorway through which I've entered the mall feels like a secondary entrance, only a small portion of all shoppers will even see these shops. Fewer eyeballs equal fewer bucks. That equation is the basis for all mall math. And it's why underachievers go nearest the door. When you enter a mall, your eye is immediately drawn to what's up ahead, to the heart of the place. That's where you want to be. Like everybody else, you speed past the ladies under the hair dryers.

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My friend Carol understands a thing or two about shopping and malls. She's a fortyish woman who has spent plenty of her own time in stores. But she's also an executive with a major corporation that specializes in selling things to women shoppers. Carol's expertise is visual merchandising, meaning she's

responsible for everything her company puts on the floor of a store—the product, the displays, the signs, the whole package, from sea to shining sea. She knows her stuff. She's also fun to shop with.

Carol had requested that I meet her near a little-used doorway in one of the mall's department stores. It's a smart move for at least one reason—the parking lot right outside is never crowded.

"This is the entrance for somebody who really knows the mall," says Carol as she breezes through the door.

"Good call," I say.

This entrance takes us into Filene's, the famous Boston-based retailer, but not to the heart of the store. It takes us into men's underwear.

Men's underwear is the bottom of the barrel for Filene's, no doubt about it. This stuff moves twice a year, when it goes on sale. No men ever come here to buy underwear. Their wives and girlfriends shop for them. Otherwise, it's the dead zone, the decompression space.

"Being a single woman, I don't need to pay any attention to men's stuff," Carol says. "But this door gets me quickly to cosmetics. And there's something else that makes this a great entrance."

"Which is?"

"The bathrooms are right over there."

"And the elevators and escalators."

"It's interesting," Carol says, "how this out-of-the-way entrance leads to cosmetics and ladies' shoes, two of the most heavily trafficked areas of the store. People in the company probably thought it was crazy to put shoes and cosmetics across the aisle from each other because they couldn't see the connection. All they saw

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was why take two successful departments and put them close together? Whereas, in reality, being together like this makes each department even stronger.”

“Because?”

“Because think about it: You’re standing in the shoe department, you’ve told the salesperson which styles you want to see in your size, and now you’re waiting for her to get back. You’re not going to keep looking at shoes, because you’ve already done that—you did it before you sent the clerk away to get your size. Most logical thing in the world. So now where do you look? You look across the aisle at the cosmetics counters. You see all these things you want to try—especially if you don’t find anything to buy in the shoe department.”

“How did the executives miss that connection?”

“Because the connection is all in the heads of the women shoppers, and it was probably men making the decisions about what would go where. What do shoes and lipstick have in common? Nothing. But because men don’t shop for shoes the way women do, they don’t know what it’s like to be a woman standing around for five minutes waiting for your size to arrive.”

“Wait a sec—sure they do.”

“Then maybe men just don’t behave like women. Women want to look at something while they wait. They want to shop. I bet some woman had to point out to the store planning executives that placing shoes and cosmetics close together was a good idea.”

Any time a shopper is standing or sitting around with nothing to do, the retailer has to deal with it. Problem or opportunity? The matter can go either way. If a woman is bored waiting for the clerk to return with her shoes, the wait feels longer than it really is. The problem becomes an opportunity when the retailer fills the empty moments in a potentially productive fashion with something for the shopper to browse—some other category of goods, such as bags, or something totally unrelated, like laptop computers, or a sign explaining the store’s made-to-measure suits. A good, long sign with lots of words might make sense—you’ve got a captive audience for at least two minutes.

Or you could do as Filene’s has done and put cosmetics adjacent to shoes. It’s a smart move. The makeup counters and shelves are big enough and graphic enough to be seen from the shoe department. Makeovers are also an activity—and one of the reasons we go to the mall is to get some action. Smart cosmetics companies vie to be near shoe departments in stores such as this. Of course, only one side of the cosmetics section can face the shoe department, so really smart cosmetics companies insist on being on that side, instead of, say, the side facing the handbag department. Smart stores have learned to treat anything that faces ladies’ shoes as prime real estate.

“But there’s a potential downside to this,” I point out.

“Which is?”

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“Shallow loop.”

“Oh, right.”

Let’s say there’s a woman out there who needs shoes and cosmetics—two staples of malls and women’s lives. A smart shopper, one who really knows this mall, can park in our little-used lot, run in, get the shoes, get the cosmetics, and run back out to continue her busy day. That’s a good thing, right? Maybe that woman would get her shoes and cosmetics elsewhere if she didn’t know how easy Filene’s makes it for her. The juxtaposition of the two departments here creates a third department—the shoe/mascara section—and drives sales.

THE BIG THEORY OF
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But I could just as easily argue that putting two strong departments together like this squanders the power of each, individually, to attract shoppers. Why put two magnets side by side when you can separate them and have each one draw women to its respective part of the store? It’s an old dilemma in retailing. Supermarket layouts always used to put

the dairy case in the rearmost corner of the store, on the theory that everybody had to buy milk and would have to traipse through the rest of the store to get it. A sound practice, except that it gave rise to the convenience store as the supermarket’s prime competitor. Instead of making it hard to buy milk, the C-store made it easy—you park, run inside, grab the milk (which is probably within 30 feet of the door), pay, and are on your way. In response, some supermarkets created little C-stores just inside their entrances. If all you really needed was milk, you could get it easily and leave. That’s the shallow loop: Instead of going from the front door to the rear and back to the front again, you barely penetrate the store.

Which layout makes more sense? Each approach sacrifices something. The old-fashioned strategy for luring shoppers through the store works, but once shoppers caught on to it, they began to feel manipulated. Which is not a good thing.

“If you know this mall well, you know you can get in and out in 20 minutes. Today, speed is everything for most women,” Carol says. “This is good for the shopper.”

“Though it could be bad for the retailer,” I add.

“I guess the retailer is going to have to figure something out.”

Shopping with Carol is always productive for me because we tend to focus on what the process is like for women, and women are the primary actors in the world of shopping. Especially mall shopping.

The big theory of stores once held that women liked spending time in them because it was their main way of interacting with the wider world of business and finance and money. They were home all day with the kids, and then home all night, too. They hungered for adult concerns and activities. The midcentury shift to the suburbs only increased female isolation. Now there was no such thing as a stroll down the street to the cleaners or the appli-

ance store or the dress shop, because none of them could be reached easily by walking. And in suburbia, even if you did walk, you didn't enjoy any of the happenstance meetings a city stroll afforded. Step outside your city door, and there was a world full of activity, purpose, and hustle. Step outside your suburban door, and there was . . . another homemaker, stepping outside her door, looking back at you.

You can understand why shopping at the mall became an appealing activity. True, it wasn't everything a woman might wish for, but it was better than anything else available.

The mall was a response to suburban existence, but it came along—the first enclosed mall was built in 1956—on the cusp of yet another major demographic shift, one that would throw shopping centers for a loop. By the 1980s, a great many suburban homemakers had begun working outside the home, either full- or part-time. Today, roughly two-thirds of adult American women work outside the home. Their infusion into the world of work is what made the past two decades of middle-class life so materially splendid, even extravagant. But it left women with a lot less time for the mall. Their lives were crunched, and the world of retailing—stores and restaurants and banks—had to respond. Women became the most avid users of ATMs, for instance, contrary to what the banking gurus expected. Women weren't scared off by the new technology; in fact, in the workplace, they were the ones required to master innovations in hardware and software. They were also the ones hardest pressed by competing responsibilities at work and at home.

The restaurant and retail food industries have been utterly transformed by the needs of women who work. "Meal replacement" has become the hottest growth area in the food industry. Supermarkets are forever increasing the space devoted to making and selling prepared foods; you can hardly find a market today that doesn't include a bakery, charcuterie, soup station, salad bar, sushi chef. And what the supermarket doesn't do, the fast-food and family restaurant chains do. We can complain all we like about the quality and nutritional value of the food these businesses provide (and about a possible connection between the boom in prepared meals and the obesity epidemic), but we must give them their due when it comes to identifying and meeting a need.

How have the malls done in that regard? If women are at work, they're not at shopping centers. The very nature of the relationship between the woman shopper and the mall has been

jeopardized. She no longer has hours to spend there, moving from shop to shop at a leisurely pace. She may now have to run in, grab what's necessary, then run out. Unless, of course, the mall can respond to the changes in her life with changes of its own.

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The Father of the Mall

Soon after he arrived in America in 1938, part of the flood of talented refugees fleeing Nazi Europe, the Vienna-trained architect Victor Gruen (1903–80) made a name for himself as the designer of eye-catching city stores that combined European modernism with a flamboyant American futurism. When Americans moved to the suburbs after World War II, Gruen became a designer of shopping centers and, increasingly, a widely quoted prophet on the suburban future.

While Gruen reveled in America's exuberance and freedom, according to M. Jeffrey Hardwick's new biography, *Mall Maker: Victor Gruen, Architect of an American Dream*, he retained a taste for European-style urbanism. The planned shopping center, carefully isolated from the vulgar shopping strips that lined suburban roads, would "fill the vacuum created by the absence of social, cultural, and civic crystallization points in our vast suburban areas," Gruen said. His design for the nation's first enclosed shopping mall, Southdale, in the Minneapolis suburb of Edina, called for adjacent houses, apartments, and schools, along with a park and medical center. When the mall opened in October 1956, *Time* hailed it as a "pleasure-dome-with-parking," but Gruen's larger plan for the site was never realized.



Victor Gruen in 1957

After many more commercial successes, Gruen moved back to his beloved Vienna in 1968. By then, he was among the harshest critics of the American suburb. The shopping mall, he complained, had been stripped of all its social promise in developers' ruthless quest for profits. As for his own creations, he said, "I refuse to pay alimony for those bastard developments."

Last year, the trade magazine *Retail Traffic* devoted an entire issue to the future of the shopping mall. In 2013, the magazine predicted, the American shopping center will function like "an old-fashioned Main Street." "Consumers will be able to visit a grocery or a post office, keep appointments with doctors and dentists, relax with a workout or a facial, take in a movie, enjoy a gourmet meal, or hang out with neighbors at an outdoor concert. If this vision of the future seems familiar, that's because architect Victor Gruen, the father of the enclosed mall, painted it 50 years ago."

Which brings me to cosmetics. The beauty business is hardball, and yet, just as you might expect, it's full of voodoo. There are many labels, each with its own niche and devotees, but for the most part the firms all buy their products from the same small group of factories. The cost of a lipstick and its packaging is around a dollar or so. The rest of the price represents marketing, distribution, and a whole lot of profit.

The world of beauty used to be divided into two classes—the stuff sold at mass-market retailers (drugstores, supermarkets, discounters), and the stuff sold at fancy

cosmetics salons in department stores. Think Revlon, Cover Girl, and Maybelline at the former, and Lancôme and Estée Lauder at the latter. It was a tidy little world—until competition came along and opened some exciting new channels. Suddenly there were boutique brands sold directly through their own stores, such as Bobbi Brown, MAC, and Aveda, and in 1998 the French retailer Sephora brought its sophisticated European stores to America. The world of beauty retailing became a lot more interesting, at least for the customers.

Let's look at just one product—hair color. When a girl is 16, hair color is a fashion accessory. My goddaughter spent her teenage years changing the color of her hair every 10 minutes. It was fun and easy. By 23, she had made peace with the color God gave her, which didn't stop her from changing it for special events or to annoy her mother. But hair color was still a fashion statement. For most women, coloring their hair becomes serious business at around age 35. The search for the proper hue gets narrower, and the range of experimentation becomes focused and purposeful. By a woman's mid-40s, hair coloring is a staple, renewed on a fixed schedule at the salon or at home.

Cosmetics move in the same arc, from play to necessity, from fun to a serious aspect of how a woman presents herself to the world. For the young customer, cosmetics are dress-up—entertainment—and the range of options is governed by price and brand appeal. Most middle-class, middle-aged American women first bought cosmetics at the drugstore, whereas Gen-X and Gen-Y began at Kmart, Target, Wal-Mart, or, as the distribution of cosmetics fanned out, the supermarket. Historically, the department store sold to well-off, middle-aged women. The price difference between a drugstore lipstick at \$6 and a fancy department store brand at \$22 is huge, though the difference in quality is slight.

The distinction between “mass” and “class” (the industry terms for, on the one hand, a drugstore, Kmart, or Wal-Mart and, on the other, a Filene's, Bloomingdale's, or Burdines) used to be clear. About 10 years ago, the lines started to blur. Women whose economic situations improved no longer reliably traded up from L'Oréal to Lancôme. They didn't like the way goods were being sold to them, and especially resented the peculiar industry

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practice of not putting price tags on the goods. Many women were too intimidated to demand to know how much they were spending, and walked away from the department store counter having shelled out a lot more than they expected to pay.

Sephora created a new world by introducing “open sell.” Traditionally, the cosmetics salesperson at the department store was an indispensable go-between linking the shopper to the manufacturer. The goods were arranged behind a counter, and the customer needed a salesperson to see them. Open sell, by putting the products out front and letting women examine and try them, changed the nature of the relationship. It put the customer in charge and turned the sales associate into her makeup pal.

Though department stores' hold on the high-end cosmetics market has weakened, makeup counters still occupy the prime real estate. That's due as much to the universal appeal of makeup as to the fact that the products belong to a high-margin category. It costs very little to make a lipstick that sells for more than \$10.

"Stores are willing to make less profit on apparel," Carol explains, "so long as they can make more on mascara. A mascara dollar is worth more than a dress dollar."

We stop walking and look at the spectacle around us. There's something Fellini-esque about a department store cosmetics section. You stand here on a Saturday morning, dressed in the standard mall-casual suburban wardrobe, and gaze at a chamber glittering with chandeliers, populated by saleswomen wearing makeup and hair dramatic enough for opening night at La Scala. Their faces are masks of pale, poreless skin, ruby-red lips, smoldering eye treatments—positively Kabuki-like, and almost intimidating.

The purchase of cosmetics is as public as a private art form gets. It isn't quite a massage, but it's an intimate act between two consenting adults. The beauty adviser will perform a makeover and offer advice, at the end of which you may simply walk away without making a purchase. So a good beauty adviser needs to build a following among her customers. Some cosmetic lines, such as Trish McEvoy, drive their business by staging mass makeover events, at which teams of "expert stylists," including Trish herself, run marathon sessions. They're quite a show, sell a lot of cosmetics, and build a devoted following.

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I've always been fascinated by the resemblance between selling cosmetics and fishing. The sales associate needs to get involved, but she can't rush things. If she offers help too soon, the shopper may demur and walk away. (In fact, we've learned that if the clerk approaches the shopper within the first 30 seconds, she scares her away.) The trick is to let the customer browse unaided

but to watch her carefully all the while—until she raises her head, even for a second. The movement means she's found something she might want but needs a little information. It's the equivalent of a jerk on a fishing line, and it marks the moment when the sales associate needs to start reeling her in.

Cosmetics seem to be everywhere in this mall. In addition to department stores, the place contains at least three or four cosmetics boutiques—specialty shops such as MAC and Sephora. Some of the stores that sell women's clothing also sell cosmetics (Victoria's Secret now does an entire companion store for cosmetics and bath products), and there's a drugstore, if not actually in the mall, then very close by.

Women will shop for cosmetics just about anywhere. If a store can get a woman to look into a mirror, it can sell her lipstick or blusher. One hot new line of cosmetics is sold only through plastic surgeons' offices. The thing that male researchers misunderstand is how most women buy cosmetics. Overwhelmingly, they purchase on impulse—a woman approaches the counter, looks into the mirror, realizes that her lips could stand some color. She begins to shop to meet that immediate need. She may also buy because she's low on mascara or has lost her favorite eyebrow pencil. But usually she buys for right now.

HERE'S ANOTHER BIT OF
VOODOO FROM THE WORLD OF
HIGH-END COSMETICS: THE
PRODUCTS NEVER GO ON SALE.

Here's another bit of voodoo from the world of high-end cosmetics. The products never go on sale. Women will not buy discounted cosmetics, though they'll buy anything else marked down as low as possible. The other day I came upon a huddle of sophisticated young Manhattan women shivering outdoors on the coldest day of the year while waiting in line at the Manolo Blahnik sale. A woman will risk hypothermia to save money on stiletto heels, but if she bought cut-rate cosmetics, she'd feel as if she were putting something ratty on her face.

So instead of sales, the cosmetics manufacturers offer something known as gift-with-purchase: "Spend this much today, and you get this free gift package containing blah, blah, and blah—a \$25 value!" The idea is to give shoppers the sensation of having saved \$25—without discounting the cosmetics; in addition, the gifts introduce them to new products. This gift-with-purchase system has been in place for some 30 years now. But the industry has found that if a gift contains three free items, the customer will use perhaps two of them, and return to buy just one. Cosmetics executives rue the day the gift-with-purchase policy began, but it's now a habit neither they nor their customers can break.

"There's a final issue playing out in cosmetics," I say.

"Which is?"

"The level of importance of anything women put on either nose or toes."

For most women, the extremes—the face and hair and feet—are the areas that matter most. When choosing a jacket or skirt, there's some leeway for color, style, and fit, as there is even with underwear. Most women do not expect perfection. But with makeup or shoes, the standards suddenly go way up. No woman is going to settle.

"And women always shop those two departments, don't they?" I ask.

"Yes," says Carol. "It's something I've noticed when I shop with my sister or my friends. No matter what else we look at, we always go through cosmetics and shoes. Doesn't matter whether we're in a high-end store or a discount store. It's like you can't not go."

"I want you to give me a little guided tour of the counters here."



American dreamland: This successful Las Vegas mall draws more than 20 million people annually.

“Okay. Well, the first thing you may have noticed is that there’s almost no real selling space. Look at this counter.”

It’s a typical cosmetics counter.

“Here you have your visual—the sign that announces they’re giving away a free gift. Next to it is your tester unit, with a small sign giving some price information. But where do you do your selling? Where’s a little bit of empty counter where you and the shopper can talk and put a few possible purchases?

“Over here you’ve got a major tester unit showing all the different shades of lipstick, then you’ve got a smaller color thing, and now, finally, maybe six inches of horizontal space. And a mirror, too, at last. So there are four or five feet of solid merchandise without a single mirror. I don’t care where you go or which cosmetics counter you visit, nobody understands the mirror, which should be the simplest thing here. It’s what cosmetics counters should be built around. How can you buy cosmetics without a mirror?”

Mirrors are a major problem in the cosmetics department. Not only are there too few of them, but they’re too small, not well positioned, and not properly illuminated.

And this is so despite the fact that the mirror is the one thing every woman shopping here wants to see—or rather, she wants to see what’s *in* the mirror. But you can quickly scan the department and figure out which furnishings the retailers think critical. The graphics—the big, expensive posters, replicas of the big, expensive ads that ran in *Vanity Fair* and

Vogue—are beautifully realized, prominently displayed, and advantageously illuminated. Someone believes in those ads. The merchandise comes second.

You might expect, for example, that after all this time someone would have solved the problem of cosmetic tester units. But that hasn't happened. The challenge is to devise a display that shows all the various shades of lipstick or powder or eye shadow and allows the woman to try a few. Each tester unit starts life looking attractive and inviting, brimming with shades and textures. Then it hits the store, and all hell breaks loose. Women start using it! And the illusion begins to disintegrate. To touch one pot of lip-gloss, you can't help dragging your cuff through three others. Pick up one pencil, and all the rest go rolling onto the floor.

"They're struggling with pencils, too," Carol says. "Everybody has a problem with pencils. And the lipstick presentation leaves a lot to be desired. Cleanliness is the number-one problem. Cleanliness is critical. Your lips are a very personal area."

"Don't you think the mirrors should be magnified?" I ask. "As we get older, our eyes get worse. And the older shoppers are the ones who really need make-up, more than the kids do."

"Absolutely. But the companies don't design these departments to make the shopper the star. To them, the star of this counter is the supermodel or the celebrity who's in the ad campaign. After all, they paid her a ton of money—she must be the star."

"And the lights here are horrible."

That was from neither Carol nor me, but from the sales associate, a pleasant-seeming lady who has been eavesdropping and now has her own two cents to contribute. "They really are, aren't they?" Carol sympathizes. "Fluorescent lights give everything a yellow cast and make it hard to know what a color will really look like."

"That's why I tell customers to go over to that full-length mirror near the window."

"That's what a good salesperson does," Carol says. "How long have you been here?"

"Two years in November. Are you people with the main office?" the saleslady asks. "Because if you are, we have no product here on the floor. The shelves are empty. I have nothing to offer. I am absolutely down on everything."

"I can see that," Carol says.

"And I won't sell my customers something that's wrong for them."

"That's great," Carol says.

"Because then they'll never come back to me. I don't make customers, I make friends."

"As it should be."

"Well, have a lovely day. It's a shame you have to spend it in here like I do."

"Oh, no," Carol says. "We're shopping. This is fun." □