ANALYTIC EDGE
a C5i company

Uncovering ROI Impact & Growth Potential in Philippines FMCG

FEBRUARY 2026

In collaboration with ♪ TikTok

Executive Summary

The media consumption landscape in the Philippines continues to evolve with Television consumption on the decline, and TikTok having least overlap with Television and Out-Of-Home (OOH). Analytic Edge, in partnership with TikTok, conducted a study to analyze 11 Marketing Market Mix Modelling (MMM) studies for FMCG brands in the Philippines. The results were reported at an overall aggregate level. The highlights of the findings are below.

TikTok ROI Growth: TikTok's overall ROI has risen sharply from 1.4 in 2023 to 2.1 in 2024, reaching 2.9 in 2025.

TikTok ROI vs. Other Channels: TikTok leads on ROI in 73% of the models analyzed, outperforming both digital and traditional media. With an average ROI of 2.1, TikTok delivers 2.2x the ROI of Linear Television, 3.2x that of traditional media, 1.8x that of social, and 2x that of total media.

Sufficiency Analysis/ Opportunity to Grow: Beyond current performance, TikTok also presents the strongest future growth potential. The sufficiency analysis shows that TikTok offers the highest opportunity for FMCG brands to grow, with a growth runway of 160%—significantly higher than both social and traditional media.

Together, these insights indicate that TikTok not only delivers superior ROI today but also represents a compelling opportunity for brands in the Philippines to unlock even greater returns by increasing their investment in the platform.

TikTok ROI Growth

38%
YOY GROWTH

TikTok ROI Multipliers

2.2x
TELEVISION ROI

3.2x
TRADITIONAL ROI

1.8x
SOCIAL ROI

Traditional: Includes Television, OOH, radio and print.
Social: Includes Meta, YouTube and any other social platforms.

TikTok Sufficiency Analysis

FMCG
60%
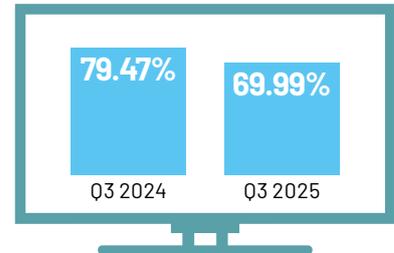**Grow TikTok Spends & Optimize ROI**

Media Landscape Overview & Case Studies

With weekly Television usage declining from 79% to 70%, driven by reduced viewership in rural regions, audiences are shifting away from traditional broadcast content. Television as a screen remains relevant, with Filipino content consumption evolving from linear Television programming toward digital an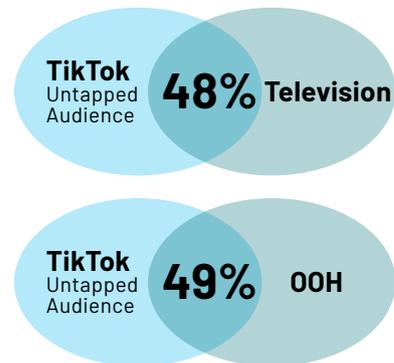d Connected Television (CTV) experiences. *(Source: Nielsen CMV Q3 2025 Urban-Rural vs Q3 2024 Urban Philippines, MF 18+ Smartphone Users, Once A Week Frequency Television Watching & Using Internet)*

TikTok reaches 21.3 million adult smartphone Filipino users, with audience overlap with traditional media such as FTA Television (48%), Cable Television (20%) and OOH (49%) showing that while TikTok shares some reach with legacy channels, it also delivers incremental and digitally native audiences that can diversify the media mix. *(Source: Nielsen CMV Q3 2025, 18+ TikTok and Smartphone Users Urban-Rural Philippines vs Platform Reach Overlaps, Daily or Once A Week Frequency.)* TikTok's unique audience profile points to a clear opportunity for brands to improve reach and efficiency by increasing investments on TikTok.

Television Viewership Decline

79.47% Q3 2024   **69.99%** Q3 2025

TikTok Overlap

TikTok Untapped Audience **48%** Television

TikTok Untapped Audience **49%** OOH

The unique reach of TikTok is compounded by the synergistic impact of TikTok in combination with Television. The following case studies demonstrate some impressive results.

MEGA SARDINES — Lift impact of Television +TikTok

Using TopView and TopFeed assets of TikTok helped to maximize the reach and drove incremental awareness (+16.9%) and incremental consideration (+8.7%) due to executing TikTok and Television together. Also Running TikTok along with Television drove key brand association metrics—brand equity, favourability, and recommendation.

AWARENESS **+16.9%**

CONSIDERATION **+8.7%**

(Source: Kantar Ad Effectiveness Study, June 2025)

Mountain Dew — Ad Awareness

Running TikTok along with Television produced an incremental ad awareness of 24.6% compared to 9.9% generated by running only Television alone. Also, key brand metrics—brand association, favourability, and purchase intent—were driven by the combined effect of TikTok along with Television.
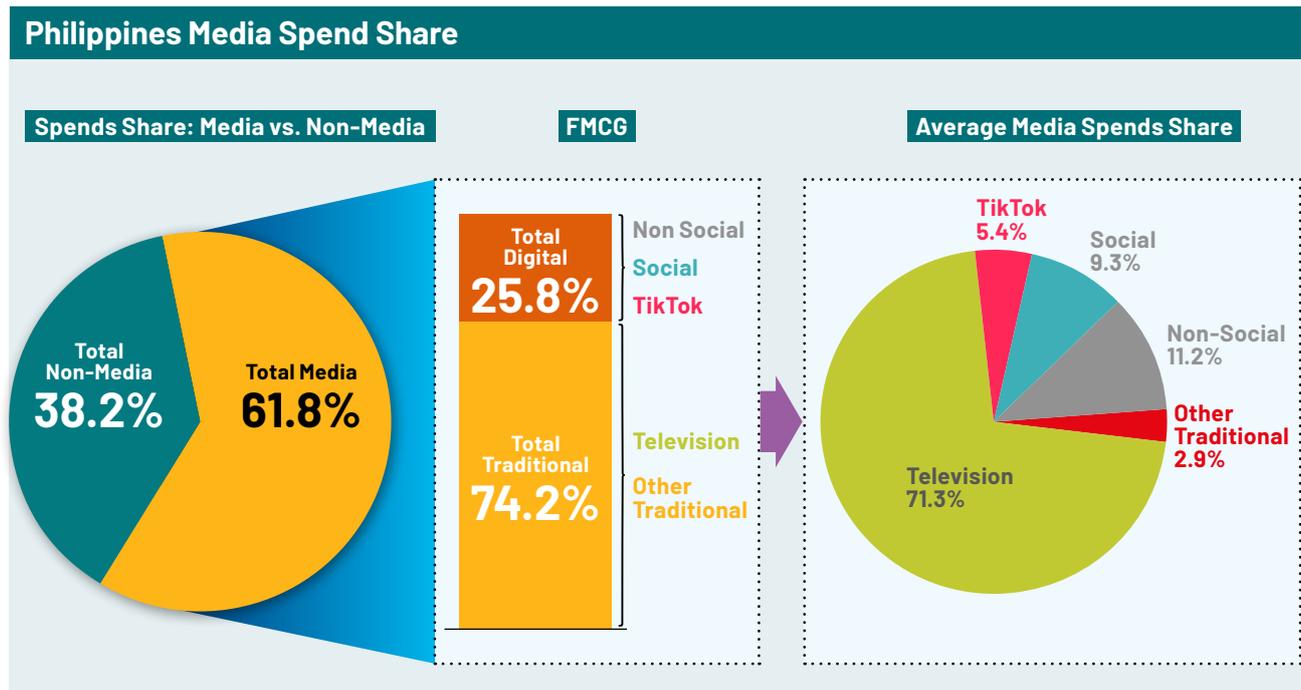
+9.9%

+24.6%

*(Source: Kantar Ad Effectiveness Study, June 2025)*

Key Findings

1. Untapped Potential to Drive Incremental Volume with Exponential Increase in Spends
While Television commanded a dominant 71% of media spends, TikTok's modest 5.4% share reveals untapped potential in the digital mix (~25% of spends).

Philippines Media Spend Share

Spends Share: Media vs. Non-Media

FMCG

Average Media Spends Share

Total Non-Media **38.2%**

Total Media **61.8%**

Total Digital **25.8%**

Non Social
Social
TikTok

Total Traditional **74.2%**

Television
Other Traditional

TikTok 5.4%
Social 9.3%
Non-Social 11.2%
Other Traditional 2.9%
Television 71.3%

TikTok ROI surged 38% YoY in 2025 outpacing other media formats. Social showed an ROI drop of 7.1% in 2025.

TikTok vs. Social ROI

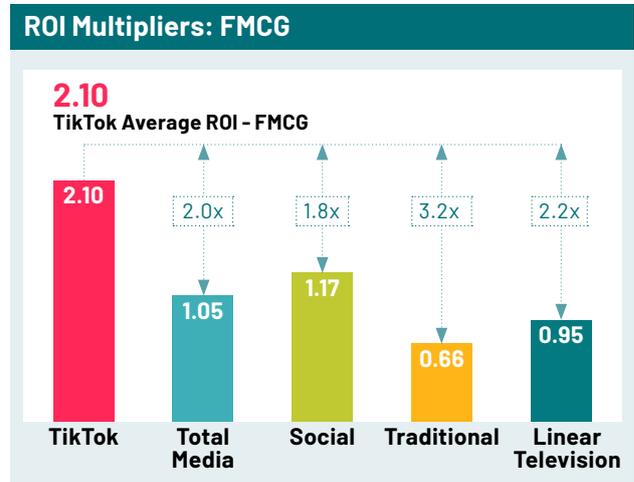|	2023	2024	2025
TikTok	1.4	2.1	2.9
Social	0.7	1.5	1.4
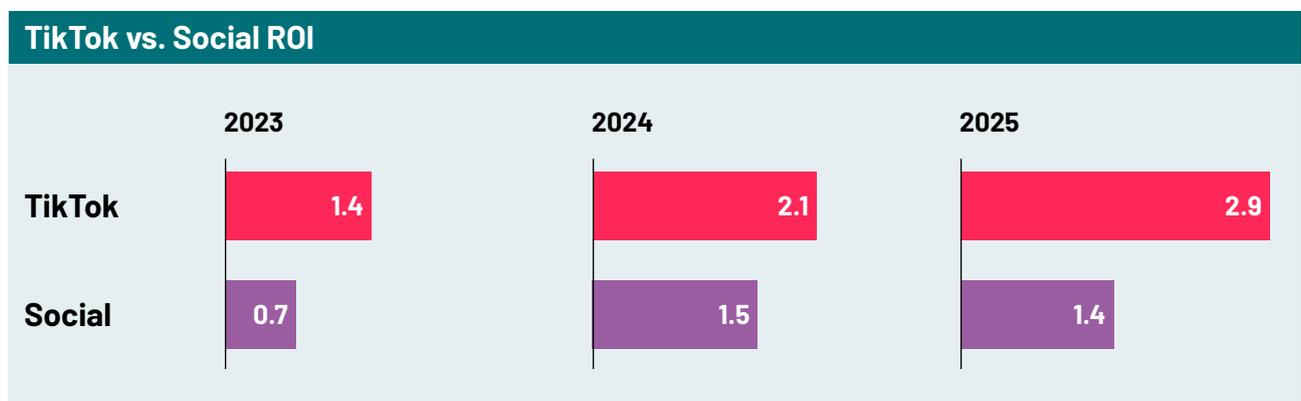
Key Findings

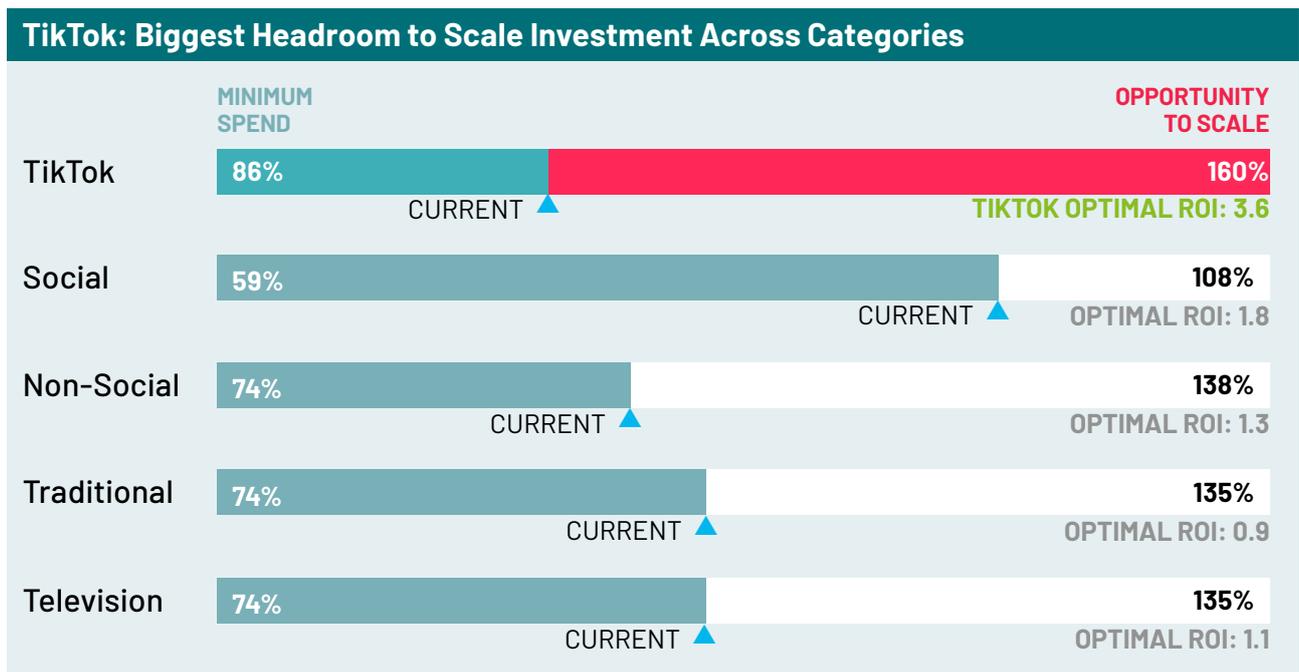## 2. TikTok Leads ROI Performance Across Television, Social, and Total Media

TikTok consistently delivers stronger ROI compared to major competing channels for FMCG. TikTok leads the pack in ROI across 70%+ of models with an ROI of 2.1. TikTok's ROI is 2.2x of Television, 3.2x of Traditional, 1.8x of Social, and 2x of Total Media.

ROI Multipliers: FMCG

2.10
TikTok Average ROI – FMCG

TikTok	Total Media	Social	Traditional	Linear Television
2.10	1.05	1.17	0.66	0.95
	2.0x	1.8x	3.2x	2.2x

Above chart indicates the ROI of TikTok as a multiplier of other channels e.g. TikTok's ROI is 2.0 times that of Total Media ROI.

3. TikTok Shows the Greatest Untapped Headroom to Scale Investments to Drive Highest Optimal ROI

The analysis found that TikTok has the greatest opportunity to scale up investment compared to all other channel groups. TikTok's optimal ROI of 3.6 is higher than that of other channel groups. The next closest optimal ROI is Social at 1.8. For the overall FMCG category, brands can increase spends by as much as 60%. This means there is an untapped opportunity to push spends further on TikTok while still driving profitable growth.

TikTok: Biggest Headroom to Scale Investment Across Categories

MINIMUM SPEND | OPPORTUNITY TO SCALE

TikTok — 86% ... CURRENT ... 160% — TIKTOK OPTIMAL ROI: 3.6

Social — 59% ... CURRENT ... 108% — OPTIMAL ROI: 1.8

Non-Social — 74% ... CURRENT ... 138% — OPTIMAL ROI: 1.3

Traditional — 74% ... CURRENT ... 135% — OPTIMAL ROI: 0.9

Television — 74% ... CURRENT ... 135% — OPTIMAL ROI: 1.1

IV Conclusion

Shifting Consumer Attention

As Filipinos embrace mobile-first habits and short-form video formats, attention continues to shift sharply from traditional media to digital platforms; driving increased consumption of TikTok.

TikTok's ROI Advantage

TikTok consistently shows strong ROI relative to other channel groups. The strong ROI shows that TikTok converts incremental investments into measurable growth.

Opportunity to Scale

Brands can scale TikTok investments by double-digit percentages while still improving ROI, signalling significant headroom for growth.

Rebalancing the Media Mix

Re-evaluating the current media mix and allocating a larger share of media spend to TikTok can help FMCG brands drive incremental revenue and improve ROI.
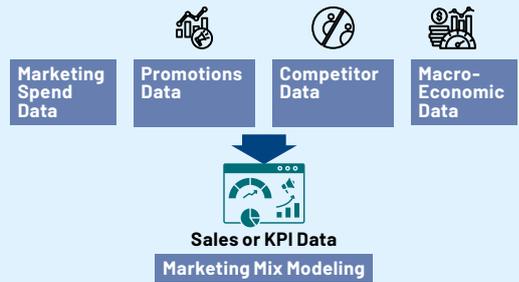
V Appendix

About Marketing Mix Modeling (MMM)

Quantifying the ROI of marketing investments is among the top challenges for CMOs.

Television	Digital
Out of Home	Print
Radio	Promotion

Marketing Mix Modeling (MMM) is a statistical methodology that measures the ROI of all marketing channels.

| Marketing Spend Data | Promotions Data | Competitor Data | Macro-Economic Data |

Sales or KPI Data
Marketing Mix Modeling

These insights are used for optimizing marketing budget to maximize revenue or profit.

Methodology

Scope
- Analytic Edge looked at MMM outcomes for **11 FMCG brands in Philippines.**
- 5 MMMs were TikTok sponsored and 6 were from Analytic Edge's database.

Definitions
- Social: Meta and YouTube.
- Non-Social: Display, Programmatic, and Search.
- Digital: Social, Non-Social, and TikTok.
- Traditional: Television, OOH, Radio, and Print.

Sufficiency Analysis & Opportunity to Grow

Sufficiency analysis is a mechanism for identifying how your response (incremental revenue per execution) moves along with additional executions. It helps explain the optimal level of execution to achieve the maximum volume response and your saturation point.

In the illustrative example below, the guidance for businesses is to spend between Point B and C. Point B indicates the lowest cut-off point for investment while Point C indicates the investment at which ROI peaks. Ideally, the investment should hover around Point C for the best 'optimal' growth. Businesses may invest beyond Point C if they aim for higher growth, or for new brands, where momentum is far more important than efficiency.

Optimal Spend Zone
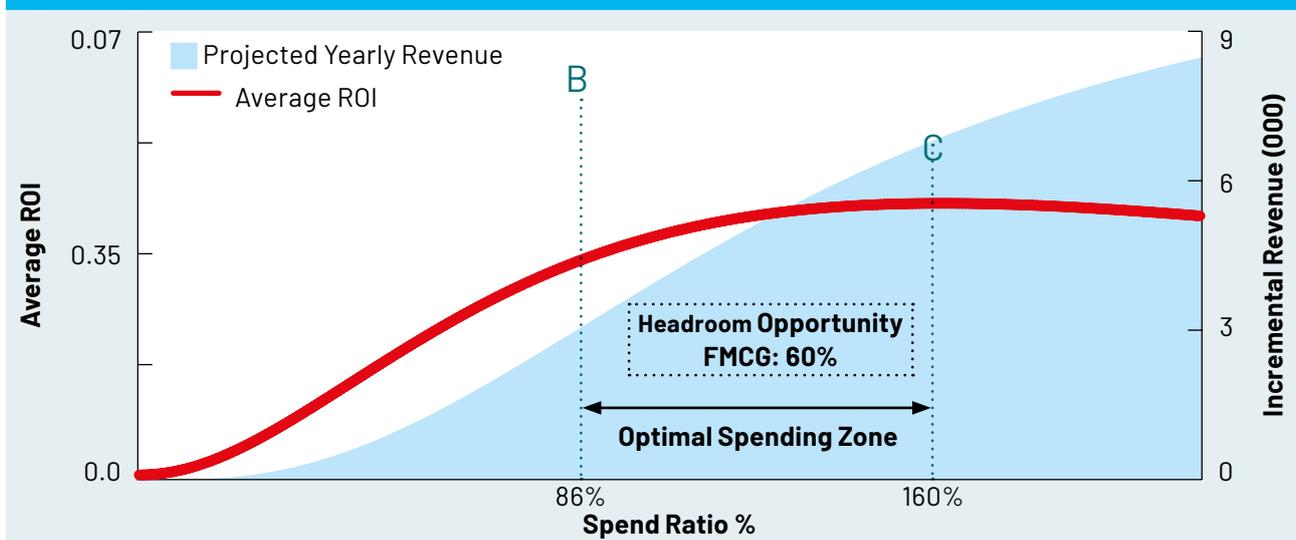
Spend Ratio %: % of spends above the current level of spends (100%).
At an overall FMCG level the optimal spending range for TikTok is from 86% to 160% of the current spends levels and there is an opportunity to grow the spends on TikTok by 60% to optimize ROI.

About Analytic Edge

Analytic Edge, a C5i group company, is a leading global provider of AI-powered marketing analytics and insights. The company delivers advanced, real-time analytics solutions that help brands make faster, smarter, and more cost-effective marketing and sales decisions.

Through proprietary technology available as SaaS or in-house deployments, Analytic Edge offers always-on analytics capabilities such as marketing mix modelling, revenue growth management, campaign incrementality, and new product launch evaluation. Its intuitive, point-and-click software makes advanced analytics accessible and scalable across teams and markets.

With a client base spanning sectors including e-commerce, mobile apps, gaming, consumer goods, retail, and automotive, Analytic Edge supports global organizations from its offices in Singapore, India, the US, Canada, Mexico, Brazil, the UK, China, Japan, South Korea, the UAE, and Australia.

Contributors

Analytic Edge

Padmanabhan Ramaswamy
Managing Director, South-East Asia

Ashwin Sukumaran
VP, Client Engagement, South-East Asia

TikTok

Joseph Albert Menez
Agency Partnerships Lead, Philippines

Nicholas Quah
Measurement Partner, South-East Asia

Nikhil Bharadwaj
Measurement Partner South-East Asia

Christopere Depasupil
Measurement Partner, Philippines

Offices

Singapore | India | US | Mexico | Brazil | UK | Switzerland | China | Japan | South Korea | UAE | Australia

For more information, write to us at **info@analytic-edge.com**
www.analytic-edge.com