

The Future of Ecommerce Search

A three-part research study conducted in 2023 uncovering expectation gaps between what shoppers want from site search, what brands think they're delivering, and what brands are actually delivering.



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Introduction

Nosto, the world's leading Commerce Experience Platform (CXP), in partnership with market research agency, Censuswide, conducted a three-part study to assess consumer and merchant sentiment toward ecommerce site search. This research consists of three studies:

1. Real-world site experience testing of 100+ online stores' site search
2. A survey of 2,000+ consumers across North America and the UK
3. A survey of 308 ecommerce professionals from brands across North America and the UK

The aim of the research was to uncover expectation gaps between what consumers want, what brands think they're delivering, and what brands are actually delivering when it comes to site search.

The results highlight a stark rift appearing between brands and consumers, and show clear areas of improvement for brands to meet consumer needs and wants, especially around search relevancy.

In this executive report, we'll go through what we found from each study, giving brands a clear roadmap for product discovery in 2023 and beyond.

PART 1

Key comparison between shopper and brand sentiment

Importance of the search experience

The online customer journey starts (and ends) with the search bar, with 69% of consumers surveyed likely¹ to go straight to this when landing on an ecommerce store. Further to this, the search bar is a key conversion battleground, as 80% of consumers surveyed said they have exited a website because of poor performing search. Brands surveyed also acknowledge the impact of this; they attribute 39%² of their site's bounce rate to a poor search experience or shoppers not being able to find relevant products.

Product discovery starts—and ends—with your search bar



69% of consumers go straight to the search bar when they visit an online store



But 80% of consumers have exited a site because of poor-performing search

Displaying irrelevant products is a major aspect of a poor search experience and can deter consumers from converting, as 35% of consumers surveyed have left a site due to the search not showing relevant results. But seeing irrelevant results is common for consumers surveyed, with 69% saying they often³ come across irrelevant results when shopping online.

Despite 99% of brands surveyed believing their search results are relevant⁴, and 35% saying they are extremely relevant, the real-world site testing revealed 79% of websites had irrelevant items from searching 2-word queries. Brands surveyed do recognize that relevancy is significant to the search experience, though, with 82% agreeing⁵ online stores could improve their site search experience through providing more relevant results. Through focusing on relevant search results, consumers are more likely to convert, as 79% of consumers surveyed are likely¹ to buy a product they'd searched for in the search results.

The importance of the search experience is only emphasized in the current economic climate; 68% of consumers surveyed agree⁵ they like to compare products from different online stores, due to the cost-of-living increases, and a good ecommerce search makes this easier. It's clear brands recognize this shift in purchasing habits, as 81% of brands surveyed agree⁵ the rising cost of living makes ecommerce search more important as it allows customers to easily find and compare similar products.

The importance of a good search experience is even more crucial when targeting consumers under the age of 34, as they have higher expectations and are more likely to leave a site due to a poor search experience. For example, consumers surveyed aged 25-34 are more likely¹ to go straight to the search bar when landing on an ecommerce store compared to those aged 55+ (77% vs 61%) and say there is at least one way in which online stores can improve their search experience (94% vs 77%). These younger consumers aged 25-34 are also less likely to tolerate a poor search experience and abandon their search due to a variety of poor performing aspects. These include showing out of stock items (with 25-35 at 33% vs 55+yrs at 21%), results taking too long to appear (30% vs 45-54yrs at 21%), and search results not being personalized to their individual preferences (29% vs 55+yrs at 10%).

Opportunity to retain and convert consumers

56% of consumers surveyed are likely¹ to continue shopping on an online store if alternative products are suggested upon zero search results being shown. This illustrates how crucial product suggestions are in ensuring consumers remain on a website and discover other products. However, only 34% of brands surveyed said they offer these!

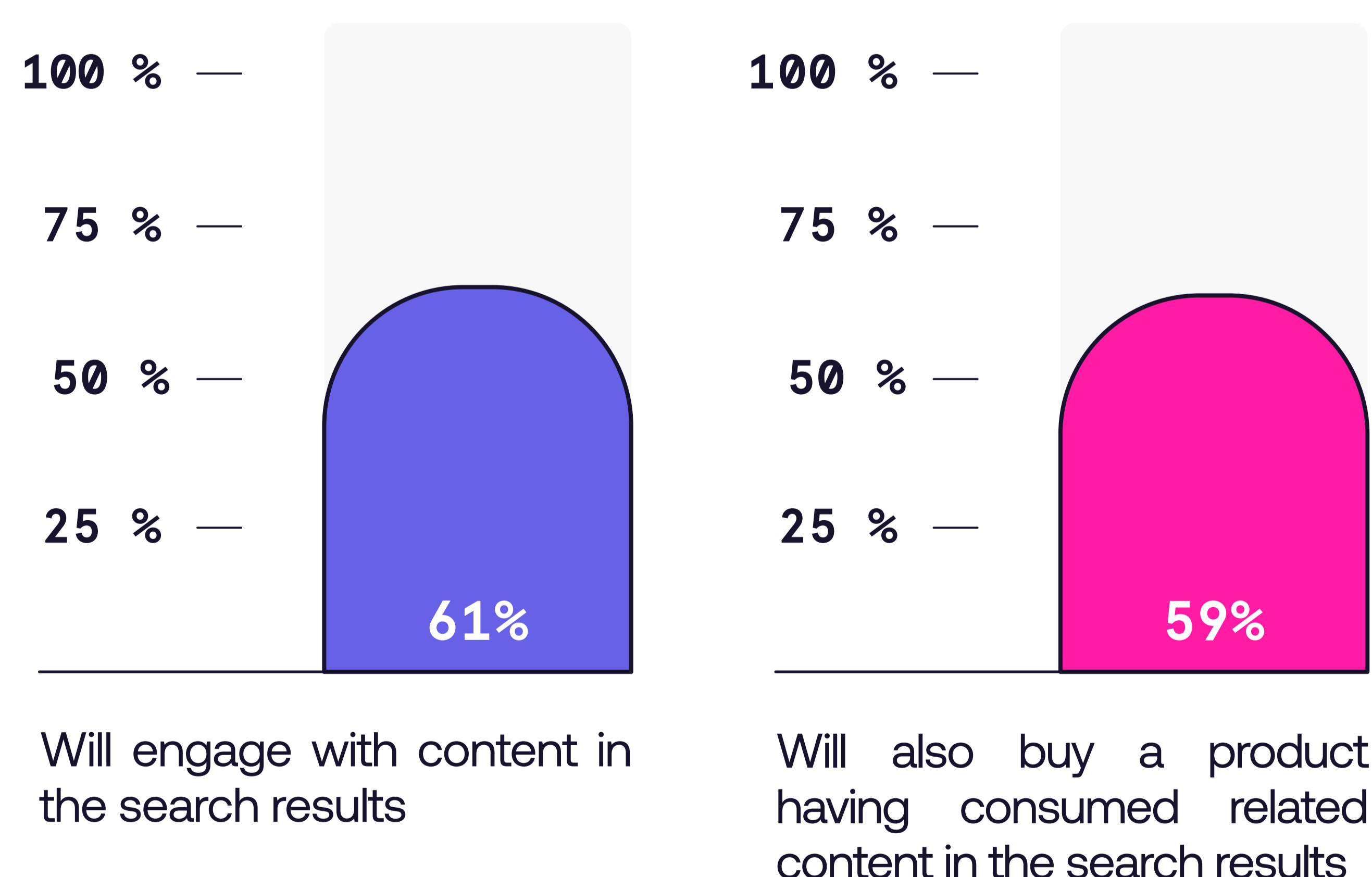
70% of consumers surveyed are likely¹ to complete a purchase if the results are personalized to their purchase history, and the vast majority (82%) of brands surveyed agree⁵ that a personalized search is critical for higher conversions. However only 34% of brands are personalizing their search results. If brands see personalized search results as being so critical for higher conversions, but only around a third have implemented a solution to allow for that, might it be that the maturity of available solutions is lacking?

Outside of personalizing the search results, content is a key aspect of a consumer's journey—and an engagement tactic—as 61% of shoppers surveyed are likely¹ to engage with relevant content if it is shown in the search results. And 59% are likely¹ to buy products having consumed related content that was served in the search results. Many brands surveyed are not utilizing this opportunity to connect with consumers, though, as 60% don't have content within their search results (e.g., FAQs) and the real-world website tests suggest even more (89%) websites do not have content included in search results.

User-generated content (UGC) (such as reviews, images, or comments from other customers) is one particularly fruitful type of content brands could better utilize to engage and convert consumers. Indeed, over half (51%) of consumers surveyed are likely¹ to engage with this type of content if it is shown in the search results, and over half (54%) are likely¹ to buy products having consumed this type of content. Despite this clear link between influencer and user-generated content and converting consumers, 57% of brands surveyed are missing this opportunity by not employing this content type in their search results.

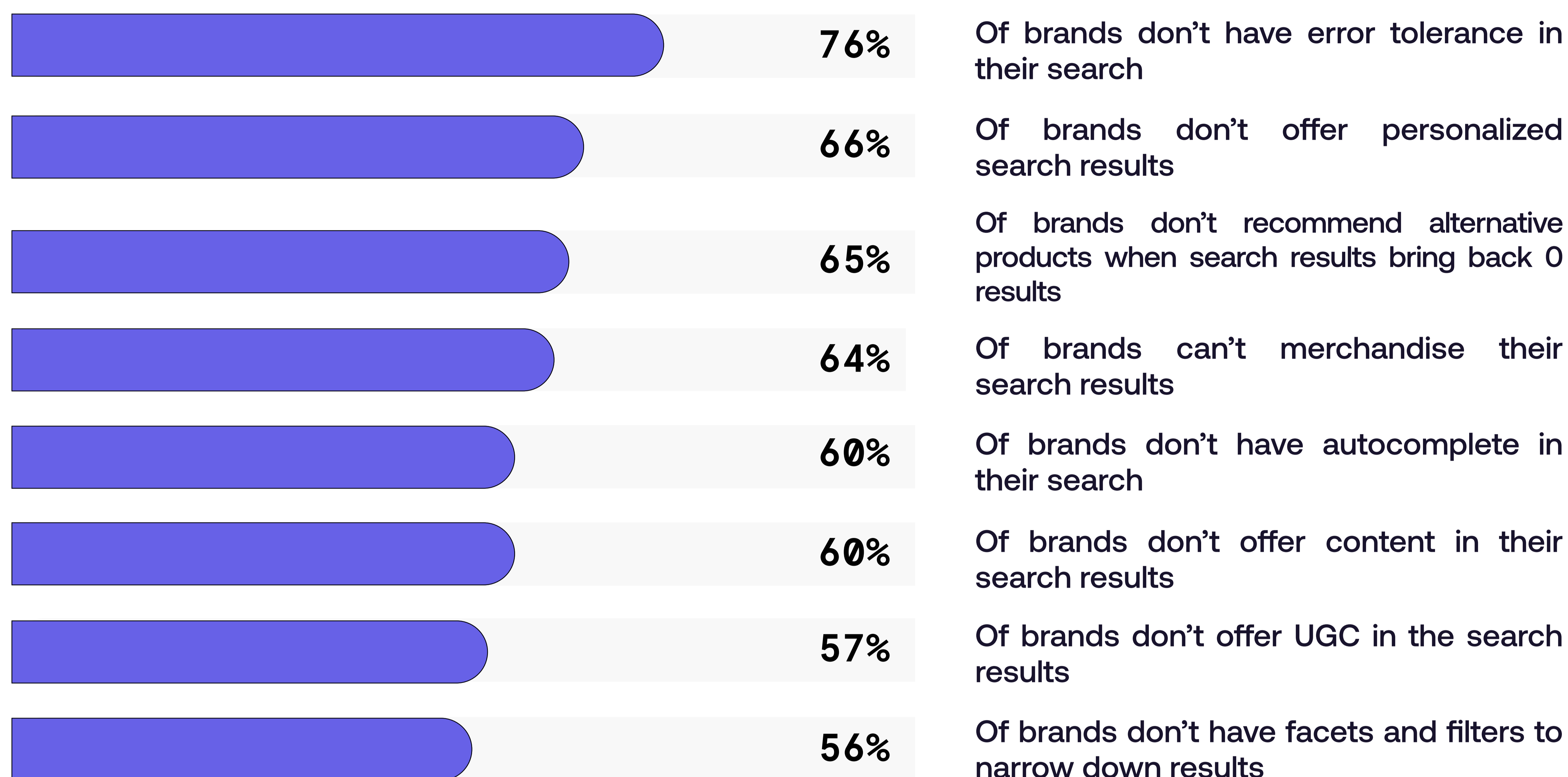
Note this is especially opportune for brands who target a consumer demographic of 25-34yrs. When we compare this age group to, say, those aged 55+, the former are much more likely¹ to engage with relevant influencer or user-generated content shown in the search results than the latter (75% vs 31%)—and similarly more likely to then buy products having consumed this content (76% vs 36%).

Shoppers want content in search results



Where can brands improve the search experience for shoppers?

Key search functionality brands are missing



Sites not helping consumers navigate their catalog is a key barrier, with 27% of consumers having left a site because the search results showed too many options and it wasn't possible to efficiently narrow down the results (e.g., through dynamic filters that are appropriate to the search query). This barrier is common among brands, as 56% of brands surveyed do not have dynamic filters on their site.

Despite customer analytics being critical to empowering search and improving relevancy, 17% of brands surveyed are not measuring any of the listed important metrics (including percentage of transactions/revenue that comes from those visitors, percent of abandoned site searches, conversion rate for each query, popular query terms etc.). Further to this, 81% of brands surveyed do not measure the most popular query terms that lead to no results and 79% said they do not measure the top revenue query.

Interestingly, the vast majority (95%) of brands surveyed experience at least one pain point with their current search solution, directly impacting the search experience for their shoppers. The most likely pain points experienced include: a lack of advanced product data processing (29%); a lack of desirable merchandising functionality (27%); and complexity of implementation (26%).

Despite these painpoints, the appetite to invest is still there, because brands understand the sheer importance of the search experience; 84% of brands surveyed agree⁵ they plan to invest on continually improving their site search, with 3 in 10 (30%) saying they strongly agree they plan to invest.

The desire to improve is certainly there, but the top-3 painpoints discussed could suggest a need for a solution that allows for more sophistication (with advanced data processing and desirable merchandising functionality) without compromising time-to-value and efficiency.

PART 2

Shopper sentiment analysis

Shopper purchasing habits

A shopper's first impression of your site often starts at the search bar, with almost 7 in 10 (69%) shoppers saying they are likely¹ to go straight to the search bar when landing on an ecommerce store. Additionally, just over three quarters (76%) agree⁵ that a good, fast, and accurate site search makes online shopping easier. The search bar has recently become even more important, as almost 7 in 10 (68%) consumers surveyed agree⁵ that, as the cost-of-living increases, they compare products from different online stores and good ecommerce search makes this easier.

The shoppers' journey then progresses from the results shown. Almost 4 in 5 (79%) consumers surveyed are likely¹ to buy a product in the search results that they directly searched for. However, the shopper's journey can quickly end, depending on the search results shown. For example, 35% of consumers surveyed have left a site because the search results haven't shown any relevant results, and 26% have left a site because the results showed products that were out of stock. This demonstrates how easily shoppers are lost to alternative brands if met with a poor search experience.

If brands don't have any relevant results or items that are in stock to pull through from a search query, brands still have an opportunity to keep consumers on their site and potentially convert them through utilizing alternative suggestions on their site. Almost 3 in 5 (56%) consumers surveyed are likely¹ to continue shopping on an online store if alternative products are suggested upon zero search results. Further to this, almost a quarter (24%) of consumers surveyed think online stores could improve their search experience by offering alternative products upon zero results being found. This demonstrates how effective alternative products can be in encouraging consumers to convert, despite not having any relevant results or in-stock items relating to a consumer's query, ensuring fewer chances of losing a customer.

Serving content within search results can also increase a brand's opportunity to retain and convert consumers. As previously mentioned, 61% of shoppers surveyed are likely¹ to engage with relevant content if it is shown in the search results. And 59% are likely¹ to buy products having consumed related content that was served in the search results.

Again, influencer or UGC content in particular provides the opportunity to offer material for consumers to engage with, and complete purchases following this; around half (51%) of consumers surveyed are likely¹ to engage with relevant influencer or user-generated content if it is shown in the search results (e.g., reviews, images, comments from other customers) and over half (54%) are likely¹ to buy products having consumed this influencer or user-generated content.

Some consumers report that having content within the search results is a key way for brands to improve their search experience. This could be through offering content for customers to read (e.g. articles) that is related to their search (19%) for instance, or offering UGC content so shoppers can see the items on other people (20%).

Where do shoppers think brands can improve site search the most?

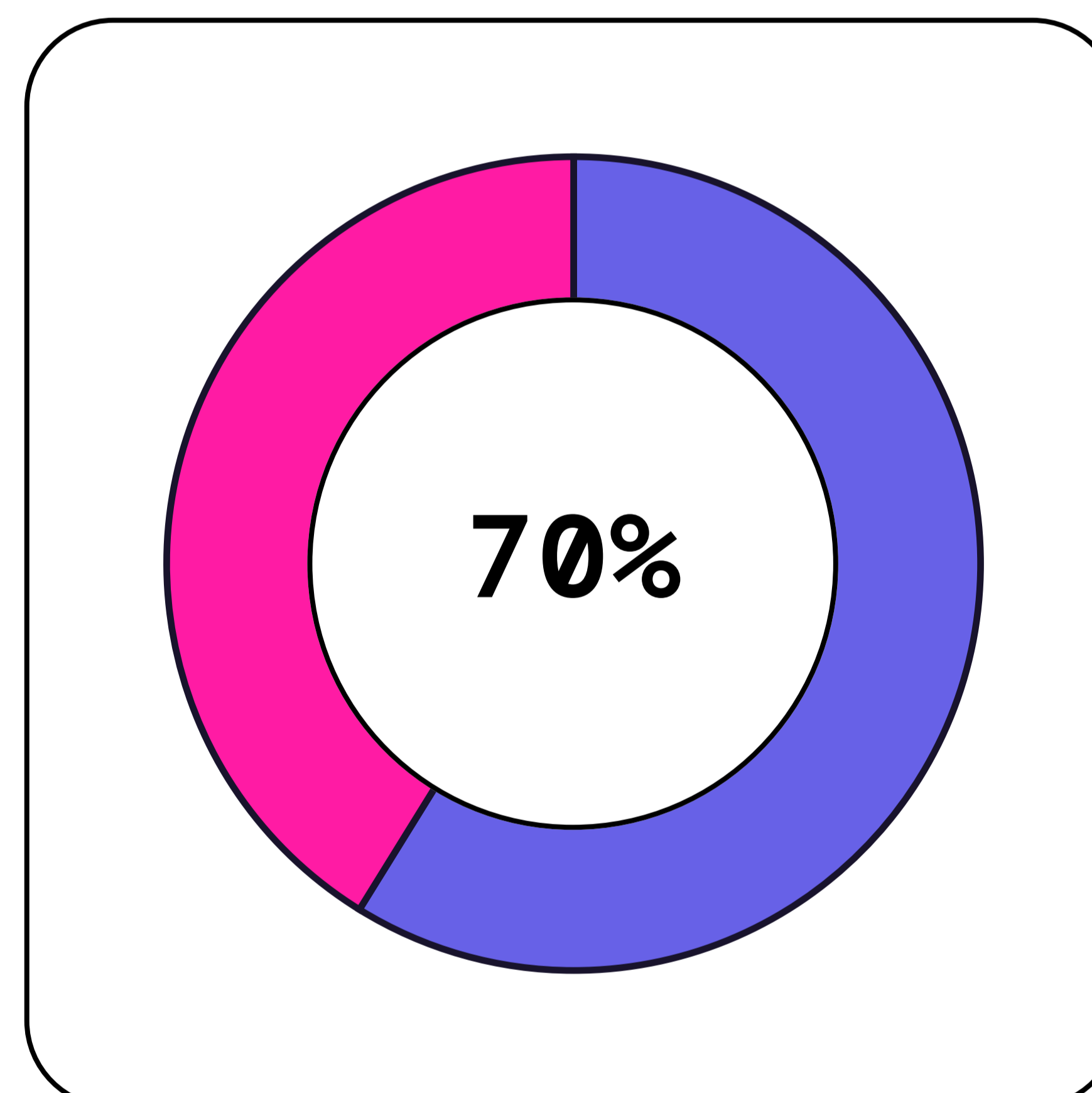


Providing content in search results is even more of an opportunity when it comes to engaging younger consumers. Consumers surveyed aged 25-34 are most likely¹ to engage with relevant influencer or user-generated content shown in the search results (75%) and buy products having consumed this content in the search results (76%), whilst those aged 55+ are the least likely to say the same (31%, 36%). These younger consumers surveyed (25-34) believe brands could improve their site by providing content within the search results in case they want to read about content related to their search (28%), but this improvement is much less of a consideration for consumers surveyed aged 55+ (15%)

Providing influencer or UGC content is a strong opportunity to engage consumers surveyed aged 34 and under, as over half of those aged 25-34 are likely¹ to engage with this type of content (51%) and buy products having consumed this type of content (54%). This is followed by those aged 16-24 (67%, 68%). Indeed, younger consumers aged 34 and under want more of this content, as 31% of those aged 25-34 and 30% of those aged 16-24 said providing influencer or user-generated content in search results would improve sites as they could see items on people other than the brand's models. Meanwhile, only 12% of those aged 55+ said the same.

Personalization of search results is another aspect that can lead to conversion, as 7 in 10 (70%) consumers surveyed are likely¹ to complete a purchase if the search results are personalized to the likes of their purchase history, or specific brands, colors, and sizes they like. Personalization is important to consumers as this is a key factor in ensuring search results are relevant to them and consumer data can be utilized by brands to inform them which products are most relevant to the individual consumer. Despite this huge benefit of offering personalized search results, 66% of brands don't currently utilize this. Creating more personalized search results also provides brands the opportunity to reduce the 39%² of bounce rates they attribute to poor search experiences/ shoppers not being able to find relevant products.

Personalization is critical



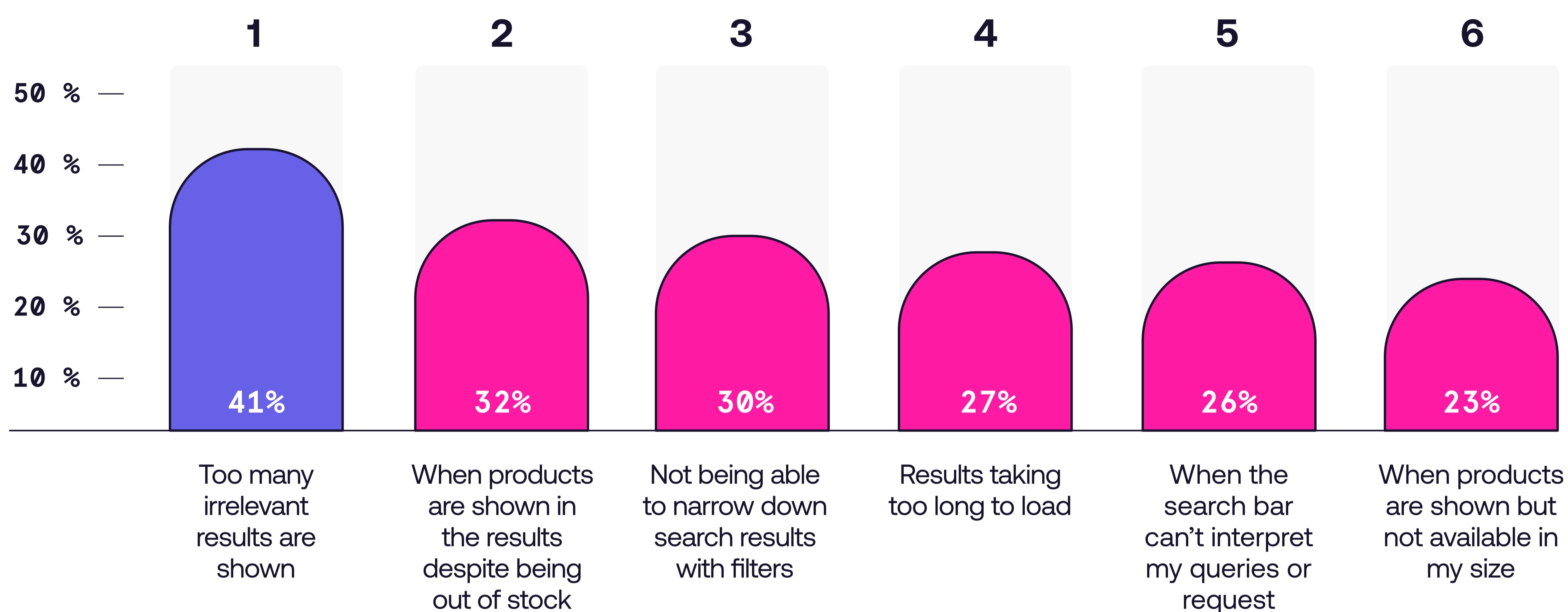
Of shoppers are more likely to purchase if the search results are personalized to them

Consumer experiences and opportunity for brands to improve

Given the search bar is an important aspect of a consumer's shopping experience, it is interesting to explore what specifically is important and what causes frustrations with this. 86% of consumers surveyed note that at least one aspect of site search frustrates them.

Similarly, 83% of consumers note there's at least one area in which online stores can improve their site search. The full list of frustrations consumers experience is shown in the below table.

What are shoppers' top frustrations with site search?



Firstly, consumers surveyed are most likely to say irrelevant results being shown frustrates them about site search (41%). Experiencing this is common for consumers surveyed and detrimental for brands; almost 7 in 10 consumers (69%) said they often³ come across irrelevant results, and over a third (35%) have left a site because no relevant results appeared.

The opportunity to narrow search results is critical for consumers to search efficiently. Not having appropriate filters for different queries to enable efficient search is frustrating for 3 in 10 (30%) consumers surveyed (e.g., not being able to filter by 'cut' for jeans). Not offering such advanced filters and not enabling consumers to efficiently narrow down the search has resulted in over a quarter (27%) of consumers surveyed leaving a site.

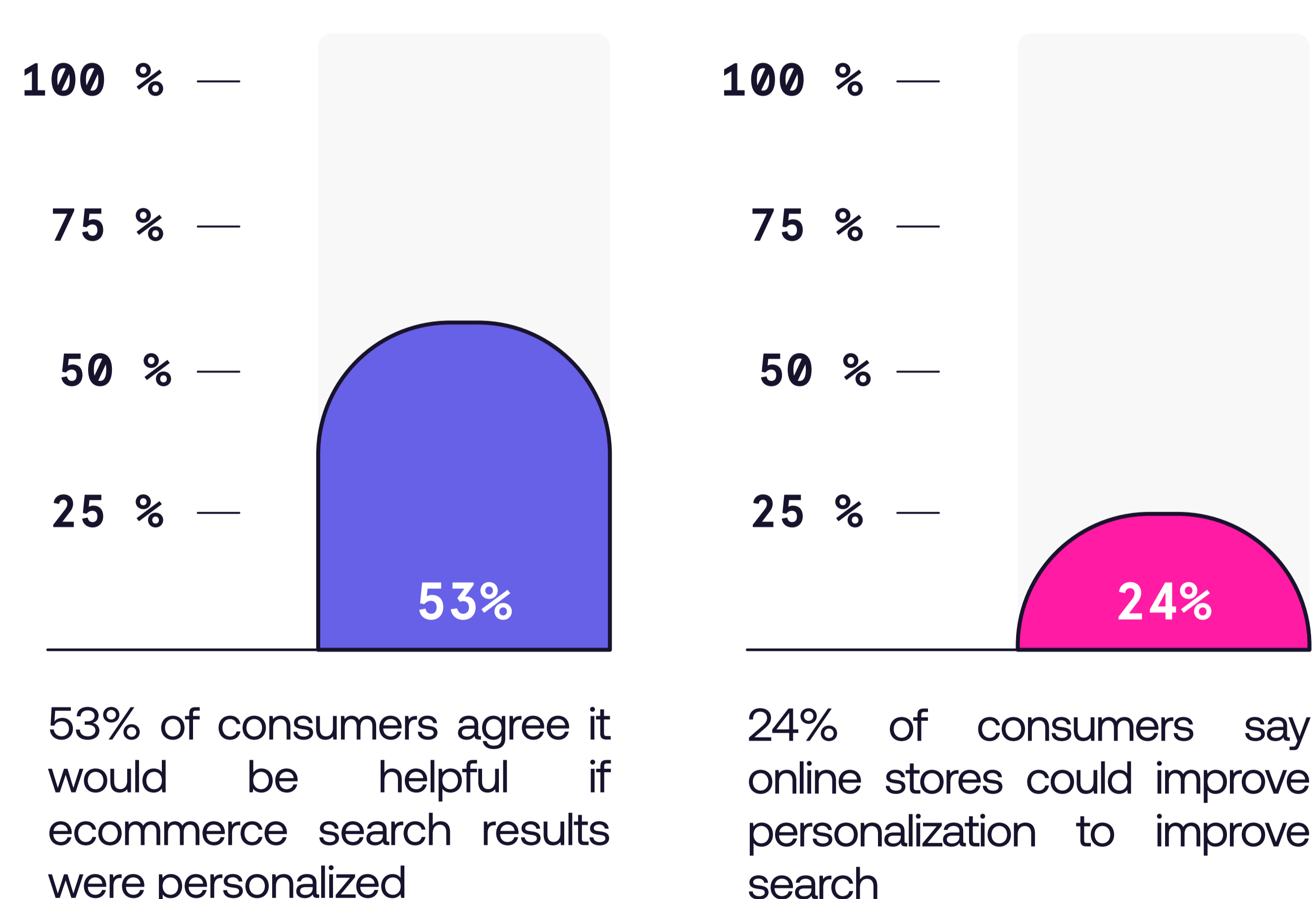
There is an opportunity for brands to improve the search experience through dynamic, query-specific filters. Indeed, just over a third (34%) of consumers surveyed said online brands could improve their search experience by offering filters based on the search query to narrow down results.

Over a quarter (27%) of consumers surveyed find results taking too long to load frustrating and just over 3 in 10 (31%) said their search experience could be improved by results' loading speeds. If loading speeds are slow, consumers are likely to abandon their search, as a quarter (25%) of consumers surveyed have left a site because the results were taking too long to appear.

Only displaying items that are available is another consumer expectation, with almost 7 in 10 (69%) agreeing⁵ they only want search results to show products that are in stock. Showing consumers products that are not in stock is a frustration for almost a third (32%) of consumers, and this has resulted in just over a quarter (26%) leaving a site.

Personalized search results is another way consumers surveyed would like brands to make searching easier, as over half agree⁵ (53%) it would be helpful if ecommerce search results were personalized to them (e.g., purchase history). Furthermore, almost a quarter (24%) of consumers surveyed said online stores could improve personalization to improve their search experience. It could be suggested this personalization is now expected as a given for some consumers surveyed, as over 1 in 6 (17%) said they left a site because the search results weren't personalized to their individual preferences.

Consumers want personalized search results



Gathering data about each shopper's search can inform personalization across the rest of the site too, and therefore is a key method to meet customers' expectations of having a consistently personalized onsite experience. Almost 3 in 5 consumers surveyed (59%) agree⁵ that when searching for items or certain product attributes, they want a website to consider what they are looking for, and use that information to inform what else they are shown while on the site. Consumers don't just expect a personalized search experience; they expect this data to deliver them personalization throughout the rest of their journey, too.

PART 3

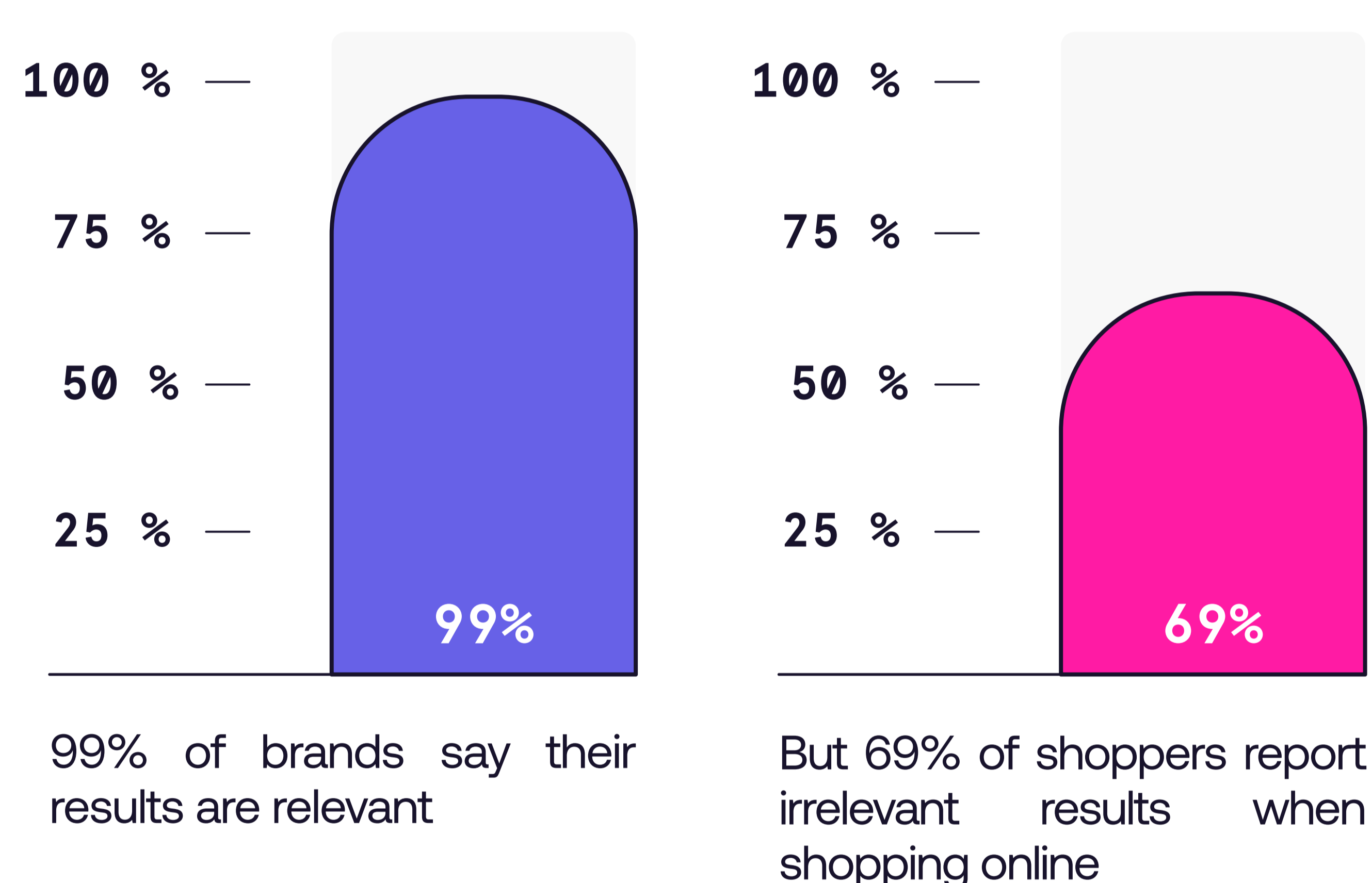
Brand sentiment analysis

Importance of the search experience

Brands surveyed understand the importance of efficient site search, as just over 4 in 5 (81%) agree⁵ good, fast, accurate site search is essential for a successful ecommerce store. As previously mentioned, consumers surveyed think that good ecommerce search makes comparing products from different online stores due to the cost of living easier (68%) and brands surveyed have anticipated this increased reliance on searching given the economic climate. Indeed, just over 4 in 5 (81%) agree⁵ the rising cost-of-living makes ecommerce more important as it allows customers to easily find and compare similar products before making purchases.

There seems to be a disparity between how relevant brands perceive their search to be, and the experience of consumers. Indeed, 99% of brands surveyed rate their search results as relevant³, with over a third (35%) saying they are extremely relevant. But almost 7 in 10 (69%) consumers surveyed said they often³ come across irrelevant results, and, in fact, the real-world website testing proved this to be even more significant, with 79% of sites having irrelevant items from searching a few words.

An expectation gap emerges



Given that not providing relevant results is the most likely reason why consumers have left a site (35%), the impact here is profound. Brands do recognize the negative impact of poor search experiences, as, they said 39%² of their bounce rate is attributed to poor search experiences/shoppers not being able to find relevant products. This data just illuminates that relevancy, in particular, is where they brands to invest.

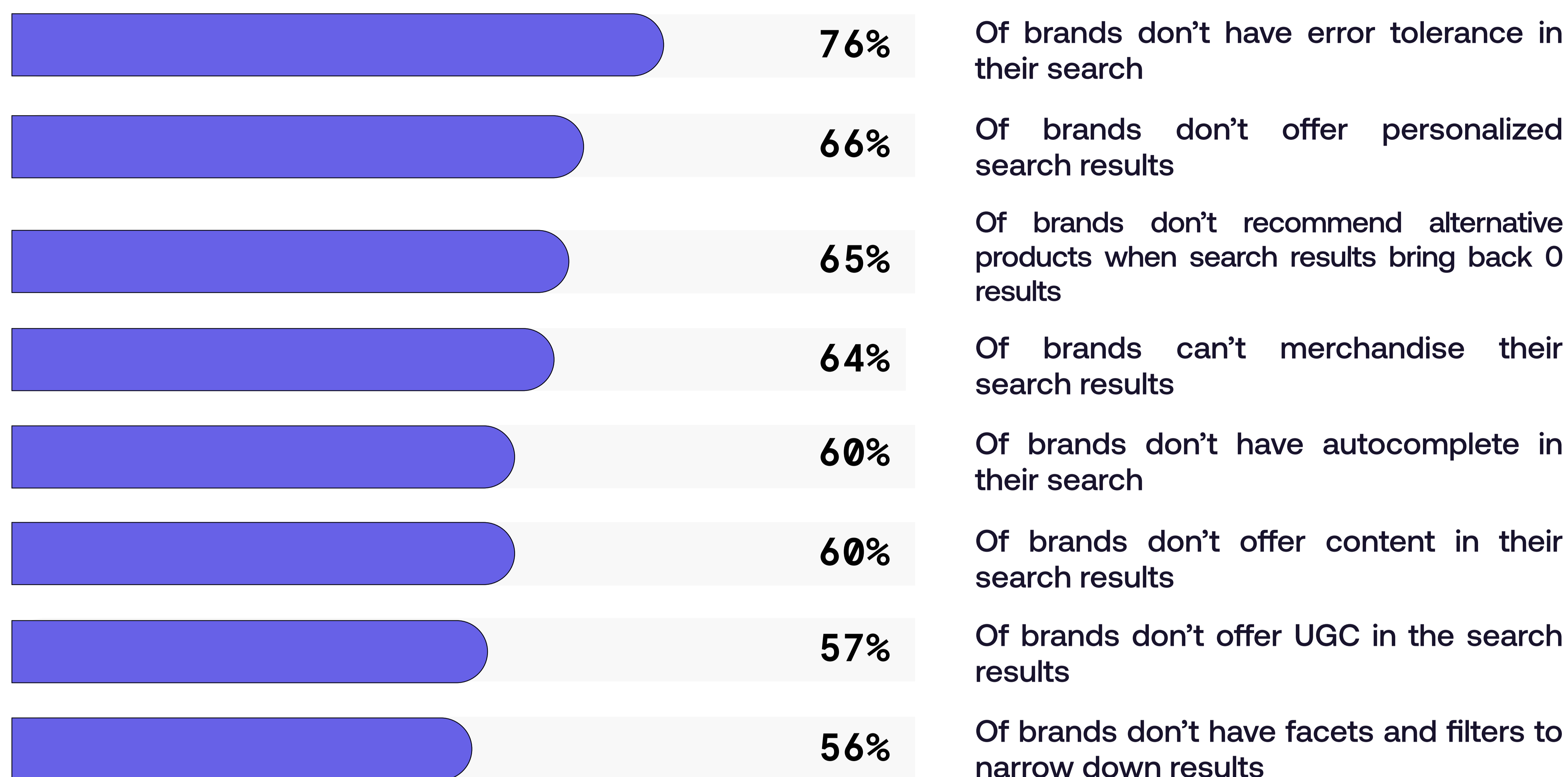
The key search functionalities that ecommerce sites are missing

Having explored the critical features that contribute to a good search experience and can also cause shopper frustration (including filters, alternative product suggestions, error tolerance and content), it is interesting to understand the features that brands surveyed don't have on their site.

Looking at the specific site features brands do not have on their site, just over three quarters (76%) of brands surveyed said they do not have error tolerance on their site, around two thirds said they don't have either personalized results (66%), alternative products offered upon zero results (66%) or merchandised results (65%).

Around 3 in 5 said they don't have autocomplete (60%), content within the search results (60%) or influencer/user-generated content in search results (57%). The real-world site tests show even more of an absence of these things, with only 11% of websites serving content as well as products on searches, for instance. Finally, over half of brands said they don't have dynamic filters (56%)—something we found to be the second most likely reason that consumers surveyed have left a site (27%).

Key search functionality brands are missing



The majority (83%) of consumers surveyed think online stores can improve their search experience in some way. Brands surveyed recognize the opportunity to improve, with over 4 in 5 saying improving results' loading speed (83%), offering alternative products upon zero results being found (82%), providing more relevant results (82%) and providing content within the results (81%) would improve an online store's search experience.

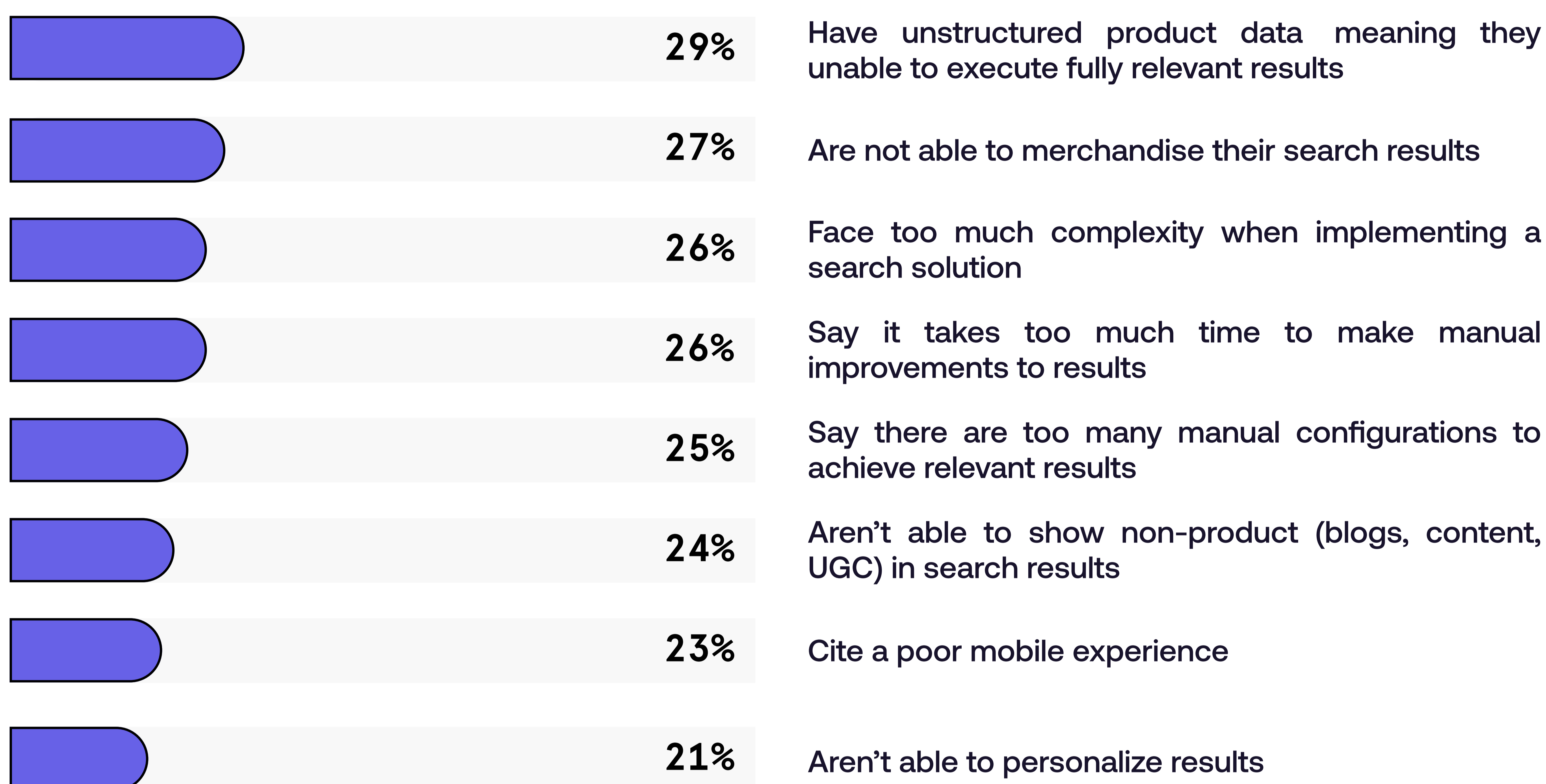
This is followed by 4 in 5 saying that offering autocomplete (80%), personalized results (80%) and influencer/user-generated content (80%) could improve search results. In addition, brands surveyed think there is a missed opportunity with product merchandising, as over three quarters (77%) agree⁵ ecommerce brands are not making the most of the product merchandising opportunities that search provides.

Given brands surveyed have noted the importance of site search, it is unsurprising to learn many brands surveyed are planning to make improvements, with over 4 in 5 (84%) agreeing⁵ they plan to invest on continually improving their site search.

Current search solution

Brands surveyed are experiencing several pain points with their current search solution, with 95% of brands surveyed experiencing at least one pain point with their current search solution, the full list of pain points are shown in the table below.

What are the biggest pain points brands face with site search?



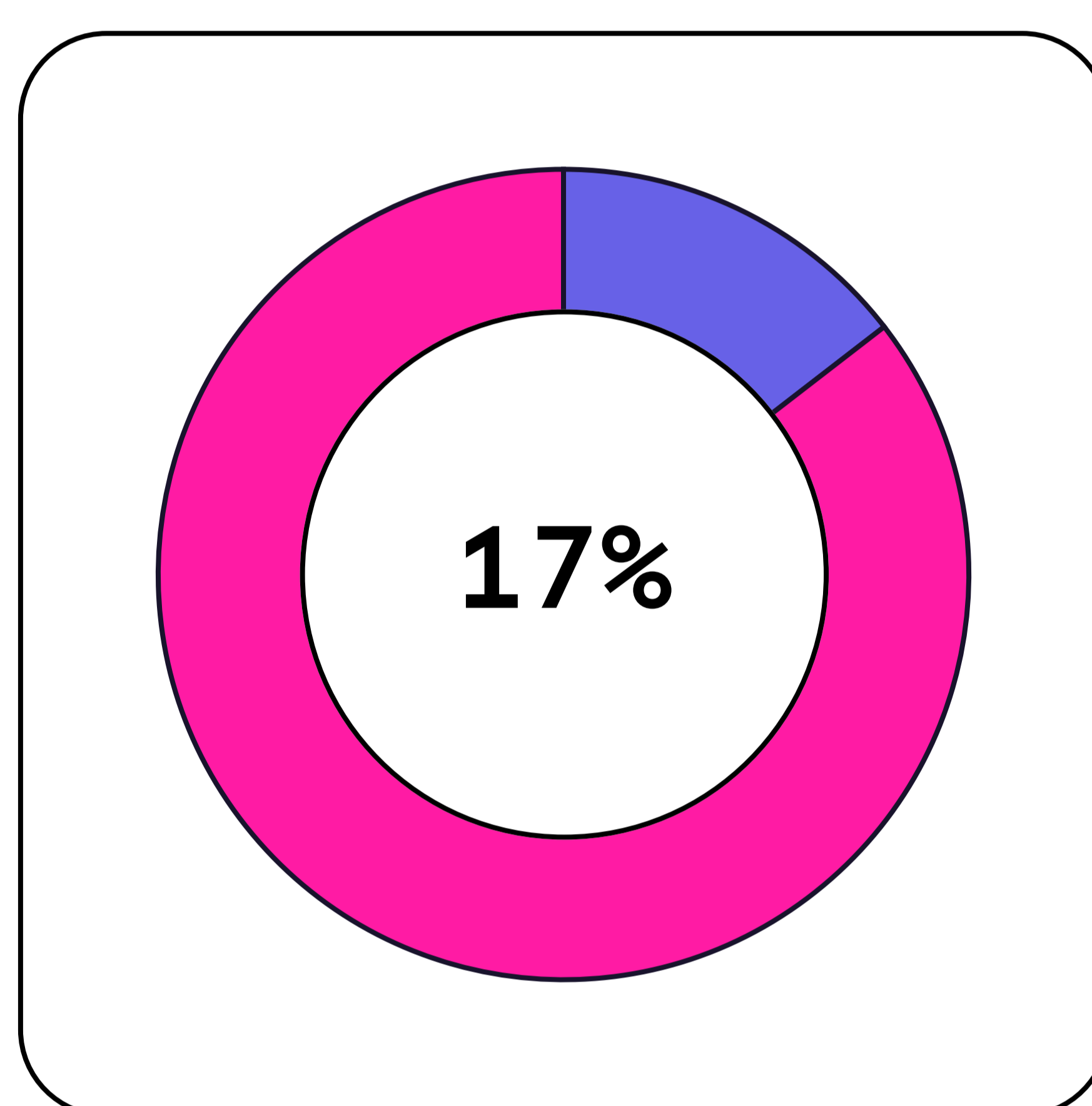
Exploring the specific pain points brands experience with their current search solution shows almost 3 in 10 (29%) brands surveyed said they lack advanced product data processing with their current solution, and over a quarter are experiencing pain points such as lacking desirable merchandising functionality (27%), complexity of implementation (26%) and too much time spent on making improvements (26%). Having too many manual configurations needed to get relevant results is a pain point for a quarter (25%) of brands surveyed, and just under a quarter (24%) said the same for the inability to serve non-product results (e.g., not showing related content). Around 1 in 5 said poor mobile experience of search (22%), high bounce rates due to irrelevant search results (22%), poor search relevancy (21%), inability to offer personalization (21%) and poor speed of search results (20%) are pain points with their current search solutions.

Highlighting the difficulties experienced by brands is important, as these pain points are directly impacting the search experience provided to their consumers. Many of the aforementioned frustrations experienced by consumers could be a result of a poor search solution implemented by the brand. Given the vast majority (95%) of brands surveyed experience at least one pain point with their current search solution, it seems the market needs to provide better solutions for brands in order for them to fully optimize their search experience.

Measuring metrics

Some brands surveyed are missing a key opportunity to improve their search experience through analytics. Useful analytics can ensure brands have a strong understanding of how their search is used, the experience of customers and the pain points for customers, all of which can inform decisions on how to improve the search experience. However, 17% of brands surveyed are not measuring any of the metrics shown in the table below and therefore lacking customer insight relating to how site searches are used and performed.

Brands lack customer intelligence from search



Only 17% of brands are actively tracking and measuring performance metrics from their site search

Just over 4 in 5 of the brands surveyed do not measure the most popular query term that led to zero results (81%) or the click through rate for each query (81%). Just under 4 in 5 brands surveyed do not measure the top revenue query (79%), the percentage of site visitors using their search (78%) or the most popular query term (78%). Finally, over three quarters are not measuring the conversion rate for each query (77%), the percentage of abandoned site searches (77%) or the percentage of transactions/revenue (76%).

PART 4

Real-world site experience testing

Having explored the consumers' surveyed experiences online and the brands' website offerings, it is interesting to discuss the results from the real-world website tests conducted.

How the tests were conducted

100 e-commerce brand sites were tested for their maturity and excellence and fell into the following revenue categories:

- **\$1m - \$10M**
- **\$10M - \$50M**
- **\$50M - \$100M**
- **\$100M - \$500M**
- **\$500M - \$1B**
- **\$1B+**

The sites also covered the following three verticals: fashion; beauty; and home, garden & DIY.

The websites were scored on both their maturity and their excellence and these scoring systems were developed by taking the characteristics and functions of each website, and assigning scores. These scores were assigned to the relevant group depending on if that function or characteristic showed excellence or maturity. For each website, the scores were then added together and banded into groups of low, medium and high, or poor, average and good, depending on the relative score.

Maturity curve model

Maturity criteria and scoring system

Low maturity

- Overall search speed
- Alternative products are displayed when 0 results served

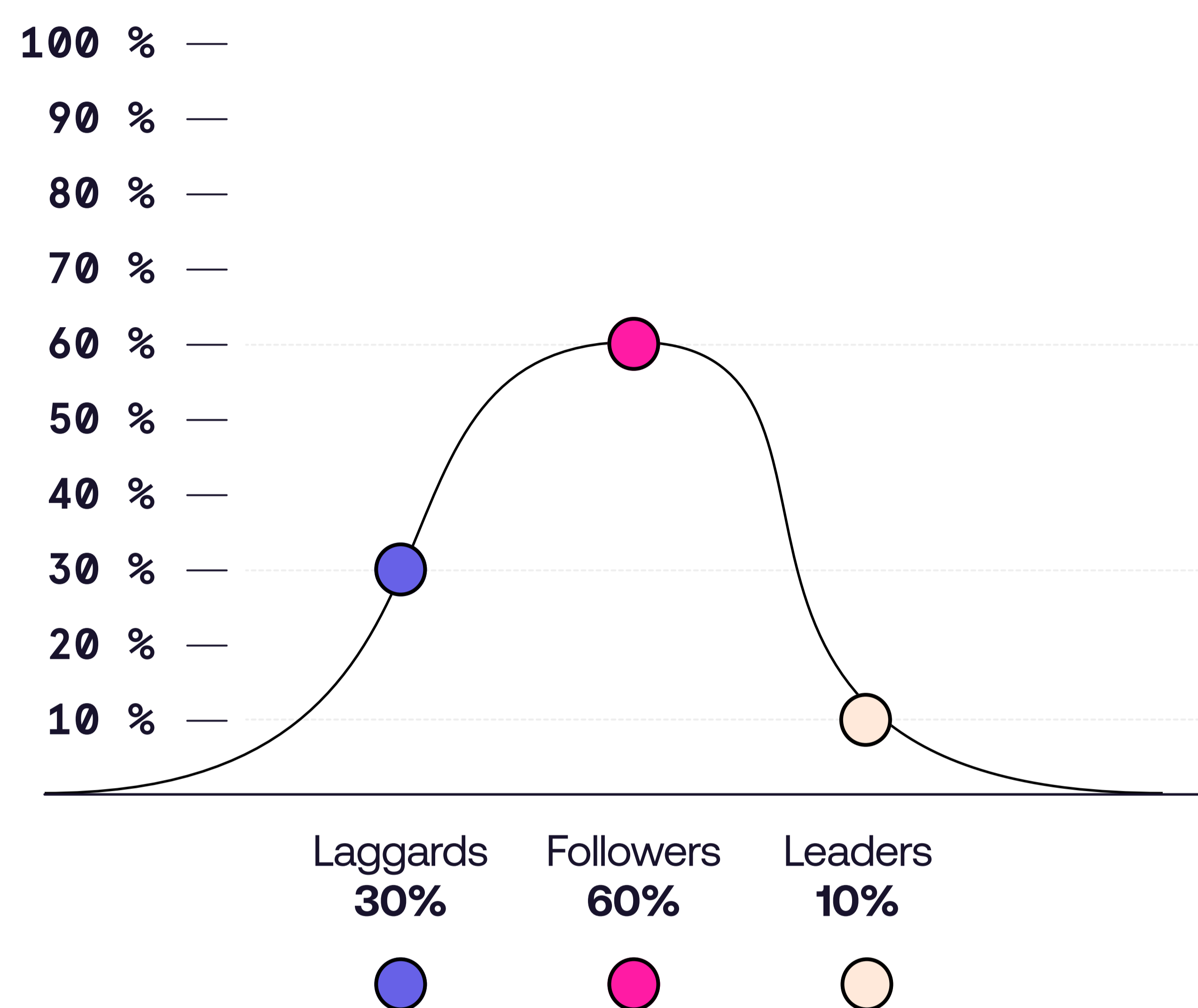
Medium maturity

- Error tolerance
- Autocomplete (query predictions)
- Dynamic facets and filters

High maturity

- Non-product served in search results
- Overall search relevance

Search Maturity



Looking at maturity scores, websites tested were most likely to be rated medium in terms of maturity, with 3 in 5 (60%) receiving this score. This is followed by 3 in 10 (30%) websites rated low for maturity and only 1 in 10 (10%) were rated high for maturity.

Search excellence model

Similar to the maturity scores, websites tested were most likely to be rated average in terms of excellence, with 7 in 10 (70%) receiving this score. This is followed by just over 1 in 5 (21%) websites rated poor for excellence and only 1 in 11 (9%) were rated good for excellence.

Excellence criteria and scoring system

Poor 0-4

- Does the search serve content as well as products? 4/10
- Are alternative products displayed when there are 0 results served? 4/10

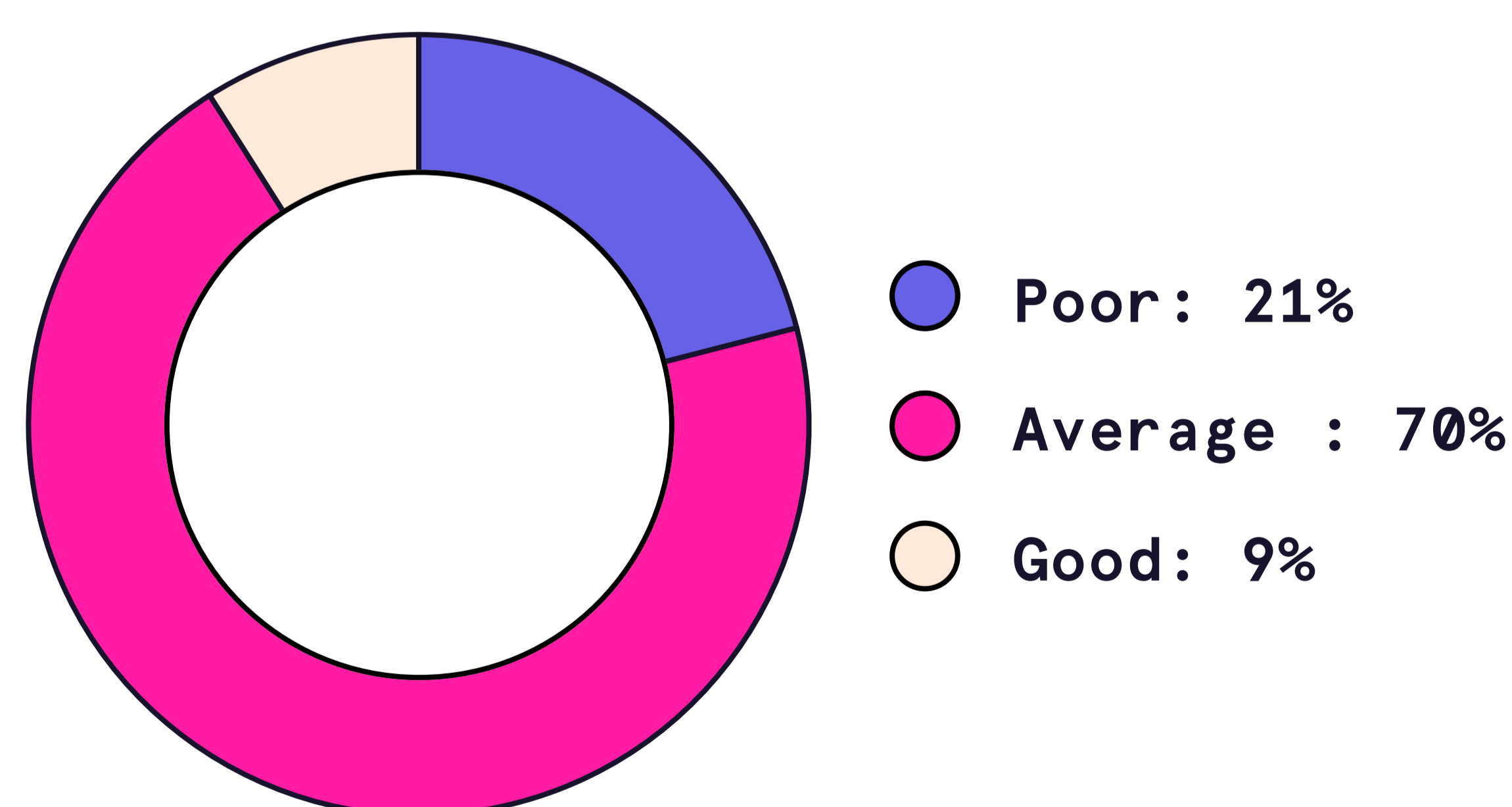
Average 5-7

- Does the search have error tolerance (understand and/or autocorrect typos)? 6/10
- Does the search have autocomplete? (query predictions) 7/10
- Does the search offer dynamic facets and filters? 7/10

Good 8-10

- Overall search speed 9/10
- Overall search relevance 10/10

Search Excellence



Key findings

Almost two thirds (65%) of sites tested show their results are not completely relevant. The site testing also shows that over 2 in 5 (44%) e-commerce websites do not offer alternative products if 0 results are shown. Another downfall is found in that over a quarter (28%) of all brand sites have slow search (a lag time of more than 1 second). In addition, 89% of e-commerce websites do not serve content in the search results—suggesting just 11% show both content and product in their search results.

As detailed in the individual breakdowns, only 10% of sites are rated as ‘high’ for their maturity and a similar pattern is true across the verticals:

Fashion: Low (35%), Medium (57%), High (8%)

Beauty: Low (26%), Medium (61%), High (13%)

Home & Garden: Low (28%), Medium (63%), High (9%)

From these results, it seems there is a huge opportunity for most websites tested to improve their maturity (90%) along with their excellence (91%) to meet the offerings of websites scoring high for these characteristics. Juxtaposing this against the survey with ecommerce professionals (which showed they thought highly of their websites across a number of attributes) illuminates that brands have more opportunity to improve than they currently believe.

The results of the real-world site experience testing also highlight that higher revenue possibly correlates with search maturity. For example, 48% of e-commerce brands with revenue below \$50m are in the low maturity category, whereas only around 20% of those with a revenue between \$50m and \$500m are in this category.

While this supports a hypothesis that higher revenue correlates with search maturity, it should be noted that, for the very top end of revenue (\$500m-\$1B), 33% are in the low maturity category, which is higher than \$50M-\$500M brands (around 20%), but lower than brands with a revenue below \$50M (48%).

The reason for high-end revenue bucking the trend this way might be due to more well-known brands having lower quality search because shoppers are still attracted to that brand due to its establishment or popularity, despite a poor experience. An alternative reason for this might be due to legacy technology from well-established brands and a reluctance to move to cutting-edge technology like their start-up counterparts.

It is also interesting to note, the results suggest websites are more likely to be rated low for maturity (30%) than rated poor for excellence (21%). When looking at average ratings, more websites are rated average for excellence (70%), compared to maturity (60%). However, it appears a similar proportion of websites are scoring high for maturity (10%) and good for excellence (9%), perhaps suggesting there is little difference between the proportion of websites that are outperforming other websites in terms of maturity and excellence.

Conclusion

Overall, the results from the three research projects have clearly demonstrated how integral search is to a consumer's experience and how it can impact behaviors and likelihood to convert.

The data demonstrated many brands are not meeting consumers' expectations for a number of search aspects, including relevant search results, alternative suggestions, personalized search and content provided, suggesting there's a huge opportunity for brands to improve their offerings to improve consumers experience and engagement with their website.

Relevant search results appear to be one of the most influential aspects of a consumer's search experience. 79% of consumers surveyed are likely¹ to buy a product they have searched for from the search results, demonstrating that displaying relevant products in search is crucial for conversion.

However, there are clear discrepancies between the proportion of brands saying they provide relevant⁴ search results to consumers (99%), and the number of websites from the real-world websites tests that actually provided relevant results from searching 2-word queries (79%). This trend (of consumers not receiving the desirable aspects within search) was consistent when looking at the many search features discussed.

Along with search feature improvements, brands also have the opportunity to measure more key metrics, as 17% of brands surveyed are not measuring any of the metrics questioned and are therefore lacking customer insights relating to how site searches are used and performed.

Finally, the real-world website tests demonstrate the true scale of opportunity for brands, as there is a significant scope for the majority of websites tested to improve their maturity (90%) along with their excellence (91%) to meet the offerings of websites scoring high for these characteristics and, in turn, improve shoppers' search experience.

[Full research data](#)

¹ 'Very likely' and 'Somewhat likely' responses combined

² Mean % of sites bounce rate

³ 'Very often' and 'Somewhat often' responses combined

⁴ 'Extremely relevant' and 'Somewhat relevant' responses combined

⁵ 'Strongly agree' and 'Somewhat agree' responses combined

nosto 

Search 
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