SUPER BOWL LX
Recap

MARCH 2026

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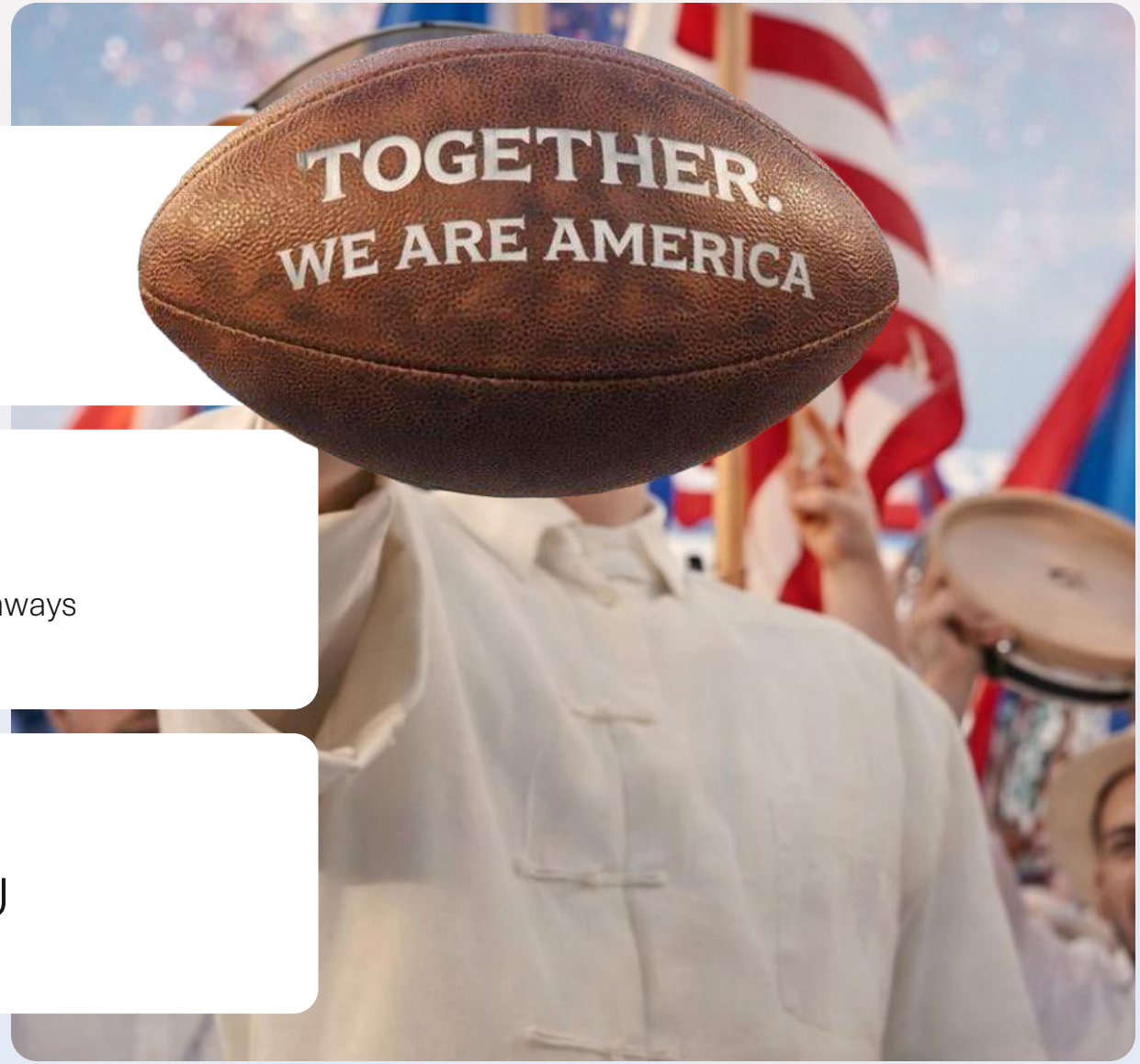
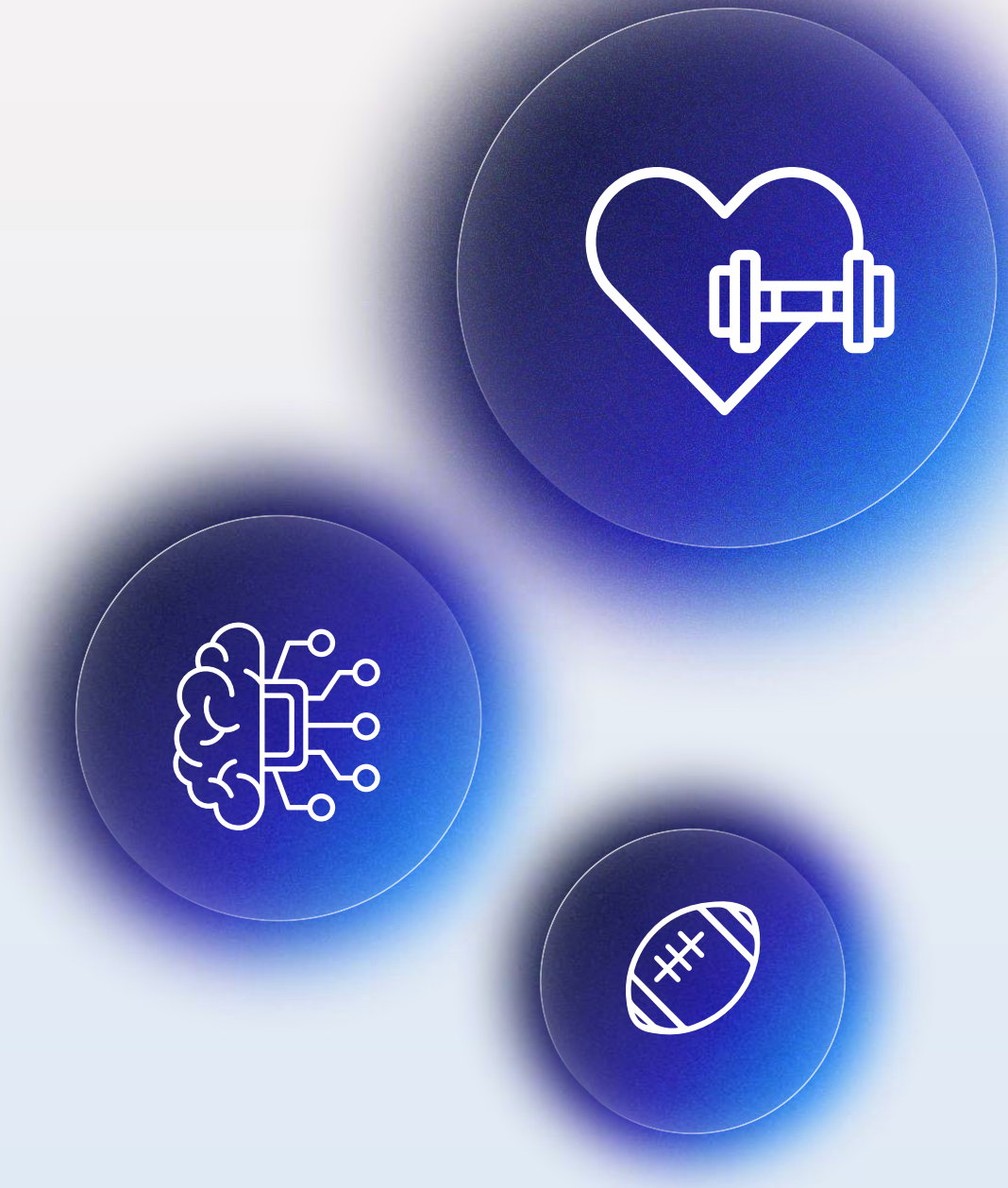


The AI & WELLNESS Bowl

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)

Source: Nielsen, BDN L+SD, Based on SBLX on NBC/PCK/TEL vs. all competitive programming, Historical comparisons based on currency at the time

February 8, 2026

Super Bowl LX Drove

#1 BEST DAY EVER IN CONSUMPTION & REACH for Peacock

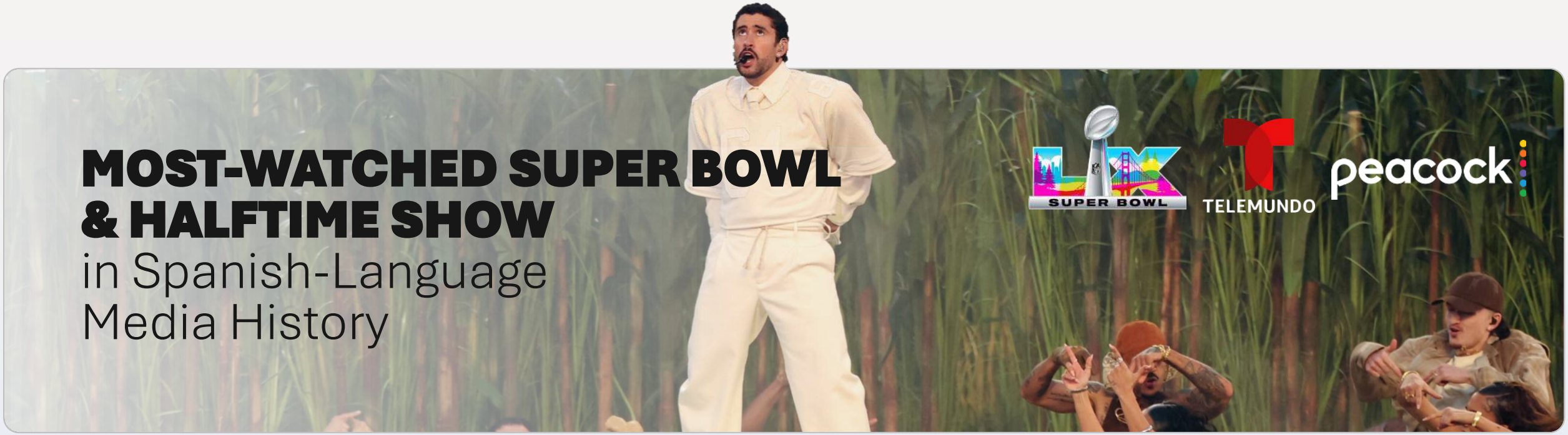
peacock

Most-Streamed Super Bowl Ever

Most-Streamed Day of the Olympics Ever

Highest-Reaching Original Peacock Debut Ever

Source: Adobe Analytics; NBCU Internal Data



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

Source: Nielsen Big Data + Panel, L+SD, 2/8/26, SBLX on NBC/PCK/TEL vs. SB on ABC/CBS/FOX/ESPN/2/NBC/PV, Historical comparisons based on currency at the time

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.

Consumer confidence at lowest level since 2014, driving increased price sensitivity[1]

Brand loyalty being challenged by rising costs, expanded choice, & higher expectations[2]

Race for GLP-1, Sports Betting, & AI market share is translating to elevated ad investment[3]

A fragmented media landscape making concentrated, high-attention moments increasingly rare

→ growth-ready brands ***ACCELERATED*** & legacy incumbents ***RECALIBRATED***

Source: 1. CNN , Bloomberg, AP 2. User Testing 3. Yahoo Finance, Wall Street Journal

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

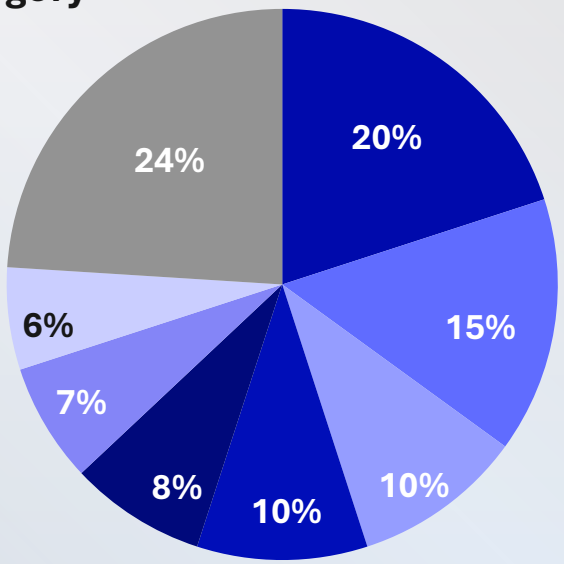
2023-2026

	FOX 2023	CBS 2024	FOX 2025	NBC 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	CPG **+67% SOV YoY** Entertainment +6% SOV YoY *Sports betting boom*	Tech **+80% SOV YoY** *AI hype starts*	CPG, Bev, Rest/Delivery **35% SOV (+12pp YoY)** *"Buy-Now Bowl"* Tech **Con't High Share** *AI hype sustains*	Tech, Pharma, Entertainment **41% SOV (+20 pp YoY)** *"AI & Wellness Bowl"* Studios **+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
- Studios
- 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

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

TOP Super Bowl Categories

Advertiser Breakout by Themes & Subcategories

Tech

AI Products

Claude | Genspark | OpenAI | Gemini | Copilot | ai.com | Base44

AI Features

salesforce | ring | alexa | WIX | OAKLEY | Meta

CPG/Beverage

Food & Snacks

Lay's | Nerds | Hellmann's | Pringles | Ritz | Kinder

Personal Care

Dove | MANSCAPED

Beverage

Budweiser | Michelob ULTRA | Bud Light | Red Bull Energy Drink | Svedka | poppi | Liquid I.V. | Liquid Death | Pepsi Zero Sugar

Entertainment

Sportsbook & Casino

DraftKings | FanDuel | Fanatics Sportsbook

Other Entertainment

NFL | Apple Music | Universal Orlando Resort

Pharma

GLP-1 / Weight Loss

Once-weekly wegovy® semaglutide injection | zepbound™ (tirzepatide) injection | ro

Early Detection/Prevention

hims | NOVARTIS | Boehringer Ingelheim

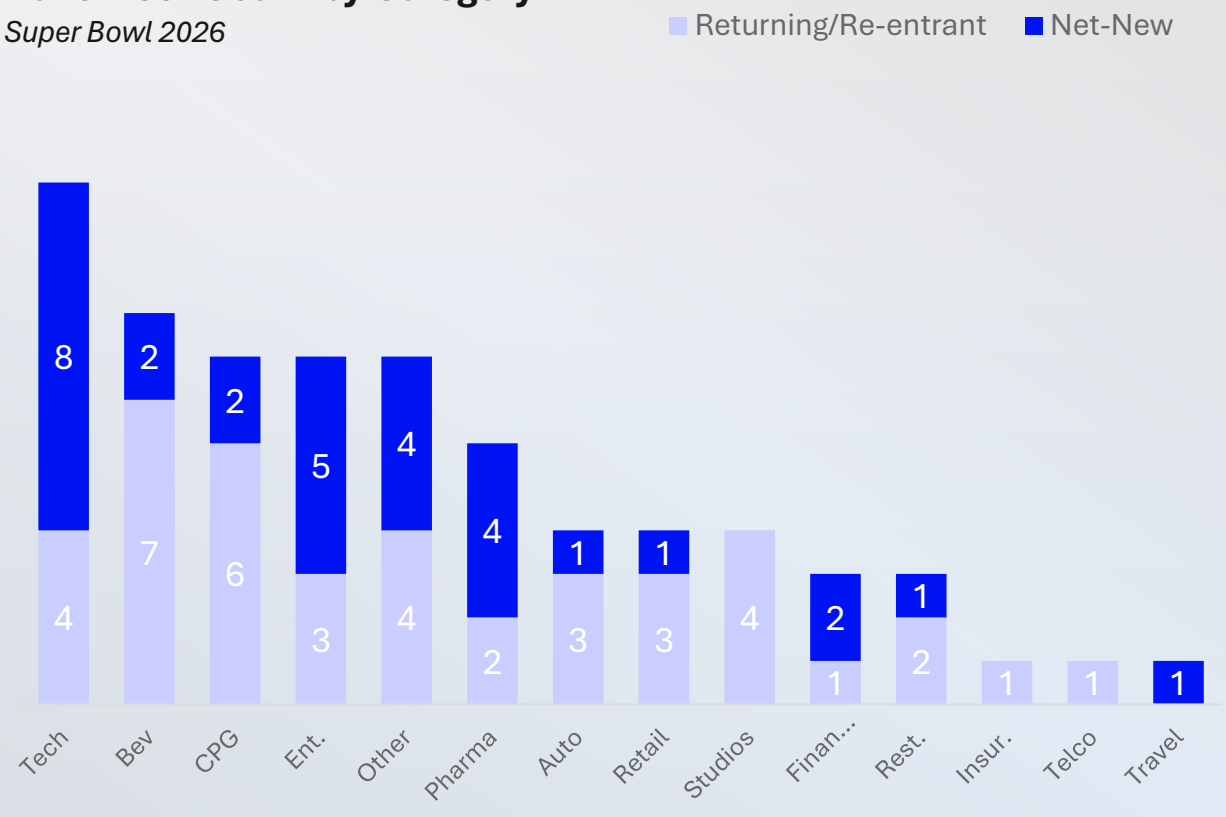
*Non-exhaustive, NBC national only **Advertisers for Pre and In-Game spots

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



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*

Source: Proprietary Internal Analysis, iSpot
"Returning" defined as "advertised in last year's Super Bowl"; "Re-Entrant" defined as "advertised in recent past Super Bowl, but not last year's Super Bowl"

Super Bowl LX **STRATEGIES**

Brands participated across a range of creative and tactical approaches

	Igniting Established Thematic	The Game as a Launchpad	Integrating into the Broadcast	All About Football: Contextual Relevance
STRATEGY	Utilizing the game to amplify established brand narratives • Contributes to campaign measurement & momentum • Drives consumers through the funnel	A high-impact debut of a thematic, message, or product/brand • Catapults legitimacy, buzz, and mass awareness • Centers narrative on one clear idea/story	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	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
SUITED FOR	• Brands prioritizing salience & ROI • Strong pre-running campaigns & establish narrative thematic • Brands with long-term league or talent partnerships	• PR-worthy creative or product news • Emerging brands • Longer consideration cycles • Prestige-driven categories	• High competition categories • Product demonstration storytelling • Sequential storytelling	• Brands with league, player, and/or team partnerships • Contextually relevant products or product demonstration storytelling
IMPACT	*+67%* lift in likeability for ads featuring long-term characters or actors vs. ads that did not[1]	*2 of Top 4* Search-driving ads were movie trailers[2]	*+53%* lift in Message Memorability for sponsors' ads compared to game norm[1]	*+5%* Ad Memorability for ads featuring football vs. ads that did not[1]
SELECT BRAND EXAMPLES	Bud Light, Budweiser, Dunkin', State Farm, Uber Eats, YouTube TV, Michelob ULTRA	Illumination's Minions & Monsters, Kellogg's Raisin Bran, Scream, Disclosure Day, ai.com, The Mandalorian & Grogu, Manscaped, Genspark, The Adventures of Cliff Booth, Project Hail Mary	Draft Kings Sportsbook, Budweiser, aws, xfinity, YouTube TV, Pepsi, Progressive, Liberty Mutual Insurance, Intuit turbotax	Novartis, Draft Kings, Copilot, YouTube TV, Meta, Uber Eats, Fanatics Sportsbook, FanDuel

Source: 1. MarketCast TVBE, Super Bowl LX on NBC/Peacock, 2/8/26, 2. EDO, Super Bowl LX Ad Ranker, 2/9/26

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

peacock

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[1]

TELEMUNDO

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[2]

Source: 1. EDO, SBLX on NBC vs. Competitive NFL (9/4/25-1/4/26), 2. MarketCast TVBE, Super Bowl LX on Telemundo, 2/8/26, Super Bowl LIX on Telemundo, 2/9/25, Super Bowl LVIII on Univision, 2/11/24

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**.[1]

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**.[2]

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**.[3]

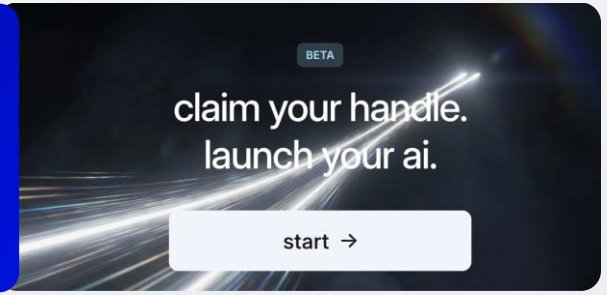
Source: 1. EDO Super Bowl LX Ad/Category Ranker, 2/9/26, 2. NBCU Internal Super Bowl Creative Analysis, 3. Kantar Super Bowl LX Creative Analysis

How Super Bowl LX **DELIVERED FOR BRANDS**

PRODUCT

AI Mainstreaming

#1
AI.com rank on Engagement Index during the game[1]



Health & Holistic Wellness

+13%
Novartis' *"Relax Your Tight End"* Likeability vs. category average, from its humor-first approach[3]

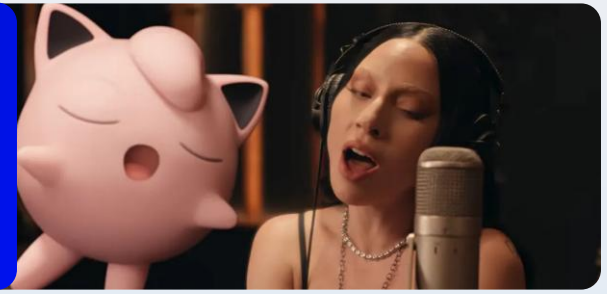
CREATIVE

Vintage & Nostalgic

Top 5
Dunkin's *"Good Will Dunkin"* 90s inspired ad rank on USA Today Ad Meter & Search[1,2]

Celeb-Fueled

43% Lady Gaga
Leader on YouGov Super Bowl Celeb Ad Recall ahead of Jennifer Aniston & Tom Brady (both 39%)[4]



MESSAGING

Sentimental Tone

Top Recall & Likeability
Budweiser's *"American Icons"* & Lay's *"Last Harvest"* lead the way[3]

Less Laughs

High Likeability
Pepsi's *"The Choice"* use of humor showing the thematic can still deliver results[3]

Source: 1. EDO Super Bowl LX Ad/Category Ranker, 2/9/26, 2. 2026 USA Today Ad Meter, 3. MarketCast TVBE, Super Bowl LX on NBC/Peacock, 2/8/26, 4. YouGov Super Bowl LX Analysis

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

NBC Sports

OWNS SUNDAY NIGHTS

One Destination. No Offseason.

51

Sunday Nights of Marquee Sports

SUNDAY NIGHT BASKETBALL

SUNDAY NIGHT BASEBALL

SUNDAY NIGHT FOOTBALL

NEAR TERM
Re-Amplify with Ownership

2026/27 Marketing Opportunities

Championship Sunday
Presenting Sponsor

Premier League

Postgame Ownership

Pre-Game Feature

FNIA

In-Game Features

BIG SATURDAY NIGHT

Notre Dame

Ownership & Features

PRESIDENTS CUP

Presenting Sponsor

PGA TOUR

Race Replay

KENTUCKY DERBY

El Pelotazo
In-Show Feature

TELEMUNDO · FIFA · peacock

Presenting Sponsor

BIG BASKETBALL · BIG EAST BASKETBALL · BIG 12 BASKETBALL

LONG TERM
Plan For 2027 & Beyond

Future Tentpoles

ALL-STAR 2027 PHOENIX — Feb 19-21, 2027

OPENING DAY — Mar 2027

KENTUCKY DERBY — May 1, 2027

USOPEN — June 17-20, 2027

THE OPEN — July 15-18, 2027

MLB at FIELD of DREAMS — Aug 2027

RYDER CUP 2027 — Sep 17-19, 2027

WNBA PLAYOFFS — Sep-Oct 2027

WILDCARD — Sep-Oct 2027

SNF THANKSGIVING NIGHT — Nov 25, 2027

LA28

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

THANK YOU!

Category & Marketplace Strategy
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MARCH 2026