

IRL MARKETING TREND REPORT

2025

FLOWCODE

2025

In a world obsessed with digital clicks, here's a wake-up call: 80% of the economy still happens offline. IRL is where purchases are made, loyalty is built, and brands come to life in the spaces where people live, work, and play.

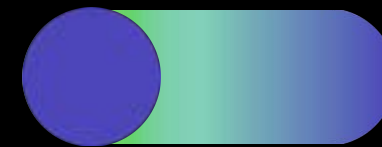
Winning brands will bridge the gap between their physical and digital ecosystems, turning offline moments into frictionless, data-driven connections.

Discover how top brands are reshaping their marketing strategies to thrive in the offline-first landscape. This report highlights the transformative trends, offering actionable insights to help you connect meaningfully with your audience in the real world.

IRL MARKETING TRENDS

Meet Your Audiences Where They Are –

80%
**Of The US
Economy
Is Offline**



This report will delve into “IRL Marketing,” defined as marketing on these channels where connection starts in the real world:

- Direct Mail
- Digital Out-of-Home (DOOH)
- Product Placement & In-Store Displays
- Billboards
- Event Sponsorships
- Transit Advertising
- Experiential Marketing
- Print Media
- TV Advertising (Local and National)
- Retail Media Networks
- Airport Advertising
- Cinema Advertising
- Radio Advertising
- Street Furniture

The Importance Of IRL Marketing

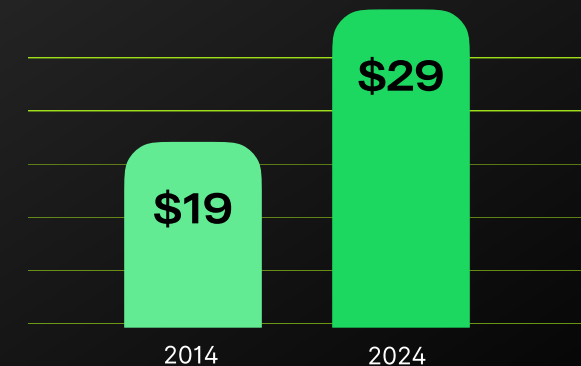
Intensified competition in the digital marketing landscape has driven customer acquisition costs to soar, with a **222% increase in CAC for mobile app downloads** over the past decade—rising from \$19 to \$29 per user.

In 2024, marketers responded by allocating **44% of budgets to IRL channels**, blending digital and physical touchpoints to combat digital saturation and strengthen brand loyalty.

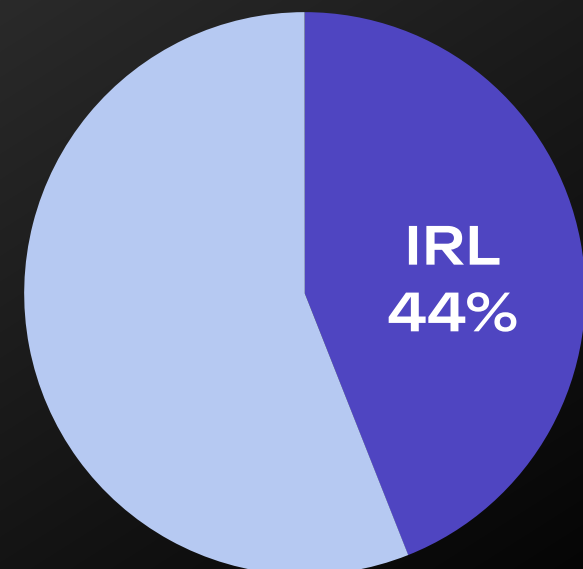
As digital saturation grows and major tech companies increasingly gate acquisition, brands are turning to IRL interactions as their most direct and impactful way to connect with audiences—engaging them authentically and without intermediaries.

Digital Saturation

Avg. Cost to Acquire App Downloads



Marketing Budget Spend



2025

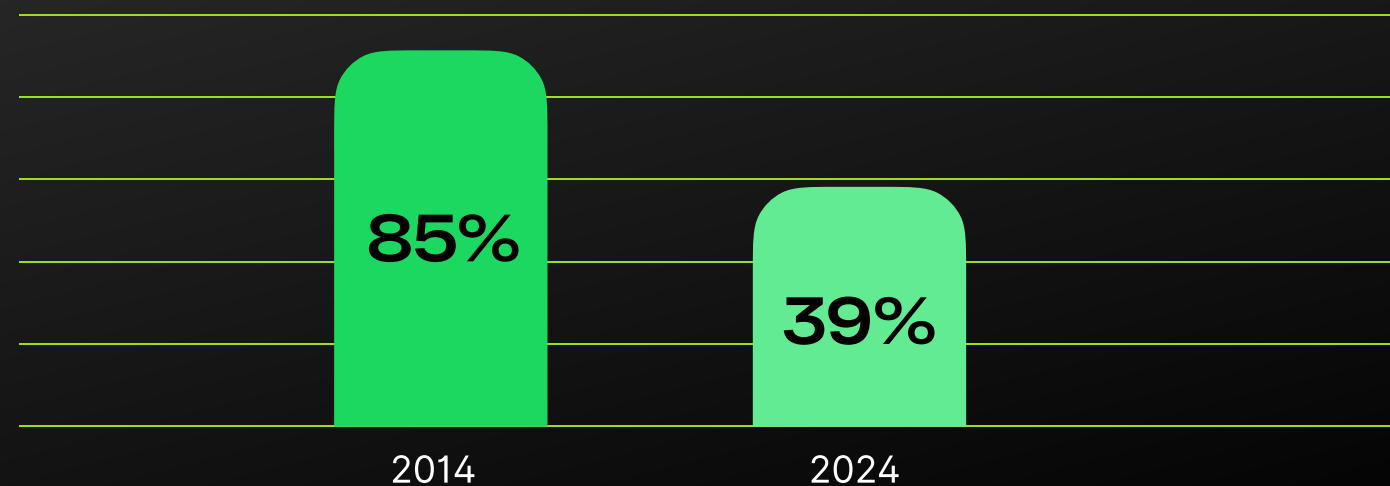
TRENDS

1

Data-Driven Strategies

With 40% of brands planning to increase their data investments in 2025, the shift from third-party to first-party data is accelerating. Brands are prioritizing direct customer insights to build deeper, more personalized connections. This transition not only boosts privacy compliance but also enhances the accuracy and relevance of marketing strategies in a cookieless future.

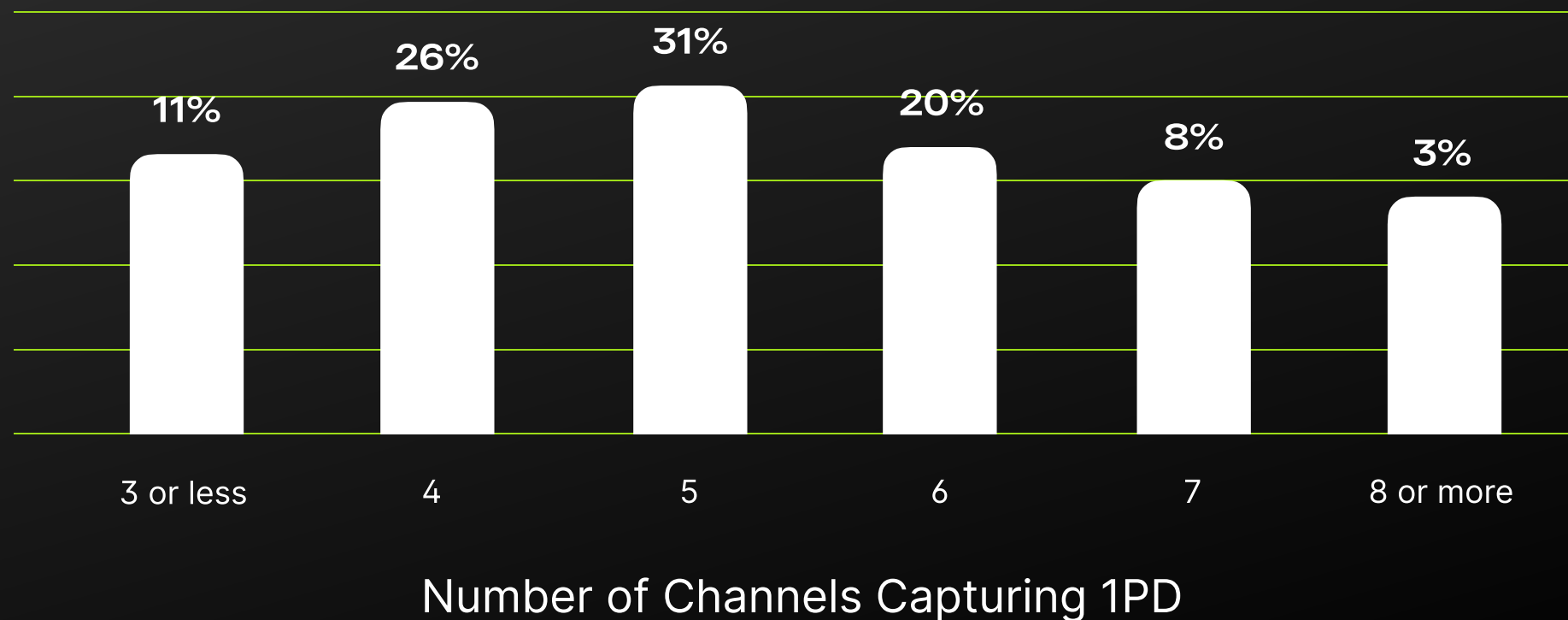
Reliance on Third-Party Data (vs. 1PD)



Where is 1PD getting captured?

On average IRL Index brands are capturing first-party data on 5 unique marketing channels, online or offline, with best-in-class brands covering 8.

Reliance on Third-Party Data (vs. 1PD)

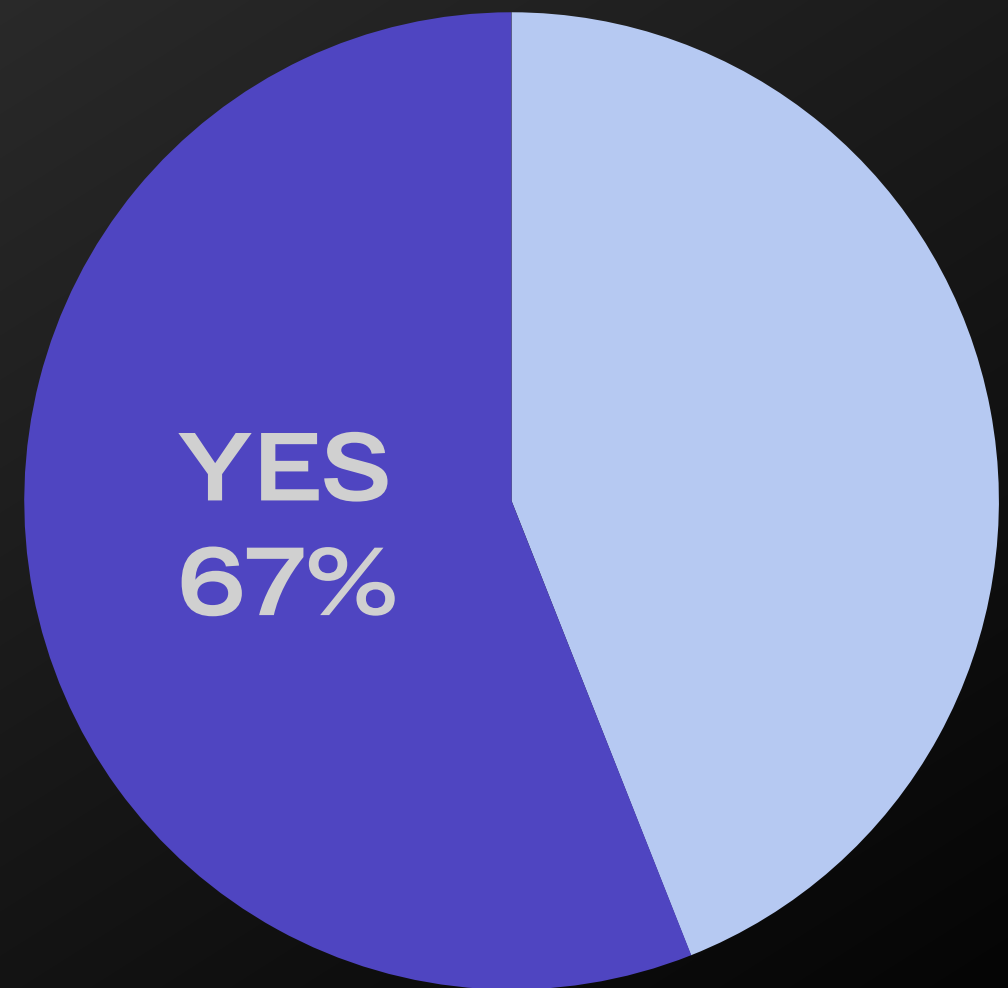


IRL high intent, opt-in data drives personalization

67% of the index is capturing high-intent, opt-in IRL first-party data for even better personalization.

Personalization, driven by first-party data, boosts customer conversion and loyalty, with McKinsey reporting 40% more revenue for companies excelling in it, and Epsilon finding that 80% of consumers are more likely to buy from brands offering targeted experiences

Capturing Data IRL



CASE STUDY: 1PD STRATEGIES

These case studies demonstrate the importance of capturing first-party data through immersive IRL experiences, providing brands with high-intent signals directly from engaged audiences. By focusing on opt-in compliant strategies, brands can build trust, gain actionable insights, and drive personalized marketing efforts that deliver measurable results.



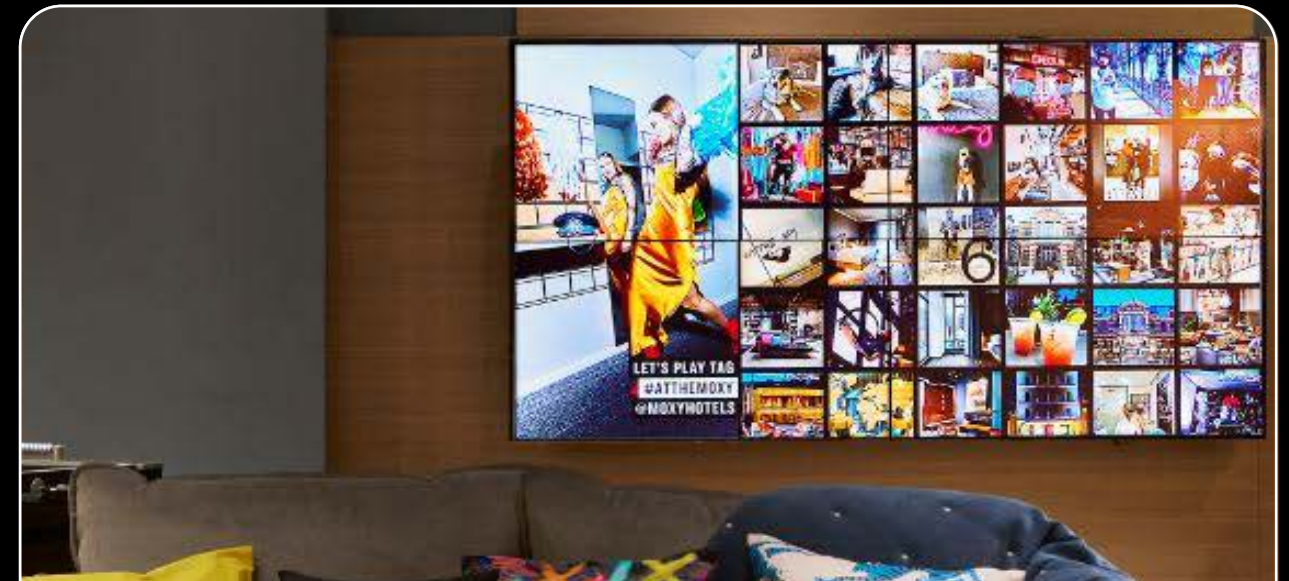
NBA FAN ID

The NBA's NBA ID system exemplifies a leading approach to leveraging first-party data for audience engagement. By offering personalized experiences and exclusive content, the NBA fosters deeper fan connections and gains valuable insights into fan behaviors and preferences. This data-driven strategy enables the league to tailor its offerings effectively, ensuring content resonates with diverse audiences. Additionally, the NBA employs in-person marketing efforts, such as immersive experiences during events like the NBA All-Star Weekend, to capture data from its most engaged fans, further enriching its understanding of the audience.



NIKE LIVE STORES

In 2024, Nike advanced its first-party data strategy by expanding Nike Live stores, which use localized NikePlus data to personalize inventory and services. Supported by the Nike App, these stores blend online and offline experiences while capturing valuable customer insights. Nike's acquisition of Datalogue further enhanced its data integration, enabling personalized marketing and strengthening its direct-to-consumer strategy. This solidified Nike's leadership in using first-party data to boost engagement and loyalty.



MARRIOTT UNIFIES DATA

Marriott International made notable progress in 2024 by investing in customer-facing technology and expanding its luxury offerings. The Marriott Media Network bolstered first-party data strategies, enabling targeted advertising to its broad customer base. Integrating Adobe Experience Cloud, including Adobe Real-Time Customer Data Platform and Adobe Journey Optimizer, Marriott unifies data across channels to better understand guest behaviors and preferences, enabling precise audience segmentation and enhancing guest experiences.

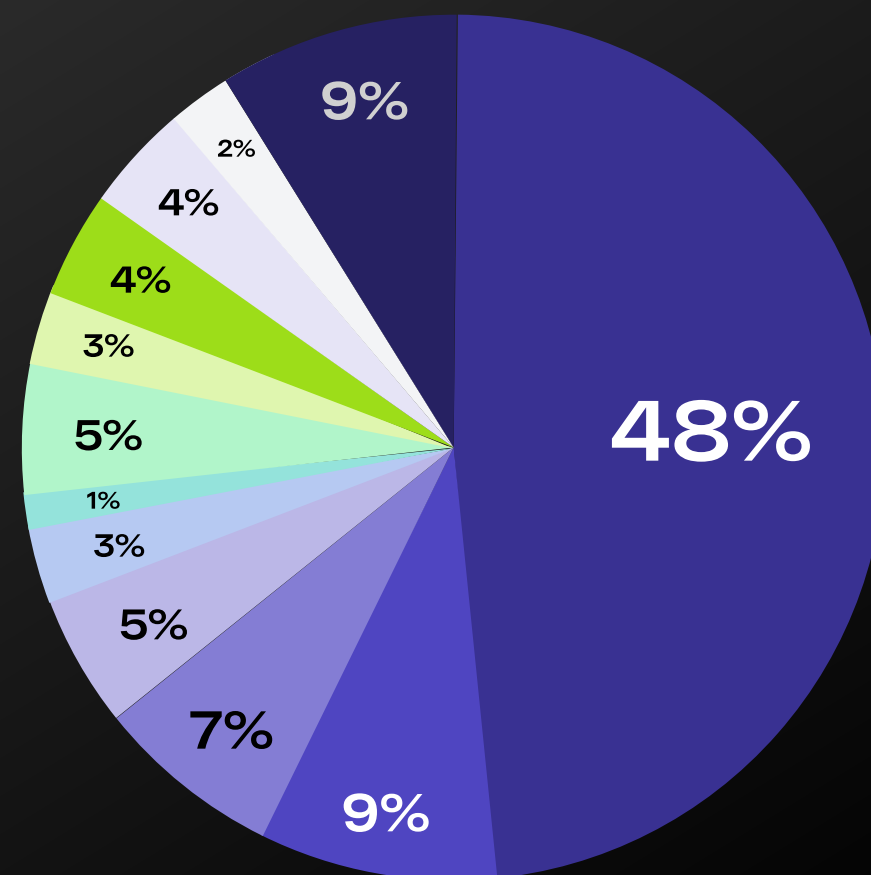
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Personalized QR Technology

In 2025, brands will leverage QR codes to drive offline-to-online conversions through personalized, exclusive experiences. This strategy boosts loyalty, incentivizes quick conversions, and provides valuable data for future engagement.

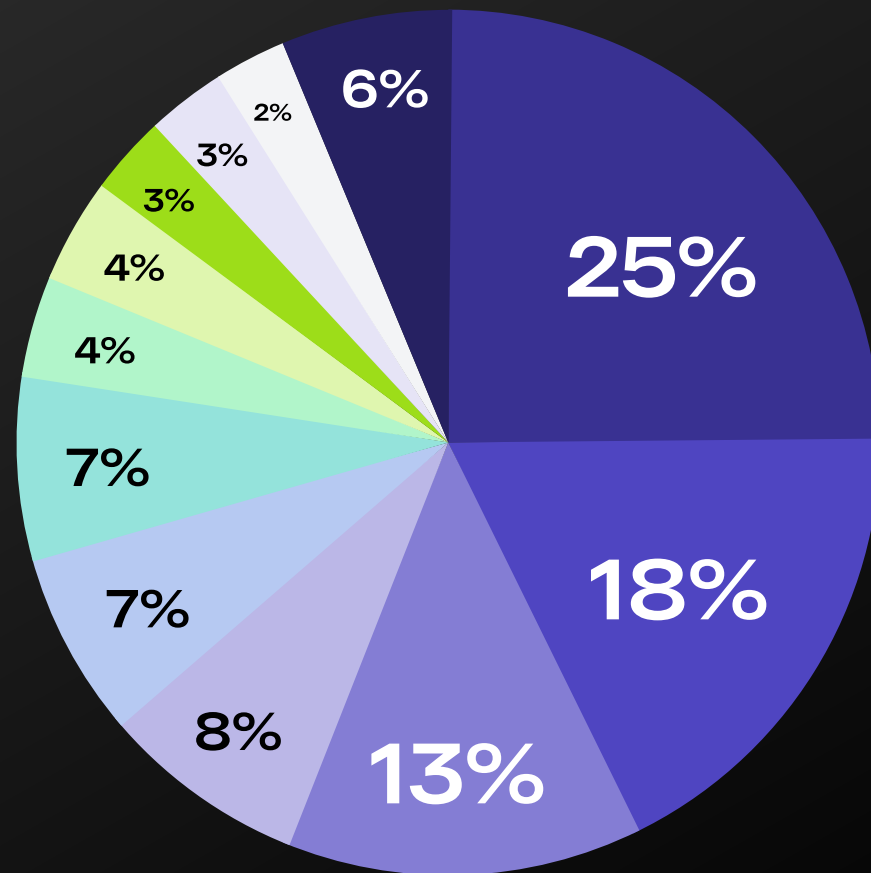
CPG industry is packing a punch with 170% growth in scans YoY. Meanwhile, real estate is closing deals like never before, up 49%, and healthcare is on the rise, with a healthy 24% boost. Even entertainment is getting in on the action, seeing a 12% lift. But not everyone's celebrating—Quick Service Restaurants hit the brakes, with scans down 25% as menu slowdown curbed the appetite for QR engagement.

INDUSTRY SCANS 2024

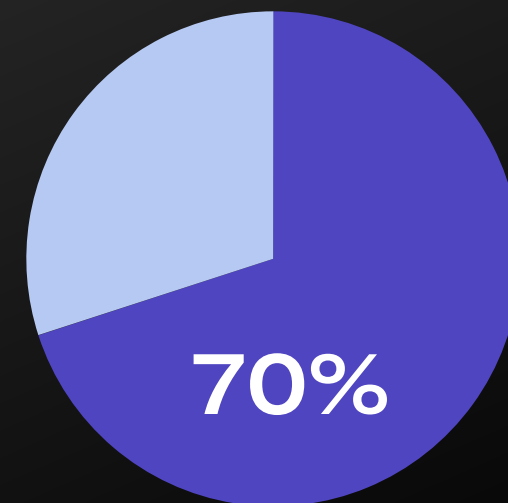


- TV Broadcasting
- Sports
- Print Media
- Travel & Hospitality
- Real Estate & Construction
- CPG
- Financial Services
- Manufacturing & Industrial
- Retail
- Tech & Telco & Internet
- Automotives
- Others

QR USE CASES



CUSTOM BRANDED QR ADOPTION



- Share Info
- Menu
- Purchase
- Collect Contact Info
- Share Multimedia
- Event Sign Up
- Log In
- Survey
- Web Homepage
- App Download
- Listing
- Others

Menu's are out and meaningful brand engagement is in as share shifts away from menu's to knowledge share, log ins and home pages from 2023 to 2024.

Integrating brand colors and logos into QR codes can increase scan rates by 50% to 200%, as they become more visually appealing and trustworthy to consumers.

CASE STUDY: QR CONNECTIONS

These case studies highlight the value of activating IRL strategies to capture underpriced attention in a world oversaturated with digital noise. By leveraging immersive offline experiences, brands can engage audiences in meaningful ways, driving authentic connections and measurable impact.



LUNCHABLES LOYALTY

Lunchables partnered with Flowcode to create a "playable" packaging experience, allowing consumers to access digital games and rewards by scanning Flowcodes on product packaging. Over a four-month campaign, the brand recorded 30,000 scans with a 50% conversion rate, driving engagement and building loyalty through interactive experiences. This initiative deepened consumer connections, provided valuable behavioral insights, and set the stage for future innovations in combining physical products with digital interactivity.

1.93B Loyalty Points

134K User Generated Avatars



VERIFIED BY CLEAR

CLEAR, a leader in biometric identity verification, has revolutionized airport experiences by integrating Flowcode technology into their physical and digital environments. This partnership simplifies traveler enrollment, enhances engagement through dynamic marketing touchpoints, and streamlines access to key services. With over 1.2M direct connections and 7,000 Flowcodes created, CLEAR leverages data-driven insights to optimize traveler interactions and improve marketing efficiency, setting a new standard for frictionless travel and customer engagement.

1.2M+ Scans

7K+ Codes Created Across U.S

3

Immersive Physical Activations

In a crowded digital landscape, real-world connections shine. As consumers eagerly return to physical spaces, top brands are making their mark with impactful IRL activations.

In 2025, brands will boost IRL marketing budgets for high-engagement experiences like sports, live TV, and entertainment. Sports sponsorships, surpassing \$50 billion globally in 2024, are growing 7% annually, focusing on immersive fan experiences. Live TV, making up 85 of the top 100 telecasts, delivers ad recall rates 50% higher than on-demand content. The \$300 billion live entertainment market, growing 9% annually, draws more experiential marketing. Digital Out-of-Home (DOOH) advertising, growing 10% in 2024, enhances real-time, interactive messaging at live events.

CASE STUDY: LIVE EVENTS

In a digital-first world, live experiences like concerts, sports, and reality TV captivate audiences and inspire action in ways digital cannot. Brands activating during high-attention events are creating unforgettable connections that drive impact and innovation. Activating IRL allows brands to capture underpriced attention, breaking through digital saturation to engage audiences in unique and meaningful ways.



SONY ENGAGEMENT

In 2024, Sony expanded offline efforts with initiatives like Sony Creative Space 2024 in New York, fostering hands-on engagement, and the "MANGA in New York" exhibition, showcasing cultural and technological innovation. Interactive events allowed fans to experience Sony's products firsthand, creating memorable touchpoints. Requiring PlayStation Network accounts for PC gaming deepens Sony's understanding of user behavior while ensuring security. These efforts demonstrate Sony's seamless integration of physical and digital interactions, solidifying its leadership in IRL audience strategy.



ZACH BRYAN ON TOUR

Ceremony of Roses, a music management company, partnered with Flowcode to enhance fan engagement during Zach Bryan's Quittin' Time Tour by integrating scannable QR codes into merchandise and tickets. This strategy enabled fans to access exclusive items and enter sweepstakes, resulting in the collection of over **152,000 fan emails**, including 74,000 new contacts for Zach Bryan's CRM. The campaign achieved a 14% scan-to-conversion rate and generated **\$1.8 million** in additional merchandise revenue, demonstrating the effectiveness of merging live events with digital engagement.



DISNEY MAGIC

Hits like "Moana" on Disney+ drive renewed interest in theme parks, while new attractions like Tiana's Bayou Adventure and plans for Disneyland Paris's "Frozen"-themed land create immersive experiences. Beyond parks, Disney's D23 Expo showcases interactive installations that deepen fan connections. This multifaceted strategy strengthens brand loyalty and delivers impactful, engaging moments in the real world that last a lifetime.

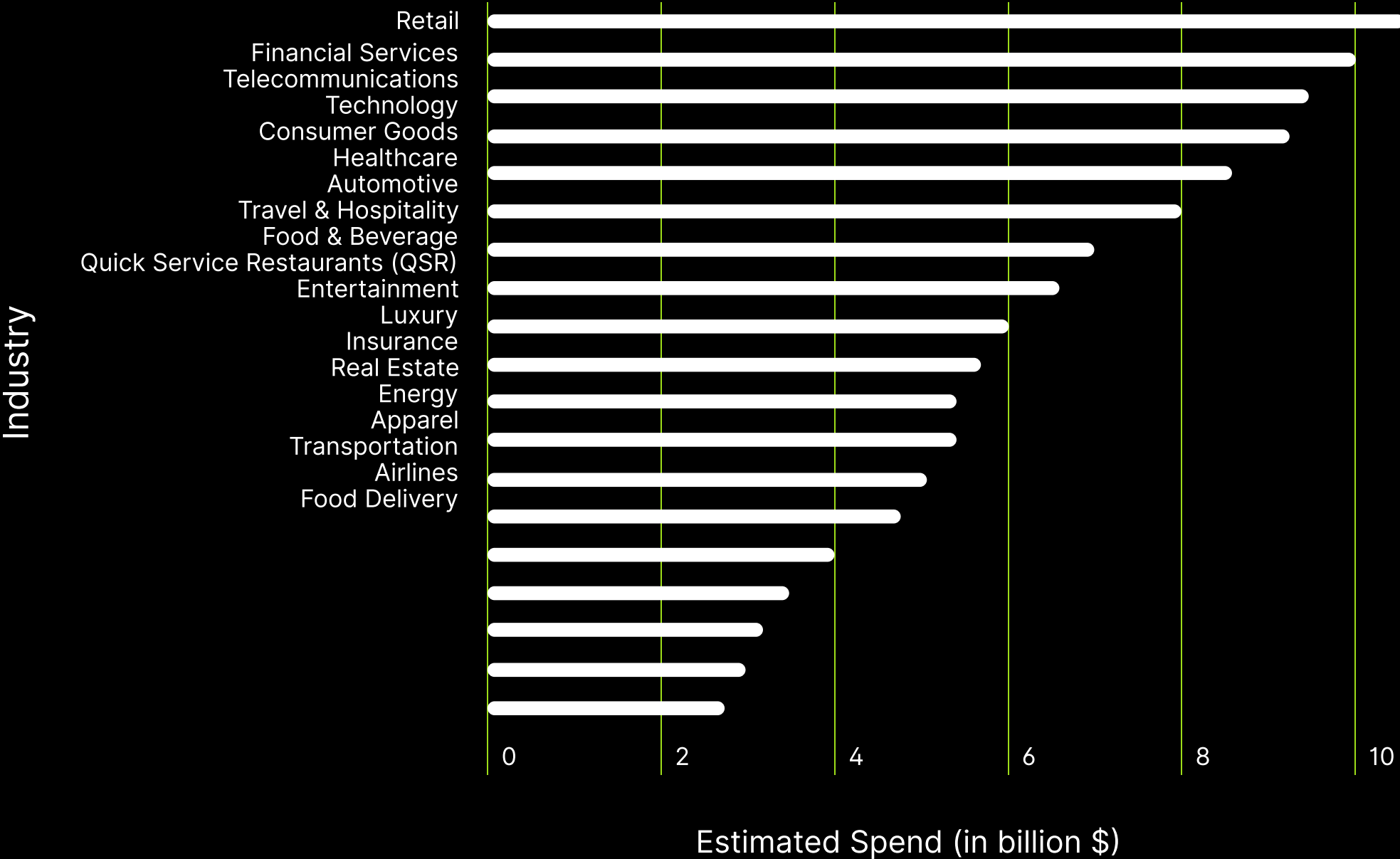
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TAKEAWAYS

25

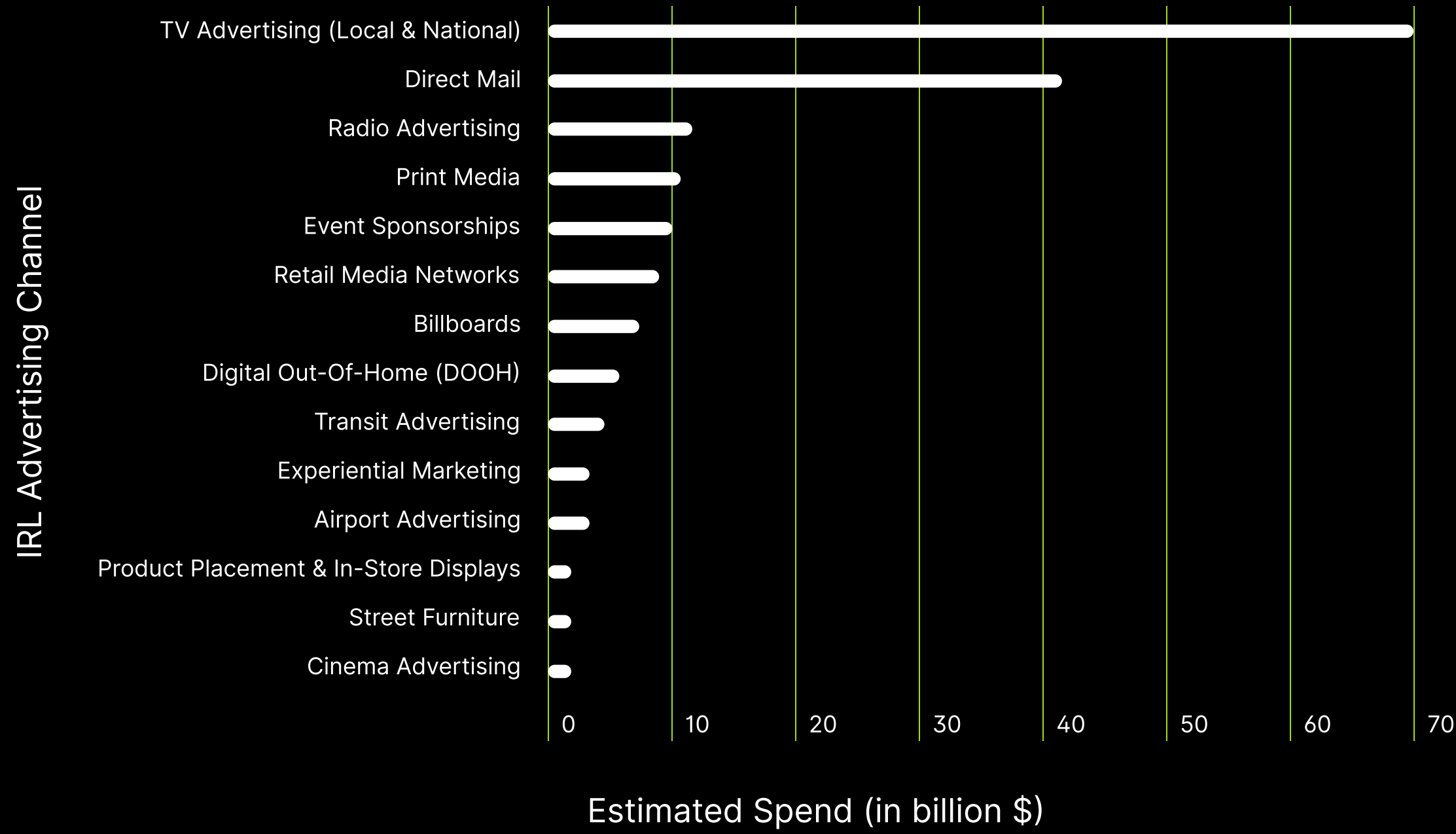
KEY INDUSTRIES ARE INVESTING IN IRL STRATEGIES

ESTIMATED IRL MARKETING SPEND BY INDUSTRY (2024)



ALLOCATE MARKETING SPEND ACROSS IRL CHANNELS

ESTIMATED IRL ADVERTISING SPEND BY CHANNEL (2024)



PREPARE FOR HYPER-LOCALIZATION AND MEASURABLE IRL INITIATIVES

Brands will focus on hyper-local activations, using city-specific events, micro-influencers, and real-time personalization to deepen engagement. Tools like Flowcode enable precise attribution by tracking offline asset performance through features like FlowID and geolocation. This strategy integrates IRL efforts into the marketing funnel, optimizing spend and maximizing ROI.



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