

we pulled the data so you don't have to.

TRENDS RESHAPING INFLUENCER MARKETING IN THE PHILIPPINES

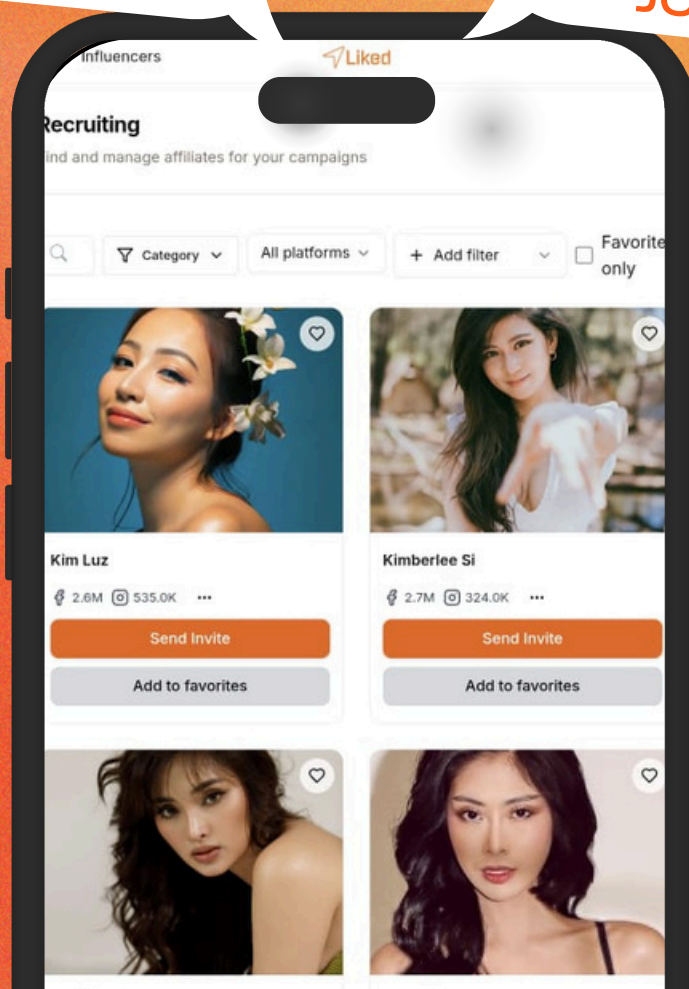
1 DITCH THE 12-TAB
SETUP

2 PAY FOR RESULTS, NOT
POSTS

3 SMALLER CREATOR,
BIGGER TRUST

4 DISCOVERY STARTS
ON THE FEED, NOT
THE SEARCH BAR

5 AI FOR THE PROCESS,
HUMANS FOR THE
JUDGMENT



*these aren't
predictions
they're already
happening*

A MESSAGE FROM OUR *founder*



Global trend reports talk about AI, top-tier creators, and platform wars. Meanwhile, many Philippine brands are drowning in spreadsheets, chasing influencers over DMs, and guessing if their campaigns worked.

I've spent over 15 years in digital marketing across Europe and Asia. What I see in the Philippines is not a lack of great creators or strong content. It is a **lack of infrastructure**.

The gap between what influencer marketing could deliver and what it delivers today is an operational problem, not a creative problem.

This report cuts through the noise.
We group what we're seeing into two tiers:

Mega Trends that change budgets and outcomes, and **Macro Trends** that matter, but are the reflection of the bigger structural change.



MEGA *Trends*

TRENDS THAT CHANGE DECISIONS,
BUDGETS, AND OUTCOMES



MEGA *trends*

TRENDS THAT CHANGE DECISIONS, BUDGETS, AND OUTCOMES

1. COMPENSATION MOVES FROM OUTPUT TO OUTCOME

The flat-fee era is ending

Pay-and-pray is dead. Slow economy means that you must defend every peso. Meta shows CAC. Google shows ROAS. Influencer marketing has been relying on vanity metrics and screenshots, but it's no longer enough.

20%

of total e-commerce in Southeast Asia is now driven by TikTok Shop — built entirely on creator-led, performance-linked commerce.

— Bain & Company + NielsenIQ, Southeast Asia Consumer Products Report, 2025

Hybrid is the new default

Talent fee plus commission. Base plus performance. The structure varies, but the principle doesn't. Brands de-risk. Creators earn upside. Campaigns become measurable.

creators get paid for what they move, not just what they post.

Affiliate is the mechanism

In the Philippines, the shift has a name: affiliate. TikTok Shop normalized it. Shopee and Lazada scaled it. Creators now expect a share of what they drive, and the ones who resist - risk becoming less competitive

YOUR TO-DO *list*

- Audit your last three campaigns. Can you tie spend to revenue, or just to reach?
- If you can't, your next campaign needs a tracked component. Even one creator on a hybrid deal is a start.
- Start building your affiliate creator network now. The brands that wait will be falling behind.



MEGA *trends*

TRENDS THAT CHANGE DECISIONS, BUDGETS, AND OUTCOMES

2. INFLUENCER MARKETING MOVES FROM ONE-OFF CAMPAIGNS TO AN OPERATIONAL INFRASTRUCTURE

The bottleneck isn't creators

The content is good. The trust is real. The audiences convert. What breaks the channel is everything around them. It's the the combination of outreach in DMs, briefs in Google Docs, approvals in Viber, payments in spreadsheets, reporting in screenshots that cause friction and errors.

61%

of marketers globally plan to increase creator content investment in 2026 — but most still don't have a system to manage it.

— Kantar, Media Reactions / Marketing Trends 2026

More creators = more chaos

Micro and nano creators now take a bigger share of budget. That's a win for your CAC and a stress test for your operations.

Ten creators is a campaign. A hundred is a logistics problem. A thousand is impossible without a system.

The brands that are truly scaling in 2026 stopped running campaigns out of inboxes. They moved all operations into one place. Discovery, deal-making, briefs, payouts, reporting - now it's all connected.



YOUR TO-DO *list*

- Map every manual step in your current workflow. If outreach, briefing, approval, and payment live in different tools, that's your bottleneck.
- Fix the system and the infrastructure before scaling the spend.



MEGA trends

TRENDS THAT CHANGE DECISIONS, BUDGETS, AND OUTCOMES

3. INFLUENCER MARKETING MOVES FROM ONE-OFF CAMPAIGNS TO AN OPERATIONAL INFRASTRUCTURE

The "celebrity vs. micro" debate is over.

Both work. Neither works alone.

The brands that are scaling effectively in the Philippines aren't picking a tier. They're designing a roster and giving each tier a specific job.

THE TRUST ARCHITECTURE IN THE PHILIPPINES

CELEBRITIES

Drive broad awareness and signal legitimacy.
Best used for launch moments and brand positioning (not conversion).

MACRO INFLUENCERS

Build category credibility and consideration.
Work well when they have genuine expertise, not just reach.

MICRO/NANO INFLUENCERS

Drive conversion and community trust.
Closest to peer recommendation - the most powerful signal in the PH market.

86% of Filipino social media users follow at least one influencer. 70% have bought something on a recommendation. That trust is not spread evenly across tiers, but rather concentrates with micro and nano influencers, because that's where the creator feels like a friend.

*"Reach alone no longer guarantees trust.
Micro and nano creators often drive deeper impact than celebrities
because they feel closer, more believable, and more relevant."*

— Kantar, Media Reactions Philippines 2025 / "Where is the Trust?", March 2026



MEGA trends

TRENDS THAT CHANGE DECISIONS, BUDGETS, AND OUTCOMES

3. INFLUENCER MARKETING MOVES FROM ONE-OFF CAMPAIGNS TO AN OPERATIONAL INFRASTRUCTURE

The "celebrity vs. micro" debate is over.

Both work. Neither works alone.

The brands that are scaling effectively in the Philippines aren't picking a tier. They're designing a roster and giving each tier a specific job.

THE TRUST ARCHITECTURE IN THE PHILIPPINES



86% of Filipino social media users follow at least one influencer. 70% have bought something on a recommendation. That trust is not spread evenly across tiers, but rather concentrates with micro and nano influencers, because that's where the creator feels like a friend.

"Reach alone no longer guarantees trust. Micro and nano creators often drive deeper impact than celebrities because they feel closer, more believable, and more relevant."

— Kantar, Media Reactions Philippines 2025 / "Where is the Trust?", March 2026

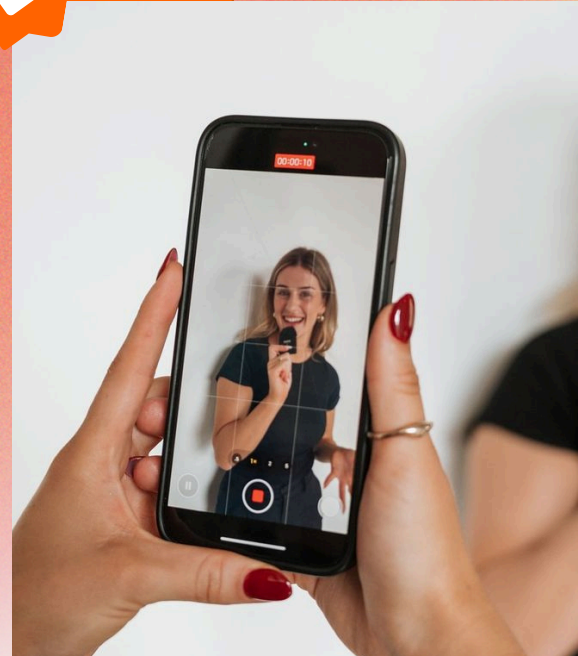
YOUR TO-DO *list*

- Map your current roster across the three tiers. If everyone is doing awareness, you have a strategy gap.
- Assign each tier a job in the funnel, and measure them on that job, not just on reach or engagement .



MACRO *Trends*

A SYMPTOM,
NOT THE FUNDAMENTAL CHANGE



MACROtrends

A SYMPTOM, NOT THE FUNDAMENTAL CHANGE

4. THE CONVERSION FUNNEL FLIPS: FROM SEARCH TO DISCOVERY

Filipinos stopped searching. They started encountering.

The old e-commerce funnel started with intent. A shopper wanted shampoo, opened Lazada or Shopee, typed "shampoo," compared, bought. The new one starts with a scroll. No intent or search bar. Just a creator on a livestream, a comment thread, and a checkout one tap away.

The Philippines is one of the fastest markets in the world adopting this new way to shop.

22B

Combined GMV across Shopee, Lazada, and TikTok Shop in the Philippines in 2025. Shopee grew 25%. TikTok Shop grew 53%. Lazada contracted 34%.

— Cube Tradewinds, Q4 2025

This might look like a platform war, but the underlying reason is the behavior change. Filipinos are looking for entertainment, and commerce becomes an embedded experience.

What this means for creators

Creators are becoming a new storefront and a layer of brand differentiation. A beauty brand on Shopee competes on price and reviews. The same brand on TikTok competes on their lineup of streamers.

"83% of Southeast Asian consumers report they have made purchases through affiliate links."

— Cube × Impact, *Influencer Marketing in Southeast Asia 2025*



YOUR TO-DO *list*

- Audit your last creator brief. Did it ask for a “video” or for a demo viewers could buy from?
- At least one creator on your next campaign should be a seller, not a poster.



MACROtrends

A SYMPTOM, NOT THE FUNDAMENTAL CHANGE

5. AI BECOMES THE OPERATING LAYER, BUT NOT THE TALENT

AI got better at producing content and running campaigns. And consumers got more suspicious of it. Both at once. That's the trend.

What used to take a team now takes an agent. Discovery, fraud detection, brief generation, performance forecasting, payout reconciliation - AI agents manage workflows, not just individual tasks.

"36.67% of marketers already use AI for creator discovery. 21.11% apply it to content generation. 13.89% to brief development. AI is beginning to run campaigns."

— Influencer Marketing Hub, 2026 Benchmark Report

In the Philippines, where trust is the entire reason influencer marketing works so well, AI can find a creator. It can't be a creator (at least not yet).

"32% of consumers say they would trust a brand less if its content was AI-generated. 49% said their trust would decline if AI replaced human creators entirely."

— Global Consumer AI Study, 2026

LET AI RUN

- Creator discovery and matching at scale
- Fake follower and engagement detection
- Brief drafting and content ideation
- Performance forecasting and reporting
- Payout reconciliation

KEEP HUMANS ON

- Choosing who fits your brand voice
- Negotiating real relationships
- Final creative judgment
- Reading why something worked
- Interpreting regional slang, humor, and tone

YOUR TO-DO *list*

- List every step in your current workflow. Mark which are repetitive and data-driven. Those are the areas AI should handle.
- Mark which require judgment, taste, or relationship. Those steps should stay human. Don't let efficiency tempt you across that line.



SO.. WHAT DOES *this* MEAN?

2026 is the year influencer marketing in the Philippines stops being informal and starts being run like a performance channel.

Five trends. One direction.

None of these trends are predictions. They're already happening. The only question is if they happen to your marketing by design, or if you notice after competitors already moved ahead.

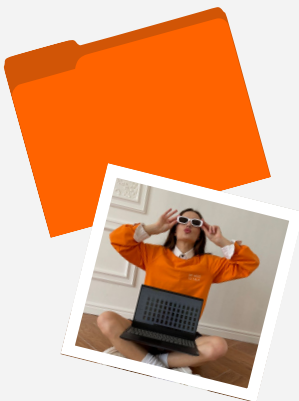
Relationships and creativity still matter. But the question is no longer "did the post go up?"

It is "did it move anything?"

If you're a brand, 2026 is the year to stop running influencer marketing out of inboxes. Build the system. Track the performance. Measure outcomes. Treat creators as a channel, not a favor.

That's the gap that Liked was built to solve: vetted creators, campaign workflows, payouts, and reporting in one place, so brands like yours can scale without scaling the chaos.

In 2026, the brands that win aren't the ones with the most creators. They're the ones with the best operating system.



READY TO *scale?*

LETS MAKE IT HAPPEN

partnerships@liked.com
www.liked.com

