

VERTO PITCH DECK

The P2P Creator Streaming Marketplace

1. INTRODUCTION

One-Liner Value Proposition

Netflix for indie creators, powered by peer-to-peer technology.

One subscription replaces scattered Patreon pledges. Creators keep 85-90% of revenue. Zero ads. Zero platform manipulation.

2. PROBLEM: THE CREATOR ECONOMY'S TRIPLE CRISIS

Who Has This Problem?

- **304 million creators worldwide** seeking sustainable monetization
- **71% of Gen Z viewers** frustrated with ad-bloated platforms
- **Small-to-mid-sized content creators** trapped between expensive self-hosting and exploitative platforms

The Three Pain Points:

➊ The Platform Tax (45-50%)

- YouTube takes 45% of ad revenue
- Twitch takes 50% of subscriptions
- Patreon charges 5-12% + payment processing fees
- **Result:** Creators need 3-5 platforms just to survive, fragmenting their audience

➋ Discovery is Broken

- Algorithms prioritize clickbait over quality
- Small creators can't compete with corporate content budgets
- Viewers spend hours searching across 10+ platforms
- **No way for independent creators to cross-promote or bundle together**

➌ The Ad-Bloat Paradox

- Platforms charge subscriptions AND serve ads (YouTube Premium ≠ truly ad-free creator experience)
- Creators lose creative control to sponsor demands
- Privacy invasion through tracking-based ad systems
- **44% streaming churn rate in 2025-2026** due to subscription fatigue

Why Current Solutions Fail:

Platform	Missing Element
YouTube	Takes 45%, algorithm buries quality content, ads disrupt experience
Patreon	No discovery, no bundling, creators operate as isolated islands
Nebula	Invite-only exclusivity, no open marketplace for new creators
Uscreen/Muvi	White-label silos—creators still do 100% of marketing alone

3. SOLUTION: THE P2P CREATOR MALL

Product Overview

Verto is a **decentralized streaming marketplace** where verified creators host ad-free, HD content. Users subscribe to individual creators OR curated "Packs" (bundles of creators), creating a modern unbundled cable TV experience.

How It Works

FOR CREATORS:

- Keep 85-90% of Revenue** (vs. 50-55% on YouTube/Twitch)
- Desktop Upload App** (Wails + Go): Lightning-fast local uploads, 4x faster than YouTube
- Collaborative Bundling**: Team up with other creators to sell "Packs"

- *Example:* 5 coding educators create a "Full-Stack Dev Pack" for 12/month → viewers save 13/month vs. individual subscriptions
- Revenue split is transparent and creator-defined
 - Linear Scheduling**: Program VOD content to "air" at specific times (like TV channels)
- Creates appointment viewing without needing to stream live
- Builds community ritual ("New episode Fridays at 8pm")

FOR VIEWERS:

- One Wallet, Infinite Choices**
 - Subscribe to individual creators (\$3-8/month)

- Grab Packs for bundled savings (\$10-20 for 3-8 creators)
- Mega Pack: \$30/month unlimited access (revenue goes to creators you watch most)
 - 100% Ad-Free, Zero Tracking:** Pure subscription model
 - Discovery Feed:** Algorithm-free chronological feed from subscribed creators
 - Viewer-as-Curator:** Create custom Packs, earn 5% referral commission
- *Example:* Superfan creates "Best Science Educators 2026" Pack → earns passive income

The Network Effect Flywheel

More creators → More bundling options → Better viewer value →
 Higher retention → More revenue per creator → Attracts more creators

Unique Value Propositions:

1. **First marketplace enabling inter-creator collaboration** (no competitor allows this)
2. **P2P infrastructure** slashes hosting costs by 80% vs. traditional CDNs
3. **Blockchain payment rails** automate revenue splits (no manual accounting)
4. **Linear scheduling** recreates "TV feel" for community engagement

4. MARKET OPPORTUNITY

Market Size (2026 Data)

Metric	Value	Definition
TAM	\$250B	Global creator economy (all monetization methods)
SAM	\$45B	Subscription-based creator platforms (excludes pure ad models)
SOM	\$2.3B	Educational & premium niche creators (Year 3 target)

Growth Drivers:

- **304M creators globally** (LinkedIn Economic Graph, 2025)
- **44% streaming churn rate** in 2025-2026 (Antenna Data) → viewers desperate for consolidation
- **71% of Gen Z** prefers ad-free content and willing to pay premium (Deloitte Digital Media Trends 2025)
- **\$1.2B invested in creator economy startups** in 2024-2025 (Pitchbook)

Addressable Customer Segments:

1. **Primary:** Educational creators (coding, language, fitness, finance) → 45M creators

2. **Secondary:** Independent filmmakers, podcasters, investigative journalists → 30M creators
3. **Tertiary:** Gaming streamers, lifestyle vloggers → 80M creators

Market Validation:

- Patreon grew from 0 to 1B+ GMV in 8 years with ZERO bundling features
 - Nebula (invite-only platform) reached 650K subscribers in 4 years
 - Substack (text-only) hit \$25M ARR in 3 years
 - **Verto combines bundling + video + P2P economics = 10x larger TAM**
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5. WHY NOW: THE PERFECT STORM

1. 🌡 Platform Trust Crisis (2024-2026)

- **YouTube's ad-tier shift:** Even Premium subscribers now see creator-injected sponsors
- **Patreon fee increases:** Raised rates by 2.9% in Q4 2025 → sparked creator exodus
- **23% of top creators actively seeking alternatives** (Creator Economy Report, 2025)

2. 💰 Web3 Infrastructure Maturity

- **Ethereum Layer 2 transaction costs dropped 95%** (2024-2025)
 - Payment splits now cost 0.02 vs. 3.50 in 2022
- **IPFS/Arweave decentralized storage** now rivals CDN performance at 1/10th the cost
- **Blockchain = instant, automated revenue splits** (no waiting 30-60 days like traditional platforms)

3. 📺 Unbundling Demand Proven

- Netflix/Disney+/HBO Max fragmentation proved consumers want **curated bundles, not 12 separate subscriptions**
- Cable TV → Streaming Boom → Streaming Fatigue → **Verto's Re-Bundling Phase**
- Consumers spent avg. 87/month on streaming in 2025 (up from 47 in 2020) → unsustainable

4. 🛠 Creator Tools Commoditized

- Live transcoding APIs (Mux, Cloudflare Stream) now \$0.005/minute
- Go-based backends enable 10x faster video processing than legacy Python/Node stacks
- Desktop frameworks (Wails, Tauri) make native app development 5x faster

Timing Validation:

- **Right after peak platform dissatisfaction** (Q4 2025 Patreon/YouTube backlash)
 - **Before competitors realize bundling is the unlock** (Patreon/Substack still don't offer this)
 - **Web3 infrastructure mature enough** to handle millions of micro-transactions
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6. TRACTION & VALIDATION

Current Milestones (Pre-Launch):

Metric	Achievement	Timeline
Beta Creators Signed	50 commitments	Q2 2026 target
Combined Audience	450K subscribers	Across 20 confirmed creators
Desktop Prototype	Tested with 12 creators	Upload speed: 4x faster than YouTube
Creator Retention	85% retention rate	From pilot program (12 creators, 3 months)
Pre-Seed Commitments	\$120K secured	Angel investors + advisor convertible notes

Early Validation Signals:

Creator Feedback:

- **12 pilot creators** uploaded 180+ hours of content
- Average upload speed: **4x faster than YouTube** (Go-based backend advantage)
- 9/12 creators reported "would switch from Patreon immediately"

Partnership Pipeline:

- **3 coding bootcamps** in partnership discussions (potential to distribute to 15K students)
- **1 educational NGO** exploring bulk licensing for member benefits
- **2 podcast networks** interested in bundling their shows

Product Validation:

- Linear scheduling feature tested with 5 creators → **32% higher engagement** than VOD-only
- Viewer-curated Packs tested with 50 beta users → **18% conversion rate** to paid subscriptions

- Desktop app (Wails) tested on Mac/Windows/Linux → zero crashes in 200+ upload sessions

Path to \$1M ARR:

- **500 creators** @ avg $450/month \times revenue = 225K/month \times 15\% \text{ platform fee} = \$33.7K \text{ MRR}$
 - **1,500 creators** @ avg $550/month \times revenue = 825K/month \times 15\% \text{ platform fee} = \$123K \text{ MRR} (\sim \$1.5M \text{ ARR})$
 - Target: Reach 1,500 creators by **Month 18**
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7. BUSINESS MODEL

Revenue Streams

Primary: Platform Transaction Fee (85-90% to creators)

- Verto keeps **10-15%** of all subscription revenue
- **85% to creators** (distributed based on Pack agreements if bundled)
- **5% to viewer-curators** (if subscription came via referral)

Example Revenue Split:

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Viewer pays $12/month for "Full-Stack Dev Pack" (5 creators):
└─ $10.20 to creators (85%) → split as they agreed
└─ $1.20 to Verto (10%) → infrastructure costs
└─ $0.60 to curator (5%) → referral commission
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Secondary: Creator Subscription Tiers

Tier	Price	Features	Target Audience
Free	\$0/month	10 videos, 1GB storage, Verto branding	Hobbyists testing platform
Creator Pro	\$15/month	Unlimited videos, custom branding, analytics dashboard	Semi-pro educators, coaches
Studio	\$50/month	Multi-user accounts, API access, priority transcoding, white-label option	Bootcamps, agencies, publishers

Projected Creator Tier Revenue (Year 2):

- $1,500 \text{ creators} \times 40\% \text{ on paid tiers} (600 \text{ creators}) \times \text{avg } 25/month = **15K \text{ MRR}**$

Tertiary: Mega Pack (All-Access Pass)

- \$30/month for unlimited access to all verified creators
- Revenue distributed based on **watch time** (70% goes to most-watched creators)
- Target: 5% of viewers convert to Mega Pack by Year 2

Unit Economics (Year 2 Projections):

Average Creator:

- Monthly revenue: \$450
- Verto commission (15%): \$67.50
- Creator LTV (3 years): **\$2,430**
- Creator CAC: \$120 (outreach + onboarding)
- **LTV:CAC ratio = 20:1**

Average Viewer:

- Monthly spend: \$18 (mix of individual + Pack subscriptions)
- Verto take (15%): \$2.70/month
- Viewer LTV (2 years): **\$64.80**
- Viewer CAC: \$12 (referral bonuses + content marketing)
- **LTV:CAC ratio = 5.4:1**

Scalability Levers:

1. **P2P infrastructure:** Cost per creator decreases as network grows (economies of scale)
 2. **Automated payment splits:** Zero manual accounting overhead via blockchain
 3. **Viewer referral loops:** CAC drops to near-zero as superfans recruit new subscribers
 4. **Linear scheduling:** Increases engagement without additional content production costs
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8. COMPETITION & UNFAIR ADVANTAGE

Competitive Landscape

Platform	Type	Platform Fee	Creator Bundling	Ad-Free	P2P Discovery	Linear TV
Verto	P2P Marketplace	10-15%	<input checked="" type="checkbox"/> User-defined	<input checked="" type="checkbox"/> Guaranteed	<input checked="" type="checkbox"/> Viewer curation	<input checked="" type="checkbox"/> TV-style
YouTube	Ad-driven	45%	X	X Premium only	X Algorithm	X
Patreon	Membership	5-12% + fees	X	<input checked="" type="checkbox"/>	X	X
Nebula	Curated	~30% (estimated)	<input checked="" type="checkbox"/> Invite-only	<input checked="" type="checkbox"/>	X	X
Substack	Newsletter	10%	X	<input checked="" type="checkbox"/>	X	X
Kajabi	White-label	\$149-399/mo	X	<input checked="" type="checkbox"/>	X	X

What Competitors Are Missing:

- 1. Inter-Creator Collaboration:** No platform allows Creator A + Creator B to jointly sell a bundle
- 2. Viewer Curation Economy:** No platform pays viewers for discovering/promoting creators
- 3. P2P Infrastructure:** Legacy platforms rely on expensive centralized CDNs
- 4. Linear Scheduling:** Pure VOD platforms miss the "appointment viewing" engagement boost

Our Unfair Advantages:

🔗 Technical Moats:

1. Go-Based Backend

- 10x faster video transcoding than Python/Node competitors
- Handles 100K concurrent streams on *500/month infrastructure* (vs. 5K+ for competitors)
- Open-source foundation = community contributions accelerate development

2. Blockchain Payment Rails

- Instant revenue splits (vs. 30-60 day delays on Patreon/YouTube)
- Zero manual accounting overhead
- Transparent, immutable creator contracts build trust

3. IPFS/Decentralized Storage

- 80% cheaper than traditional CDNs (Cloudflare, AWS)

- Content remains accessible even if Verto servers go down
- Creators own their content metadata (can migrate if needed)

⌚ Strategic Moats:

4. First-Mover on Viewer-Curated Packs

- Creates viral referral loops (superfans become ambassadors)
- Network effects: Each curator brings their audience to Verto
- Patent pending on "viewer-defined creator bundling with automated royalty distribution"

5. Linear Scheduling IP

- Custom algorithm for "TV channel" programming from VOD libraries
- 32% higher engagement than VOD-only (validated in pilot)
- Competitors would need 12-18 months to build equivalent feature

6. Creator Network Effects

- The more creators bundle together, the stickier the ecosystem
- Switching cost increases exponentially with each Pack a viewer subscribes to
- Unlike Patreon (creators operate in silos), Verto creators actively recruit each other

💼 Operational Advantages:

7. Desktop-First Creator Tools

- Wails app works offline, syncs when online
- Local video processing reduces server costs by 60%
- Creator-friendly UX designed by actual content creators (not engineers)

8. Zero-Marketing Growth Model

- Viewer referral commissions (5%) create self-sustaining viral loops
- Creator Pack collaborations = built-in cross-promotion
- Linear scheduling drives word-of-mouth ("tune in Friday at 8pm!")

Why We'll Win:

- **Patreon** won't add bundling (cannibalizes their business model)
- **YouTube** can't pivot to ad-free (99% of revenue is ads)
- **Nebula** is invite-only forever (exclusivity is their brand)
- **Kajabi/Uscreen** are infrastructure plays, not marketplaces (no discovery layer)

Verto is the only platform built from day one around creator collaboration + viewer curation.

9. GO-TO-MARKET STRATEGY

Phase 1: Niche Domination (Months 1-6)

Target Segment: Educational Creators

Why this niche?

- High-value content (viewers willing to pay \$15-30/month)
- Existing Patreon fatigue (tired of low discoverability)
- Natural bundling affinity (coding + design + marketing = full skill stack)
- Underserved by YouTube (algorithm buries long-form tutorials)

Acquisition Tactics:

1. Invite 50 Beta Creators (already committed)

- Offer first 6 months of Creator Pro free (\$90 value)
- Guarantee front-page featuring during beta period
- Direct outreach via LinkedIn, Twitter, creator-focused Discord servers

2. Launch 5 Flagship Packs

- Partner with top creators to build high-visibility bundles:
 - "Full-Stack Web Dev Pack" (5 educators, \$12/month)
 - "Financial Independence Pack" (4 finance creators, \$10/month)
 - "Digital Nomad Essentials" (6 creators, \$15/month)
- Each Pack gets dedicated landing page + social media campaign

3. Community Building

- Launch "Verto Creator Council" (20 founding creators)
- Weekly AMAs with founders (build trust + gather feedback)
- Private Discord for beta creators to collaborate on Packs

Success Metrics (Month 6):

- 200 active creators
 - 5,000 paying viewers
 - \$25K MRR
 - 60% of creators in at least 1 Pack
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Phase 2: Viral Bundling (Months 6-12)

Unlock Viewer-Curated Packs

The Flywheel:

Superfan creates "Best Science YouTubers" Pack →
Shares on Reddit/Twitter →
Earns 5% commission on sign-ups →
Other superfans copy the model →
Exponential growth

Marketing Channels:

1. Referral Program (5% Commission)

- Viewers earn passive income for curating Packs
- Target: 500 active curators by Month 12
- Expected: Each curator brings 20-50 subscribers

2. Content Marketing

- Launch "Creator Sovereignty Manifesto" (viral blog post)
- Case studies: "How 5 Creators Earned \$8K/month by Bundling"
- Guest posts on The Hustle, Morning Brew, Hacker News

3. Partnerships

- 3 coding bootcamps (distribute to 15K students)
- 2 podcast networks (cross-promotion)
- 5 creator-focused newsletters (sponsored mentions)

4. PR Campaign

- Pitch: "Netflix for Indie Creators Launches"
- Target: TechCrunch, The Verge, ProductHunt launch
- Founder story: "We left YouTube to build a fairer platform"

Success Metrics (Month 12):

- 1,500 active creators
- 30,000 paying viewers
- \$120K MRR
- 40% of subscriptions via viewer-curated Packs

Phase 3: Mass Expansion (Year 2-3)

Horizontal Expansion

1. New Verticals

- Independent filmmakers (short films, documentaries)
- Investigative journalists (ad-free deep dives)
- Gaming streamers (alternative to Twitch's 50% cut)

2. Geographic Expansion

- Launch in EU (GDPR-compliant from day one)
- India, Brazil, Nigeria (high creator density, low YouTube ad CPMs)
- Localized payment methods (UPI, Pix, mobile money)

3. Product Expansion

- Mobile apps (React Native) → launch Month 18
- Live streaming (for premium creators) → Month 20
- Web3 features: NFT badges for superfans, DAO governance → Month 24

Sales Channels:

- Direct to Creator:** Outbound to top 10K Patreon creators
- B2B Partnerships:** Sell "Studio" tier to bootcamps, agencies, publishers
- Community-Led Growth:** Viewer referrals drive 60% of new sign-ups

Success Metrics (Year 3):

- 10,000 active creators
- 250,000 paying viewers
- 1.5MMRR (18M ARR)
- Break-even on operational costs

Customer Acquisition Cost (CAC) Breakdown

Channel	CAC	LTV	Ratio	% of Growth
Creator Referrals	\$40	\$2,430	60:1	30%
Viewer Referrals	\$8	\$65	8:1	40%
Content Marketing	\$25	\$65	2.6:1	20%
Paid Ads	\$50	\$65	1.3:1	5%
Partnerships	\$15	\$2,430	162:1	5%

Blended CAC: $22(\text{creator}) + 12(\text{viewer}) = \text{Extremely efficient unit economics}$

Key Growth Levers:

1. Creator → Creator Recruitment

- Each creator invited to Packs recruits 1.5 new creators on avg
- Compounds monthly (viral coefficient = 1.5)

2. Linear Scheduling Events

- "Premiere nights" drive social sharing
- Target: 20% of viewers invite friends to watch together

3. Platform Exclusives

- Offer select creators equity + revenue guarantees for exclusivity
- Creates FOMO for viewers ("only on Verto")

4. Press & Media

- Founder story (bootstrapped alternative to YouTube) → media catnip
 - Launch on ProductHunt (goal: #1 Product of the Day)
 - Speaking circuit: VidCon, Podcast Movement, Creator Economy Expo
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THE ASK

We're building the infrastructure for creator sovereignty.

Immediate Next Steps:

1. Finalize P2P architecture (IPFS vs. WebTorrent vs. hybrid) → **Month 1**
2. Complete desktop creator app MVP (Wails + Go) → **Month 2**
3. Launch with 50 pilot creators → **Q2 2026**
4. Raise **seed round (500K – 1M)** to scale hosting infrastructure

Use of Funds:

- 40% Engineering (2 full-time devs + infrastructure costs)
- 30% Creator Acquisition (onboarding bonuses, free Pro tier)
- 20% Marketing (content, partnerships, PR)
- 10% Legal & Operations (blockchain compliance, payment rails)

Vision:

By 2028, **10,000 creators earning \$50K+/year through Verto**, collectively earning \$500M annually while keeping 85% of revenue.

Verto isn't a platform. It's a protocol for creator sovereignty.