

# SUPER BOWL LX

## Recap



MARCH 2026



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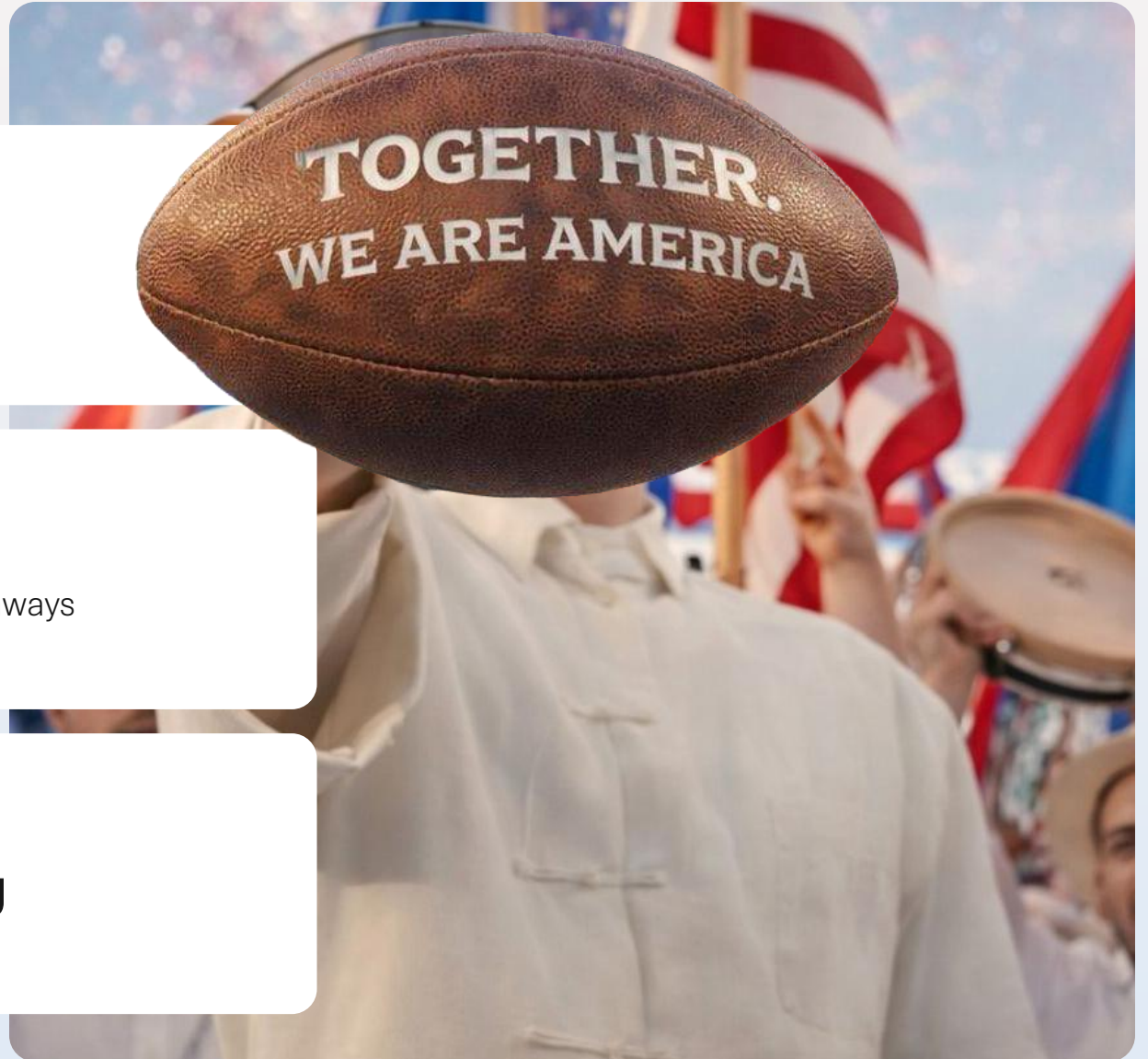
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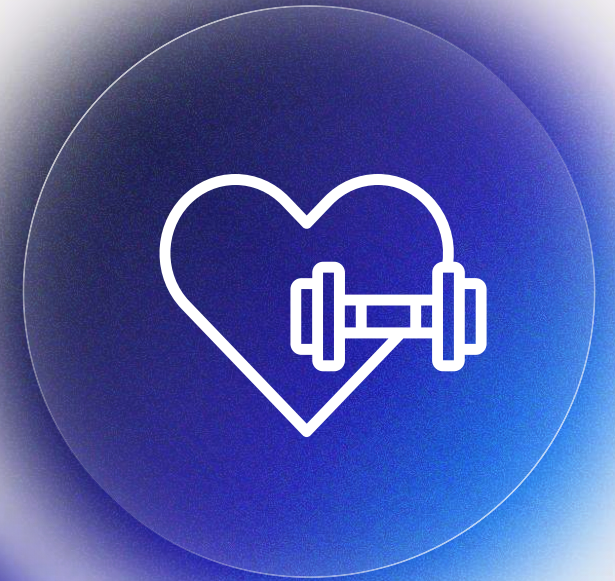


# The **AI & WELLNESS** Bowl

Super Bowl LX was the most-watched program in NBCUniversal history and the second-most watched show in U.S. TV history.

2026 advertisers took bigger swings, leveraging humor, nostalgia, & celebrity talent to appeal to consumers. Key themes included AI & wellness thanks to the dominant share of Tech and Pharma brands spotlighting AI use cases & weight-loss drugs.

This recap dives into Super Bowl advertising trends for 2026 vs. prior years, and best practices for capturing attention & maximizing impact beyond Legendary February.



# **GAME DAY**

Trends & Category  
Participation

# Super Bowl LX CAPTURED THE NATION



# 126M

    
Total Audience Delivery

#1

**Highest TV Peak Viewership**  
In U.S. History (139M)

#1

**Most-Watched Show**  
In NBC's 100-Year History

#2

**Most-Watched Show in U.S. History**  
Behind Super Bowl LIX (2025)



February 8, 2026

Super Bowl LX Drove  
**#1 BEST DAY EVER  
IN CONSUMPTION &  
REACH** for Peacock

peacock



**Most-Streamed**  
Super Bowl Ever



**Most-Streamed**  
Day of the  
Olympics Ever



**Highest-Reaching**  
Original Peacock  
Debut Ever

# MOST-WATCHED SUPER BOWL & HALFTIME SHOW

in Spanish-Language  
Media History



## GAME

3.3M

Total viewers

+47%

vs. previous record

## HALFTIME

4.8M

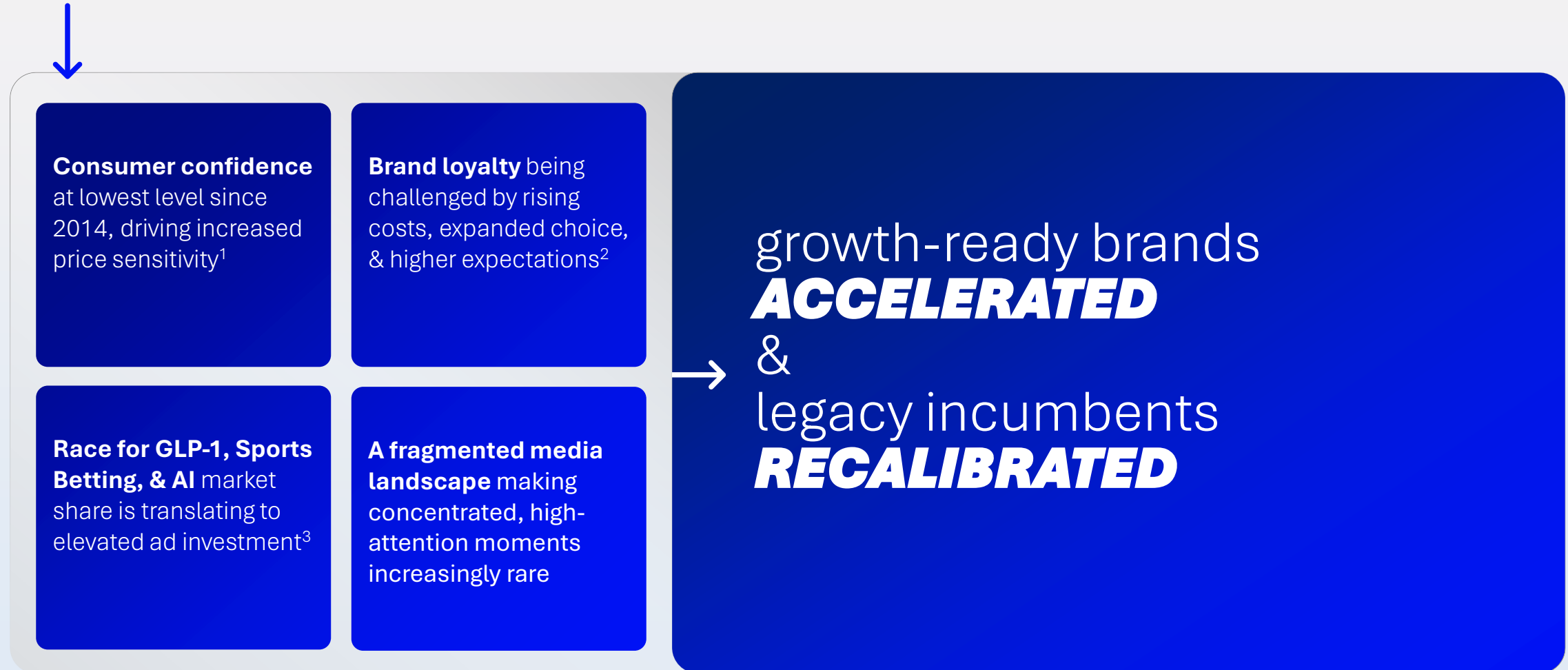
Total viewers

+80%

vs. previous record

# The **EVOLVING MIX** of Super Bowl Brands

Macroeconomic forces and emerging technologies are reshaping advertising investment, making the Super Bowl a real-time barometer of economic confidence and category momentum.














# Each year, the Super Bowl advertiser lineup reveals where industries are **INVESTING TO CAPTURE GROWTH AND CONSUMER MOMENTUM**

## This Year

Tech, Pharma, and Entertainment surged, while CPG and Beverage remained top advertisers in pre-game and in-game spots.

Entertainment topped YoY share of voice due to Sports Betting legalization & adoption.

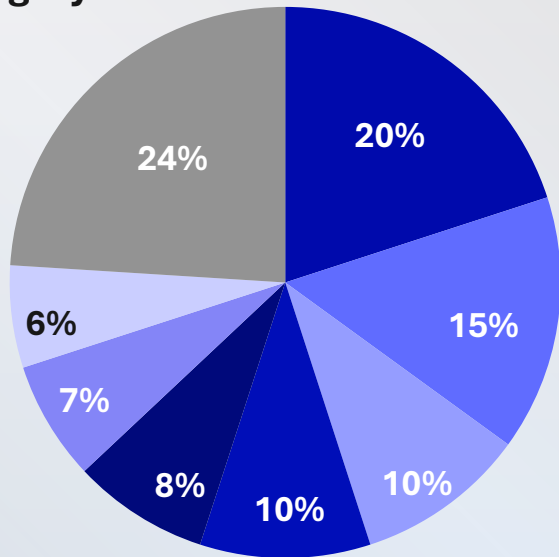
## Super Bowl Category Trends 2023-2026

	 <b>FOX</b> 2023	 <b>CBS</b> 2024	 <b>FOX</b> 2025	 <b>NBC</b> 2026
Top Categories (by SOV)	Ent 38% Bev 14% CPG 11%	Ent 30% CPG 18% Bev 12% Tech 7%	CPG 16% Tech 13% Bev 13% Ent 12%	Ent 20% Tech 15% Bev 10% CPG 10%
Category Spikes	 <b>CPG</b> +67% SOV YoY   <b>Entertainment</b> +6% SOV YoY Sports betting boom	 <b>Tech</b> +80% SOV YoY AI hype starts	 <b>CPG, Bev, Rest/Delivery</b> 35% SOV (+12pp YoY) "Buy-Now Bowl"   <b>Tech</b> Con't High Share AI hype sustains	 <b>Tech, Pharma, Entertainment</b> 41% SOV (+20 pp YoY) "AI & Wellness Bowl"   <b>Studios</b> +250% # of movie trailers YoY

Note: Analysis was conducted based on iSpot from 2023-2026. Includes some Pre-Game and In-Game national broadcast airings  
 Share of voice (SOV) based on # of units; YoY trends based on average SOV growth from 2023-2026

# SPORTS BETTING, GLP-1s & AI continue redefining category priorities and trends as brands compete for awareness, credibility, & market share

## 2026 Super Bowl SOV by Category








■ Entertainment    ■ Tech    ■ Beverages  
■ CPG    ■ Other  
■ Finance    ■ Other

Other: Pharma (6%), Auto (5%), Retail (5%), Restaurants (3%), Insurance (2%), Telco (1%), Travel (1%) and more

## Key Takeaways

# UNIQUE BRANDS

YOY SPEND GROWTH

 Tech	12	+82%	AI and non-AI brands spotlighted AI capabilities via humanized, practical demonstrations to reinforce innovation and relevance
 Beverage	9	-15%	Legacy bands defended their heritage amidst a shift towards moderation, while emerging brands looked to capitalize on rising demand for functional benefits
 CPG	8	-18%	Challenged by a shift toward health-conscious mindsets, traditional snacking staples maintained their presence but saw a dip in new advertisers
 Entertainment	8	+209%	Sports betting prioritized real-time utilization and contextual relevance as platforms compete for user adoption
 Pharma	6	+169%	Doubled down on GLP-1 conversation with emotional storytelling, positioning weight-loss treatments as accessible, life-changing household staples

# TOP Super Bowl Categories

Advertiser Breakout by Themes & Subcategories



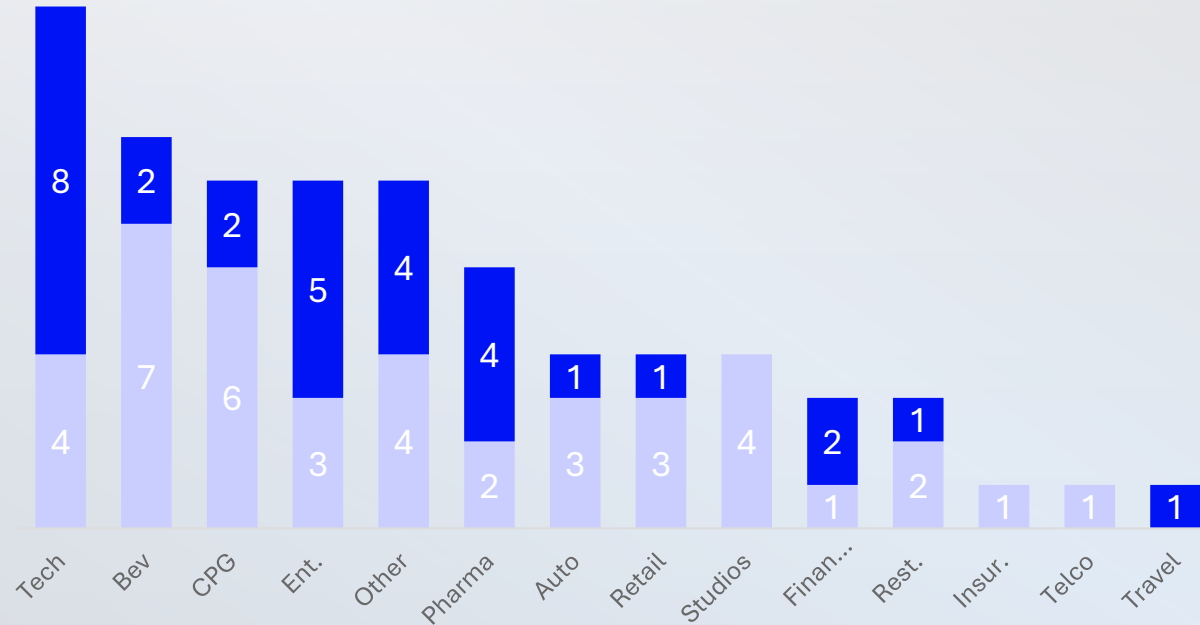
\*Non-exhaustive, NBC national only \*\*Advertisers for Pre and In-Game spots

# Super Bowl LX attracted a **RECORD NUMBER OF BRANDS** as advertisers continue recognizing the impact of the cultural tentpole

## Advertiser Count by Category

Super Bowl 2026

Returning/Re-entrant Net-New



## Overall Takeaways

Record **72**

Individual Advertisers vs. previous range of 55-67

**31**

New Advertisers; Largest net new over last 2 years

**41**

Returning Advertisers from recent Super Bowls

## Category Takeaways

Tech



Entertainment



Pharma



**17 of 31**

New Advertisers

**High Growth Categories** as brands fiercely compete for share of voice, consideration, & adoption

CPG



Beverage



**12 of 41**

Returning/Re-Entrant Advertisers

**Super Bowl Mainstay Categories** as brands fight for relevance amidst increased health-consciousness

**“Other” Category Advertisers** include peripheral brands & special interest groups tapping into the game’s scale for a strategic, ad hoc moment of relevance e.g., *Bosch, Invest America, He Gets Us, Blue Square Alliance*

# Super Bowl LX STRATEGIES

Brands participated across a range of creative and tactical approaches

STRATEGY

## Igniting Established Thematic

Utilizing the game to amplify established brand narratives

- Contributes to campaign measurement & momentum
- Drives consumers through the funnel

SUITED FOR

- Brands prioritizing salience & ROI
- Strong pre-running campaigns & establish narrative thematic
- Brands with long-term league or talent partnerships

IMPACT

+67%

lift in likeability for ads featuring long-term characters or actors vs. ads that did not<sup>1</sup>

SELECT BRAND EXAMPLES



## The Game as a Launchpad

A high-impact debut of a thematic, message, or product/brand

- Catapults legitimacy, buzz, and mass awareness
- Centers narrative on one clear idea/story

- PR-worthy creative or product news
- Emerging brands
- Longer consideration cycles
- Prestige-driven categories

2 of Top 4

Search-driving ads were movie trailers<sup>2</sup>



## Integrating into the Broadcast

Creatively involved in the broadcast presentation via integrations or sponsored segments in the game and/or across sports tentpoles

- Differentiates via unique ownership & share of voice
- Provides contextual relevance

- High competition categories
- Product demonstration storytelling
- Sequential storytelling

+53%

lift in Message Memorability for sponsors' ads compared to game norm<sup>1</sup>



## All About Football: Contextual Relevance

Thematically tapping into the sport and/or using partnership marketing rights (ex. IP, lock-up logo, endorsers in uniform, etc.)

- Delivers seamless legitimacy, credibility, & association
- Differentiates & captures attention

- Brands with league, player, and/or team partnerships
- Contextually relevant products or product demonstration storytelling

+5%

Ad Memorability for ads featuring football vs. ads that did not<sup>1</sup>



# SEVERAL ADVERTISERS opted for streaming-only units or tailored Spanish-language creative



## Most Streamed Super Bowl Ever

Several advertisers pivoted to Peacock-exclusive units to drive reach and relevance with a younger, streaming-first audience rather than the national broadcast.

**+205%**

Peacock-exclusive ads delivered +205% greater **likelihood to search** than ads during the 2025-26 NFL regular season<sup>1</sup>



## Most Watched Super Bowl & Halftime Show in Spanish-Language Media History

While most brands mirrored creative across NBC and Telemundo, several advertisers developed custom Spanish or Spanglish assets to connect and resonate with the Hispanic audience.

**+9%**

The Telemundo telecast delivered +9% greater **Brand Memorability** than ads on SL broadcast during the last two Super Bowls<sup>2</sup>

# Super Bowl LX **ADVERTISING THEMES**

From AI-driven futures to 90s throwbacks, this year's ads leaned into a mix of celebrity influence, wellness culture, and the enduring power of community resilience

PRODUCT



## *AI Mainstreaming*

After last year's arrival, AI evolved to a focus on utility, showcasing how the tech functions as a practical tool for everyday life and creative production. Its heavy presence vaulted the **AI category to #1 in share of search.**<sup>1</sup>



## *Health & Holistic Wellness*

Brands used the big stage to destigmatize clinical treatments, prioritize functional hydration, and champion body confidence. **One in six gameday ads focused on health-related products or benefits.**

CREATIVE



## *Vintage & Nostalgic*

Advertisers tapped into "reunion culture" and the "30-year rule" to cut through cultural uncertainty and target Millennials/Gen X with '90s callbacks **within some of the most critically acclaimed ads.**



## *Celeb-Fueled*

Star power is a Super Bowl mainstay. While fewer ads featured celebs compared to last year, it was on par with the 2014-24 norm. However, **two-thirds of celeb ads featured multiple celebrities, +60% YoY.**<sup>2</sup>

MESSAGING



## *Sentimental Tone*

Multiple brands utilized the platform for feel-good messaging to great effect, **resulting in several of the top-performing ads across multiple metrics.**



## *Less Laughs*

The power of laugh is always a key lever for brands to foster emotional connections, yet the use of humor was down, with **only 57% of brands leveraging the tactic, -70% YoY.**<sup>3</sup>

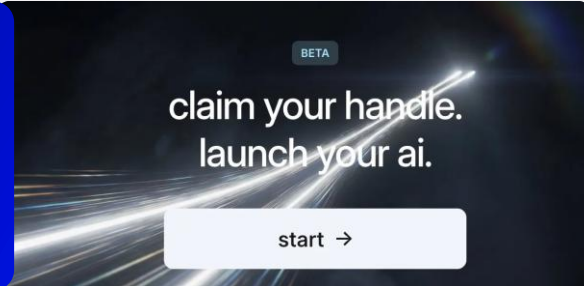
# How Super Bowl LX **DELIVERED FOR BRANDS**

PRODUCT

## AI Mainstreaming

#1

AI.com rank on Engagement Index during the game<sup>1</sup>



## Health & Holistic Wellness

+13%

Novartis' "Relax Your Tight End" Likeability vs. category average, from its humor-first approach<sup>3</sup>



CREATIVE

## Vintage & Nostalgic

Top 5

Dunkin's "Good Will Dunkin" 90s inspired ad rank on USA Today Ad Meter & Search<sup>1,2</sup>



## Celeb-Fueled

43% Lady Gaga

Leader on YouGov Super Bowl Celeb Ad Recall ahead of Jennifer Aniston & Tom Brady (both 39%)<sup>4</sup>



MESSAGING

## Sentimental Tone

Top Recall & Likeability

Budweiser's "American Icons" & Lay's "Last Harvest" lead the way<sup>3</sup>



## Less Laughs

High Likeability

Pepsi's "The Choice" use of humor showing the thematic can still deliver results<sup>3</sup>



# WHAT'S NEXT

How brands can leverage the halo effect and best practices from Super Bowl LX and Legendary February

## IMMEDIATE Maintain Momentum

Ongoing 2026/27 Sports Calendar



**OWNS SUNDAY NIGHTS**

One Destination. No Offseason.

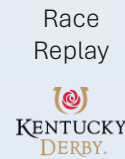
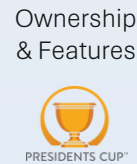
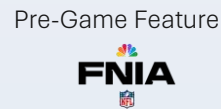
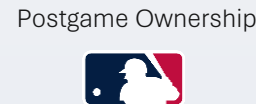
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Sunday Nights of Marquee Sports



## NEAR TERM Re-Amplify with Ownership

2026/27 Marketing Opportunities



## LONG TERM Plan For 2027 & Beyond

Future Tentpoles



\*Non-exhaustive inventory/opportunities – contact your NBCU POC for more information

# THANK YOU!

## Category & Marketplace Strategy

Dominique Folacci, Nicole Lee, Nick Cafiero,  
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## Insights & Measurement

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## Trade Marketing

Bonnie Fallon & Bonnie Katz

MARCH 2026

