

SHOPVISION MARKET INTELLIGENCE

Beauty Black Friday Benchmark:

How 25 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?

Across 13 weeks of Q4 2025, ShopVision tracked every promotional move 25 of the most-watched beauty brands made — when they launched, how deep they went, which products they discounted, and the gift, loyalty, and email plays they used to pull the shopper in.

What follows is a peer-informed reference: a clear picture of what the market did, giving you the context to benchmark your timing, offers, and promotional strategy for Holiday 2026.

What we saw

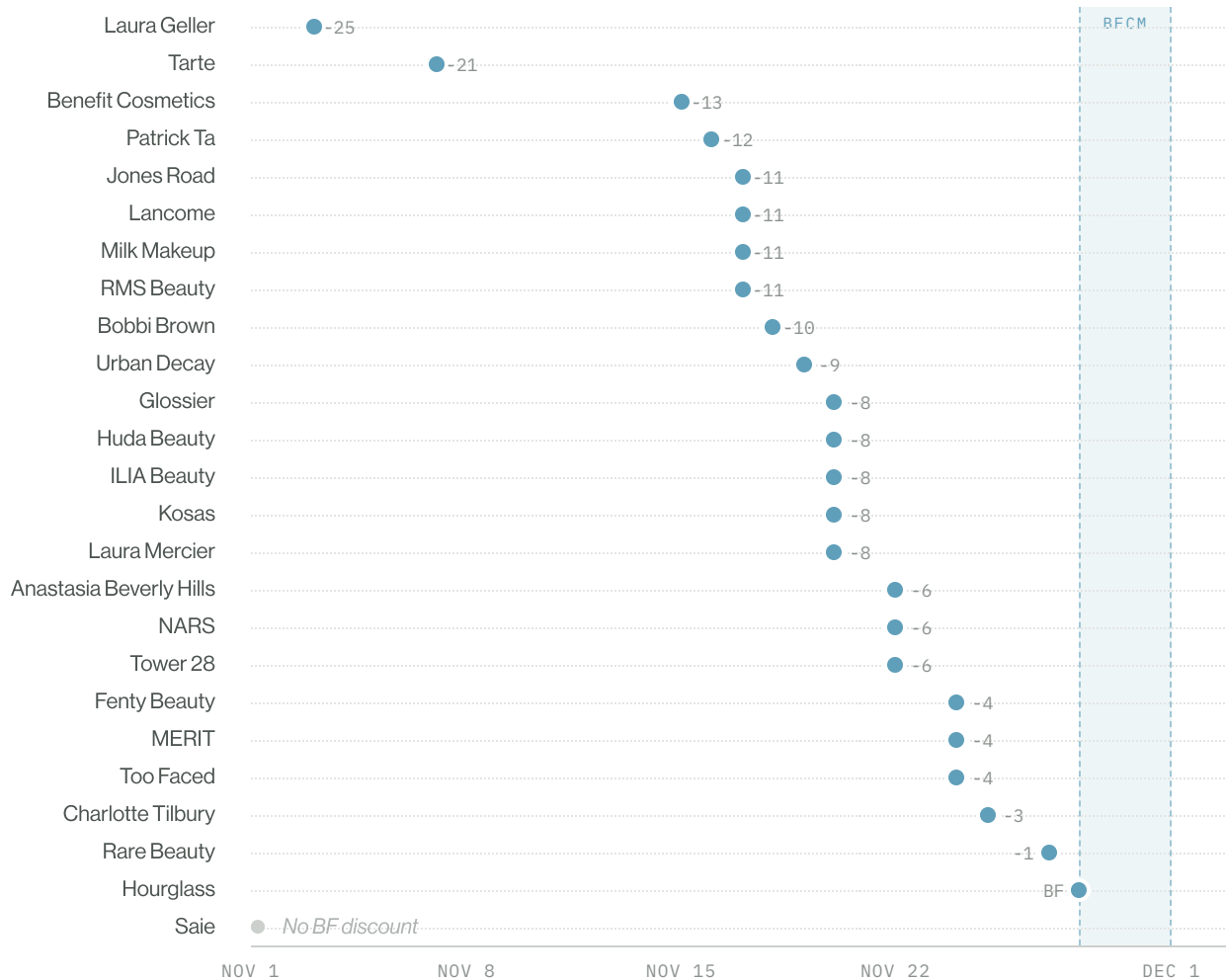
- **92% had a discount live before Black Friday, and half were live by Nov 20.** Laura Geller moved first with a Black Friday Preview on Nov 3 — Lancôme, Jones Road, and Milk Makeup were all live by Nov 17. No brand discounted in October.
- **92% ran a sitewide discount, and 84% paired it with a gift.** Beauty didn't choose between price and present. The gift-with-purchase stacked on top of the discount rather than replacing it.
- **Flat sitewide rates clustered at 20–30%, with 30% the common ceiling.** Brands advertising "up to 50–80%", like Huda's Cyber Craze and Laura Geller's stacked codes, were discounting select or aged stock, not the full catalog.
- **52% opened the sale behind a loyalty or VIP login first.** Glossier, ILIA, Fenty, Bobbi Brown, Patrick Ta, and Lancôme gave members the same rate days before the public. The gate bought early access, not a deeper price.
- **Gift-with-purchase was beauty's signature sweetener.** Free full-sizes, deluxe minis, and tiered gift ladders ran across nearly the whole set, stacked on top of the discount rather than standing in for it.
- **The deeper cuts ran on curated "select" edits, not categories.** Fenty's up-to-60% select and Urban Decay's 50%-off best-selling eye sat under a flat sitewide rate. Benefit's 50% off all brows was the one true category-wide cut.
- **Email cadence varied widely across the 2 weeks.** The heaviest senders pushed 40–50 emails over the window, many times the volume of the quiet end of the set.
- **After Christmas, almost no one went dark.** 20 brands opened a fresh post-Christmas sale at clearance depth, 6 launched or teased new product to re-engage, and only Huda Beauty and Jones Road sat it out.

25	13	9,000+	Q4 2025
BEAUTY BRANDS	WEEKS TRACKED	DATA POINTS ANALYZED	OBSERVATION WINDOW

When do beauty brands kick off Black Friday?

Most beauty brands launch their BFCM events well ahead of Black Friday, with first-mover Laura Geller starting Nov 3. Next was Tarte on Nov 7. The set went quiet again until Nov 15 and launched in a tight cluster from there: 5 brands went live on Nov 20 alone, 9 launched during Black Friday week, and Hourglass was the last to open, on Black Friday day itself.

23 of 25 beauty brands launched sitewide sales ahead of Black Friday



Each brand's sitewide sale-live date relative to Black Friday (Nov 28). The shaded band marks Black Friday through Cyber Monday (Nov 28 - Dec 1). Saie ran no BF discount and is shown as a holdout. Source: ShopVision.

Who moved first, and what they led with

- **Laura Geller (Nov 3).** The earliest move in the set, and one of the few that was fully public — a Black Friday Preview open to everyone, no login.
- **Tarte (Nov 7).** The second mover, gated to VIPs and built on value sets rather than a sitewide rate.
- **The mid-November wave (Nov 15–20).** After an 8-day lull, the set launched in volume. Benefit opened Nov 15, a cluster followed on Nov 17 (Jones Road, Lancôme, Milk Makeup, RMS), and the largest single day was Nov 20, when Glossier, Huda, ILIA, Kosas, and Laura Mercier all went live.
- **Black Friday week (Nov 22–27).** 8 more brands launched during the week, including NARS, Fenty, MERIT, Too Faced, and Charlotte Tilbury.
- **Black Friday day (Nov 28).** Hourglass was the last to open, going live with its 20%-off event on Black Friday morning.

What it tells us about timing the market

Early November was open space. After Tarte on Nov 7, no brand in the set launched a sale until Benefit on Nov 15. That gap lines up with the 2 events that owned the window — Sephora's Savings Event ran Oct 31–Nov 10 (up to 20% off for members) and Ulta's Hello Holidays ran Nov 8–11 (up to 40% off online).

Many brands here also sell through Sephora and Ulta, and it's notable that only 2 launched a sale that collided with a retailer event: Laura Geller and Tarte, both inside the Sephora window. No brand launched during Ulta Hello Holidays, and every other brand opened after both events had closed. The set ceded early November to the retailers and opened DTC once those events cleared, then landed in a dense cluster: Nov 20 was the single most crowded launch day of the season.

Members-only early access

Membership had its privileges for the 13 of 25 brands that gave loyalty a leg up on Black Friday. Bobbi Brown's BB Access ran the widest, 30% live Nov 18 against a Nov 23 public open, while Lancôme, Glossier, and Laura Mercier gave members a single day.

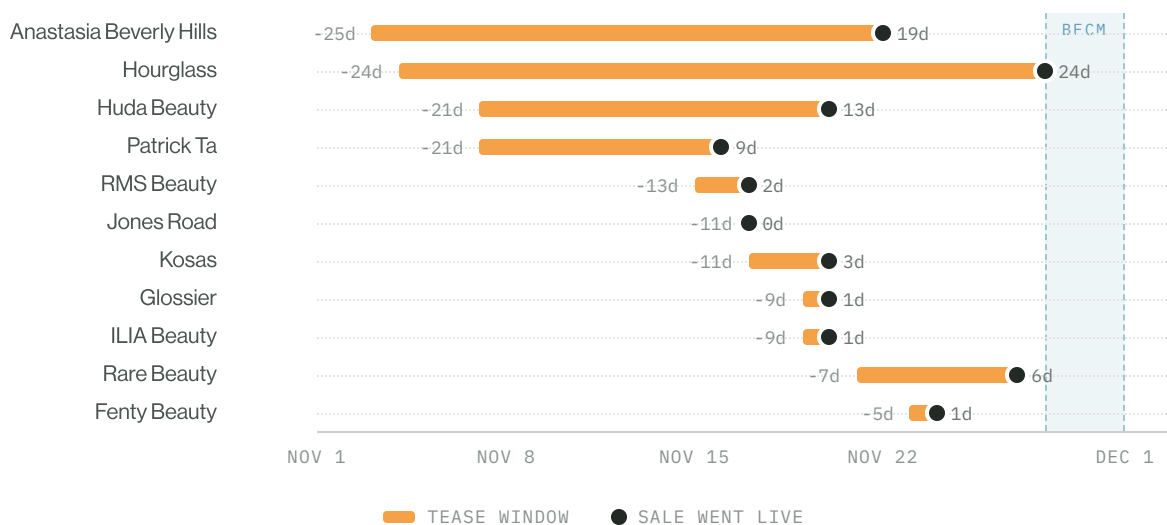
Saie switched up its strategy

Saie notably changed its 2025 event from sitewide (observed up to 2024) to "12 Days of Saie" — a daily gift-with-purchase offer on minimum spend. It will be interesting to watch if they stick with this approach in 2026, or revert back to the competitive norm.

How long do they tease before going live?

When sales is one question. When brands start talking about Black Friday is another. 11 of 25 brands ran a public Black Friday tease before launch — the other 14 launched cold.

Black Friday teasers: how early beauty brands started pre-promoting BFCM



Each brand's tease window, from its first Black Friday tease to sale-live. Source: ShopVision.

Who teased, and for how long

The longest teasers were not public "sale coming" warm-ups — they were VIP early-access sign-up drives. Hourglass ran the longest runway in the set, a 24-day email drip from Nov 4 inviting shoppers to sign up for early access, then opened on Black Friday day. Anastasia ran a 19-day homepage tease built around Cyber Week VIP access. Huda's Cyber Craze early-access tease ran 13 days. After those, teasers were short — most landed 1 to 3 days before launch and worked as launch alerts.

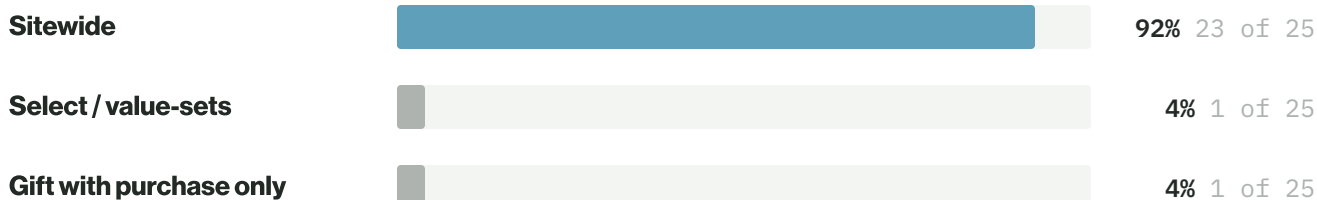
TAKE INTO 2026 PLANNING

- 1 When's your sale launch sweet spot?** Beauty didn't turn October into Black Friday, but most brands launched ahead of it: half the set was live by Nov 20, and several brands opened in the Nov 16–17 cluster. Is a later launch a margin-protecting move or a missed opportunity?
- 2 Are competitors stealing your thunder?** Teasing a sale early may not pull demand forward — but it sends a signal. Which messaging moments belong in your 2026 calendar?

The sitewide discount: one flat rate, capped at 30%.

23 of 25 ran a sitewide discount for Black Friday — the two that held back ran value sets or gifts instead of cutting the full price.

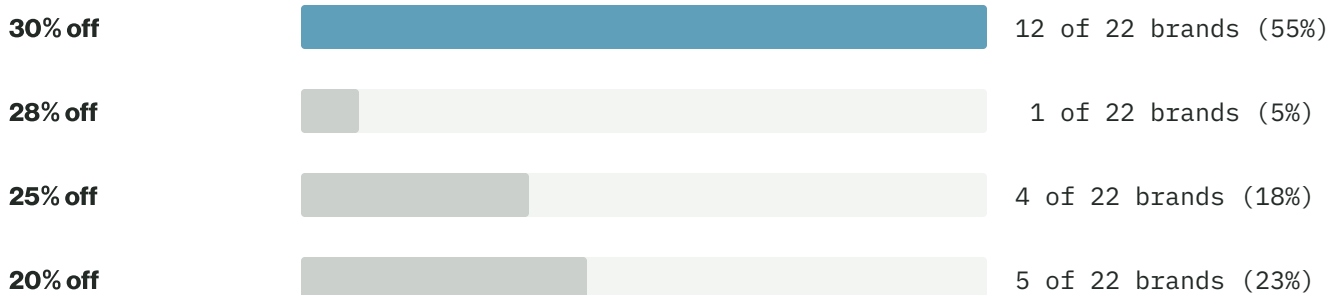
92% of beauty brands ran sitewide discounts for Black Friday 2025



Each brand's primary Black Friday discount mechanic, counted once per brand across the 25-brand set. Source: ShopVision.

Sitewide offers stuck to a tight band: 55% of participating brands ran 30% off everything, with no brand pushing higher.

30% was the modal sitewide rate among beauty brands for Black Friday 2025



The flat sitewide rate each brand ran, for the 22 brands with a single headline rate. Tiered and select-only rates are not counted. Source: ShopVision.

The deeper headlines

Some brands sweetened their sitewide offers with additional cuts — 50%, 60%, and 80% figures on select items.

- **Laura Geller.** Stacked an extra 15% on up-to-75%-off markdowns.
- **Huda Beauty.** Headlined "up to 80%" while bestsellers carried 30% and new arrivals 15%.
- **Fenty.** Ran up-to-60% on top of a flat 30%.

Read across the whole set, 30% was the hard ceiling on any rate applied to the full catalog.

For a few, the member rate ran deeper

Members almost always got the same rate as the public, just earlier. A few brands rewarded loyalty with deeper discounts. Tarte gave VIPs an extra 10% on top of the public offer, the one explicitly member-only price in the set. Anastasia and Laura Mercier let members in at 30% versus the public 25%. Beyond price, Benefit rewarded members with tiered bonus points, 2x to 6x by status, on Black Friday and Cyber Monday.

Every brand's headline sitewide offer

Brand	Headline offer
Anastasia	30% off sitewide, 25% public Cyber Week
Benefit	30% off sitewide + free shipping
Bobbi Brown	30% off sitewide (up to 50% Nov 25–30)
Charlotte Tilbury	25% off everything with \$85+
Fenty	30% off sitewide (60% select Nov 28)
Glossier	Up to 30% off (\$100+), 25% public
Hourglass	20% off everything
Huda	Cyber Craze, up to 80% off (bestsellers 30%, new 15%)
ILIA	25% off everything + 3 free gifts with \$125+
Jones Road	First-ever sitewide, 10/15/20% (tiered to 25%)
Kosas	Extra 25% off sitewide
Lancôme	30% off sitewide (to 50% Nov 25–29)
Laura Geller	Up to 65% off everything + extra 15%
Laura Mercier	30% off sitewide (25% public)

Brand	Headline offer
MERIT	20% off everything + free full-size with every order
Milk Makeup	30% off sitewide (50% select)
NARS	25% off sitewide, 30% off \$150+ (to 50% Nov 25)
Patrick Ta	20% off sitewide
Rare Beauty	20% off sitewide (and daily free gift)
RMS	Up to 30% off sitewide (tiered)
Too Faced	30% off everything (up to 50% select)
Tower 28	28% off sitewide
Urban Decay	30% off sitewide (50% select)

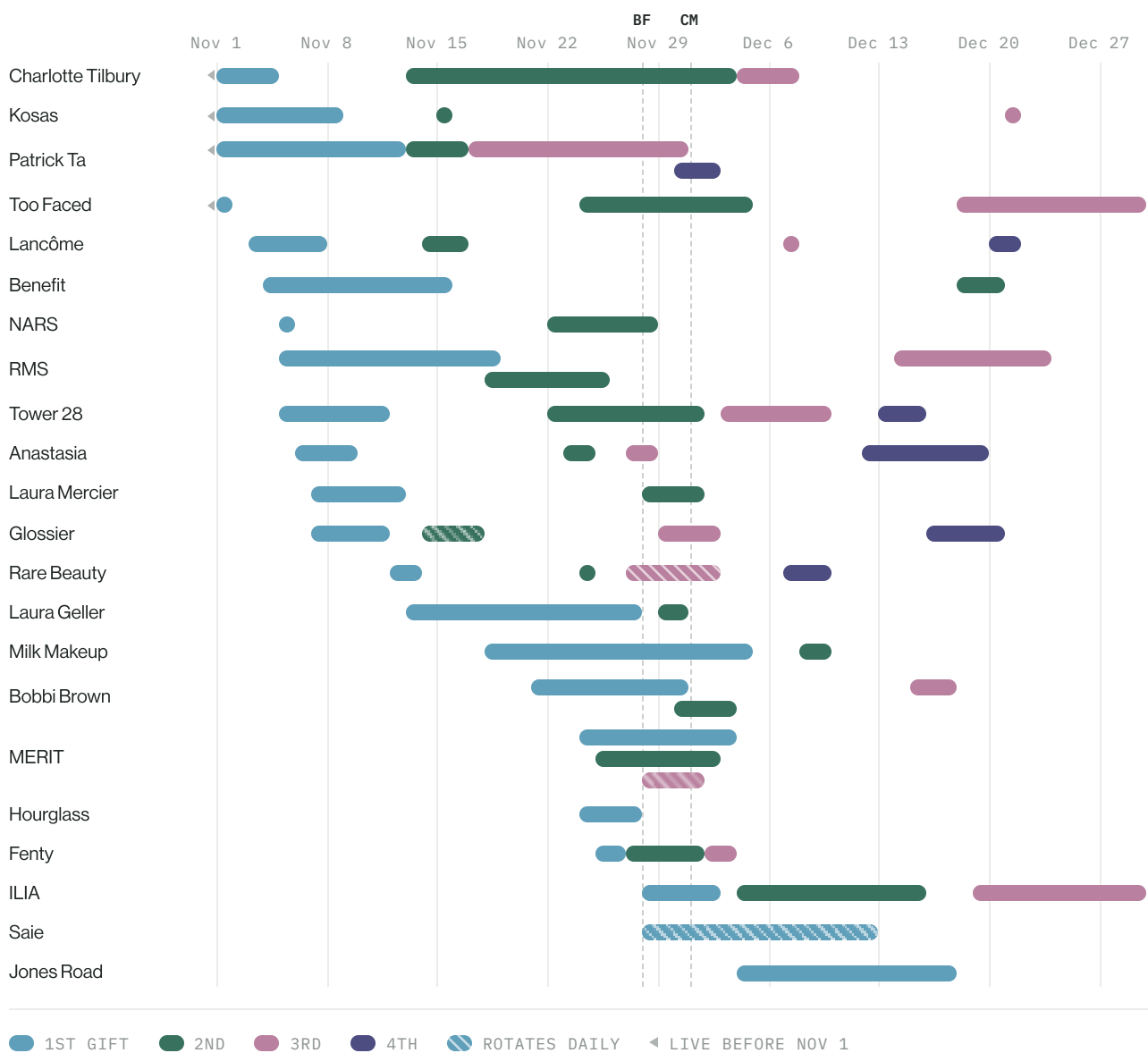
TAKE INTO 2026 PLANNING

- 1 Is 30% your 2026 offer?** If yes, you're in line with the majority of the market. But additional deals on select items can make your headline pop relative to your peers.
- 2 Do members get a better price, or an earlier one?** Almost every brand gave members the same rate, sooner — only a few reserved a deeper number for members. If you discount harder for members, you are an outlier in this set, where the member benefit was overwhelmingly access. The question is whether your loyalty tier earns a deeper rate, or competes on timing alone.

GWP: 22 brands offered at least one. 21 stacked gifts on top of sitewide offers.

Beauty's Black Friday was a discount and a gift, run together. 21 of 25 brands stacked a gift-with-purchase on the same order as their sitewide rate, not as an alternative to it. The gift was a second deal, gated and tiered as deliberately as the discount.

How beauty's gift-with-purchase offers moved across Black Friday 2025



Each pill is a distinct gift offer. A color change marks a swap to a new gift. Hatched pills rotated the gift daily. Arrows mark gifts already live before Nov 1. Source: ShopVision.

Most brands ran a sequence, not a gift

The first thing the timeline shows is motion. Of the 22 brands that ran a gift, 19 ran more than one — they swapped the gift, moved the threshold, or ran it in waves across the window. Saie ran a single program that swapped the gift every day for 12 days. Hourglass and Jones Road were the exceptions that ran one gift and held it, and Jones Road's did not go live until after Black Friday. For most of the set the gift was not a banner a brand put up and left. It was a rotation.

That rotation is where the sharper tactics sit:

- **Patrick Ta** held one structure — 2 gifts above a spend threshold — from late October through Cyber Monday, stepping it from \$100 to \$150 and changing the actual gifts underneath it 3 times.
- **Glossier** rotated a different mini through mid-November, then a fresh set again over Cyber weekend.
- **MERIT** stacked 3 gifts at the same time: a card case with every order, a signature bag with every first order, and a rotating full-size on top.

What the gift is 'giving'

Read the thresholds and the gift stops looking like a giveaway. It was pointed at 3 different jobs, and the threshold tells you which one.

- **Engineer the basket.** The spend ladders used the gift to pull order value up. Charlotte Tilbury at \$110 / \$160 / \$225, Fenty at \$75 then \$125, NARS at \$100 then \$125, Too Faced at \$50 then \$85 — each tier bought a bigger gift.
- **Buy the customer.** At the other end, the gift carried almost no spend bar. MERIT gave one with every order. Saie's started at \$30, Laura Geller's at \$55, and RMS ran free samples on every order with no minimum at all.
- **Earn the return visit.** The rotators — Patrick Ta, Glossier, Anastasia, Saie, each with up to 4 distinct gifts — used the gift to manufacture a reason to come back.

Minis were the most common GWP

55% of the gifts were samples or minis, 18% a full-size product. Samples and minis are table-stakes. Here's where brands went "full-on":

- **MERIT.** A free full-size Flush Balm.
- **Milk Makeup.** A mini paired with a full-size Lip + Cheek.
- **ILIA.** A 3-piece gift with a stated \$100 value.
- **Charlotte Tilbury.** A full-size Beauty Light Wand, not a deluxe sample of one.

The third mechanic: the hard good keepsake

The keepsake hard good was the gift for 27% of brands — a pouch, tote, or bag, usually above a higher spend threshold: Tower 28's mini tote, NARS's exclusive pouch, MERIT's signature bag, Rare Beauty's puffy tote, Glossier's beauty bag.

Every brand's gift-with-purchase

Brand	Gift offers	Dates observed
Anastasia	Free 2 deluxe lip liners with \$75+	Nov 6–Nov 9
	Free 3 lip glosses + beauty bag with \$75+	Nov 23–Nov 24
	Free Mini Modern Renaissance kit with \$75+	Nov 27–Nov 28
	Free gift with \$55+	Dec 12–Dec 19
Benefit	4 free deluxe samples + pouch with \$85+	Nov 4–Nov 15
	Free faux fur pouch with \$65+	Dec 18–Dec 20
Bobbi Brown	Free 5-piece gift set with \$90+ (BB Access, then public)	Nov 21–Nov 30
	Free full-size skincare with \$120+	Nov 30–Dec 3
	Free mini bestsellers duo + pouch with \$90+	Dec 15–Dec 17
Charlotte Tilbury	Free mini skincare duo with \$100+	Oct 31–Nov 4
	Tiered gift: 1 with \$110, 2 with \$160, 3 with \$225	Nov 13–Dec 3
	Free Spotlight wand with 2 Holiday Tricks	Dec 4–Dec 7
Fenty	Free 3-piece gift with \$125+ (early access)	Nov 25–Nov 26
	4-piece with \$75+, 6-piece with \$125+ (Cyber Week)	Nov 27–Dec 1
	Free travel bag with \$125+	Dec 2–Dec 3
Glossier	Free Red Mini Beauty Bag with \$100+	Nov 7–Nov 11
	Free daily mini with \$75+ (Boy Brow, Lip Gloss, You)	Nov 14–Nov 17
	Free gift with \$100+ (Cloud Paint, Ultralip, You Candle)	Nov 29–Dec 2
	Free Crème de You with \$100+	Dec 16–Dec 20

Brand	Gift offers	Dates observed
Hourglass	Free deluxe sample with \$65+	Nov 24–Nov 27
ILIA	3 free gifts (\$100 value) with \$125+	Nov 28–Dec 2
	Free full-size with \$75+	Dec 4–Dec 15
	Free full-size with \$75+	Dec 19–Dec 29
Jones Road	Free Reusable Eye Mask with \$85+	Dec 4–Dec 17
Kosas	Free makeup bag with holiday sets	Oct 30–Nov 8, Nov 15, Dec 21
Lancôme	Free gift with purchase	Nov 3–Nov 7
	Complimentary samples	Nov 14–Nov 16
	Complimentary samples	Dec 7
	Free samples + engraving	Dec 20–Dec 21
Laura Geller	Free gift with \$55+ (corduroy bag)	Nov 13–Nov 27
	Free gift with \$55+ (mini kajal)	Nov 29–Nov 30
Laura Mercier	Free gift with \$85+ (early)	Nov 7–Nov 12
	Free 6-piece gift with \$95+	Nov 28–Dec 1
MERIT	Free Card Case with every order	Nov 24–Dec 3
	Free Signature Bag with first order	Nov 25–Dec 2
	Free daily full-size (Shade Slick, Flush Balm)	Nov 28–Dec 1
Milk Makeup	Free mini setting spray + full-size Lip + Cheek with \$75+	Nov 18–Dec 4
	Free Day-4 KUSH mini with \$50+	Dec 8–Dec 9
NARS	Free gift with purchase (early access)	Nov 5
	4 free minis with \$100+, exclusive pouch with \$125+	Nov 22–Nov 28

Brand	Gift offers	Dates observed
Patrick Ta	2 free gifts with \$100+	Oct 27–Nov 12
	2 free gifts with \$150+ (gloss + beauty bag)	Nov 13–Nov 16
	2 free gifts with \$150+ (lip crayon + gloss)	Nov 17–Nov 30
	2 free gifts with \$150+ (gloss + mini tote)	Nov 30–Dec 2
Rare Beauty	Free sample with minis purchase	Nov 12–Nov 13
	Free Puffy Essentials Pouch with \$75+	Nov 24
	Free pouch with \$75+, tote with \$125+, daily surprise	Nov 27–Dec 2
	2 free deluxe samples with \$50+	Dec 7–Dec 9
RMS	Free samples with every order	Nov 5–Nov 18
	Free Mini Cashmere Eyelights Trio + brush with \$75+	Nov 18–Nov 25
	Free gifts on select orders	Dec 14–Dec 23
Saie	12 Days of Saie: daily rotating deluxe sample, \$30+ / \$50+ / \$75+	Nov 28–Dec 12
Too Faced	Free Ribbon Lash mini with \$50+	Oct 30–Nov 1
	Free mini mascara + balm with \$50+, bag with \$85+	Nov 24–Dec 4
	Free mini mascara + balm with \$65+	Dec 18–Dec 29
Tower 28	Free Travel SOS Cream with \$60+	Nov 5–Nov 11
	Free Mini Tote (\$24 value) with \$79+	Nov 22–Dec 1
	Free Travel SOS Cream with \$60+	Dec 3–Dec 9
	Free Mini Tote (\$24 value) with \$79+	Dec 13–Dec 15

BOGO: almost no-show

Only 4 brands ran a true buy-one-get-one — free full-size product, not a % off a second item. None stacked it on their sitewide rate. Anastasia and Charlotte Tilbury ran theirs in the days before Black Friday, ending as the sitewide opened. RMS and Tower 28 ran theirs after the sale closed. A buy-one-get-one is effectively half off the pair, too

deep to layer on a 30% rate, so each kept it as a separate moment.

Brand	Offer	Dates observed	Vs sitewide
Anastasia	Buy one, get one free, mix-and-match heroes	Nov 18 – Nov 22	Before the sale
Charlotte Tilbury	Buy one, get one free on select duos	Nov 19 – Nov 25	Before the sale
RMS	Buy one, get one free, mix-and-match selects	Dec 8 – Dec 15	After the sale
Tower 28	Buy 2, get 1 free on select holiday sets	Dec 9 – Dec 13	After the sale

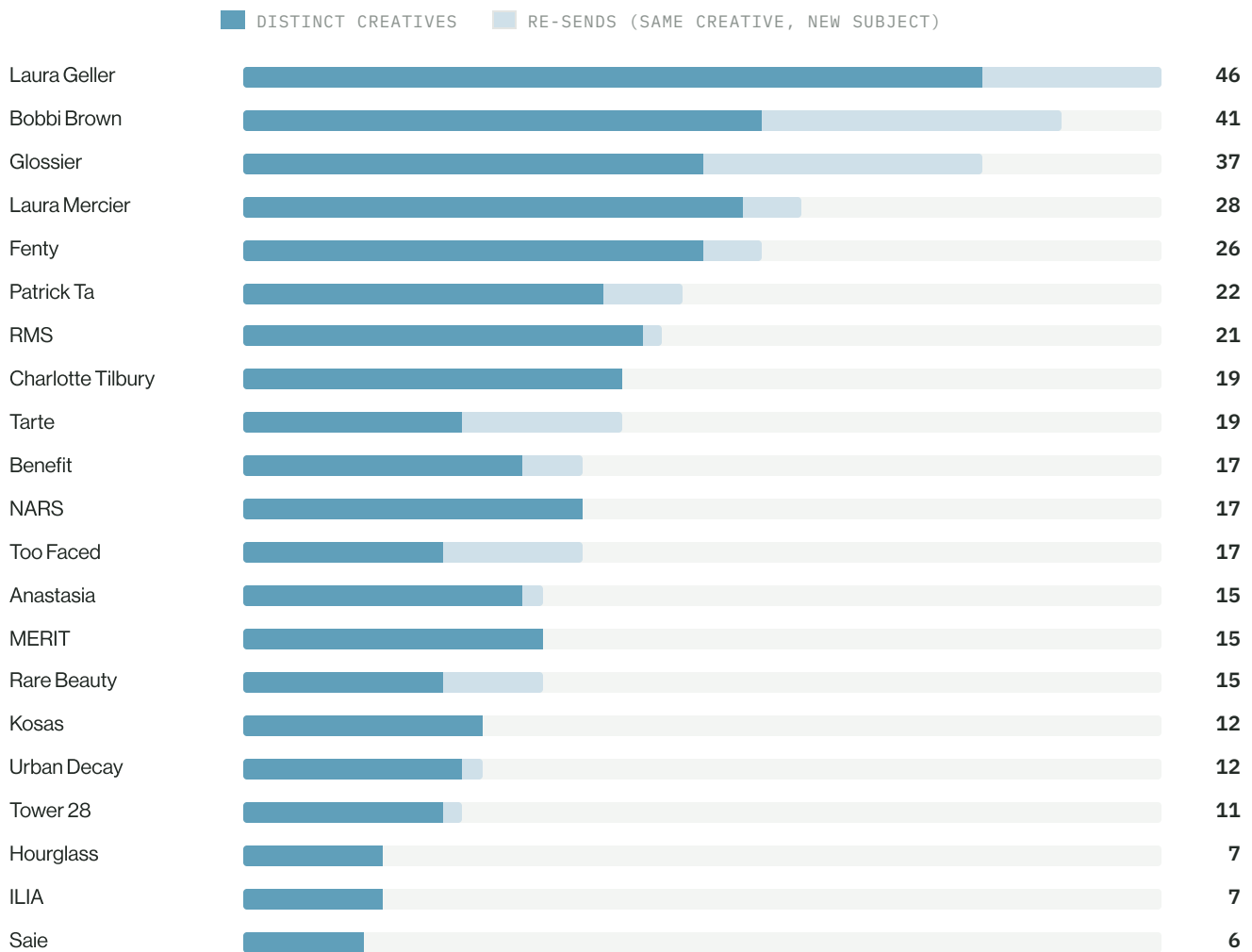
TAKE INTO 2026 PLANNING

- **GWP sweetens sitewide offers.** 84% of brands stacked gifts with their Black Friday discounts, allowing both benefits on a single order. In a market where every brand is shaving 30% off, the value-added bonus is becoming the new competitive standard.

The Black Friday inbox: daily sends are the norm.

Beauty brands sent 410 emails across the Black Friday band (November 19–December 2). We tracked both distinct campaigns and re-send to non-opener behavior. 14 of 21 brands sent at least one nudge — Laura Geller re-sent on the tightest cadence in the set, as little as 3 hours apart.

Beauty Black Friday 2025 email volume: new creative versus re-sends



Distinct email campaigns per brand (Nov 19 — Dec 2). 21 of 25 brands shown. Source: ShopVision.

Milk Makeup, Lancôme, Jones Road, and Huda Beauty excluded.

Across the set, 82% of sends were new creatives and 18% were re-sends, and the mix swung hard by brand.

Where the sending heat landed

Unsurprisingly, email sends by brand were hottest across the Cyber 5. A competitive inbox spurred some brands to schedule multiple campaigns per day with distinct creative (Laura Mercier, Fenty, and Charlotte Tilbury), or to push re-sends to non-openers at regular intervals (Tarte, Rare Beauty, and Too Faced).

Beauty Black Friday 2025 email sends by day

	19	20	21	22	23	24	25	26	27	BF 28	29	30	CM 1	2	TOT
Laura Geller	2	3	3	3	3	3	2	2	4	5	3	5	5	3	46
Bobbi Brown	1		2	1	3	4	2	4	4	4	5	4	3	4	41
Glossier	1	2	3	2	3	3	3	3	3	3	3	2	3	3	37
Laura Mercier	2	2	1	2	2	2	2	2	2	3	2	2	3	1	28
Fenty	1	1	1	1	1	2	3	2	2	3	2	2	3	2	26
Patrick Ta	1	2	2	1	1	2	3	1	1	1	2		3	2	22
RMS	1	1	2	1	1	2	1	1	1	1	2	3	3	1	21
Charlotte Tilbury	1	1	1	1	1	1	1	2	1	2	2	2	1	2	19
Tarte	1				1	1	2	2	2	2	2	2	2	2	19
Benefit	1	1	1	1	1	1	1	1	1	1	2	2	1	2	17
NARS	1	1		1	1	1	2	1		1	1	2	2	3	17
Too Faced	1	1			1	1	1	1	1	2	2	2	2	2	17
Anastasia	1	1		2	1	1			1	1	3	1	2	1	15
MERIT						1	1	1	2	3	2	2	1	2	15
Rare Beauty		1			1			1	2	2	2	2	2	2	15
Kosas		1	1	1	1	1	1	1	1	1		1	2		12
Urban Decay	1		1	1	1	1	1		1	1	1	1	1	1	12
Tower 28				1	1	1	1	1	1	1	1	1	1	1	11
Hourglass			1				1			1		2	1	1	7
ILIA	1	1	1								3		1		7
Saie		1			1				1	1			1	1	6
INBOX TOTAL	17	20	20	19	25	28	28	26	31	39	40	38	43	36	410
1 2 3 4 5 EMAILS / DAY															

Distinct email campaigns per brand per day, Nov 19 — Dec 2. Source: ShopVision.

A closer look at the heat

The inbox peaked on Cyber Monday (43 sends) and Black Friday (39), against 17 the day the window opened. Behind the busiest rows:

- **Laura Mercier.** A product-deal email plus a separate sitewide creative on 12 of 14 days, different each time.
- **Fenty.** Staged tiers within a day — an early-access creative, then a separate deeper-discount push — up to 3 distinct campaigns in a day (Nov 25).
- **Charlotte Tilbury.** A distinct creative for every send and never a repeat — all 19 were new.

- **Tarte.** One "up to 80% off" creative re-sent twice a day for 5 straight days, a fresh subject each time.
 - **Rare Beauty.** A near-mechanical re-send about 17 hours apart, daily, rotating the featured product.
 - **Too Faced.** The same creative re-sent about 18 hours later, on the peak days.
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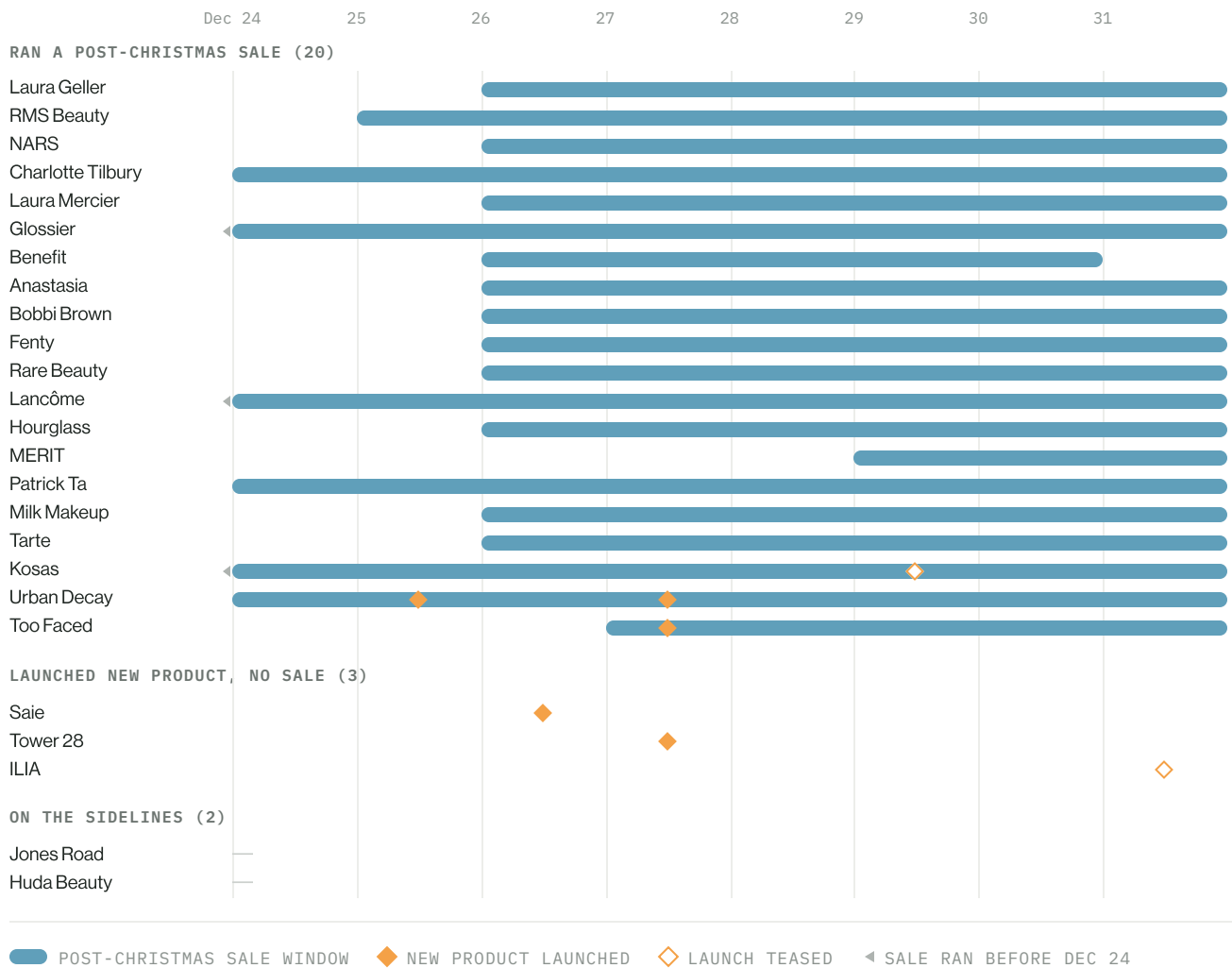
TAKE INTO 2026 PLANNING

- **Will your email playbook change?** Now that you see the market head-to-head, where do you want to compete harder for the inbox? If you're not sending daily, you're behind the pack.

The post-Christmas promotional wave.

After Christmas, almost no one went dark. 23 of the 25 brands stayed active between December 24 and 31, with 20 opening a fresh post-Christmas sale, often deeper than Black Friday, and 6 launching or teasing new products. Only Huda Beauty and Jones Road sat on the sidelines.

Post-Christmas promotions by beauty brands, Dec 24 – 31, 2025



Post-Christmas sale window and new-product launches per brand, Dec 24 – 31. Source: ShopVision.

Deeper headline discounts

Where November sitewide rates capped at 30%, these were clearance events: Tarte to 80%, Laura Geller and Patrick Ta to 75%, Too Faced to 60%, with Anastasia, Milk, and NARS up to 50%. Many carried their own identity, from RMS opening a Friends & Family event on Christmas Day to Milk opening the Vault, NARS running a Year-End Sale, and Too Faced its signature Pink Bag Sale.

Sliding into Spring

6 brands used the final week to put new product in front of the shopper instead of, or alongside, a markdown. Saie ran a 2-day teaser into a Dec 26 CitySet setting spray launch, Tower 28 introduced Bleach Bath skincare, Urban Decay dropped Tube Job mascara and the 24/7 Liquid Stick, and Too Faced debuted its Super Glow skin enhancer. Others were teasers planting a January drop, like ILIA's Overglaze gloss and Kosas's Wet Glisten highlighter.

Brand	Sale event	New product	Window	Scope / headline
Charlotte Tilbury	Beauty Secrets	—	Dec 24–31	Select kits & beauty secrets, up to 30%
Patrick Ta	End-of-year	—	Dec 24–31	Sitewide, up to 75% off
Urban Decay	Get More, Save More	Tube Job + 24/7 Liquid Stick (launch week)	Dec 24–31	Up to 30% + 40% off sets
RMS Beauty	Friends & Family	—	Dec 25–31	Sitewide 20%; holiday bundles to 75%; Secret Stash 30%
Benefit	Weekend offer	—	Dec 26–30	Sitewide threshold, up to \$30 off \$100+
Laura Geller	New Year countdown	—	Dec 26–31	Sitewide, up to 75% off + New Year code
NARS	Year-End Sale	—	Dec 26–31	30% off holiday + up to 50% off Last Chance
Laura Mercier	End-of-year	—	Dec 26–31	Sale items, 50% off
Anastasia	Winter Sale	—	Dec 26–31	Select (palettes), up to 50% off
Bobbi Brown	25% off sitewide	—	Dec 26–31	25% sitewide, up to 50% off select
Fenty	Get More, Save More	—	Dec 26–31	Tiered to 30% + 40% off select sets

Brand	Sale event	New product	Window	Scope / headline
Rare Beauty	Holiday sets	—	Dec 26–31	30% off select holiday sets
Hourglass	NYE sale	—	Dec 26–31	Sitewide, up to 75% off + code (site only)
Milk Makeup	Vault Sale	—	Dec 26–31	LE/discontinued, up to 50% off
Tarte	New Year Sale	—	Dec 26–31	Sitewide, up to 80% off
Saie	—	CitySet Setting Spray (Dec 26)	—	—
Too Faced	Pink Bag Sale	Super Glow Skin Enhancer (Dec 27)	Dec 27–Jan 4	Sitewide, up to 60% off
Tower 28	—	Bleach Bath skincare (Dec 27)	—	—
MERIT	Year-end	—	Dec 29–31	Up to 75% off + extra 15% (code)
ILIA	—	Overglaze gloss (teased Dec 30)	—	—
Glossier	End of Season	—	through Dec 31*	Select favorites, up to 50% off
Lancôme	Holiday gift sets	—	through Dec 31*	Gift sets, 25% off in cart
Kosas	Holiday sets	Wet Glisten (teased, Jan 6)	through Dec 31*	Holiday sets, up to 45% off
Jones Road	—	—	—	No promotion or launch
Huda Beauty	—	—	—	No promotion or launch

* Sale was already running before Dec 24 and continued into the window.

TAKE INTO 2026 PLANNING

- **Shaping the Q5 calendar.** The last week of the year — often called "Q5" — is just as promotionally active as BFCM. If the market replays the 50–75% off headline, will your offer stand out in the inbox?

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 benchmark was built.

Peer set. 25 leading beauty brands: Anastasia Beverly Hills, Benefit Cosmetics, Bobbi Brown, Charlotte Tilbury, Fenty Beauty, Glossier, Hourglass, Huda Beauty, ILIA Beauty, Jones Road, Kosas, Lancôme, Laura Geller, Laura Mercier, MERIT, Milk Makeup, NARS, Patrick Ta, Rare Beauty, RMS Beauty, Saie, Tarte, Too Faced, Tower 28, Urban Decay.

Window. Oct 1 to Dec 31, 2025. The Black Friday event window is Nov 19 to Dec 2, with Black Friday Nov 28 and Cyber Monday Dec 1.

Classification. Every promotional event was read from the brand's own public copy and classified into a beauty mechanic taxonomy: sitewide, category, select-products, spend-threshold, gift-with-purchase (split by gift type), holiday set, bundle, and loyalty-gated. Value-set and compare-at SKUs sold at a fixed price all season are treated as merchandising and excluded from sale-event counts.

Timing. First-move and sale-live dates are cross-referenced across 3 signals: the promotional record, present-tense email subject lines, and the homepage banner. A discount counts as live only when the offer was accessible, including to a member or VIP segment.

Coverage. 4 brands excluded from the email-volume chart for the window — see send-volume footnote.