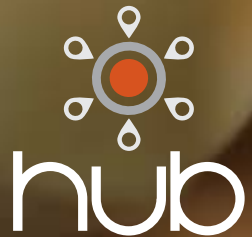
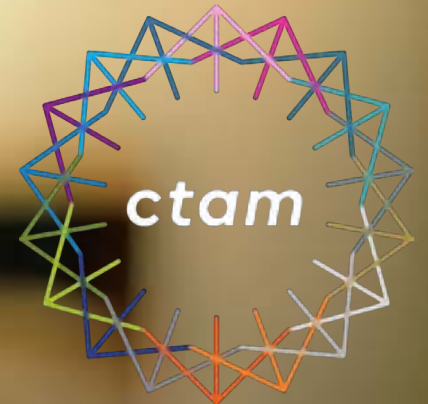


Value by Design:

Building a better streaming UX and discovery experience



ENTERTAINMENT
RESEARCH



Goal:

1. Understand how content discovery works, **on and off the app**
2. Identify elements of app design that will make a TV service **more valuable**



Cover new territory:

1. What are the most important things TV apps need to do?
2. How well are they doing those things today?
3. What can TV learn from social?
4. Are there great design ideas no one has thought of yet?



1. Qualitative

- 24 in-depth interviews
- 3-day homework assignment

2. Quantitative

- 3,000 online interviews
- Cross section of platforms (pay TV, streaming, social)





1

QUALITATIVE:
WHAT WE LEARNED



The app ecosystem
sets the standard



1

The best apps remove orientation — they launch doing what you came for

Viewers reward apps that open straight into content — relevant, actionable, and free of decision fatigue. Anything that asks them to orient themselves first feels like friction.

When I open an app, I want it to already be where I left off or already doing what I need. The ones I like don't make me figure anything out.

JESSICA · AGE 40



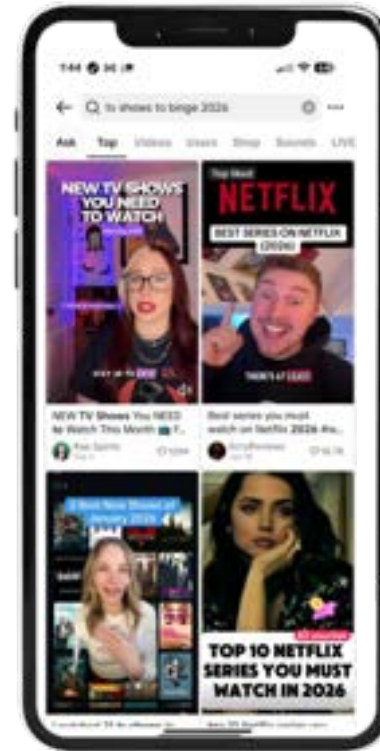
Some viewer needs get
met outside of TV apps



2

Discovery often takes place outside of TV apps, long before viewers sit down to watch

Clips on TikTok or YouTube, reactions or recommendations from influencers, and conversations mean that viewers often don't need to do research once they log into an app



*“Whether that’s TikTok, or Instagram, or YouTube clips, **seeing others comment about a show gets me excited.**”*

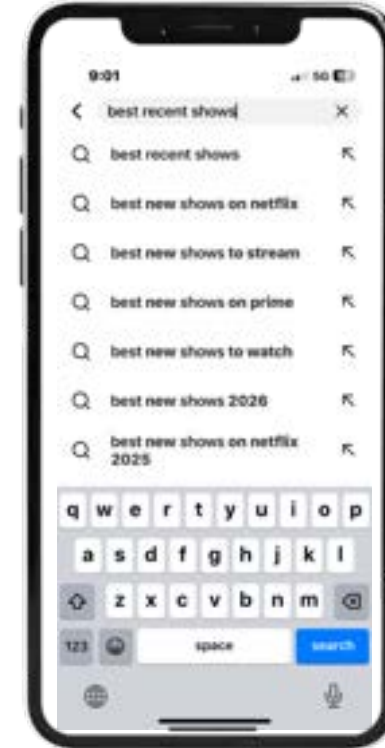
NEAL · AGE 22



3

Viewers don't trust TV apps as the authority on which shows are worth watching

They verify recommendations by gathering information on their own: Google, ChatGPT, ratings sites, communities on Reddit, “unofficial” clips created by consumers



*“I've found **it's actually better to not use a TV app.** I can go on Google or YouTube and [find] top 10 sci-fi shows from 2024 or something like that. In **TV apps you end up clicking around for 20 minutes** and I **haven't even watched anything yet.**”*

SILAS · AGE 27



Viewers expect apps
to be personalized



4

Recommendations from TV apps feel generic, not personalized

Getting the same recommendations, suggestions that don't reflect their interests, or home pages that promote originals all ring false to viewers (and make the content itself feel less valuable)



*... "then I would scroll down and it would be like, Top 10 shows and I do like the Top 10 shows, but it would always be like Rings of Power. And then I'd go down two more and it would be like, drama shows, Rings of Power. And like **I don't need the repeats.**"*

AVARIND · AGE 25



5

Users take friction in design and user experience personally

Cumulative moments of friction – slow startup, buried “continue watching”, repeat recommendations – lead viewers to abandon sessions, rely on alternatives, and question whether a service is worth paying for



“That’s how I feel like a valued customer...If all of this stuff is meant to be so intuitive, then make it more intuitive. If I’m giving you all of my data, then the least you can do is save me some steps.”

JILL · AGE 55



We asked viewers
for their design ideas



Design the home page around what viewers came to do

- Pin **“Continue Watching”** at the top of the homepage
- Surface **saved content before promotional** rows
- Allow users to **customize and hide categories** they don't use



*“Sometimes the Netflix app, while intuitive, can be frustrating to use as there's like **4-5 rows of random content or shows recommended before I can even get the content which I'm interested in**”.*

ANDREW · AGE 20



Build apps around the role phones play in the TV experience

- **Support phones as a companion screen** for research, making watch lists, etc.
- **One tap handoff** from phone to TV once a selection is made

*“If I'm watching a TikTok video and a guy recommends top 10 shows and then maybe in the description of the video itself, **there's Netflix or Hulu links where I click the show and it opens it up on my TV automatically.**”*

ANDREW · AGE 20

Survey Findings



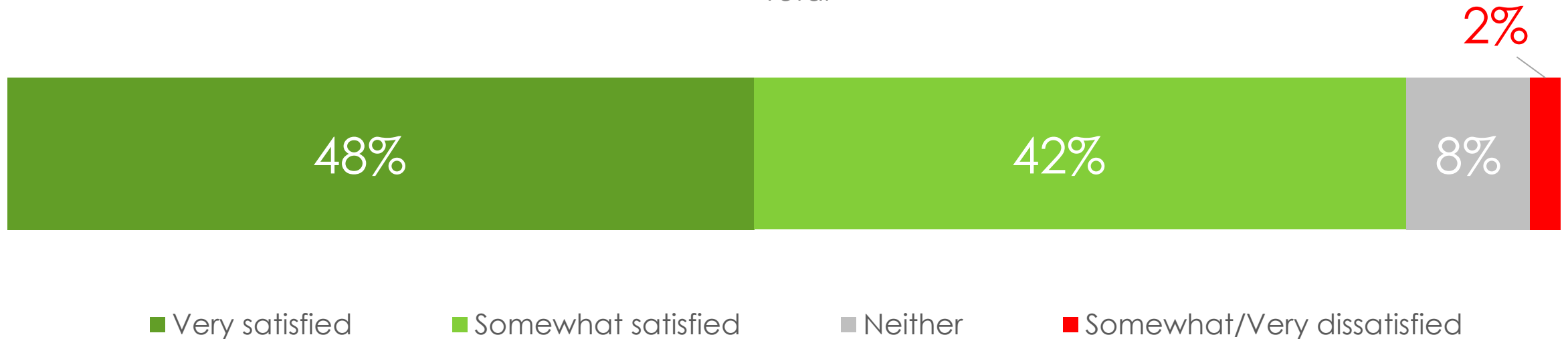
2

HOW DO VIEWERS FEEL ABOUT
THE TV EXPERIENCE?

HALF OF VIEWERS ARE “VERY SATISFIED” (AND ALMOST NONE ARE DISSATISFIED)



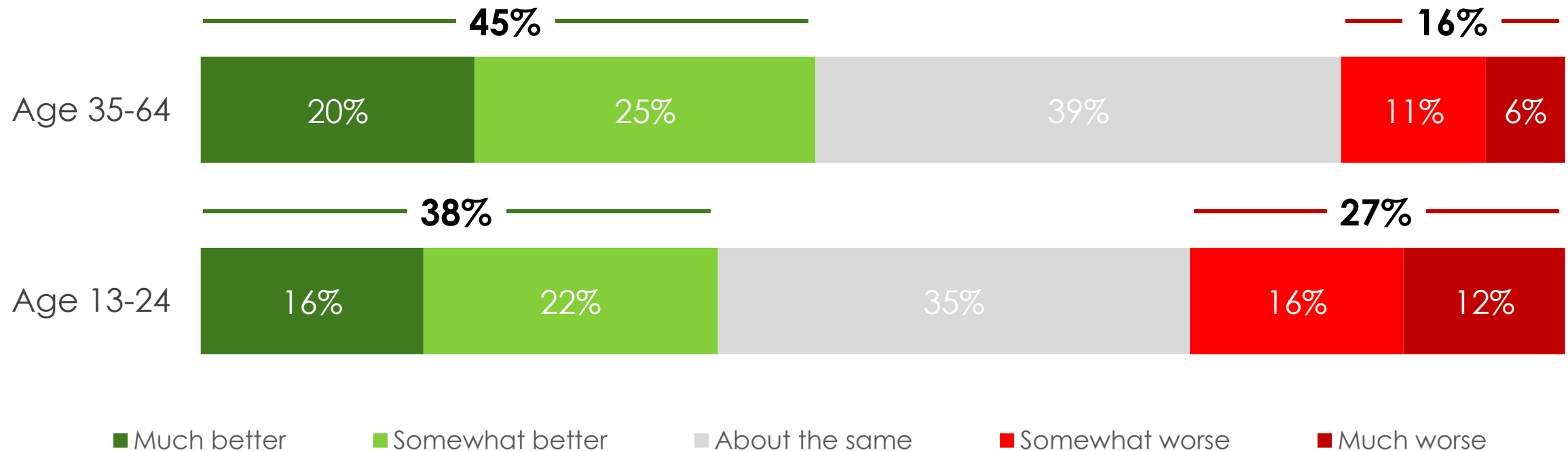
How satisfied are you with the user experience on TV apps?
(NOTE: we're not asking about the quality of the content, just the design and experience of the app itself)
- Total -





(ALTHOUGH YOUNG VIEWERS ARE MORE AMBIVALENT)

Is the user experience on TV apps better or worse than other apps you use?
(E.g. Instagram, TikTok, Reddit, or any other apps)



Base: Total Respondents N=3,000

Q22. Now think about other apps that you use a lot – e.g., Instagram, TikTok, WhatsApp, Reddit, or anything else. In general, how does the user experience on a TV service or app compare to the experience of those other apps?



However...

...THE VAST MAJORITY OF VIEWERS EXPERIENCE PROBLEMS THAT MAKE SERVICES LESS VALUABLE



99%

experience at
least one of the
problems we
tested

Base: Total Respondents N=3,000

Q23. How often do you experience each of the following problems when using a TV streaming service or TV app?

Q24. How frustrating is each of the following problems when it does occur while using a streaming TV app or service?

...THE VAST MAJORITY OF VIEWERS EXPERIENCE PROBLEMS THAT MAKE SERVICES LESS VALUABLE



99%

experience at least one of the problems we tested

72%

experience at least one problem that leaves them **“extremely frustrated”**

Base: Total Respondents N=3,000

Q23. How often do you experience each of the following problems when using a TV streaming service or TV app?

Q24. How frustrating is each of the following problems when it does occur while using a streaming TV app or service?

...THE VAST MAJORITY OF VIEWERS EXPERIENCE PROBLEMS THAT MAKE SERVICES LESS VALUABLE



99%

experience at least one of the problems we tested

72%

experience at least one problem that leaves them **“extremely frustrated”**

80%

experience at least one problem that happens **“all the time”**

Base: Total Respondents N=3,000

Q23. How often do you experience each of the following problems when using a TV streaming service or TV app?

Q24. How frustrating is each of the following problems when it does occur while using a streaming TV app or service?

3

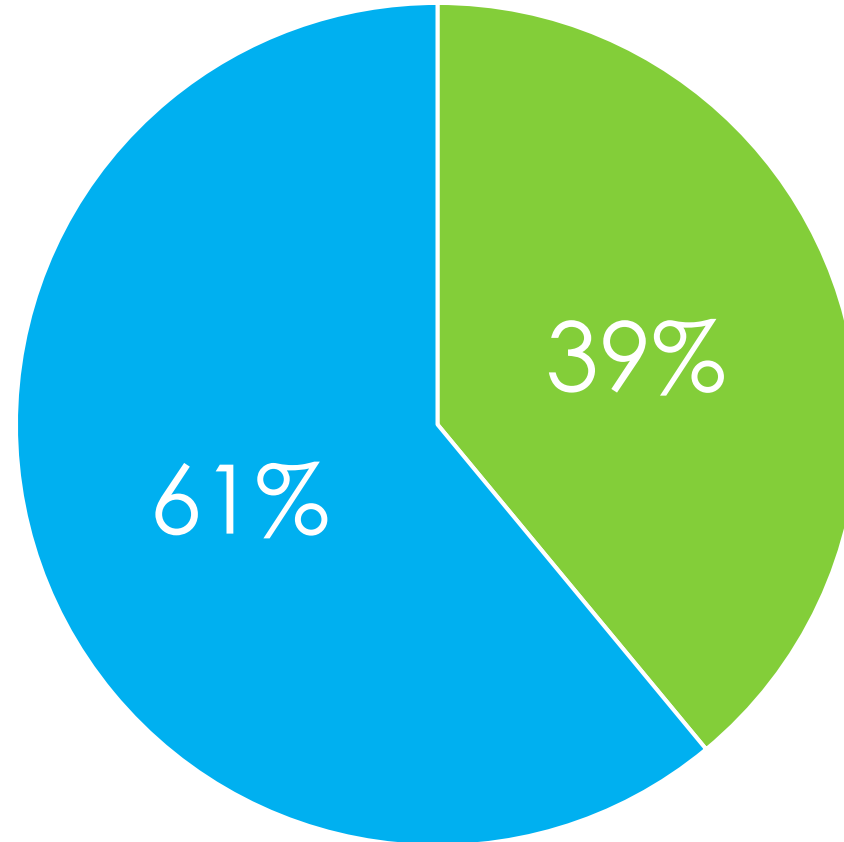
THE TV DISCOVERY PROCESS

TV APPS NEED TO SERVE BOTH IMMEDIATE VIEWERS, AND THOSE WHO RESEARCH FIRST AND WATCH LATER



Watch right then:

I go into a TV app or service, find something to watch and watch it right then



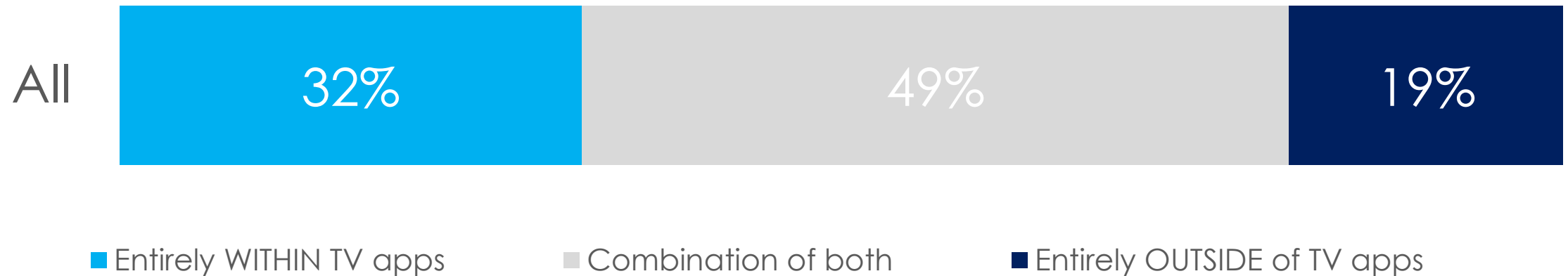
Watch later:

I decide what I want to watch in advance, and might not actually watch it until days or weeks later



TWO THIRDS OF VIEWERS DO AT LEAST SOME OF THEIR DECISION-MAKING OUTSIDE OF THE APP

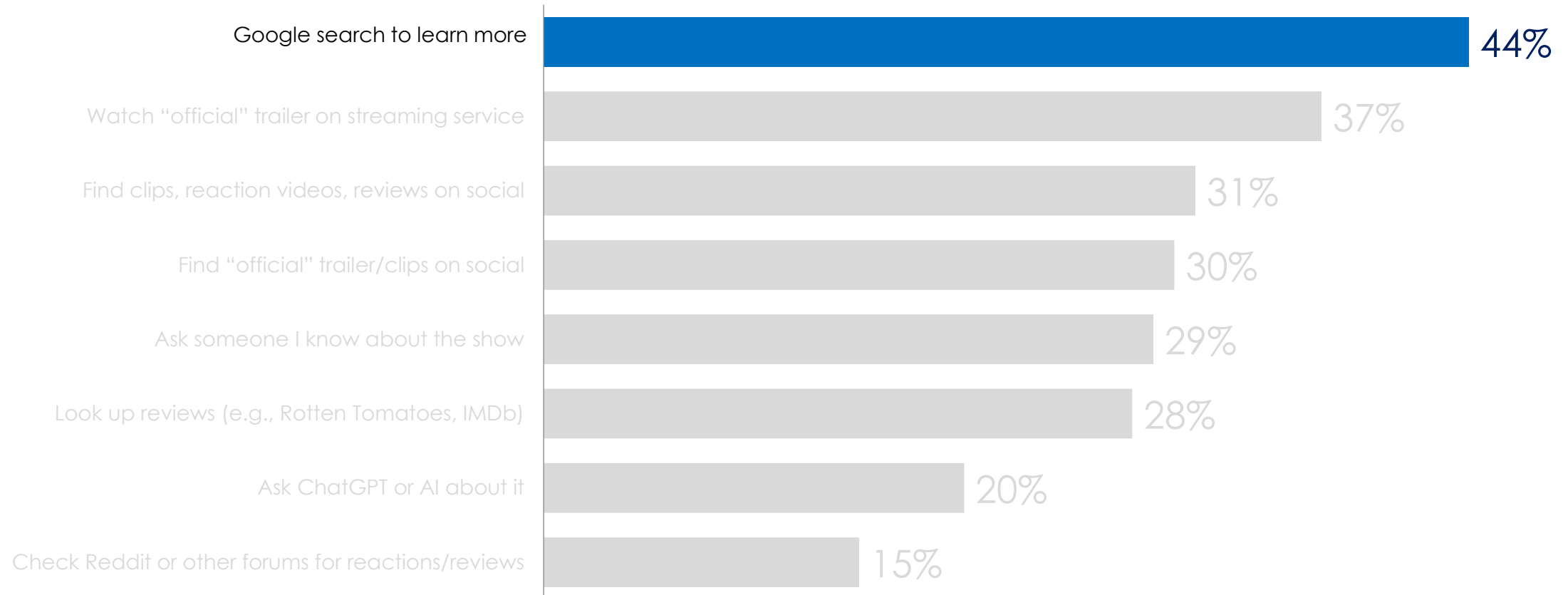
Where do you do your research about what to watch next?



ALMOST HALF OF THOSE WHO LOOK FOR MORE INFO ABOUT A TITLE LOOK FOR IT ON GOOGLE



Where do you go for more information about a show?
- Top 3 most often used info sources -

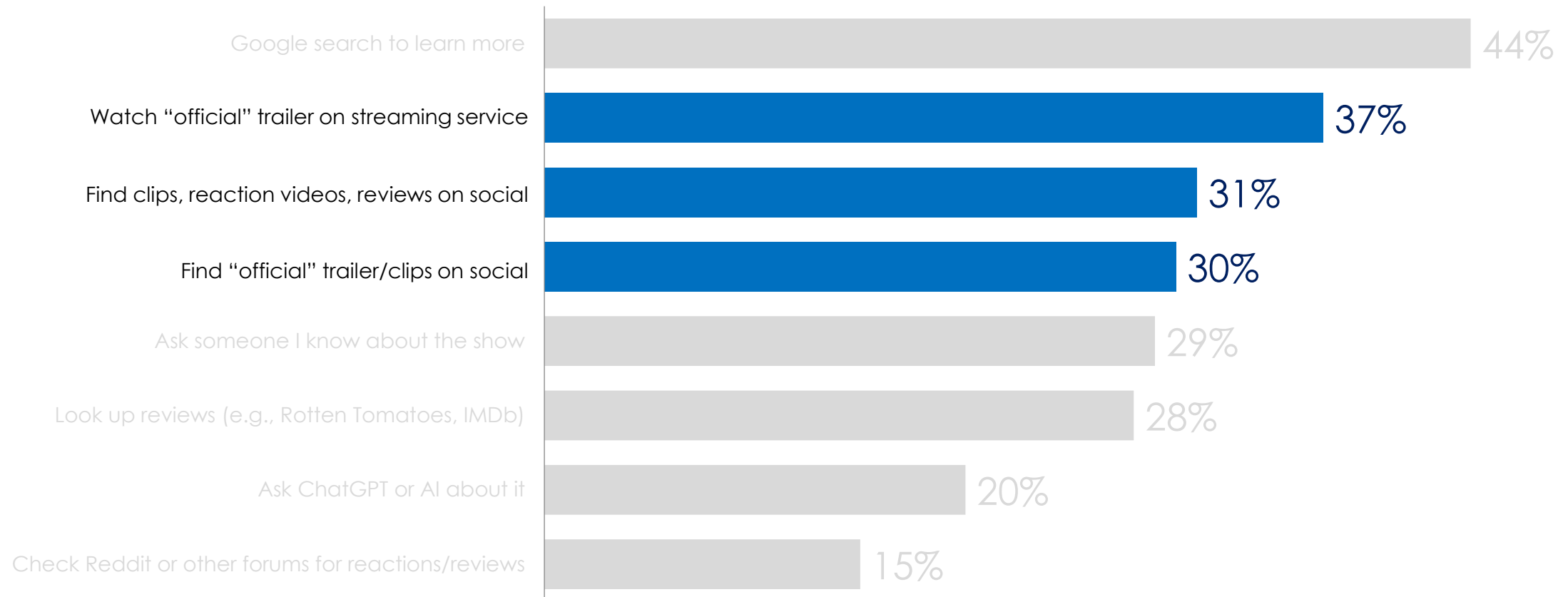


BASE: AMONG THOSE WHO NEED MORE INFORMATION (n=1633)
Q15. How do you get more information about a show or movie before deciding to watch? Let us know the 3 things you do *most often*.

AFTER THAT, CLIPS AND TRAILERS (ON APP AND OFF) ARE THE MOST COMMON WAY VIEWERS VET A TITLE



Where do you go for more information about a show?
- Top 3 most often used info sources -

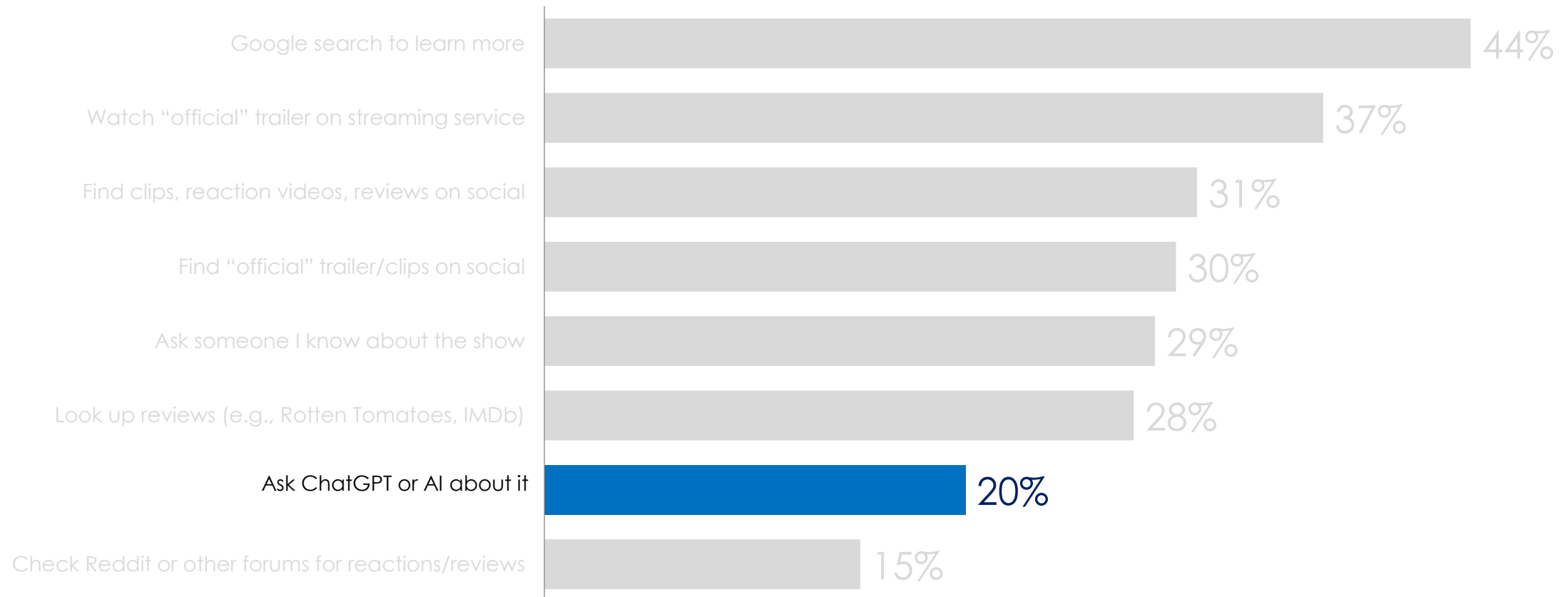


BASE: AMONG THOSE WHO NEED MORE INFORMATION (n=1633)
Q15. How do you get more information about a show or movie before deciding to watch? Let us know the 3 things you do *most often*.



AI APPS ARE STILL NEW – BUT ALREADY THEY’RE A COMMON METHOD OF DISCOVERY FOR A FIFTH OF VIEWERS

Where do you go for more information about a show?
- Top 3 most often used info sources -



BASE: AMONG THOSE WHO NEED MORE INFORMATION (n=1633)
Q15. How do you get more information about a show or movie before deciding to watch? Let us know the 3 things you do *most often*.



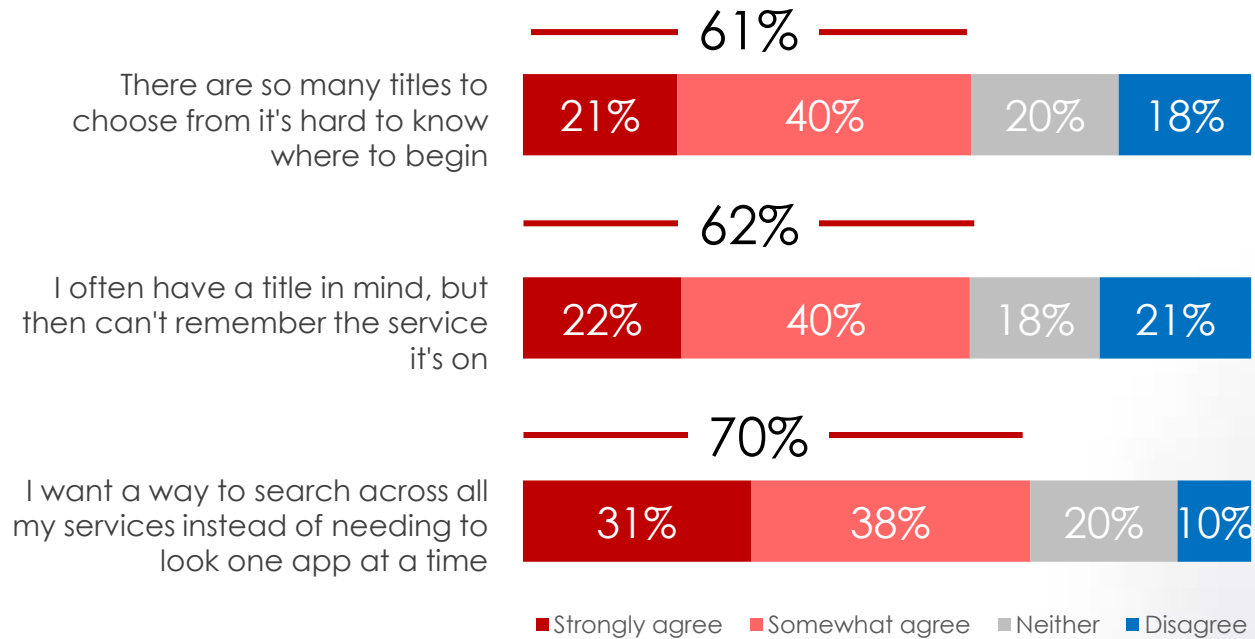
How do viewers feel about the process of deciding what to watch?



Information overload makes TV harder to use



Do you agree or disagree with these statements?

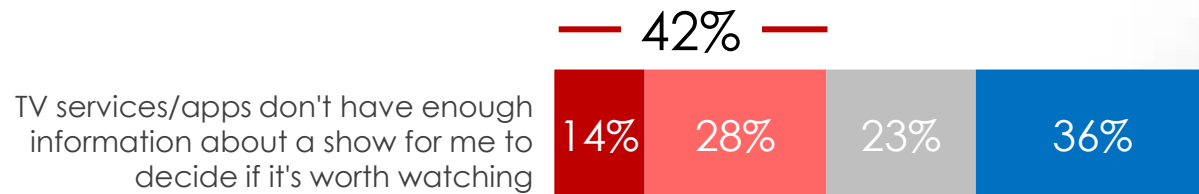
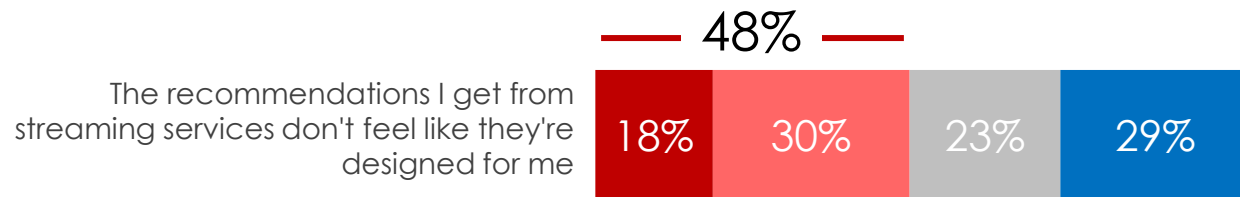


BASE: TOTAL RESPONDENTS (n=3000)
Q18. Please tell us how much you agree or disagree with each of the following statements about finding something new to watch.

TV apps themselves don't provide enough context



Do you agree or disagree with these statements?



■ Strongly agree ■ Somewhat agree ■ Neither ■ Disagree

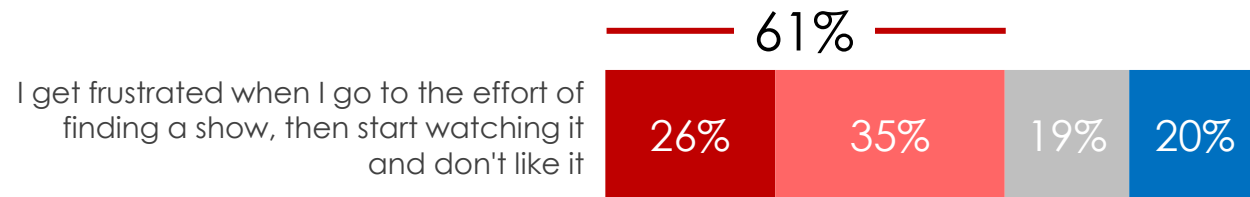


BASE: TOTAL RESPONDENTS (n=3000)
Q18. Please tell us how much you agree or disagree with each of the following statements about finding something new to watch.

Friction in discovery causes frustration among viewers



Do you agree or disagree with these statements?



■ Strongly agree ■ Somewhat agree ■ Neither ■ Disagree



BASE: TOTAL RESPONDENTS (n=3000)
Q18. Please tell us how much you agree or disagree with each of the following statements about finding something new to watch.

Young viewers discover on social platforms, and decide what to watch in advance



SOCIAL-FIRST DISCOVERY

48%

hear about shows and movies from trailers on social platforms
vs. 38% of older viewers

DELIBERATE VIEWERS

43%

decide what to watch in advance
vs. 35% of older viewers



4

THE PROBLEM WITH TV (APPS)

In the survey we tested 20 UX problems to learn...

- **How often** they happen
- **How frustrating** they are, when they do



Issues with recommendations



**Recommendations don't
match my taste**

The recommendations I get from streaming services or apps don't reflect what I like to watch

**Recommendations don't
update based on viewing**

The recommendations I see on the home page don't change based on the types of shows or movies I am currently watching

**Recommendations feel like
promotions**

The home page of a streaming service tends to prioritize the shows that company wants me to watch, instead of shows I'm going to like

**Recommendations are skewed
by unfinished content**

If I just start watching a show it gets incorporated into my recommendations for other things to watch, even if I didn't like it and never finished it

**Same recommendations
repeat over and over**

A service will recommend the same shows to me over and over, even though I'll never watch them

Issues with search and discovery



Content categories too broad

Streaming TV service and app content categories are too broad to be useful to me (i.e. Comedy versus 90s Sitcoms)

Can't customize categories

I can't customize content categories or organize them by personal preference (i.e. create My Favorites category and add all my favorite shows)

Can't search by mood/context

I can't search for titles based on things like my mood or who I'm watching with

Can't hide unwanted content

There is no way to hide or remove content I don't want to watch from the home page

No ratings in the TV app

There's no way to check ratings of a show on a site like Rotten Tomatoes or IMDb before I decide to watch

Voice search inaccurate

Voice activated search doesn't accurately pull up the show or movie I ask for



Issues with app design and features

**“Continue Watching”
hard to find**

I have to scroll too far down to find my "Continue Watching" list

Watchlist hard to find

It's too hard to find my watchlist of saved shows when I log into the app

Can't give detailed feedback

I can't read or provide specific feedback on a title to/from other users, I can only give a "thumbs up" or "thumbs down"

Can't chat with other viewers

I can't chat or interact online with other people who watch the same things I do

Issues with app performance



App glitches

The app glitches, crashes, or otherwise doesn't operate smoothly

App doesn't remember watch position

When I close the app and come back later, the app doesn't always remember the exact place I stopped watching

Get logged out unexpectedly

I get logged out of the TV streaming service or app unexpectedly

Hard to type with TV remote

TV apps make me use the remote control to type in the "search" or other fields, which is too hard to do

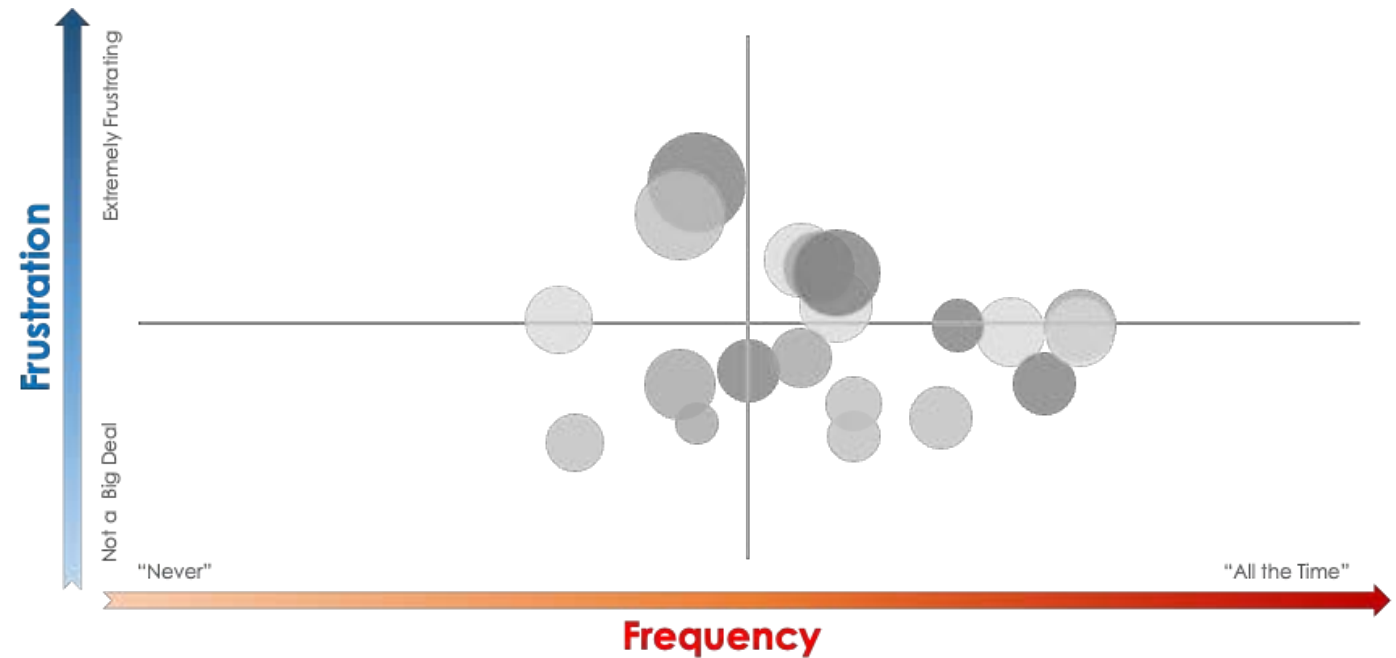
Hard to log back in the app

TV apps make it hard to log back and often require resetting passwords, getting a code, etc.



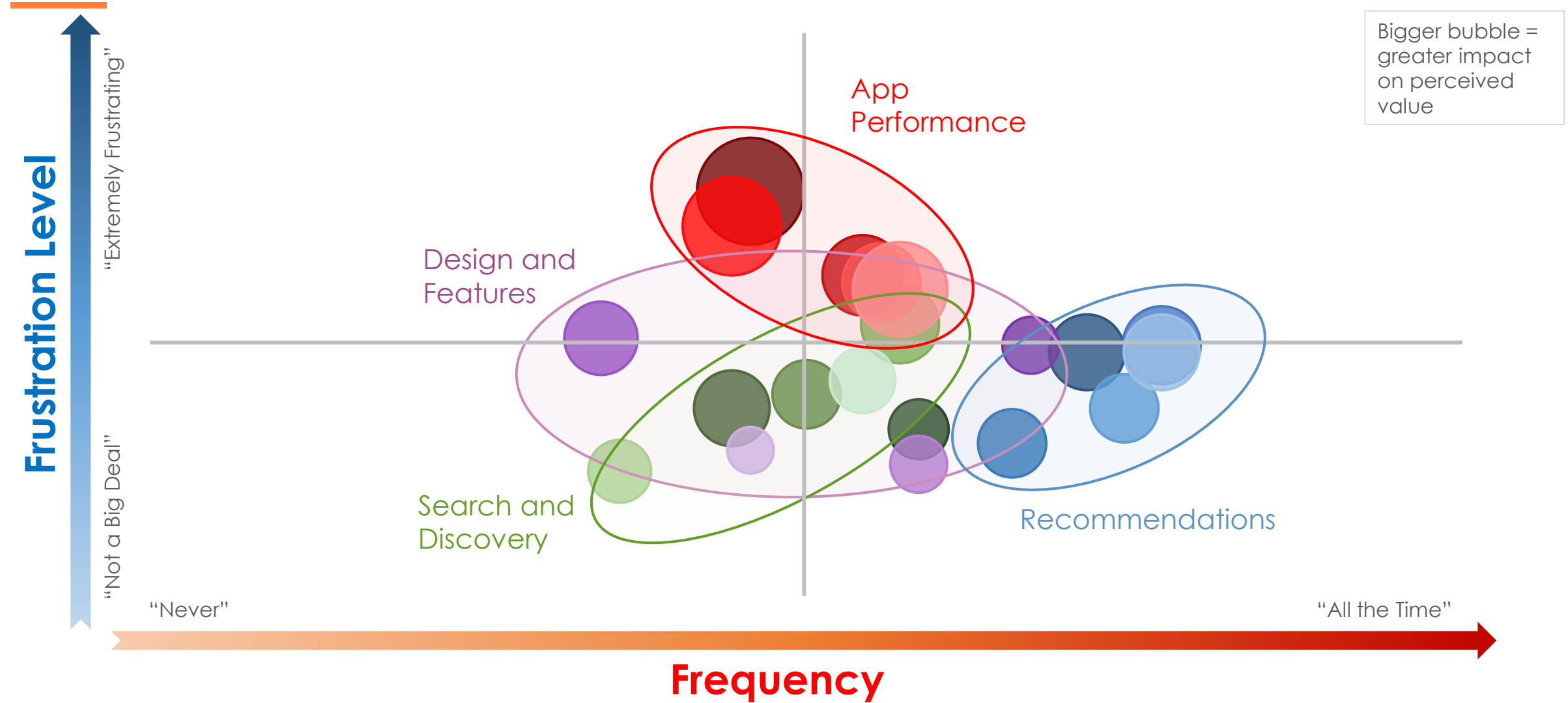
How to read the map:

- **Frequency:** how often the problem happens
- **Frustration:** how frustrating the problem is when it occurs
- **“Value Destruction”:** larger bubble means greater negative impact on perceived value



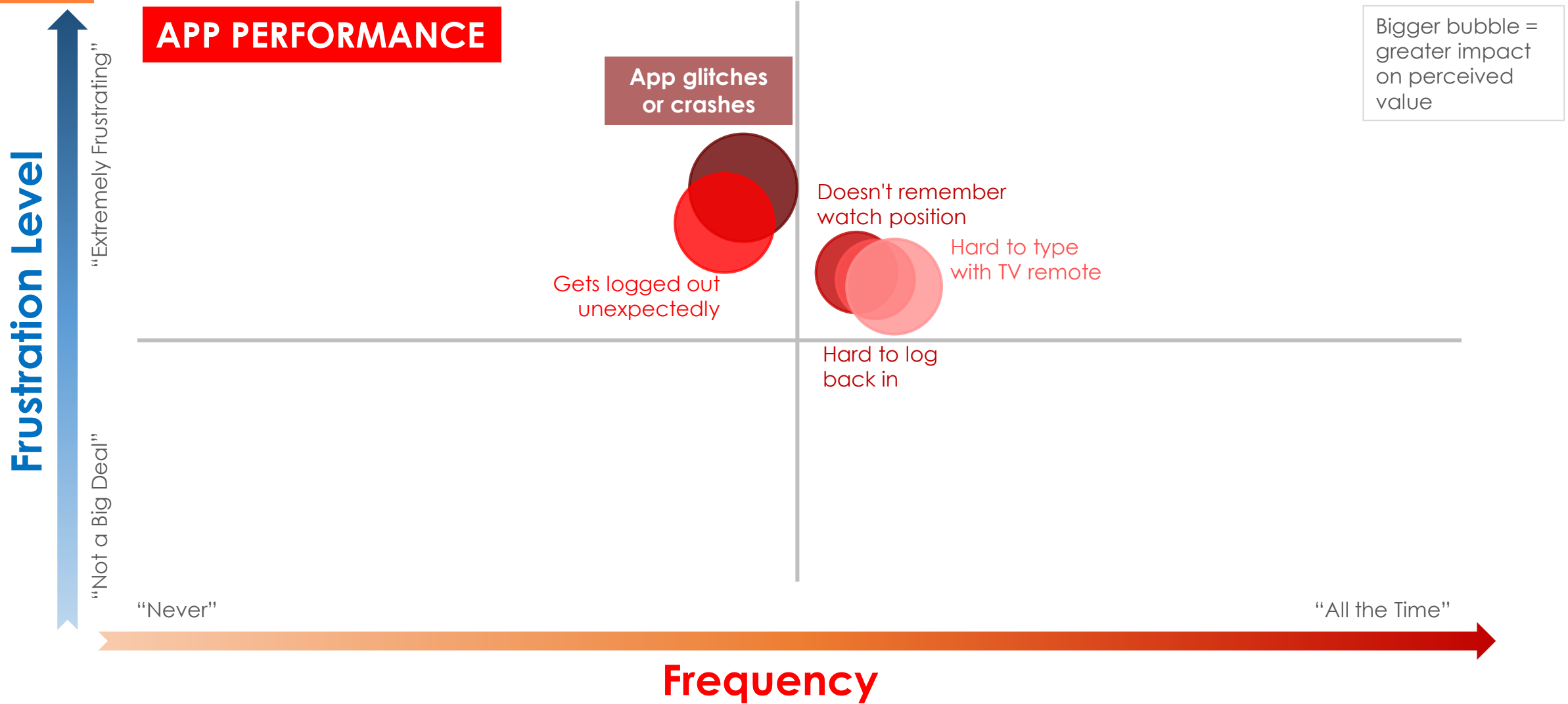


HERE'S HOW THE PROBLEMS MAP OUT:



Q23. How often do you experience each of the following problems when using a TV streaming service or TV app?
Q24. How frustrating is each of the following problems when it does occur while using a streaming TV app or service?
Q26. For each problem you encounter, tell us how much it impacts the value you get from that service.

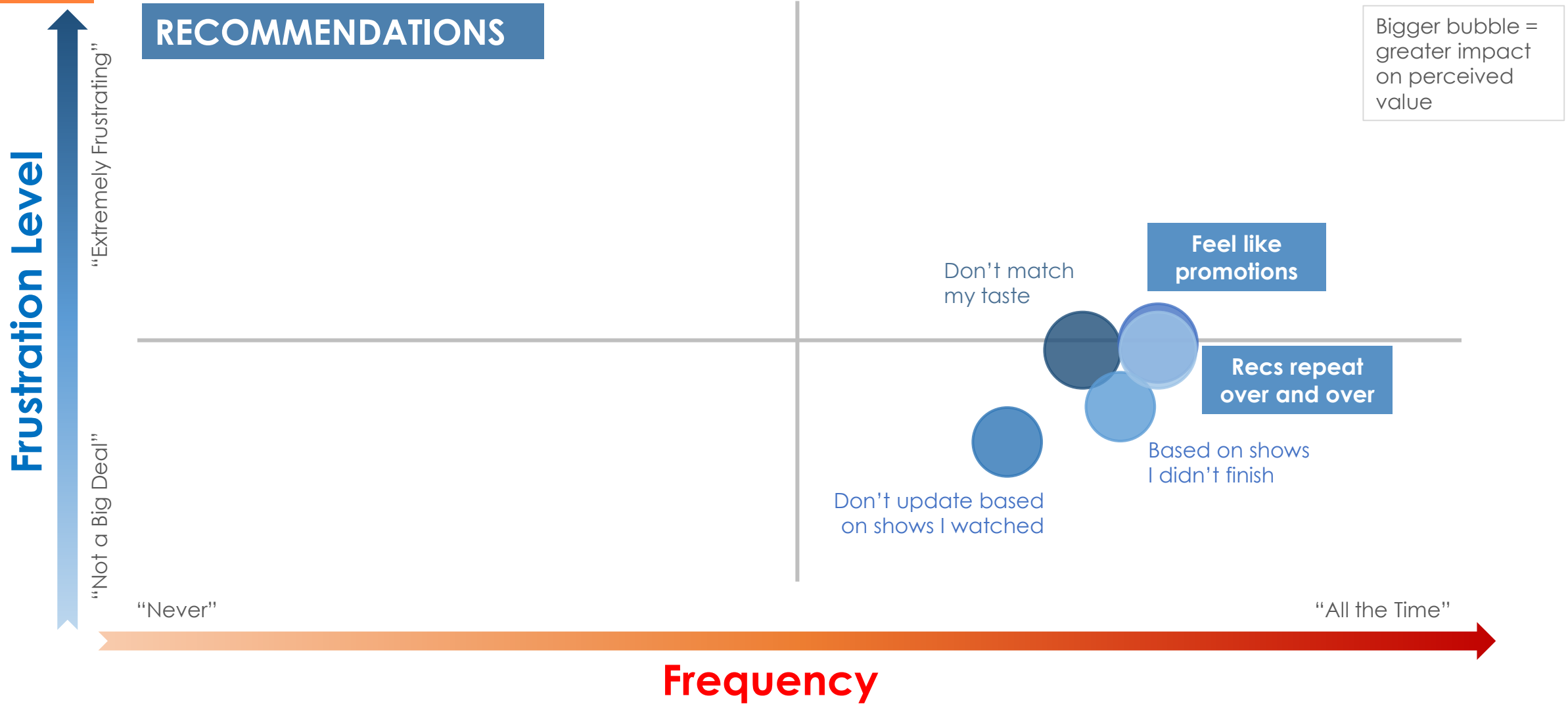
APP PERFORMANCE ISSUES ARE RARE – BUT WHEN THEY HAPPEN, THEY HAVE A BIG IMPACT



Q23. How often do you experience each of the following problems when using a TV streaming service or TV app?
Q24. How frustrating is each of the following problems when it does occur while using a streaming TV app or service?
Q26. For each problem you encounter, tell us how much it impacts the value you get from that service.



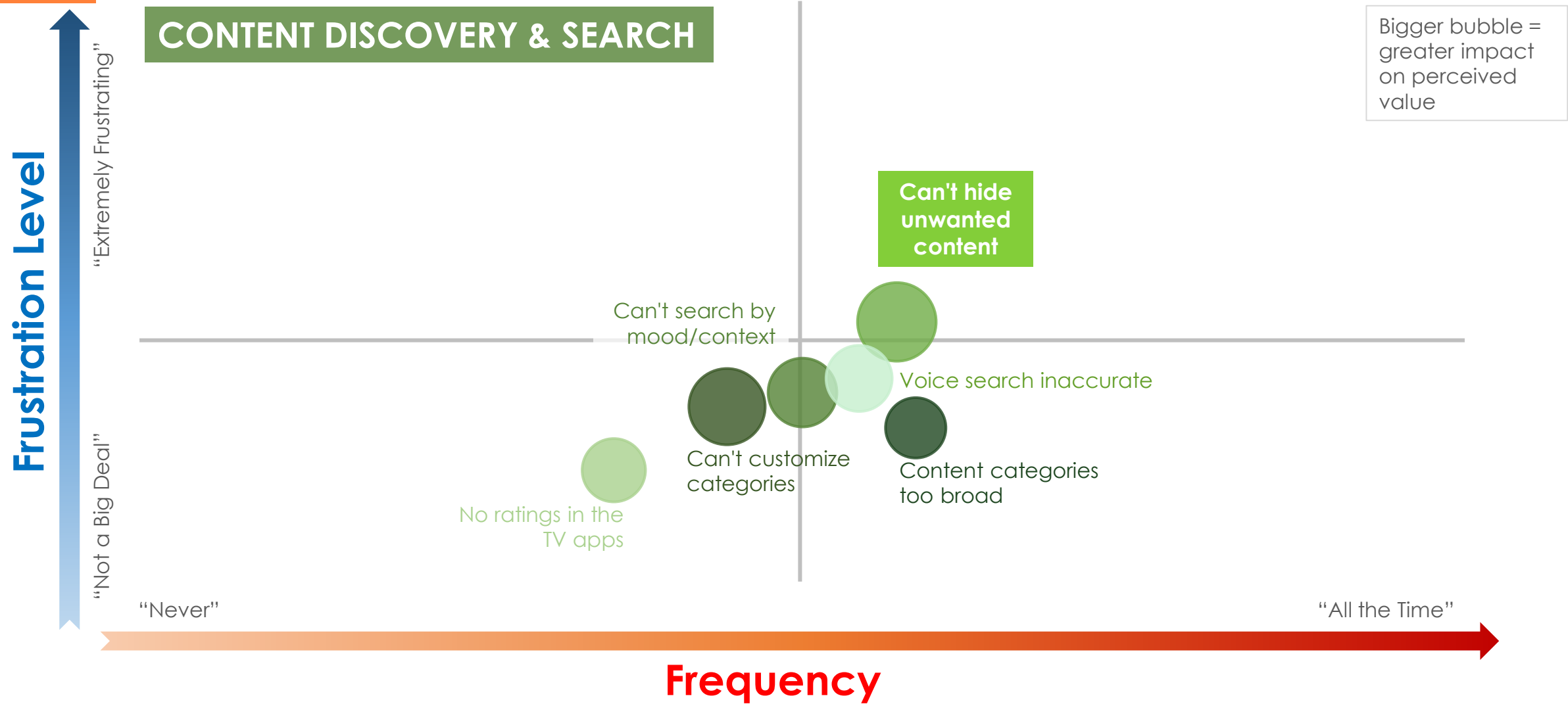
REC PROBLEMS AREN'T CATASTROPHIC – BUT THEY HAPPEN CONSTANTLY, AND THE MOST COMMON ARE THE MOST DAMAGING



Q23. How often do you experience each of the following problems when using a TV streaming service or TV app?
Q24. How frustrating is each of the following problems when it does occur while using a streaming TV app or service?
Q26. For each problem you encounter, tell us how much it impacts the value you get from that service.



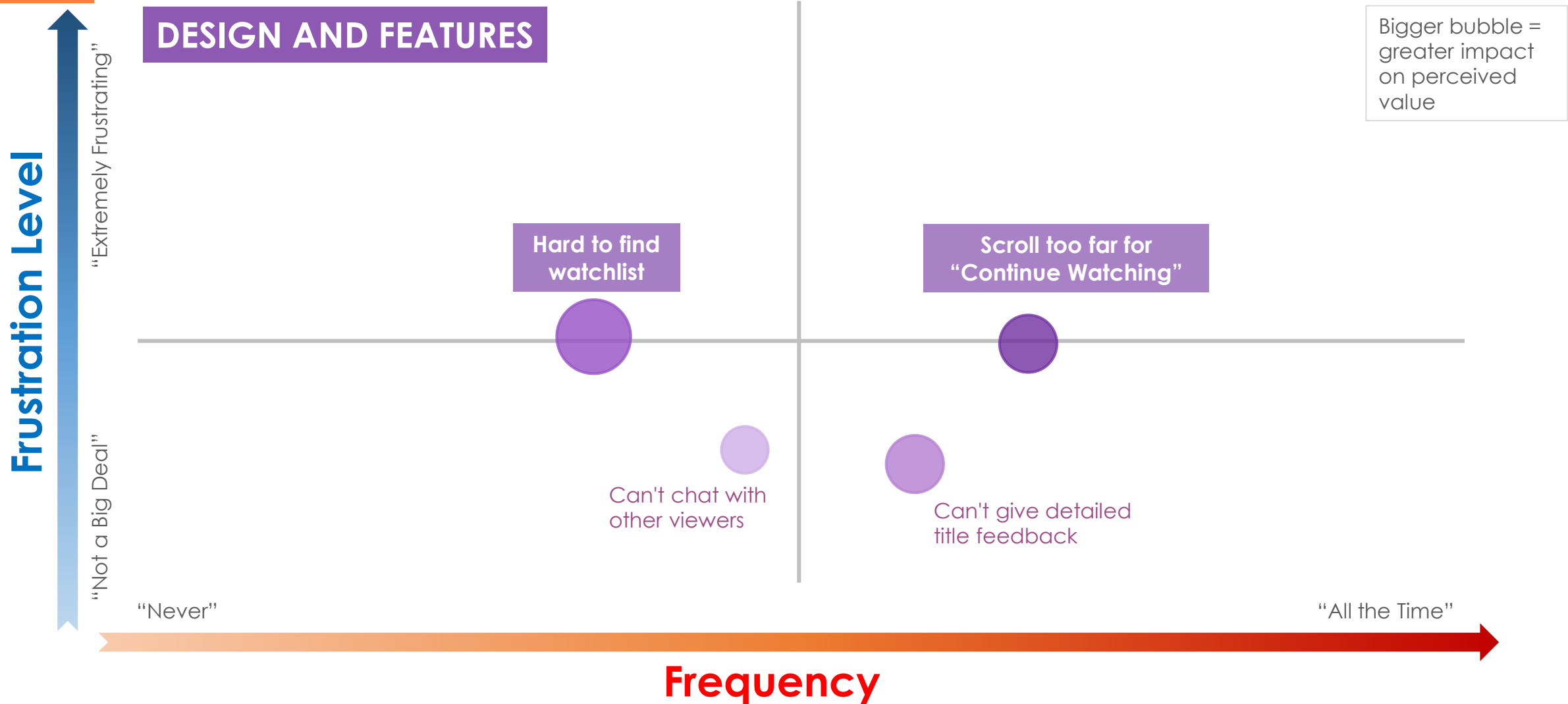
MANY FEEL LIKE THEY HAVE TO SIFT THROUGH TOO MUCH INFORMATION THAT ISN'T RELEVANT BEFORE THEY WATCH



Q23. How often do you experience each of the following problems when using a TV streaming service or TV app?
Q24. How frustrating is each of the following problems when it does occur while using a streaming TV app or service?
Q26. For each problem you encounter, tell us how much it impacts the value you get from that service.



“BURYING” OF COMMON TASKS WAS THE MOST DAMAGING DESIGN AND NAVIGATION ISSUE



Q23. How often do you experience each of the following problems when using a TV streaming service or TV app?
Q24. How frustrating is each of the following problems when it does occur while using a streaming TV app or service?
Q26. For each problem you encounter, tell us how much it impacts the value you get from that service.



**Are these problems
worth solving?**

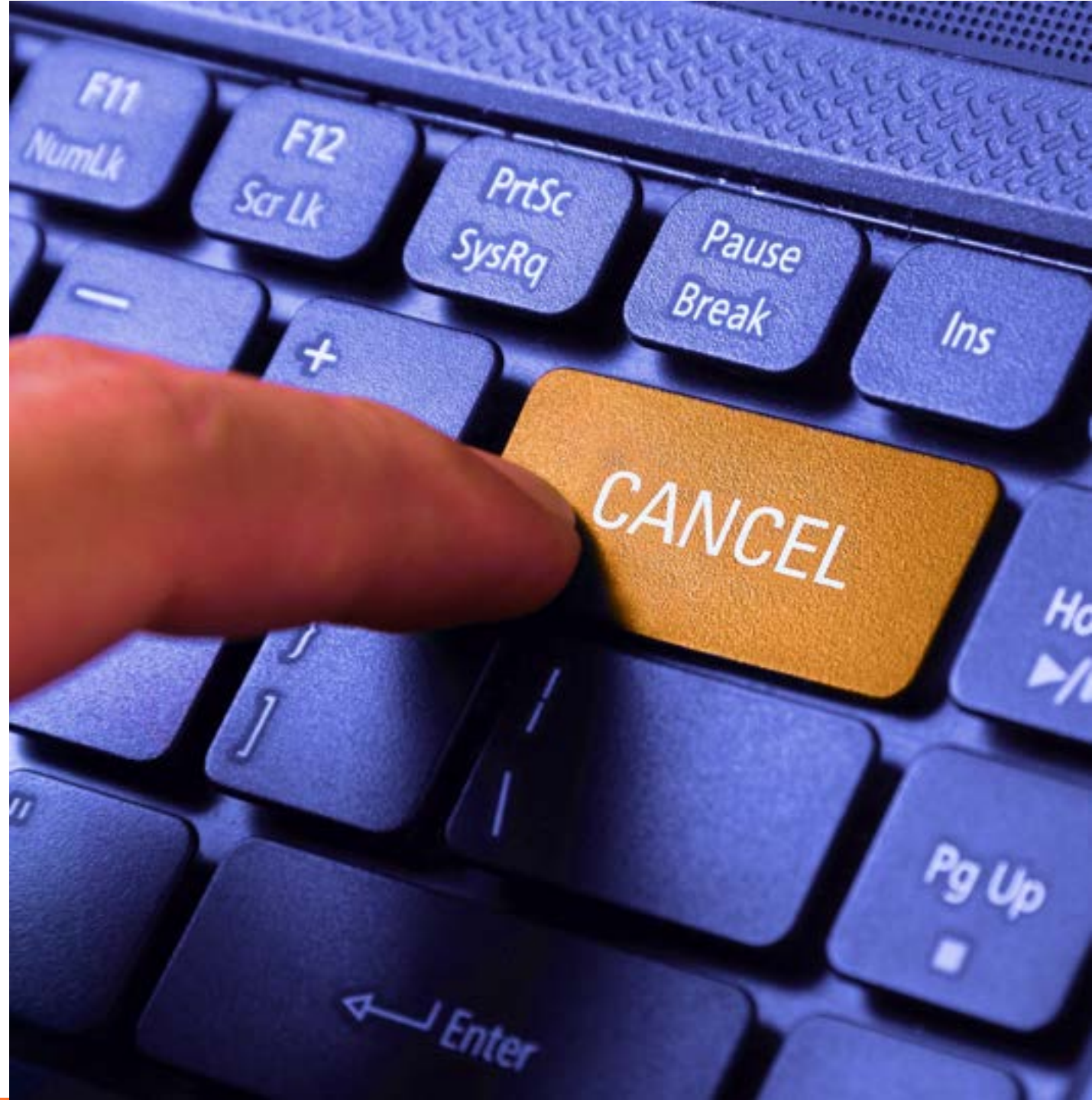


**Are these problems
worth solving?**

Yes

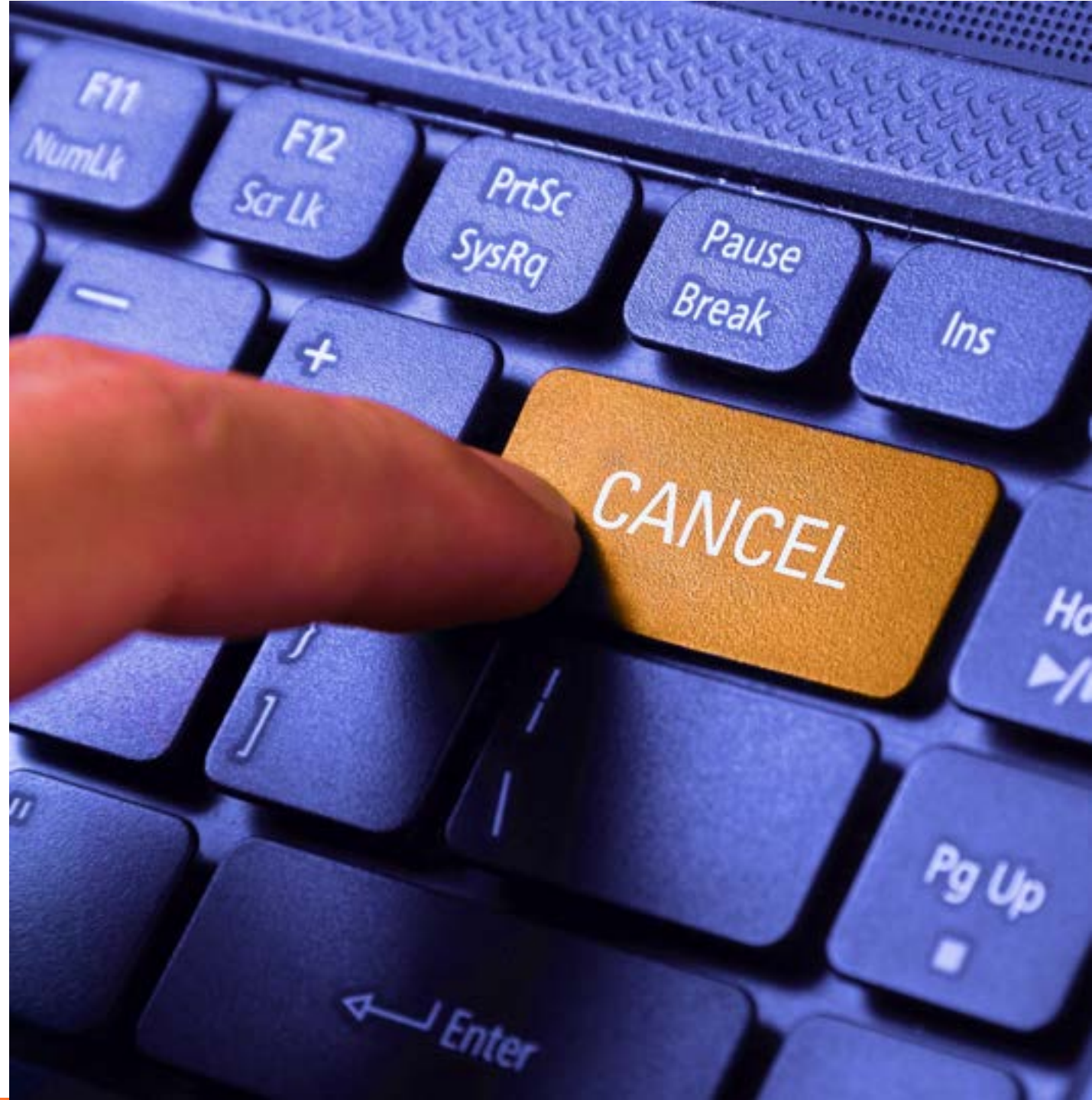
36%

have cancelled a
subscription because the
app was frustrating to use



43%

of viewers under 25
(vs. only 23% of those
age 55+)



Young viewers have less tolerance when the app experience fails



THE RECOMMENDATIONS GAP

59%

say that TV recommendations don't feel like they are designed for them vs. 45% of older viewers

LOGIN FRICTION

39%

say that difficult logins make them use a TV service less often vs. 25% of older viewers





5

TESTING SOLUTIONS



We generated 13 design
elements and features



THE SOLUTIONS RESPONDENTS SAW:

- 1 Pinned Continue Watching**
Always pinned at the top of the homepage so it's the first thing you see
- 2 Pinned Watch lists**
Your saved list of shows is always pinned at the top of the homepage so it's easy to find
- 3 Hide unwanted categories**
Remove things you don't use (like "Trending Now" or "Leaving Soon") so you don't see them again
- 4 "Pinterest for TV"**
Create custom boards (e.g. "Background Shows," "Watch with Boyfriend") and drag titles onto each
- 5 Why is this recommended?**
See specific reasons a title was recommended for more context and greater credibility
- 6 More relevant recommendations**
Algorithm updates recommendations based on what you finish, not shows you sampled but abandoned
- 7 Ratings and reviews**
Shows ratings and reviews (IMDb, Rotten Tomatoes) for titles so you can evaluate without leaving the app



THE SOLUTIONS RESPONDENTS SAW:

- 8 Share right from the app**
Share clips, comments or reviews with friends or to social while watching, without leaving the app
- 9 Built-in AI search**
Ask ChatGPT-style questions to find your next show, e.g. "What should I watch if I liked Severance?"
- 10 Built-in access to online communities**
Link to groups on Reddit or Discord tied to what you're watching, right in the TV app
- 11 Phone as a remote**
Use your phone instead of the TV remote to make typing in a TV app easier
- 12 Seamless handoff between phone and TV**
Start a show on your phone and continue at the same point on TV, or transition from TV back to phone
- 13 Discover on mobile, watch on TV**
Explore titles and make watchlists on your phone; the TV app organizes them, ready to watch



FIRST WE ASKED THE APPEAL OF EACH FEATURE/SOLUTION

1

APPEAL

Do you **LIKE**
this idea?

5

point scale

...THEN WE ASKED FOUR OTHER QUESTIONS OF NON-REJECTORS OF EACH FEATURE



Among non-rejectors of each feature

1
APPEAL
Do you LIKE this idea?

5
point scale

2
ADOPTION
Would you USE that feature?

3
point scale

3
VALUE
Make TV service MORE VALUABLE?

5
point scale

4
"DEFAULT"
More likely to become your TV "HOME BASE"?

3
point scale

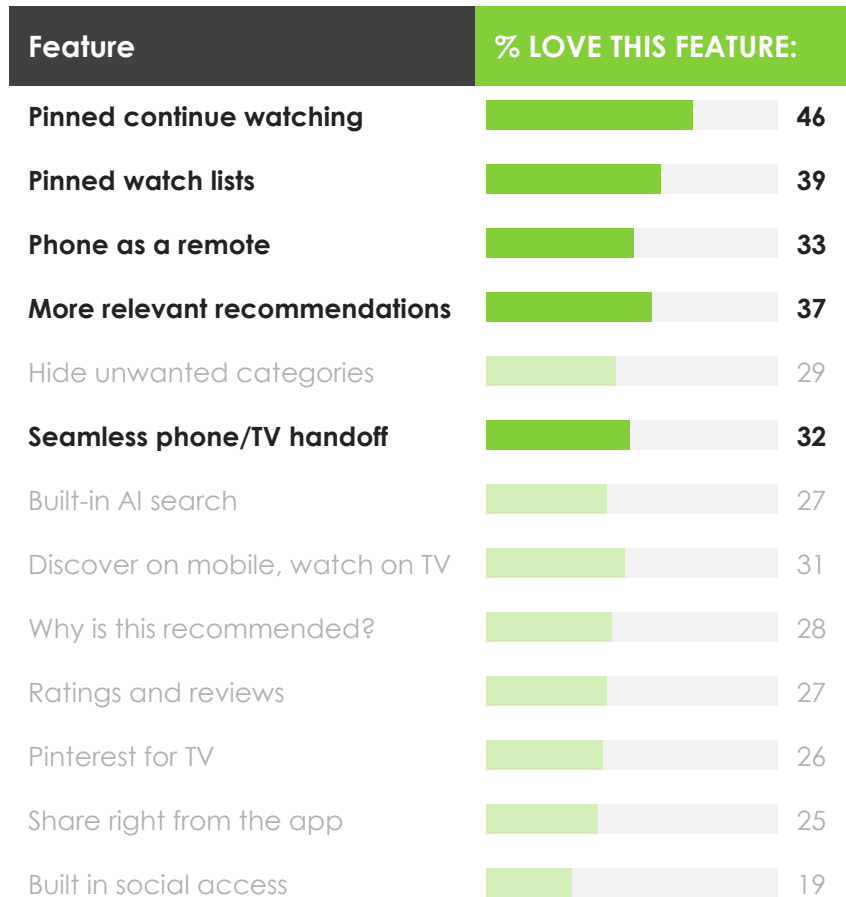
5
RETENTION
More likely to KEEP your subscription?

3
point scale



THE FIVE “MOST BELOVED” FEATURES:

Each column shows the **top-box** % of viewers selecting that feature for the given behavior.



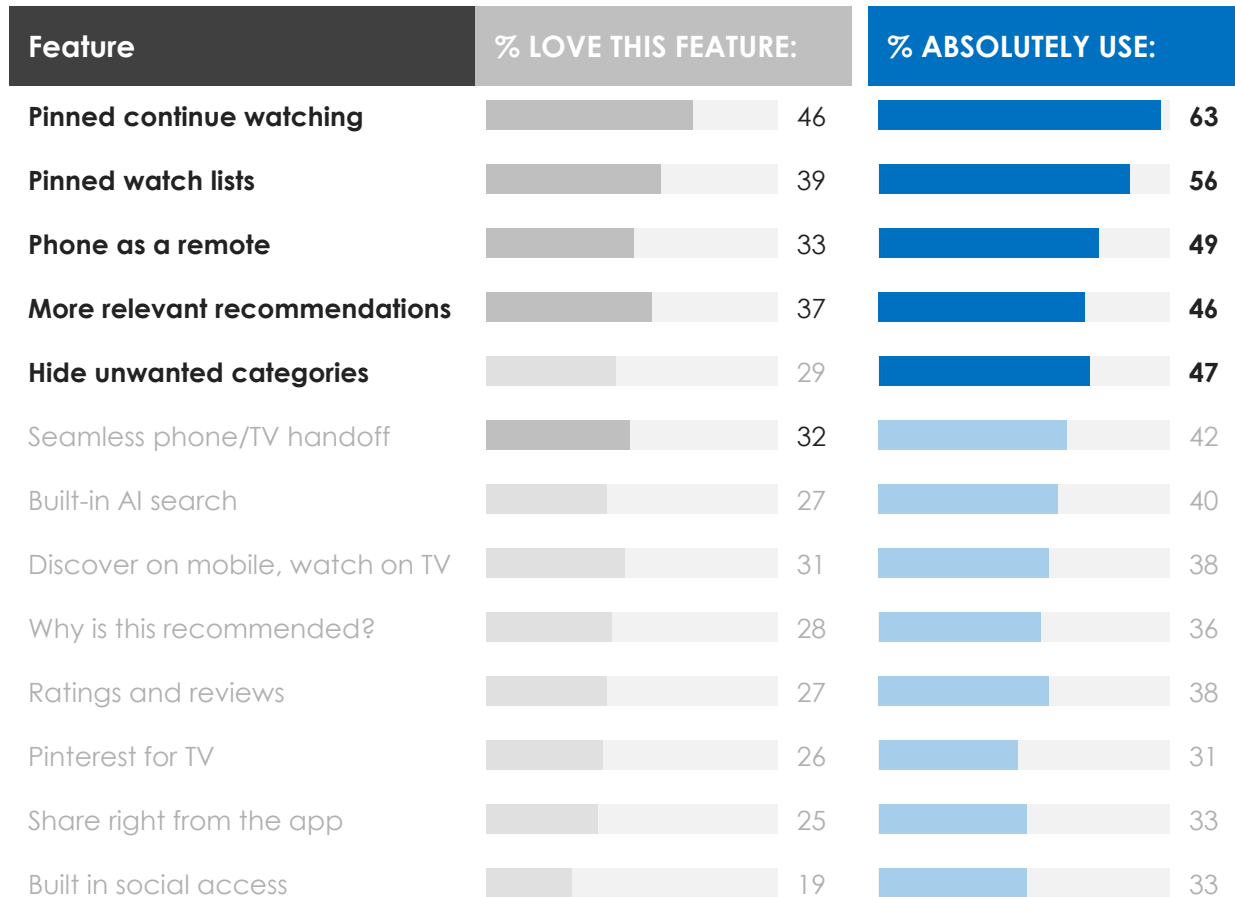
Base: n=3,000

Q30 For each of the following features that a TV app could offer, please tell us how much you like or dislike the feature. 5-point scale.



THE FIVE VIEWERS ARE MOST LIKELY TO USE:

Each column shows the **top-box** % of viewers selecting that feature for the given behavior.



Base: 2522-2874

Q31. Would you use this feature if it was available? 3-point scale.



THE FIVE MOST LIKELY TO ADD VALUE TO A SUBSCRIPTION:

Each column shows the **top-box** % of viewers selecting that feature for the given behavior.

Feature	% LOVE THIS FEATURE:	% ABSOLUTELY USE:	% MORE VALUABLE
Pinned continue watching	46	63	42
Pinned watch lists	39	56	36
Phone as a remote	33	49	38
More relevant recommendations	37	46	30
Hide unwanted categories	29	47	31
Seamless phone/TV handoff	32	42	28
Built-in AI search	27	40	28
Discover on mobile, watch on TV	31	38	26
Why is this recommended?	28	36	25
Ratings and reviews	27	38	27
Pinterest for TV	26	31	22
Share right from the app	25	33	23
Built in social access	19	33	23

Base: 2522-2874

Q32. Would an app with this feature make that service or subscription more valuable to you? 5-point scale.

THE FIVE MOST LIKELY TO INFLUENCE WHERE VIEWING SESSIONS BEGIN:



Each column shows the **top-box** % of viewers selecting that feature for the given behavior.

Feature	% LOVE THIS FEATURE:	% ABSOLUTELY USE:	% MORE VALUABLE	% HOME BASE
Pinned continue watching	46	63	42	48
Pinned watch lists	39	56	36	42
Phone as a remote	33	49	38	41
More relevant recommendations	37	46	30	42
Hide unwanted categories	29	47	31	36
Seamless phone/TV handoff	32	42	28	39
Built-in AI search	27	40	28	41
Discover on mobile, watch on TV	31	38	26	39
Why is this recommended?	28	36	25	40
Ratings and reviews	27	38	27	34
Pinterest for TV	26	31	22	39
Share right from the app	25	33	23	34
Built in social access	19	33	23	32

Base: 2522-2874

Q33. Would this feature make you more likely to choose that app or service as your home base for TV - the **first thing** you turn on when you're ready to watch? 3-point scale.



THE FIVE MOST LIKELY TO REDUCE CHURN:

Each column shows the **top-box** % of viewers selecting that feature for the given behavior.

Feature	% LOVE THIS FEATURE:	% ABSOLUTELY USE:	% MORE VALUABLE	% HOME BASE	% KEEP SUBSCRIPTION
Pinned continue watching	46	63	42	48	48
Pinned watch lists	39	56	36	42	43
Phone as a remote	33	49	38	41	43
More relevant recommendations	37	46	30	42	35
Hide unwanted categories	29	47	31	36	37
Seamless phone/TV handoff	32	42	28	39	37
Built-in AI search	27	40	28	41	36
Discover on mobile, watch on TV	31	38	26	39	33
Why is this recommended?	28	36	25	40	29
Ratings and reviews	27	38	27	34	32
Pinterest for TV	26	31	22	39	29
Share right from the app	25	33	23	34	30
Built in social access	19	33	23	32	32

Base: 2522-2874

Q34. Would an app with this feature make you more likely to keep your subscription? 3-point scale.



6

PRIORITIZING SOLUTIONS

Tier 1: Pinned "Continue Watching" and Watch Lists deliver the biggest impact on behavior



T
I
E
R
1

Build Now

Composite score >40% | Top across all 5 metrics

**Pinned
"Continue Watching"**

Composite: 50%

**Pinned
Watch Lists**

Composite: 43%

**Phone
as Remote**

Composite: 41%

Composite score = Avg. of T1B scores for appeal, use, value, "home base" and "keep subscription"

Tier 2: Improvements to discovery (via new features, mobile integration or enabling users to “clean up” the interface)



T
I
E
R
1

Build Now

Composite score >40% | Top across all 5 metrics

**Pinned
“Continue Watching”**

Composite: 50%

**Pinned
Watch Lists**

Composite: 43%

**Phone
as Remote**

Composite: 41%

T
I
E
R
2

Build Next

Composite 33-40% | Strong on 2-3 key metrics

More Relevant Recs

Composite: 38%

Hide Categories

Composite: 36%

Seamless Handoff

Composite: 35%

Built-in AI Search

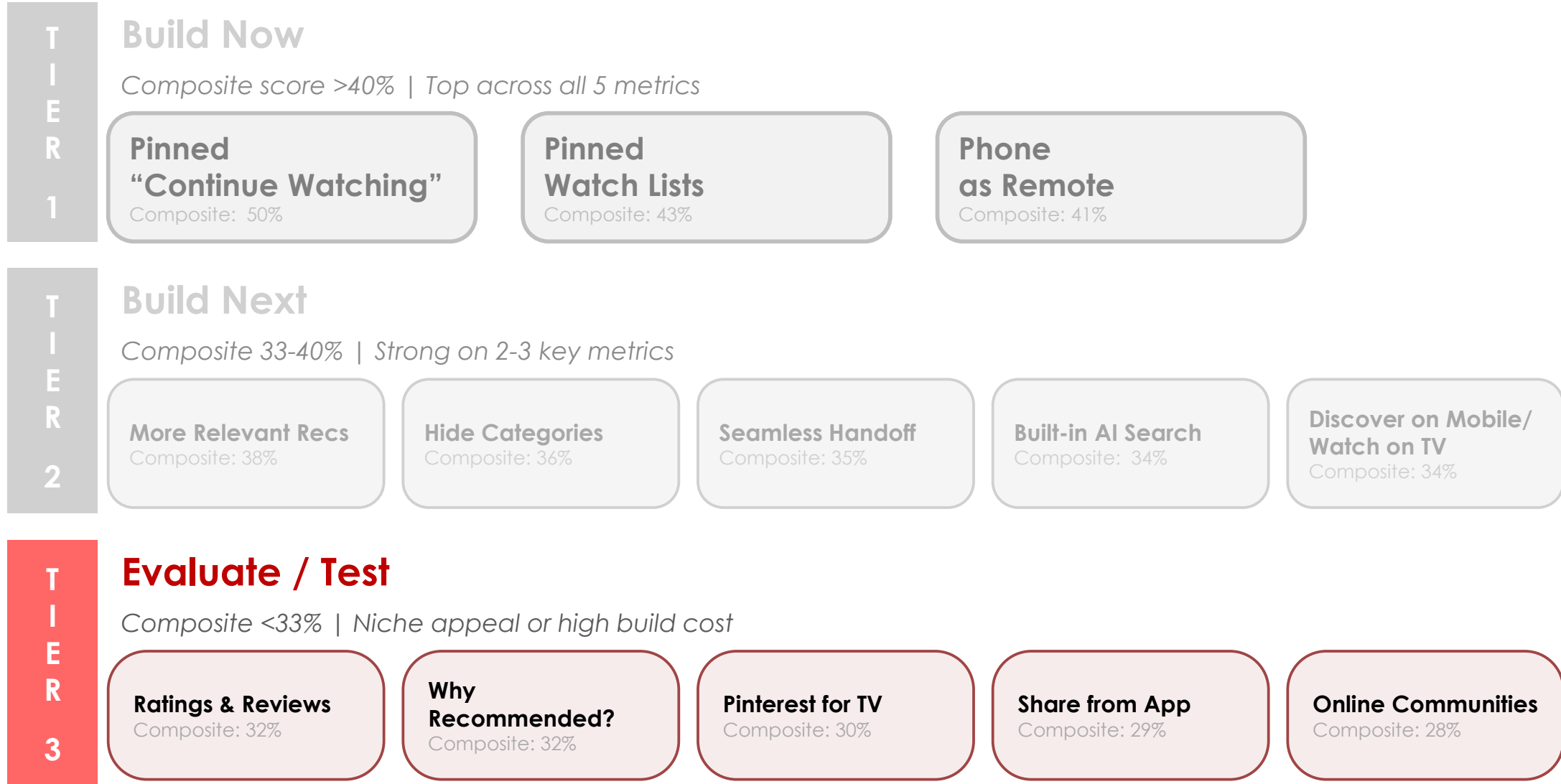
Composite: 34%

**Discover on Mobile/
Watch on TV**

Composite: 34%

Composite score = Avg. of T1B scores for appeal, use, value, “home base” and “keep subscription”

Tier 3: Context and research features rank lowest — but still move a meaningful share of viewers



Composite score = Avg. of T1B scores for appeal, use, value, "home base" and "keep subscription"



Prioritizing by Audience



The most promising improvements resonate across ages

T
I
E
R
1

Build Now: Age 13 to 24

Composite score >40% | Top across all 5 metrics

Pinned "Continue Watching"

Composite: 50%

Pinned Watch Lists

Composite: 46%

More Relevant Recs

Composite: 41%

T
I
E
R
1

Build Now: Age 35+

Composite score >40% | Top across all 5 metrics

Pinned "Continue Watching"

Composite: 49%

Pinned Watch Lists

Composite: 42%

Phone as Remote

Composite: 40%



7

CONCLUSIONS



Summary: Top Performers



1 Pinned
"Continue Watching"

50%

Top-box composite

2 Pinned
Watch Lists

43%

Top-box composite

3 Phone
as Remote

41%

Top-box composite

4 More
Relevant Recs

38%

Top-box composite

5 tenets of TV apps:



#1

TV apps are judged against every app

Instagram, TikTok and WhatsApp set the bar — not other TV apps

#2

Discovery is the biggest pain point

Information overload and missing context make deciding what to watch hard

#3

A frustrating app drives churn

36% have cancelled a service over a bad app experience

#4

Personalization is the biggest unmet expectation

Viewers want what they watch and save to actually shape what they see

#5

Phones are part of the TV experience

Viewers research and decide on phone, then hand off to TV — design for both

A hand is raised in the air, palm facing forward, against a blurred background of warm bokeh lights. The hand is wearing a watch. The overall scene suggests a meeting or a presentation.

QUESTIONS?

JON GIEGENGACK

PRINCIPAL

JONG@HUBRESEARCHLLC.COM