

SUPER BOWL LX

Recap



MARCH 2026



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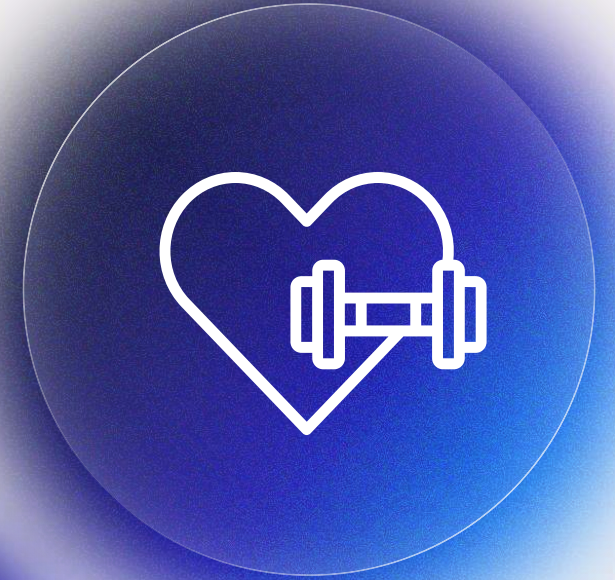


The **AI & WELLNESS** Bowl

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)



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

The
BURBS

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

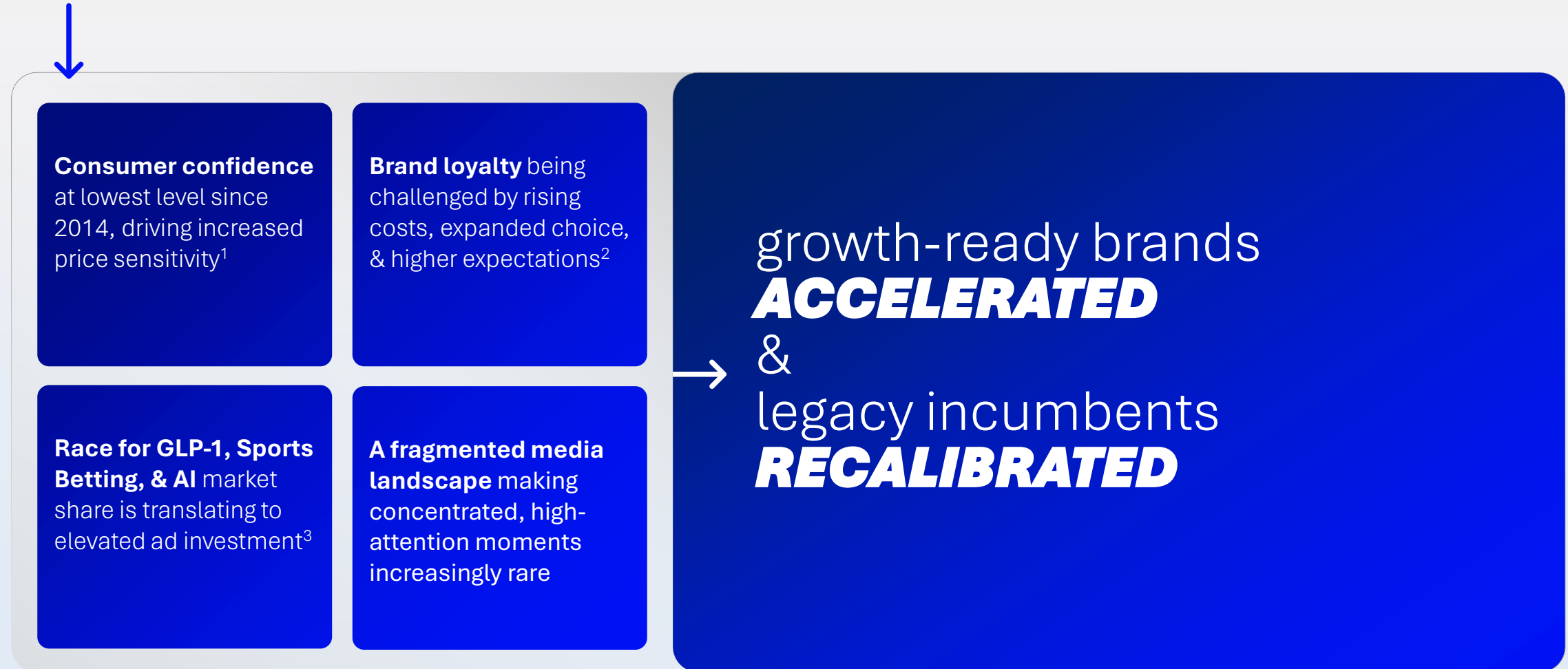
Total viewers

+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

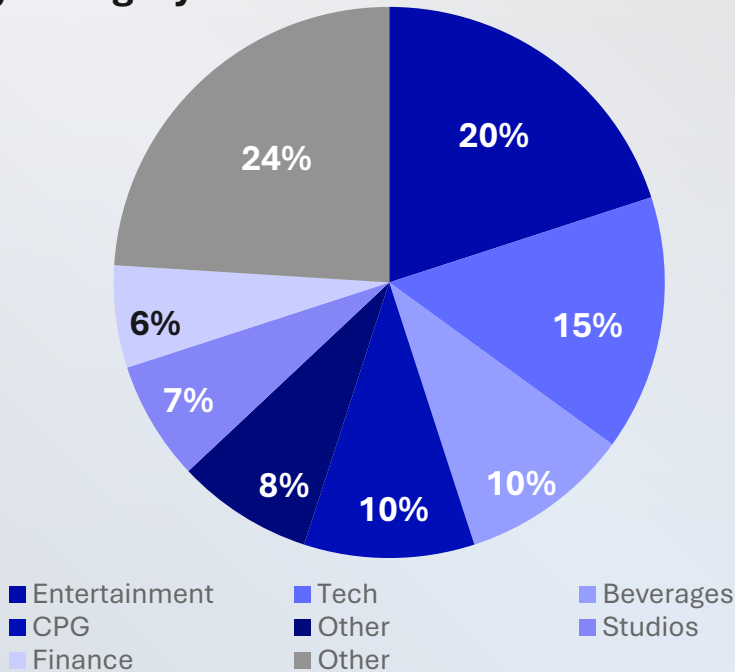
	 FOX 2023	 CBS 2024	 FOX 2025	 NBC 2026
Top Categories (by SOV)	Ent 38% Bev 14% CPG 11%	Ent 30% CPG 18% Bev 12% Tech 7%	CPG 16% Tech 13% Bev 13% Ent 12%	Ent 20% Tech 15% Bev 10% CPG 10%
Category Spikes	 CPG +67% SOV YoY  Entertainment +6% SOV YoY Sports betting boom	 Tech +80% SOV YoY AI hype starts	 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



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

Tech

AI Products



AI Features



CPG/Beverage

Food & Snacks



Personal Care



Beverage



Entertainment

Sportsbook & Casino



Other Entertainment



Pharma

GLP-1 / Weight Loss



Early Detection/Prevention



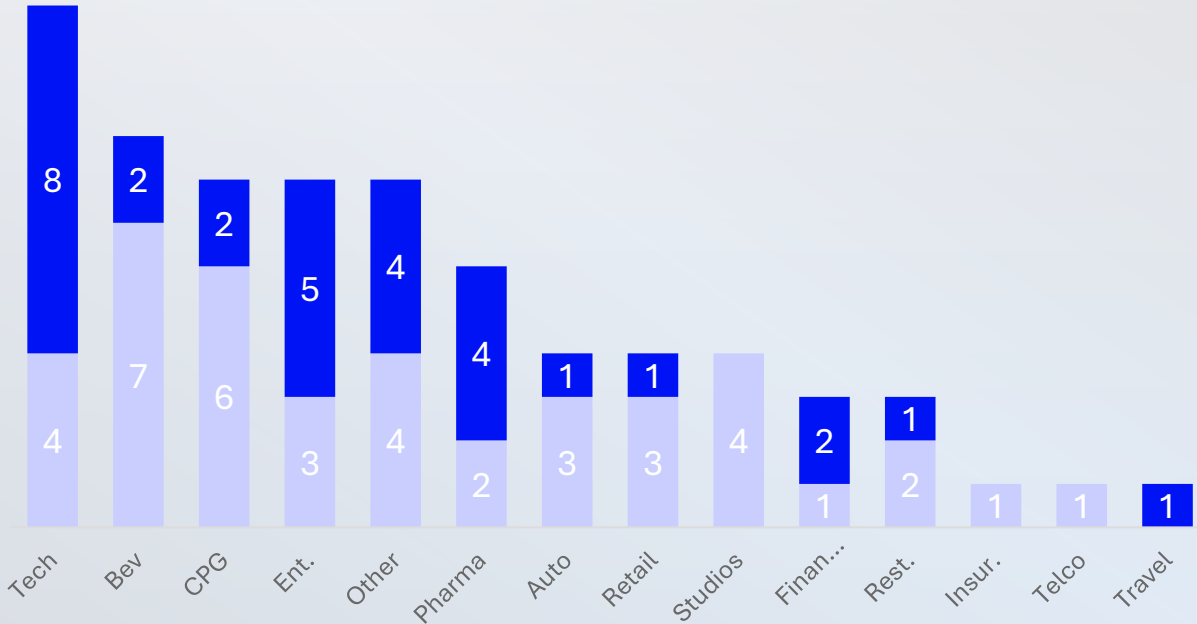
Super Bowl LX attracted a **RECORD NUMBER OF BRANDS**

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

SUITED FOR

IMPACT

SELECT BRAND
EXAMPLES

Igniting Established Thematic

Utilizing the game to amplify established brand narratives

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

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

+67%

lift in likeability for ads featuring long-term characters or actors vs. ads that did not¹



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 trailers²



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 norm¹



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 not¹



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 season¹



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 Bowls²

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

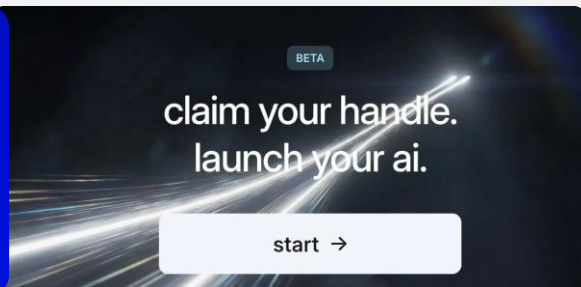
How Super Bowl LX **DELIVERED FOR BRANDS**

PRODUCT

AI Mainstreaming

#1

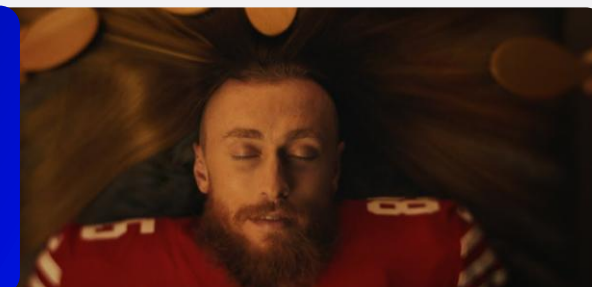
AI.com rank on Engagement Index during the game¹



Health & Holistic Wellness

+13%

Novartis' "Relax Your Tight End" Likeability vs. category average, from its humor-first approach³



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 way³



Less Laughs

High Likeability

Pepsi's "The Choice" use of humor showing the thematic can still deliver results³



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.

51

Sunday Nights of Marquee Sports



NEAR TERM Re-Amplify with Ownership

2026/27 Marketing Opportunities

Championship Sunday
Presenting Sponsor



Postgame Ownership



Pre-Game Feature



In-Game Features



Ownership
& Features



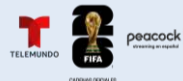
Presenting
Sponsor



Race
Replay



El Pelotazo
In-Show Feature

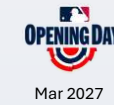


Presenting Sponsor



LONG TERM Plan For 2027 & Beyond

Future Tentpoles



THANK YOU!

Category & Marketplace Strategy

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Trade Marketing

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MARCH 2026

