

SHOPVISION MARKET INTELLIGENCE REPORT

Athleisure Black Friday Benchmark:

How 19 leading brands
ran Holiday 2025

Insights to take into Q4 2026 planning



How would you plan Holiday 2026 differently if you knew exactly what your peers did in 2025?

That's the question this report is built to answer. Over 13 weeks of Q4 2025, ShopVision tracked every promotional move made by 19 of the top athleisure brands in the market — when they launched, how deep they went, which categories they put in the spotlight, and how they used email and non-discount mechanics to show up during the busiest selling window of the year.

What follows is a peer-informed playbook: not a set of prescriptions, but a clear picture of what the market actually did — so you can make sharper decisions about what you want to do next.

What we saw

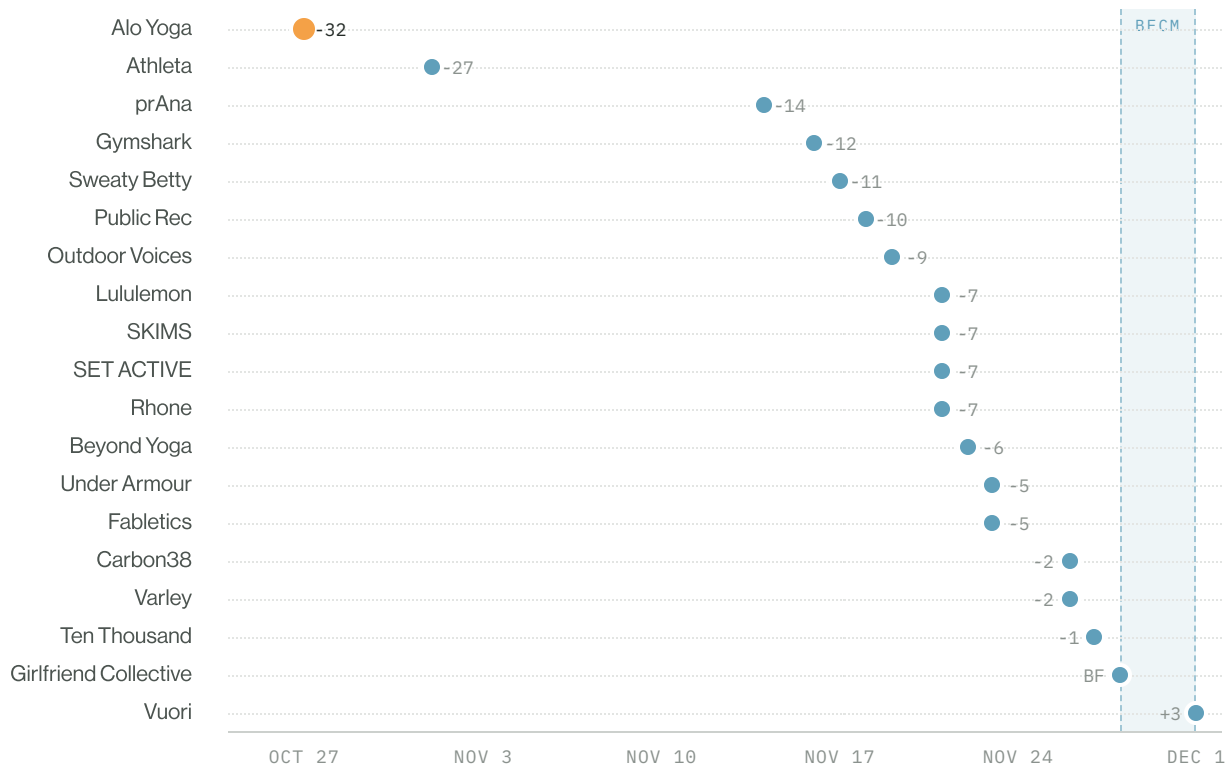
- **Only 1 of 19 brands moved before November.** Alo Yoga ran a members-only Black Friday Early Access on October 27. Every other brand waited.
- **13 of 19 brands ran a public sitewide Black Friday offer. The other 6 played different mechanics** — members-only depth (Alo Yoga, Fabletics), select / up-to-X% (Lululemon, Varley), a rotating multi-day campaign (SET ACTIVE), and a designer-collab gift-with-purchase only (Vuori).
- **30% was the modal Black Friday sitewide rate. 3 brands went to 50%** — Under Armour, Gymshark, and Public Rec ran the deepest public-facing positions in the market.
- **Only 4 brands ran category-specific Black Friday events.** prAna, Sweaty Betty, Gymshark, and SKIMS merchandised distinct category cuts on top of (or instead of) sitewide. Leggings and accessories drew the spotlight; every other brand let sitewide do the work.
- **Flash sales kept momentum moving post-Cyber Monday.** 6 brands ran 24-hour events after the main BFCM headline cooled — SKIMS, Sweaty Betty, Rhone, Under Armour, Ten Thousand, and Fabletics — using flash as a calendar layer, not a replacement.
- **Email cadence spread the peer set roughly 9x apart.** Vuori sent 74 emails in 14 days (5.3/day). Girlfriend Collective and Gymshark sent fewer than 1/day. Both ends were deliberate.
- **After Christmas, clearance was near-universal.** 15 of 19 brands ran a year-end clearance event at depths up to 70%, and only 3 opted out. The real variable was whether brands merchandised the clearance as a named moment or a quiet markdown.

19 ATHLEISURE BRANDS	13 WEEKS TRACKED	8,500+ DATA POINTS ANALYZED	Q4 2025 OBSERVATION WINDOW
-------------------------	---------------------	--------------------------------	-------------------------------

When do athleisure brands kick off Black Friday?

If you've been hearing that the holiday season "starts earlier every year," the 2025 calendar tells a quieter story. Only 1 of 19 athleisure brands we watched stepped into Black Friday with a live discount in October — and that move was an explicit Black Friday Early Access event, not a generic fall sale. Almost everyone else waited until they were inside 3 weeks of Cyber Monday, and 7 brands didn't move until Black Friday week itself.

Only 1 of 19 athleisure brands made a Black Friday move before November in 2025



First Black Friday-framed sale event by brand; values shown as days from Black Friday. Excludes non-Holiday Q4 sales. Source: ShopVision.

Who moved first, and what they led with

- Alo Yoga (Oct 27).** A Black Friday Early Access at 30% off — entirely gated to ALO Access members. The earliest Black Friday move in the market, but invisible to anyone outside the loyalty program. Critically, the event copy positioned this as Black Friday — not as a generic fall promo.

- **Athleta (Nov 1).** A Black Friday Cardmember Early Access at 30% off — gated to Gap Inc. credit card holders. The first November move in the peer set, and the second loyalty-gated launch.
- **Mid-November (Nov 14–21).** 9 brands stepped in over a single week — prAna's Holiday Head Start (Nov 14), Gymshark's countdown launch (Nov 16), Sweaty Betty (Nov 17), Public Rec's VIP early (Nov 18), Outdoor Voices (Nov 19), then a four-brand cluster on Nov 21 — Lululemon, SKIMS, SET ACTIVE, and Rhone all going live the same day.
- **Black Friday week (Nov 22–28).** Beyond Yoga, Under Armour, Fabletics, Carbon38, Varley, Ten Thousand, and Girlfriend Collective rounded out the peer set during BF week itself.
- **Cyber Monday only (Dec 1).** Vuori held entirely until Cyber Monday — the latest mover in the peer set, with a GWP-only mechanic (no percentage-off discount).

What it tells us about timing the market

Late October and early November had real breathing room this year. Most brands held public messaging until they were two or three weeks out from Cyber Monday, which means anyone planning to move earlier in 2026 has a relatively quiet window to own before the cluster hits. The two brands that did move early — Alo Yoga and Athleta — both ran loyalty-gated mechanics, suggesting that an early move in 2026 may be more defensible if it lives inside a membership program than as a public sitewide discount.

The two brands that ran no public discount at all

Two brands held out from running any public-facing percentage-off discount during BFCM 2025 — same outcome, very different mechanism.

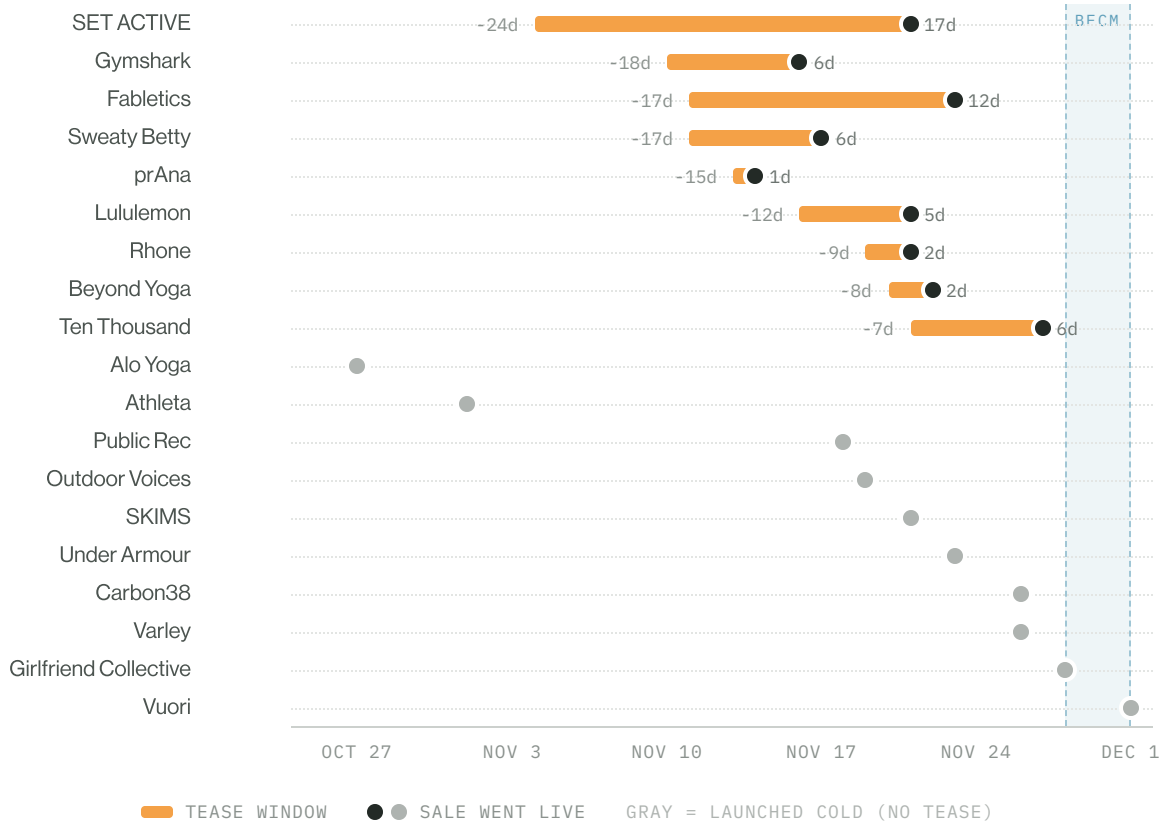
- **Alo Yoga.** 30% off entirely behind the ALO Access membership wall — non-members saw no public discount at any point during BFCM.
- **Vuori.** Cyber Monday built around a Cody Hudson designer-collab GWP — tiered \$150 and \$250 spend thresholds for collab pieces, no markdown anywhere on the site.

Both signaled brand-position confidence: each had a Holiday story that didn't depend on a flat sitewide cut to compete.

How long do they tease before going live?

"When did the sale start" is one question. "When did they start TALKING about the sale" is another — and the answer is louder than the launch dates themselves. 10 of 19 athleisure brands ran no public tease at all before flipping the switch. The other 9 ran tease windows ranging from a single day to nearly three weeks.

Black Friday teasers: how early athleisure brands started pre-promoting BFCM events in 2025



Lead time between a brand's first Black Friday tease and its sale going live. Source: ShopVision.

Who teased, and for how long

- **SET ACTIVE — 17 days.** The longest tease runway in the peer set — first Black Friday-named messaging surfaced Nov 4, more than two weeks ahead of the Nov 21 launch.
- **Fabletics — 12 days.** An email-first tease — "Black Friday Came Early — Preview Inside" Nov 11 — giving VIP members an inside-track feel ahead of the public Nov 23 launch.
- **The 5–6 day cluster — Gymshark, Sweaty Betty, Ten Thousand, Lululemon.** All four ran teases that landed roughly a week before launch — long enough to build anticipation, short enough not to fatigue the inbox.
- **The tight teases — Rhone (2), Beyond Yoga (2), prAna (1).** Day-of or day-before forward-looking communications that effectively functioned as launch alerts.

The 10 brands that launched cold

Alo Yoga, Athleta, Carbon38, Girlfriend Collective, Outdoor Voices, Public Rec, SKIMS, Under Armour, Varley, and Vuori all launched their Black Friday events without a public forward-looking tease in email, homepage banner, or social post. Several of these are loyalty-gated launches where the membership audience already knew an event was coming — but to the non-member customer, the sale arrived without warning.

A clever tactic worth flagging — SKIMS

SKIMS' first Black Friday-named communication appeared Nov 7 in the body copy of an email subject-lined "Up to 50% Off Select Styles" — already-active Bi-Annual Sale content reframed as "*Get a head start on Black Friday.*" Not a tease for the upcoming sitewide event in the strict sense (no separate forward-looking message), but a sharp piece of marketing — tying a late-fall sale to Black Friday anticipation and giving the shopper permission not to wait. The implicit message: "no need to wait for deals, shop now." It's the kind of move that doesn't show up on a tease-window chart but is worth borrowing.

TAKE INTO 2026 PLANNING

- 1 When do you flip the switch?** The 2025 calendar left real breathing room before mid-November for any brand willing to anchor an early move in a loyalty program rather than a public sitewide cut.
- 2 Do you pre-promote the event, and for how long?** Half the peer set ran no public tease at all, so silence before launch is a legitimate posture, not a tactical gap. And if you ran an October or early-November sale that wasn't framed as Black Friday, look at what SKIMS did, turning an unrelated sale into Black Friday anticipation with a single sentence of body copy.

How athleisure brands anchored their Black Friday discounts.

"Are we running sitewide this year?" is usually the first question asked in a Q4 planning meeting. Athleisure answered that question 4 different ways. 13 brands ran a public sitewide. 2 went members-only. 3 ran select-product mechanics that hedged the depth on a subset. 1 brand — Vuori — skipped a percentage-off offer entirely and built their Black Friday around a designer-collab gift with purchase.

68% of athleisure brands ran sitewide discounts for Black Friday 2025



Each brand in sample placed once based on their primary public-facing Black Friday mechanic (Nov 19 – Dec 2 window, plus any tied early-access or extension events). Source: ShopVision.

The 4 mechanics, side by side

Mechanic	Brands
Sitewide one flat % off everything	Athleta Beyond Yoga Carbon38 Girlfriend Collective Outdoor Voices prAna Public Rec Rhone SET ACTIVE SKIMS Sweaty Betty Ten Thousand Under Armour
Sitewide member-gated	Alo Yoga Fabletics
Select products only Up-to-X% on a subset	Gymshark Lululemon Varley
Gift with purchase	Vuori

Who sweetened the sitewide deal

Rhone was the only athleisure brand to layer a spend-threshold tier on top of their sitewide rate, 25% off everything with a kick to 30% off above \$300, a "spend more, save more" ladder more common in higher-AOV verticals like jewelry and home.

Who stacked sitewide with sale, and who didn't

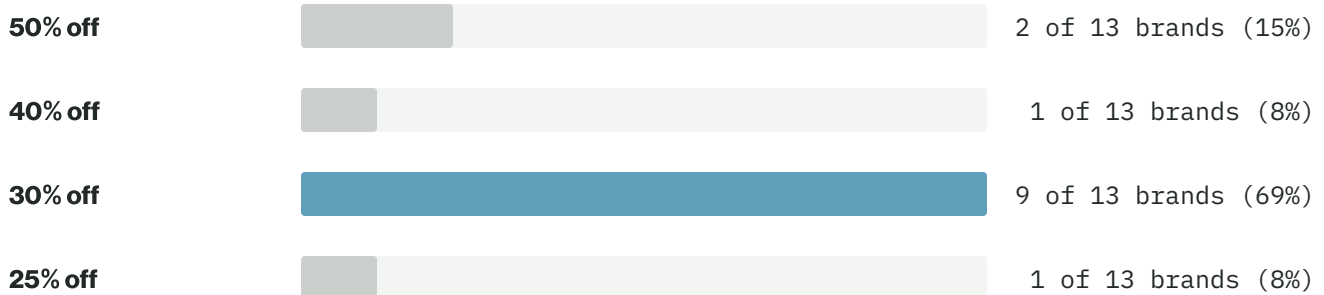
The "sitewide" headline doesn't always mean what it looks like.

- **Public Rec, Outdoor Voices, Girlfriend Collective.** Stacked extra discounts on top of items already in their sale section — 50% + extra 15% on sale; 30% + Up to 50% off outlet; 30% + Up to 70% off select clearance.
- **SET ACTIVE.** Went the other way — their "30% off rest of site" copy explicitly excluded items already at markdown.
- **Beyond Yoga.** Signaled depth by stating their 30% off "everything" covered styles that don't normally see discount.

How deep did the sitewide cuts go?

30% off was the most common rate — 9 of the 13 athleisure brands running a public sitewide landed there. 2 went deeper to 50%. 1 went lighter at 25%. If you're sizing up a 2026 rate against the brands you compete with, this is the chart and the table that tell you where the market sits.

Black Friday 2025 sitewide discount depth: Athleisure



Distribution of peak flat sitewide discount rates across the 13 of 19 athleisure brands that ran a public sitewide discount offer for Black Friday 2025. Source: ShopVision.

Every brand's headline Black Friday offer

Brand	Mechanic	Headline offer
Public Rec	Sitewide	50% off everything + extra 15% off sale code
Under Armour	Sitewide	CHEATCODE — 30-50% off sitewide + free shipping
Sweaty Betty	Sitewide	40% off everything including leggings
Athleta	Sitewide	30% off everything sitewide
Beyond Yoga	Sitewide	30% off everything (incl. never-on-sale styles)
Carbon38	Sitewide	Cyber Sale — 30% off sitewide
Girlfriend Collective	Sitewide	30% off sitewide + Up to 70% off select styles
Outdoor Voices	Sitewide	30% off sitewide + Up to 50% off OV Extra outlet
prAna	Sitewide	BFCM sitewide 30% off + free shipping
SET ACTIVE	Sitewide	30% off rest of site (Cyber Monday)
SKIMS	Sitewide	30% off sitewide (Nov 21– Dec 2)
Ten Thousand	Sitewide	30% off sitewide, escalating to Up to 45% off select styles
Rhone	Sitewide	25% off everything + 30% off orders over \$300
Alo Yoga	Sitewide (member-gated)	30% off sitewide — ALO Access members only
Fabletics	Sitewide (member-gated)	VIP 80% off everything — VIP membership pricing
Gymshark	Select products	Up to 50% off everything (select subset, not flat sitewide)
Lululemon	Select products	Up to 40% off select styles

Brand	Mechanic	Headline offer
Varley	Select products	30% off selected styles
Vuori	Gift with purchase	Cody Hudson designer collab pouch at \$150+ / tote at \$250+

What the signal means for your 2026 offer

- **At 30% off, you're on par with the market.** 9 of 13 athleisure brands running a public sitewide landed exactly there — neither standing out nor falling behind.
- **At 40-50%, you're cutting through.** 3 brands took this position; the trade-off is margin against a sharper Black Friday headline.
- **Below 30%, you risk reading light next to peers.** Rhone was the only brand under 30%, and they paired it with a \$300+ spend tier to give shoppers a path to a deeper rate.
- **Off sitewide entirely, you signal a different brand position.** Members-only (Alo, Fabletics), select products (Lululemon, Varley, Gymshark), or no discount at all (Vuori) — each says the brand isn't competing on Black Friday depth.

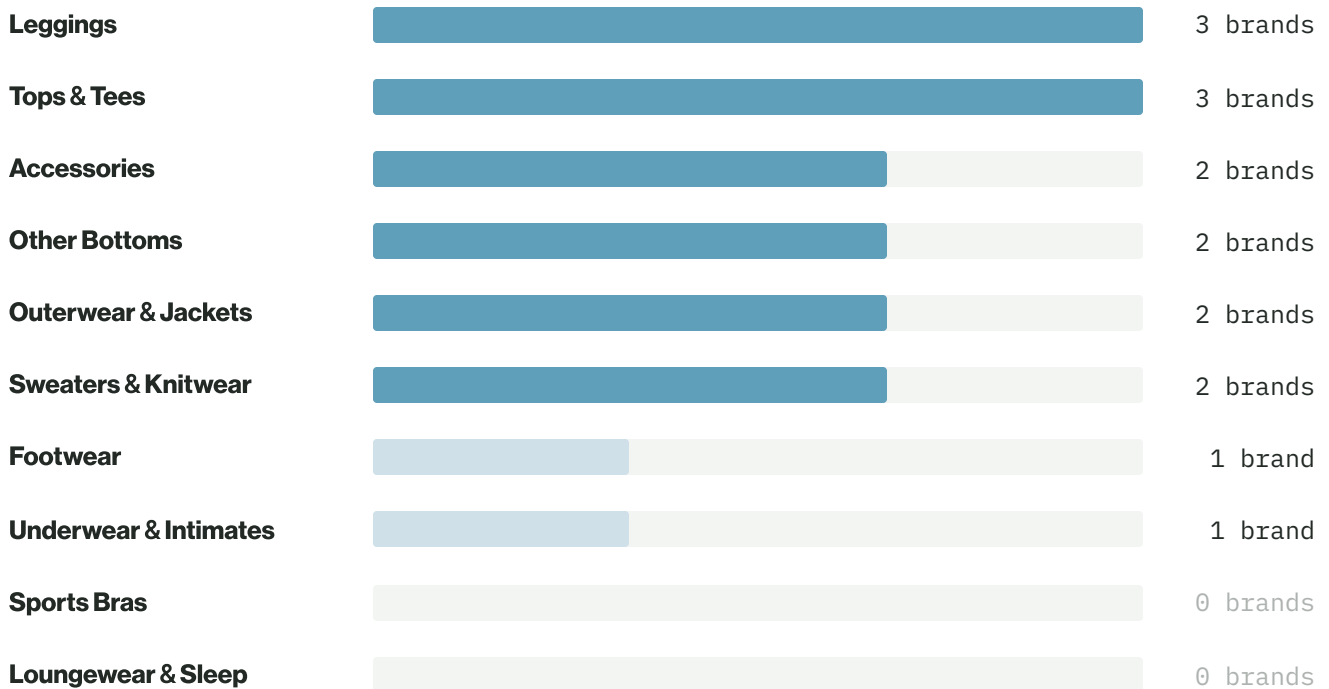
TAKE INTO 2026 PLANNING

- 1 Do you go sitewide this year?** If your default is sitewide, you're in good company with the market. If you're considering members-only or a select-product play, you have peers running both successfully.
- 2 If you go sitewide, how deep is the offer?** Cross-check the 2025 rates of the 5 brands your customer most often considers alongside you, what are the optics? The lighter end is a real position if it's paired with something else (a member benefit, a category cut, a sharper non-discount play) that earns customer attention the discount won't.

Which categories got the spotlight — and which stayed off the offer slate.

Even with most athleisure brands anchored in sitewide, some still ran distinct category-level events on top — a 50% off accessories sale, a Power Leggings cut, a hero-product flash. The chart counts brands that ran at least one discrete category-level event during the Black Friday event window, where the brand named a specific product category in the offer.

Athleisure category-level discounts most commonly featured for Black Friday 2025



Category-level discounts defined as Black Friday offers naming a specific product category in the promotion. Bars count athleisure brands with at least one such offer during the BFCM event window. Source: ShopVision.

The brands running the most category-level events

- **prAna** ran the most category-merchandised Black Friday — discrete events on men's pants, women's sweaters, the Stretch Zion hero line, gift-guide and stocking-stuffer events, all in parallel.
- **Sweaty Betty** ran category events on Power Leggings (their hero), selected coats, knitwear, and jumpers — leaning into layering for winter selling.

- **Gymshark** ran a 50% off accessories sale as its own event, plus single-product cuts on Vital, Adapt, and Conditioning Club pieces.
- **Athleta** cycled through Rainier Legging (40% off), Tranquil Waffle Collection (40% off), and trending gifts (30-50% off).

The categories that didn't get their own Black Friday event

- **Sports bras — 0 brands.** No athleisure brand ran a discrete category-level discount on bras during BFCM. Included in sitewide rates, but never called out as their own moment.
- **Loungewear — 0 brands.** Same pattern — included in sitewide where brands ran one, never merchandised as a standalone event.
- **Underwear & intimates — 1 brand.** SKIMS — Panty Advent Calendar and a BOGO underwear flash.
- **Footwear — 1 brand.** Public Rec — NOBULL cross-promo.

Brand by category — who ran category-specific discounts.

4 brands ran discrete category-level events on top of (or instead of) a sitewide rate. The table names which categories each one cut, and at what depth.

prAna

Leggings 50%

Bottoms 50%

Sweaters/Knit 50%

Tops/Tees 30%

Outerwear 30%

Sweaty Betty

Leggings 50%

Outerwear 50%

Sweaters/Knit 50%

Tops/Tees 30%

Gymshark

Accessories 50%

Leggings 40%

Tops/Tees 40%

Bottoms 40%

SKIMS

Accessories 50%

Brands not listed ran sitewide discounts that implicitly covered every category they sell at their sitewide rate.

Two of the single-brand bars reflect specific category events worth naming.

- **SKIMS** ran a 50% off women's underwear BOGO plus a Panty Advent Calendar (Underwear & Intimates).
- **Public Rec** ran a NOBULL cross-promo at 50% off footwear.

Sports bras, loungewear, and kids categories saw zero discrete category-level events across the peer set.

TAKE INTO 2026 PLANNING

- 1 Is there market pressure to break out a category cut?** Light. Only 4 brands ran a category-level discount. If you run sitewide and hold the line on categories, you'll match the dominant posture. If you're considering a cut on a category nobody touched, the market isn't asking you to, that's open ground if your own merchandising signals warrant it.
- 2 If you DO break out a category cut, what depth does it take?** Higher than your sitewide rate. The 4 brands went 10–20 points above their headline, leggings hit 50% at prAna and Sweaty Betty, accessories 50% at Gymshark and SKIMS. Worth checking against your own 2025 category sales: did the brands going deeper pull share from your category sales?

Loyalty gating became the door, not the deal.

4 brands ran genuine members-only Black Friday Early Access events in 2025 — but only one made the loyalty wall the entire offer. The rest used it as an acquisition pre-roll for a public follow-up.

The loyalty-gated four

Brand	Members-only event	Public equivalent
Alo Yoga	BF Early Access 30% sitewide (Oct 27); Singles Day 30% (Nov 11)	None — entire BFCM gated
SKIMS	30% sitewide for ONYX / Marble members (Nov 19-21)	Public sitewide BF 30% (Nov 21 – Dec 2)
Lululemon	Members-only early access Black Friday (Nov 17)	Public BF sale up to 40% off select (Nov 21-30)
Fabletics	VIP 80% off everything (Nov 3); BF/CM early access VIP upgraded (Nov 28)	VIP pricing model is the base — public BF was lighter

The two patterns

Members-only as the pre-roll. SKIMS, Lululemon, and Fabletics ran members-only depth events 24–72 hours ahead of a public sale that carried the same offer (or close to it). The members got the same discount earlier — the lever isn't price, it's timing. The conversion goal is loyalty enrollment ahead of the public moment, then redemption at the same depth.

Members-only as the entire offer. Alo Yoga's BFCM was members-only across the board — there was no public-facing equivalent. The members got the discount; non-members got product drops and shipping messages. Alo's program is the only one in the peer set built tightly enough to make this work without a public follow-on.

SKIMS also used the BFCM window to establish a new tiered loyalty structure — the ONYX and Marble tiers launched on October 23, just weeks before the Members-Only Early Access ran on November 19-21. The October launch was the structural setup move for the November activation.

Fabletics is the structural outlier

Fabletics' VIP membership isn't a Q4 lever — it's the entire pricing model. The VIP 80% Off Everything event on November 3 and the BF/CM Early Access at "upgraded VIP rate" on November 28 are membership-acquisition events disguised as promotions. The pricing matters less than the membership flip; once a shopper converts to VIP, the relationship becomes a recurring monthly credit.

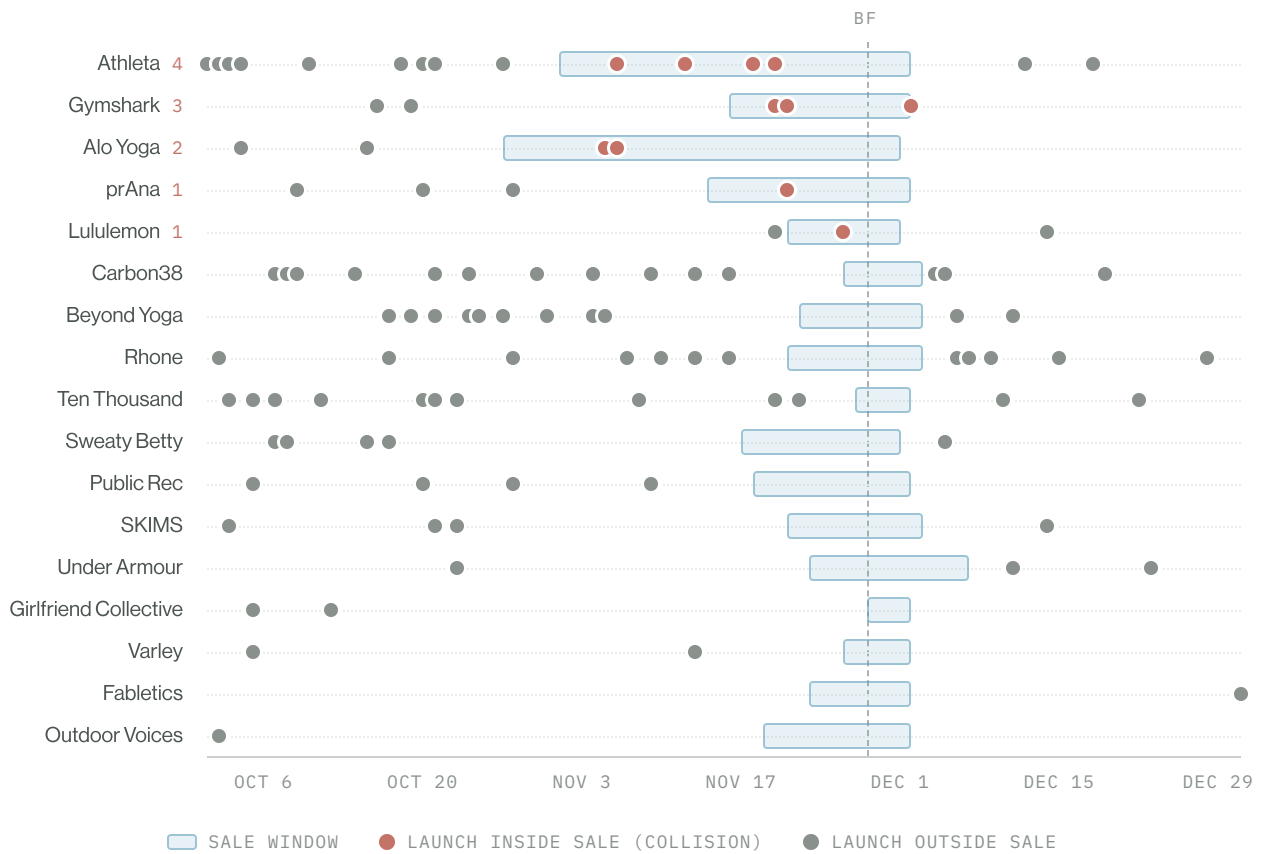
TAKE INTO 2026 PLANNING

- **Is there market pressure to gate early access?** Not in this set. Only 4 brands made that move, the tactic is neither table stakes nor played out. If you share customers with any of these movers, will you answer with your own members-only event?

New product drops vs the BFCM calendar — who collided, who didn't.

Most athleisure brands keep new product drops out of their sale window to avoid margin erosion. The brands that didn't each played it differently: a collab big enough to BE the Black Friday sale, a launch held at full price while everything else got discounted, a members-only model that absorbed new product into the same member rate.

5 of 19 athleisure brands launched new product inside their Black Friday sale



Athleisure new product launches against each brand's Black Friday sale window, 2025. Source: ShopVision.

Brands that stacked drops inside the sale window

- **Athleta (4 drops in window).** Stranger Things capsule (Nov 6), Simone Biles online-exclusive (Nov 12), GAPSTUDIO WINTER (Nov 18), Endless Pant Elm colorway (Nov 20), all inside the Cardmember Early Access window (Nov 1 to Dec 2). The Gap-umbrella merchandising cadence kept rolling; the sale absorbed the launches rather than pausing for them.
- **Gymshark (3 drops in window).** Onyx limited drop (Nov 20, positioned as the Black Friday event itself), Conditioning Club (Nov 21, framed in-email as “Sale spotlight”), STORM (Nov 30). The sale window WAS the launch surface.
- **Alo Yoga (2 drops in window).** Winter '25 (Nov 5) and Brownstone colorway (Nov 6), both inside the members-only-entire-BFCM window that opened Oct 27. Members got new product at the member rate.
- **Lululemon (1 drop in window).** Polka Flock Define Jacket plus Align Pant Drop (Nov 26), staggered launch, in-store first then online, inside the Nov 21 to Dec 1 sale.
- **prAna (1 drop in window).** DreamFleece collection (Nov 21), opened the same day as prAna’s Black Friday.

Swept-in or carved-out

The same collision produced 2 different margin postures. Alo Yoga, Athleta, Gymshark, and prAna pulled new product into the sale rate, the launch joined the discount alongside the rest of the catalog. Lululemon held new product at full price even as the sale ran; their public Black Friday was “up to 40% off select,” and the **select** language was the carve-out. Polka Flock launched into the same window but at full price.

A clever play worth flagging: Gymshark

Gymshark’s Onyx drop on Nov 20 wasn’t a launch that happened to land during their sale, it was the sale’s headline. The Black Friday event itself was Onyx. The mechanic merges the launch moment and the discount moment into a single piece of merchandising news, with the new product carrying the brand-story weight and the discount carrying the urgency weight. Different from a collision; closer to a deliberate fusion.

Brands that pushed drops past the sale

10 brands waited out the sale, then dropped new product into the post-Cyber-Monday gift-buying window at full price. 2 stand out:

- **Rhone (5 post-sale drops).** Whisper Gray (Dec 6), Cape Blue (Dec 7), Après Houndstooth Seamless (Dec 9), Tech Waffle Hoodie (Dec 15), Gotham Jacket (Dec 28). A month of full-price newness rolling out behind the Dec 3 sale close, the clearest post-sale cadence in the peer set.

- **Lululemon (Erewhon Final Drop, Dec 14).** A high-profile collab capstone landing 2 weeks after Cyber Monday. The timing reads as deliberate: protect the launch from sale-rate dilution, then close the partnership story at full price during the gift-window.
-

TAKE INTO 2026 PLANNING

- **How will you time new drops around the sale?** The peer set is clear: full-price launches generally stay out of the discount window, so keeping new product clear of the sale puts you in good company, 14 of 19 brands did the same. Dropping new product deep into December is just as common: 10 brands pushed launches past Cyber Monday into the full-price gift window.

Flash sales kept momentum moving post-Cyber Monday.

6 athleisure brands used flash sales during Holiday 2025, with activity clustered in the days after Cyber Monday. The mechanic gave brands a way to create new promotional energy once the main BFCM offer had cooled, without committing to another long-running markdown.

Flash event calendar by brand

Brand	Date	Mechanic
SKIMS	Nov 27	Panty advent calendar 50% off
Sweaty Betty	Nov 29	Selected coats 50% off
SKIMS	Nov 29	Women's underwear BOGO
SKIMS	Nov 30	Faux fur totes 50% off
Rhone	Nov 30 – Dec 2	Cyber weekend 50% off 500+ styles (24h core)
Sweaty Betty	Dec 2	Power Prints 50% off — midnight cyber
Under Armour	Dec 9	Outerwear 40% off — 24h
Ten Thousand	Dec 13-20	Rotating category 24h flashes
Fabletics	Dec 20	VIP 1-hour flash: \$20 leggings + 65% off

SKIMS was the most consistent flash operator

Three distinct 24-hour events across Thanksgiving week — panty advent calendar at 50% (Nov 27), women's underwear BOGO (Nov 29), faux fur totes at 50% (Nov 30). Each one a single-product flash inside a 12-day sitewide BF sale. The pattern functionally creates daily merchandising news during the noisiest selling moment without diluting the sitewide headline.

Ten Thousand used flash to own December

December 13–20: rotating category 24-hour flashes, one per day, each on a different product line. Ten Thousand effectively built their own December cadence using the flash mechanic — keeping the calendar in motion when the rest of the peer set had quieted down. The single sharpest example in the report of using flash as a post-BFCM momentum tool rather than a peak-week amplifier.

Fabletics ran the sharpest single moment

December 20: \$20 leggings + 65% off VIP pricing, available for sixty minutes, members-only, in-store at Fabletics Century City. Sixty minutes, real urgency, gated audience. The conversion measurement is cleaner than any multi-day event because the entire mechanic is the time window.

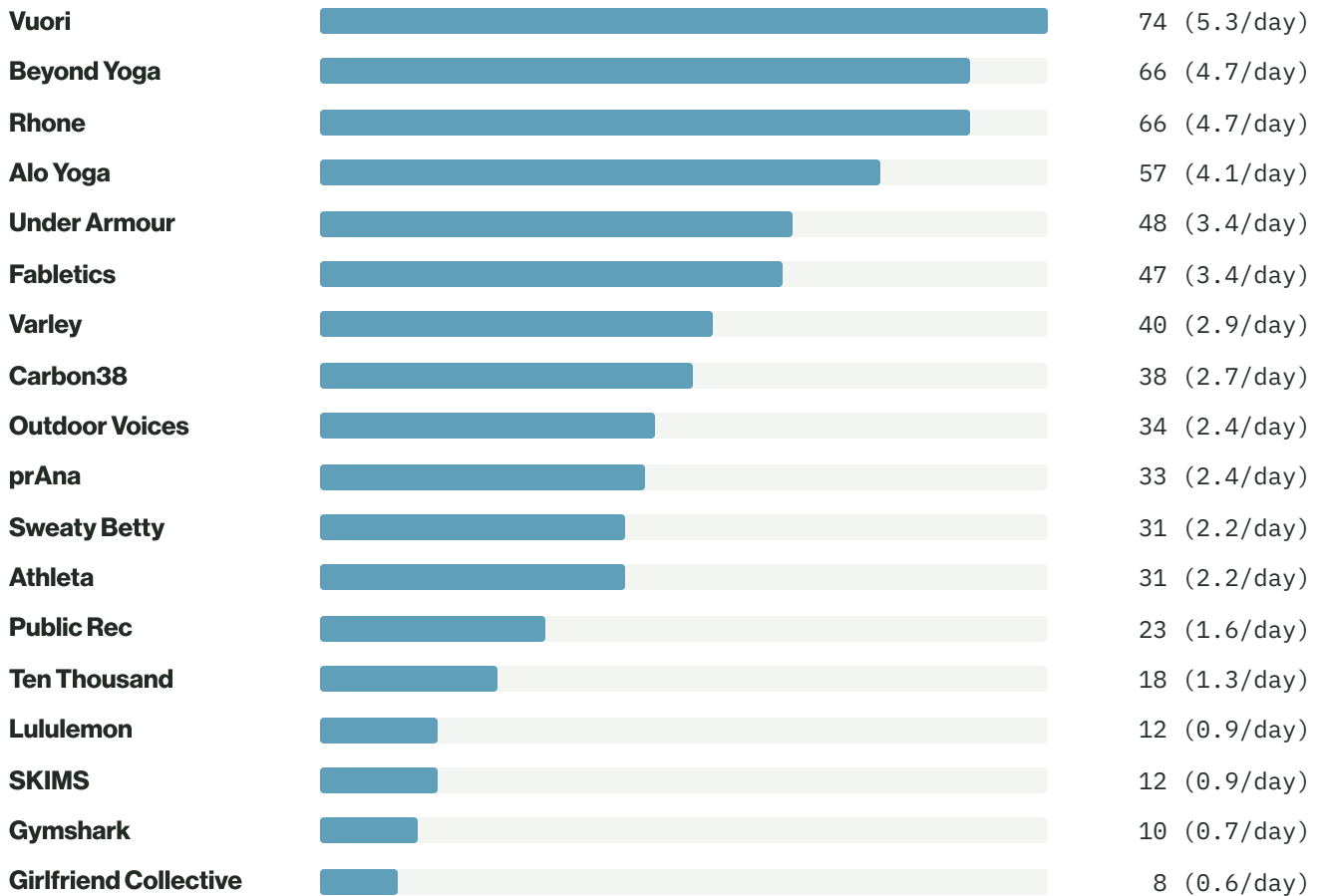
TAKE INTO 2026 PLANNING

- **Where could your calendar use another beat?** Flash sales can keep holiday momentum moving past Cyber Monday, and add spice to your main event. This tactic is surprisingly underused in your peer set, which categories and products deserve their own headline this year?

How often did athleisure brands email during Black Friday?

Email cadence varied massively across athleisure during the BFCM event window. Vuori sent 74 emails in 14 days, 5.3 a day, on average. At the other end, Gymshark and Girlfriend Collective sent fewer than 1 a day. The brands at the top of the chart are filling inboxes; the brands at the bottom are deliberately quiet. Both are choices, and they signal different things about how the brand wants to show up at the busiest sending window of the year.

Athleisure email send volume for Black Friday 2025



Email sends per brand during the Black Friday 2025 event window (Nov 19 – Dec 2). 18 of 19 athleisure brands shown. SET ACTIVE excluded. Source: ShopVision.

The high-cadence senders

Vuori (5.3/day), **Beyond Yoga (4.7/day)**, **Rhone (4.7/day)**, and **Alo Yoga (4.1/day)** were the peer set's heaviest senders. Vuori is the one to call out: it ran no public sitewide discount (Insight 03), yet it sent more email than any other brand in the set. That's a brand-message-led cadence rather than a discount-led one, the heaviest presence in the inbox came from the brand competing least on price.

The low-cadence senders

Lululemon (0.9/day), **SKIMS (0.9/day)**, **Gymshark (0.7/day)**, and **Girlfriend Collective (0.6/day)** deliberately kept email volume light during the busiest sending week of the year. Lululemon is the most striking — a brand at the scale of Lululemon could clearly send more if they wanted to. Their restraint reads as brand-discipline, not capability.

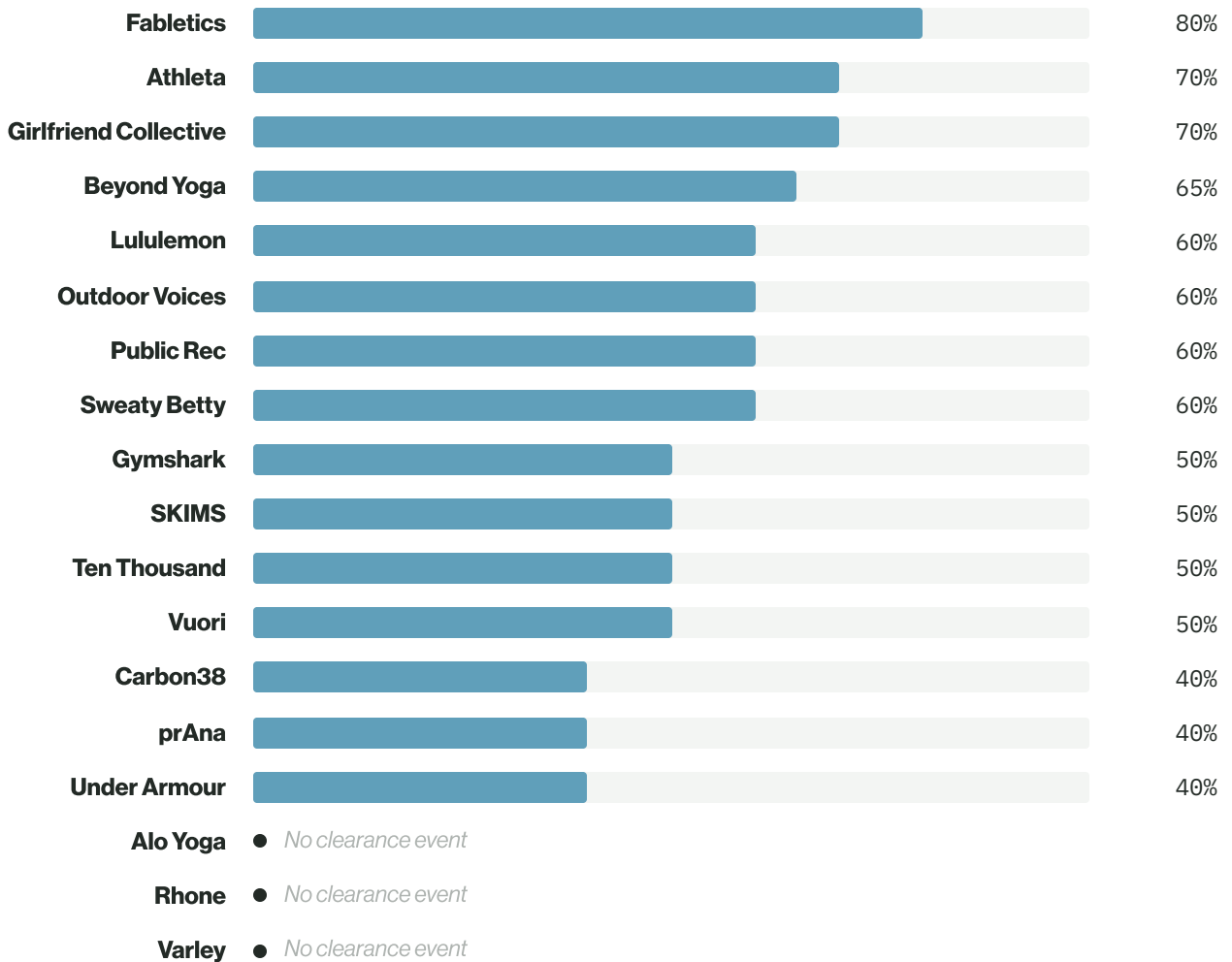
TAKE INTO 2026 PLANNING

- **How much email is too much?** The average brand sent about 2.5 a day, and most clustered between 2 and 3, land there and you're matched to your peers, not louder. The one to study is Vuori: it sent the most of anyone at 5.3 a day while running no public sitewide discount, so the loudest inbox in the set belonged to the brand competing least on price.

After Christmas, almost every athleisure brand leaned into clearance.

Black Friday closed and the discount banners came down, but only briefly. 15 of 19 athleisure brands launched a post-Christmas clearance event between Dec 20 and Dec 31, separate, named campaigns with their own framings (Year-End Sale, Warehouse Sale, End of Season), depths up to 70% off, and code-stacked sale-on-sale layers. 3 brands held the line entirely: no markdown, no promo code, no clearance push.

79% of athleisure brands ran a post-Christmas clearance event



Headline "up to X% off" observed at least once Dec 20–31, 2025; events did not necessarily run the full window. Fabletics (80%) reflects VIP/member-gated pricing. SET ACTIVE excluded, discount signal present but depth not quantified. Source: ShopVision.

Sale-on-sale stackers, the deepest layered plays

4 brands layered an extra discount on top of already-discounted sale inventory. These were the deepest effective offers in the peer set.

- **Athleta.** Up to 70% off Winter Sale + extra 30% off sale (Dec 22), then extra 50% off markdowns (Dec 29). The clearest mid-window depth escalation.
- **Carbon38.** EXTRA40 code (extra 40% off sale, Dec 25 to Jan 2) layered with two flash overlays, \$80 Sweaters (Dec 29), FLASH30 on Takara + Diamond (Dec 30–31).
- **Sweaty Betty.** Up to 60% off Holiday Sale + EXTRA15 code on all leggings (Dec 26–29). The category-specific extra layer mirrors the BF-era category cut, post-Christmas.
- **Under Armour.** Sitewide 40% off (Dec 25), then EXTRA30 outlet code (Dec 26 to Jan 4). Pivoted from sitewide promo to outlet-focused extra discount in a single move.

Dec 25–26 launch cluster

8 brands opened their post-Christmas clearance on Dec 25 or Dec 26. Each brand named its event independently: Winter Sale, End of Season, End of Year, Holiday Sale, Year-end, Warehouse Sale. Same week, six different framings.

- **Dec 25 launches.** Carbon38 (End of Season), Gymshark (Winter Sale), Outdoor Voices (End of Year), Sweaty Betty (Holiday Sale), Under Armour (Holiday Sale).
- **Dec 26 launches.** Beyond Yoga (Year-end), Girlfriend Collective (Warehouse Sale), prAna (End of Season), SKIMS (Winter Sale), Vuori (End of Season), Under Armour Outlet (EXTRA30 layer).

Depth escalation mid-flight

3 brands ramped their post-Christmas depth as the window closed, a pacing pattern that opens moderate and escalates toward Jan 1:

- **Athleta.** Extra 30% off sale (Dec 22), then extra 50% off markdowns (Dec 29).
- **Public Rec.** Up to 50% off (Dec 20), then up to 60% off (Dec 25+). Brand-led copy escalation rather than code-driven.
- **Under Armour.** Sitewide 40% off (Dec 25), then outlet-focused extra 30% (Dec 26+). Pivoted both the depth and the scope.

TAKE INTO 2026 PLANNING

- **Where should your year-end depth sit?** The headline depths here are a competitive benchmark, the bulk at 50–60%, the deepest at 70–80%, 3 brands holding full price. A shopper who follows several of these brands reads yours against that spread, so the call is positioning: match it, go deeper to clear faster, or hold lighter on purpose.

Want to drill deeper into this data?

ShopVision holds the deepest competitive intelligence dataset in digital commerce. The report you just read is one slice of one peer set across one quarter — every promotional event verified at the source from the brand's own public copy.

What ShopVision shows you next

Your own peer set, your own granularity. Define the data set that matters to your team — follow competitors, retail partners, wholesalers, owned brands, specific country domains, or any site you want to monitor.

Ask your own questions of the data. This report is one cut of the dataset. ShopVision lets your team drill into the brands, channels, campaigns, and time periods that matter to you — then turn the findings into intelligence briefs, competitor teardowns, creative swipe files, and data-backed slides.

Every season, every business case. BFCM is one moment. ShopVision tracks every competitor move across promotions, email, ads, social, pricing, and catalog dynamics to support year-round planning, benchmarking, and strategy.

See the moves shaping your market.

Your competitors are making moves every day across pricing, promotions, ads, email, social, catalog, and wholesale channels. ShopVision helps your team turn those signals into sharper strategies, faster decisions, and stronger seasonal planning — not just during BFCM, but every week of the year.

[Book a demo at shopvision.ai](https://shopvision.ai) →

How this report was built.

Peer set. Nineteen athleisure brands — a deliberate spread across scale incumbents (Lululemon, Athleta, Under Armour, Gymshark, Vuori), digitally-native challengers (Alo Yoga, SET ACTIVE, Outdoor Voices), category specialists (Sweaty Betty, Beyond Yoga, Carbon38, Varley), and adjacent-category players (Girlfriend Collective, Ten Thousand, prAna, Rhone, Public Rec, Fabletics, SKIMS).

Window. October 1–December 31, 2025 (92 days; 13 weeks).

Classification. Every promotional event was tagged against an eleven-category mechanic taxonomy (sitewide, category, select / up-to-X%, non-holiday sale, flash ≤24h, loyalty-gated, product drop, GWP, free shipping campaign, holiday shipping, other). Each event was also tagged with product-category coverage (leggings, sports bras, tops, outerwear, accessories, etc.) extracted from copy and supporting evidence.

Flash sale definition. A strict 1-to-24-hour duration filter applies, regardless of how the brand framed the event. Multi-day "limited-time" framing is classified as a regular sale event.

Holiday-framing filter. Push-timing analysis (Insight 01) filters to events where the brand's own public copy used Black Friday, Cyber, BFCM, Holiday, Early Access, or Thanksgiving framing — OR landed inside the standardized Black Friday window (Nov 19 – Dec 2) as a sitewide / category / select event.

Peer set included

Alo Yoga	aloyoga.com	Outdoor Voices	outdoorvoices.com
Athleta	athleta.com	prAna	prana.com
Beyond Yoga	beyondyoga.com	Public Rec	publicrec.com
Carbon38	carbon38.com	Rhone	rhone.com
Fabletics	fabletics.com	SET ACTIVE	setactive.co
Girlfriend Collective	girlfriend.com	SKIMS	skims.com
Gymshark	us.gymshark.com	Sweaty Betty	sweatybetty.com
Lululemon	shop.lululemon.com	Ten Thousand	tenthousand.cc
Under Armour	underarmour.com	Varley	varley.com
Vuori	vuoriclothing.com		