

SHOPVISION MARKET INTELLIGENCE
REPORT

Outdoor & Technical Apparel 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?

Across 13 weeks of Q4 2025, we tracked every promotional move 19 outdoor and technical apparel brands made — when they launched, how deep they went, which products they discounted, and the mechanics they used to pull the shopper in. It's a peer-informed playbook to carry into your own 2026 planning.

What we saw

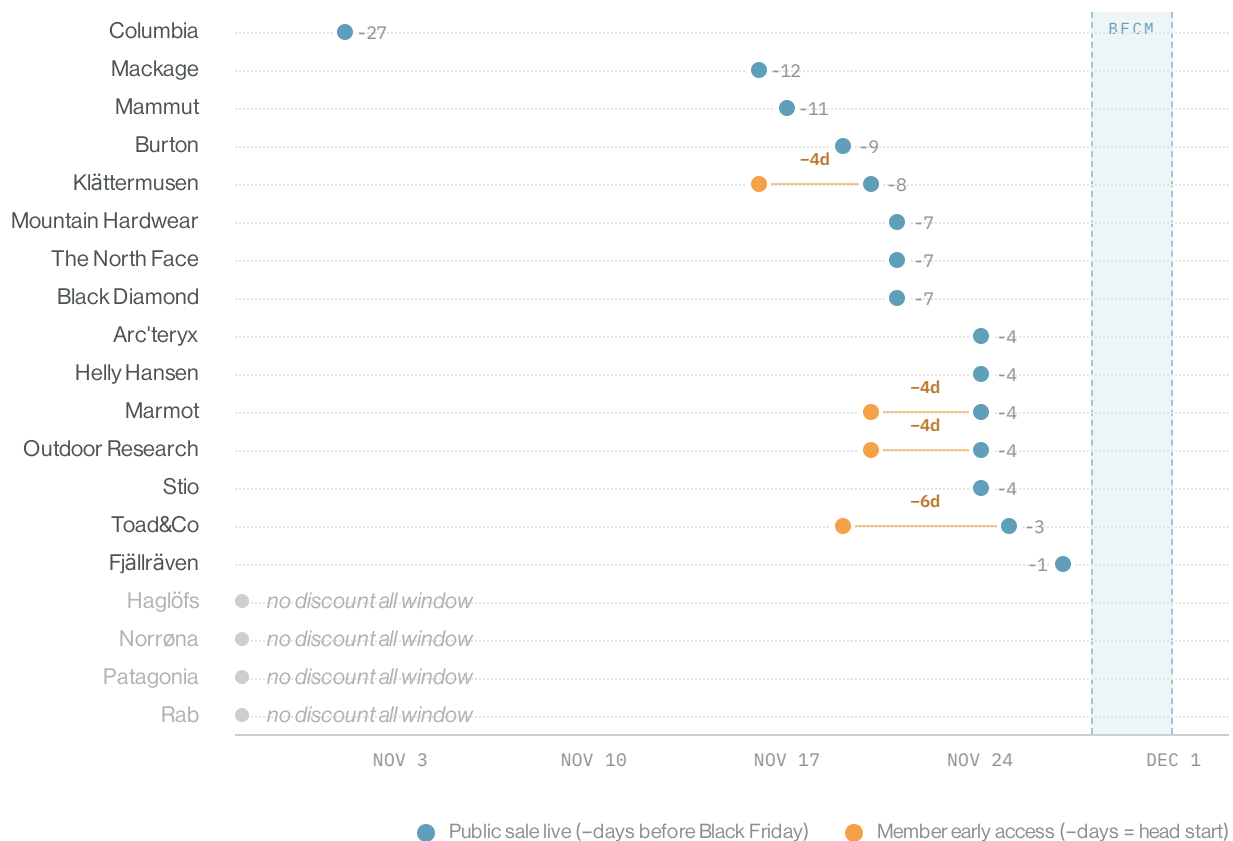
- **Only 1 of 19 brands discounted before mid-November.** Columbia opened "Early Black Friday" on Nov 1. The rest of the field clustered into Black Friday week.
- **Just 4 brands ran a real sitewide rate.** 11 of 19 led with "up to / select" instead — the ceiling, not the store-wide cut, was the market default.
- **Flat sitewide rates clustered at 25%.** "Up to 40%" reached deeper only on select stock.
- **Norrøna, Patagonia, Rab, and Haglöfs ran no discount at all,** 3 of them publishing explicit anti-Black Friday editorials — the clearest premium hold in the set.
- **Past-season stock was the real depth lever.** Brands protected current-season pricing and pushed "up to 50%" onto last year's gear. Marmot even held current snowsports at 20% under a 30% headline.
- **6 brands gated the holiday through membership,** and 5 stacked a code on an already-marked price — depth without a deeper published rate.
- **Stio ran its sale as 24-hour daily drops,** part of a flash-heavy pattern. The flash concentrated on and after Cyber Monday.
- **The inbox was packed: 137 sends across 19 brands in 6 days.** Columbia, Black Diamond, and Toad&Co led, peaking at 27 on Cyber Monday.
- **42% of brands kept promotions going after Christmas,** splitting between clearance up to 60% and clean new-year resets.

19	13	9,500+	Q4 2025
OUTDOOR APPAREL BRANDS	WEEKS TRACKED	DATA POINTS ANALYZED	OBSERVATION WINDOW

79% of brands launched their sale before Black Friday.

Black Friday, for most of this field, started before Black Friday. 15 of 19 brands were live before the day itself — and several opened earlier still for members, the same sale, days ahead of the public.

15 of 19 outdoor apparel brands launched their sale before Black Friday 2025



Each brand's first Black Friday-framed sale by launch date. Source: ShopVision.

Who moved first

The early movers were legacy and challenger alike, and they ran live prices rather than save-the-date banners.

- **Columbia (Nov 1).** An "Early Black Friday" up to 40% off select, nearly 3 weeks ahead of the field and the earliest holiday-framed discount in the set.
- **Toad&Co (Nov 15).** A BOGO on Mission Ridge pants opened the season, ahead of its main Gift Good Sale.

- **Mackage (Nov 16).** A "Seasonal Sale" up to 40% off, live under no Black Friday branding.
- **Mammut (Nov 17).** A 30%-off-sitewide code (SHOPFIRST) in the pre-Black-Friday window.

The weight of the market landed Nov 21–24, and Fjällräven held until Black Friday itself.

Members got the head start

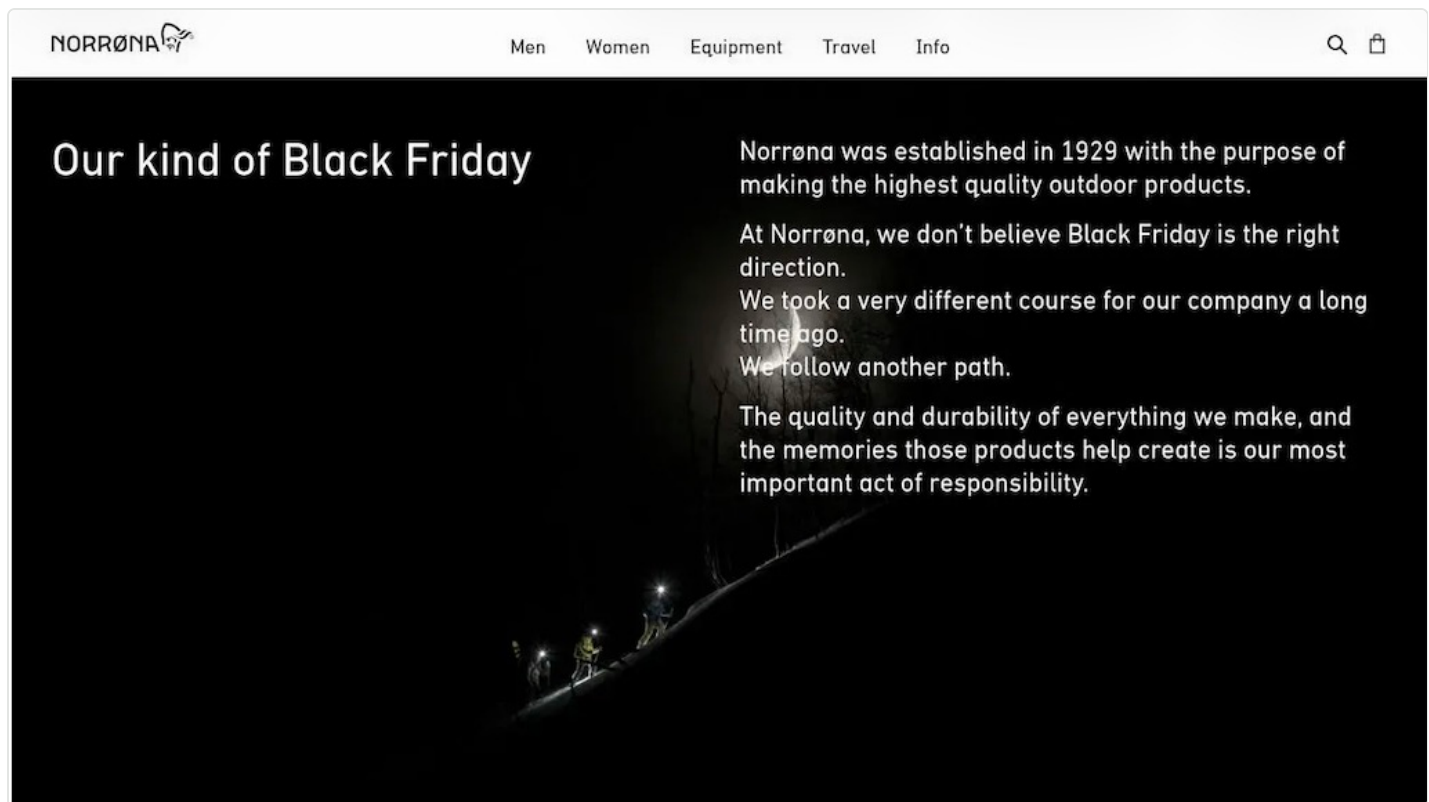
Several brands opened the same sale to members before the public, the orange leg-up on the chart:

- **Toad&Co — 6 days.** The longest member runway in the set, opening the Gift Good Sale nearly a week before the public date.
- **Klättermusen — 4 days.** Members-first entry to the Archive Sale, ahead of the public window.
- **Marmot — 4 days.** Rewards-tier early access, 4 days before the public 30%.
- **Outdoor Research — 4 days.** Members got first dibs 4 days ahead, through the email tier.
- **Burton — same day.** Flipped First Chair early access and the public sale on the same date, a members badge, not a head start.

And the brands that didn't discount

4 of 19 ran no Black Friday discount at all, and 3 said so out loud:

- **Norrøna.** Replaced its Black Friday homepage with an editorial rejecting the day and ran the "3.2.1. Dropping." Iofoten Porsche Edition as its whole Q4 story — no sale banner appeared all window.
- **Patagonia.** Kept its "Our Black Friday" stance and Outlet-only clearance, and made a Cyber Monday "2045 future arrivals" product tease its headline instead of a discount.
- **Rab.** Held its product hero across Black Friday and Cyber Monday with no on-page offer — a launch sequence, not a sale.
- **Haglöfs.** A decade of opposing Black Friday — its homepage gave the day "the cold shoulder yet another year," and a live explainer held store-wide prices unchanged with no additional discount. Its only markdown, 20% off accessories and tees, went to email subscribers, never posted publicly.



Norrøna's anti-Black Friday homepage, captured November 28, 2025: a brand stance in place of a sale.

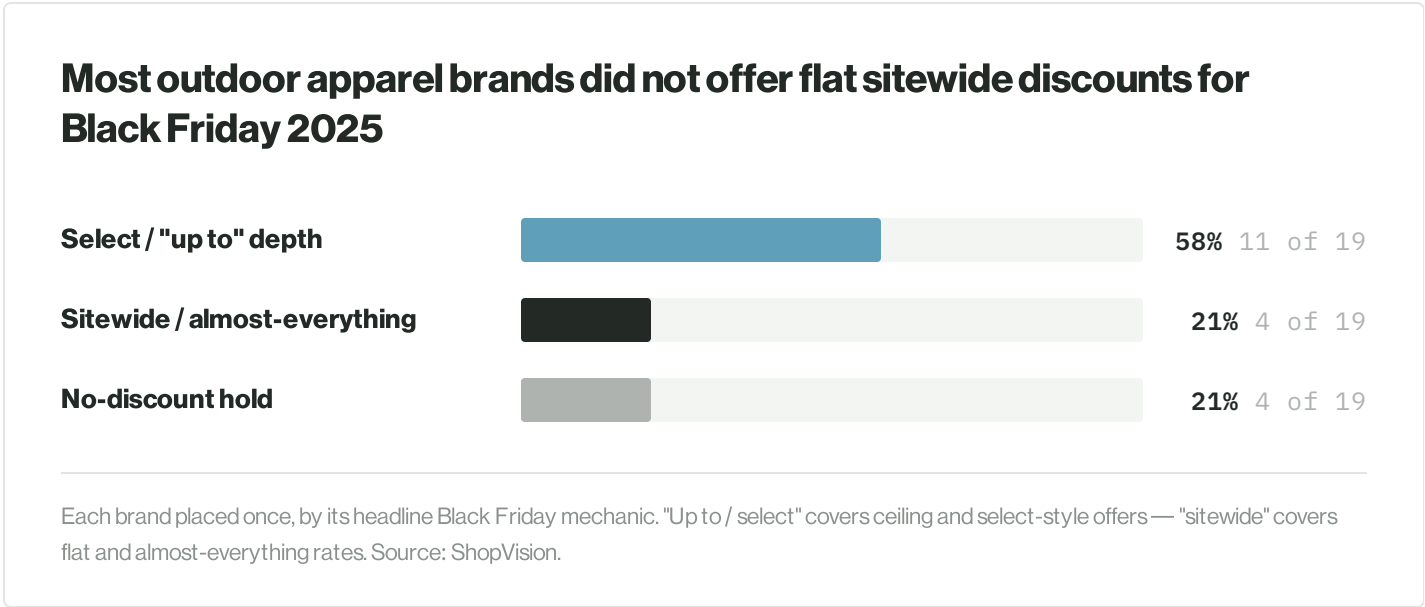
2 more discounted but refused the Black Friday label outright — Klättermusen ("Archive Sale") and Mackage ("Seasonal Sale"). Nearly a third of the set declined to compete on the Black Friday number as stated.

TAKE INTO 2026 PLANNING

- 1 When do you flip the switch?** The pre-November window stayed open in 2025, only 1 of 19 peers moved into early November. The question is whether owning that quiet air wins enough early demand to be worth it, or whether the season still concentrates tightly enough in Black Friday week to hold.
- 2 How early should your members really get in?** The member gate in this field bought a few days' head start — Toad&Co opened 6 days early, most others 4. Now that you can see when peers unlocked their member windows, the question is whether yours opens early enough to matter, or just wears a badge.
- 3 Does opting out read as confidence or absence?** Nearly a third of the set either ran no discount or refused the Black Friday label, clustered at the premium end. If you share a shopper with Norrøna, Patagonia, Rab, or Haglöfs, the question is whether a visible hold reads as a premium signal, or as a gap a discounting peer fills.

Only 21% offered blanket sitewide discounts.

"Are we running sitewide this year?" is the Q4 question, and only 4 of 19 answered with a real store-wide rate. The rest reached for "up to," gated the best price behind membership, or held out entirely.



The 5 anchoring positions

The 3 headline buckets split further by what a shopper saw at the shelf. Only 4 brands ran a rate that applied across the store — the rest delivered "sitewide" as a high ceiling on select stock, or reserved the best number for members.

Position	Brands		What it looked like to a shopper
Sitewide, flat rate	Black Diamond Helly Hansen Outdoor Research		A single rate applied broadly, 25% off, from the whole store to "almost all gear."
Sitewide, "almost everything"	Marmot		A near-store-wide 30% off almost the entire catalog, with a stated snowsports carve-out at 20%.
Select / "up to"	Arc'teryx Fjällräven Mackage Mammut	Mountain Hardwear Stio Toad&Co	A ceiling — "up to 40%" — on a slice: select styles, categories, or past-season stock, sometimes behind a sitewide banner (Mammut).
Select / "up to," member-gated	Burton Columbia Klättermusen The North Face		The best price sat behind a login, early-access window, or a spend threshold.
No public discount	Haglöfs Norrøna Patagonia Rab		No percentage off anywhere — warranty, editorial, and full-price product as the message.

How deep did the sitewide cuts go?

Every flat rate landed in a tight 25–30% band, and the modal rate was 25%. But the scope fine print matters: Helly Hansen stated 25% current and up to 50% past-season in the same breath, and Marmot's 30% explicitly excluded current-season snowsports, which held at 20%. That scope fine print pointed one way across the set: brands concentrated the markdown on carryover and past-season stock, and largely kept current and new-season arrivals off the discount table.

Black Friday 2025 sitewide discount rates clustered at 25% in outdoor apparel



Peak store-wide rate for the 4 of 19 brands that ran one. "Up to / select" offers excluded. Source: ShopVision.

The sale-on-sale events

5 brands layered an extra discount on already marked down merchandise.

Brand	Stacked mechanic
Marmot	30% off almost everything, plus an extra 25–30% on already-reduced past-season gear.
The North Face	30% off full price plus an extra 15% off already-marked sale, for XPLR members.
Toad&Co	An extra 50% off sale (up to 70% total), stacked on existing markdowns, post-Christmas.
Helly Hansen	An extra 10% on already-reduced styles in the pre-Black-Friday run-up.
Klättermusen	Up to 40% off past-season stock, members only, a deep cut walled off from full price.

Where membership had privileges

For a few brands the member tier moved the number, not just the timing:

- **Columbia.** An extra 15% for members (MEMBER15) stacked on top of its public doorbusters.
- **The North Face.** Went furthest — membership as the price itself: 30% off full-price orders over \$250, plus an extra 15% off sale, for XPLR Pass.
- **Marmot.** Ran the inversion: its rewards tier opened 4 days early at 20%, a shallower rate than the 30% the public later saw.

Underneath sat a lighter tie-in, a 2X-points weekend at Columbia, The North Face, and Toad&Co. Across the set, though, the member lever was far more often an earlier door (Insight 01) than a better deal.

Every brand's headline offer

Here's what your peerset promoted on Black Friday:

Brand	Anchor	Headline offer
Arc'teryx	<i>Select</i>	Up to 30% off select bestselling gear (main line, outlet excluded)
Black Diamond	<i>Sitewide</i>	25% off sitewide, plus up to 70% off select clearance
Burton	<i>Select (member)</i>	20% off select items (SNOWDAY), First Chair early access — 1-day 50% doorbuster
Columbia	<i>Select (member)</i>	50% off Doorbusters, up to 40% early — members extra 15% (MEMBER15)
Fjällräven	<i>Select</i>	Up to 40% off select, Black Friday weekend
Haglöfs	<i>No discount</i>	No public Black Friday discount — decade-long anti-BF stance; 20% off accessories & tees to email subscribers only
Helly Hansen	<i>Sitewide</i>	25% off almost all gear, up to 50% past-season, 5% donated to BCM
Klättermusen	<i>Select (member)</i>	Archive Sale, up to 40% off past-season, members-only
Mackage	<i>Select</i>	Seasonal Sale, up to 40% off — early access (no Black Friday branding)
Mammut	<i>Select</i>	Up to 40% off (advertised sitewide), plus a 30% pre-BF code (SHOPFIRST) — free ship \$50
Marmot	<i>Sitewide</i>	30% off almost everything, up to 50% + 25% past-season (HOLIDAY25 / CYBER30)
Mountain Hardwear	<i>Select</i>	25% off holiday, plus 40% StretchDown and 1-day 50% hero flashes
Norrøna	<i>No discount</i>	No public discount — anti-Black Friday editorial, warranty message
Outdoor Research	<i>Sitewide</i>	25% off sitewide plus free shipping (HOLIDAYDEALS) — Cyber \$ price-points
Patagonia	<i>No discount</i>	No Black Friday event — “Our Black Friday,” rotating product markdowns only

Brand	Anchor	Headline offer
Rab	<i>No discount</i>	No public discount on the captured storefront — warranty and repair message
Stio	<i>Select (tiered)</i>	Up to 30% current / up to 50% past-season, plus 24-hour daily drops
The North Face	<i>Select (threshold)</i>	30% off select, member 30% off \$250+ full price + extra 15% off sale
Toad&Co	<i>Select (sale-on-sale)</i>	Up to 50% off sale, 25% off new, a \$99 jacket flash, 2X points

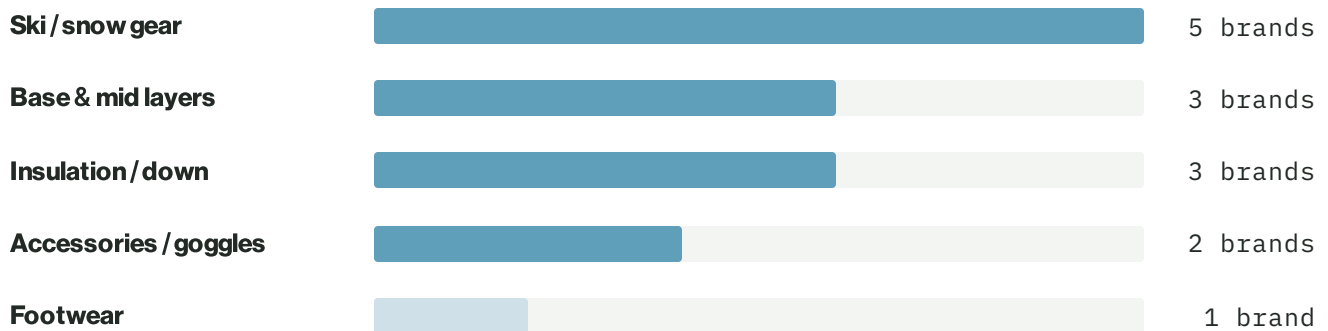
TAKE INTO 2026 PLANNING

- 1 Is a flat sitewide rate the expected move?** Not in this set, "up to / select" was the majority play (11 of 19), and only 4 ran a true store-wide rate. If you're sizing a flat cut for 2026, you'd be clearer than most of the market, not matching it.
- 2 Will you stack sale-on-sale?** Only 5 brands used Black Friday as a clearance acceleration event. But BFCM is exactly the time when shoppers look for great deals — waiting for post-Christmas may be a missed opportunity to turn over aging inventory.

Ski & snow, last-season and hero cuts dominated the dealscape.

Discounting clustered in the cold-weather technical categories — ski and snow above all — with the deepest cuts landing on past-season stock and named hero products rather than the headline rate.

Category-level Black Friday 2025 discounts: Outdoor apparel



Discrete category-level discounts offered by outdoor and technical apparel brands across Black Friday / Cyber Monday 2025. Source: ShopVision.

Ski gear and insulation took the cuts.

Helly Hansen built on "25% off almost all ski gear," Burton rotated goggles/gloves/layers flashes, Mountain Hardwear cut StretchDown and down heroes.

Category and hero product promotions by brand

Each category/hero-level headline offer across the holiday calendar, from November 1 through Cyber Week:

Brand	Category / hero	Depth	vs. headline	Window
Mountain Hardware	Ghost Shadow / Temescalborz jackets	50% off, 1 day	+25 pp vs 25% sitewide	Nov 28
Mountain Hardware	Past-season StretchDown	40% off, 6-week run	+15 pp	Nov 3 – Dec 14
The North Face	Women's & Men's (Cyber flash)	50% off, 1 day	+20 pp vs 30% select	Dec 1
Helly Hansen	Past-season gear	up to 50% off	+25 pp vs 25% sitewide	Nov 16 – Dec 2
Burton	Anon goggles	30% off	+10 pp vs 20% sitewide	Nov 21 – 30
Outdoor Research	Best-selling down hoodie	\$100 off (Cyber)	dollar-anchored, not %	Dec 1
Marmot	Select snowsports	20% off	–10 pp, held below the 30% headline	Nov 25 – Dec 5
Stio	Ski kits vs soft goods	25% vs 30%	ski gear capped below apparel	Nov 25 – Dec 1

Spotlight on past-season merchandise

4 brands call out last season's stock in the promotional headline.

- **Stio.** Up to 30% off current-season, up to 50% off past-season.
- **Marmot.** Up to 50% plus an extra 25% on past-season gear.
- **Helly Hansen.** 25% current and 50% past-season, stated in the same message.
- **Klättermusen.** An entire members-only Archive Sale on past-season stock.

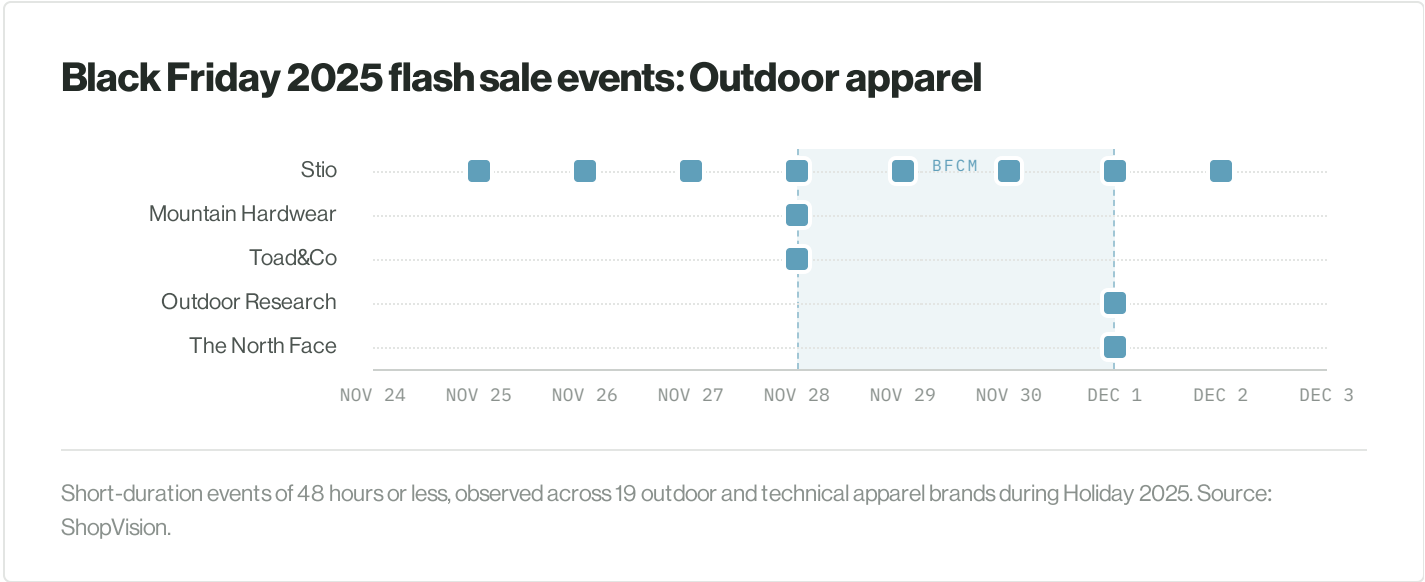
Marmot went further and held current-season snowsports at 20% while its headline read 30%, a category carve-out stated in its own copy. Stio tiered within current season too, capping ski kits at 25% against 30% on soft goods.

TAKE INTO 2026 PLANNING

- 1 Is the current-vs-past-season split the real depth story?** Several brands protected current-season pricing and pushed the deep numbers onto past-season stock. If you're worrying about a peer's "up to 50%," the question is what inventory their ceiling actually applied to, often not the product you're competing on.
- 2 Does your discount calendar respect your best categories?** This field mostly protected current-season technical product and discounted last season's. Is your deepest number landing on the gear you most want to defend at full price, or on the stock you need to clear?

26% of brands ran holiday flash sales.

Outdoor and technical apparel brands kept promotions fresh with "today only" offers and rotating daily deals — 24-hour drops, 1-day hero markdowns, and Cyber Monday dollar price-points, clustered through Black Friday and Cyber week. 5 brands ran at least one flash sale event between Nov 25 and Dec 2.



Flash sale offers by brand

5 brands layered day-long sales on top of BF/CM offers. Stio ran rotating drops for 8 days straight.

Brand	Window	Flash mechanic
Stio	Nov 25 – Dec 2	24-hour “daily drops” rotating through footwear, baselayers, fleece, and ski kits, each at up to 25–30%.
Outdoor Research	Dec 1	Cyber Monday fixed price-points, base layers at \$49, stocking stuffers at \$10, \$100 off the best-selling down hoodie.
Mountain Hardware	Nov 28	1-day 50% hero flashes (Ghost Shadow, Temescalborz).
The North Face	Dec 1	Cyber Monday 50% off Women's and Men's, 1 day only, over a 30% window.
Toad&Co	Nov 28, Dec 1	A \$99 Nomader jacket on Black Friday, and an extra \$5 off (CUPOFJOY) on Cyber Monday.

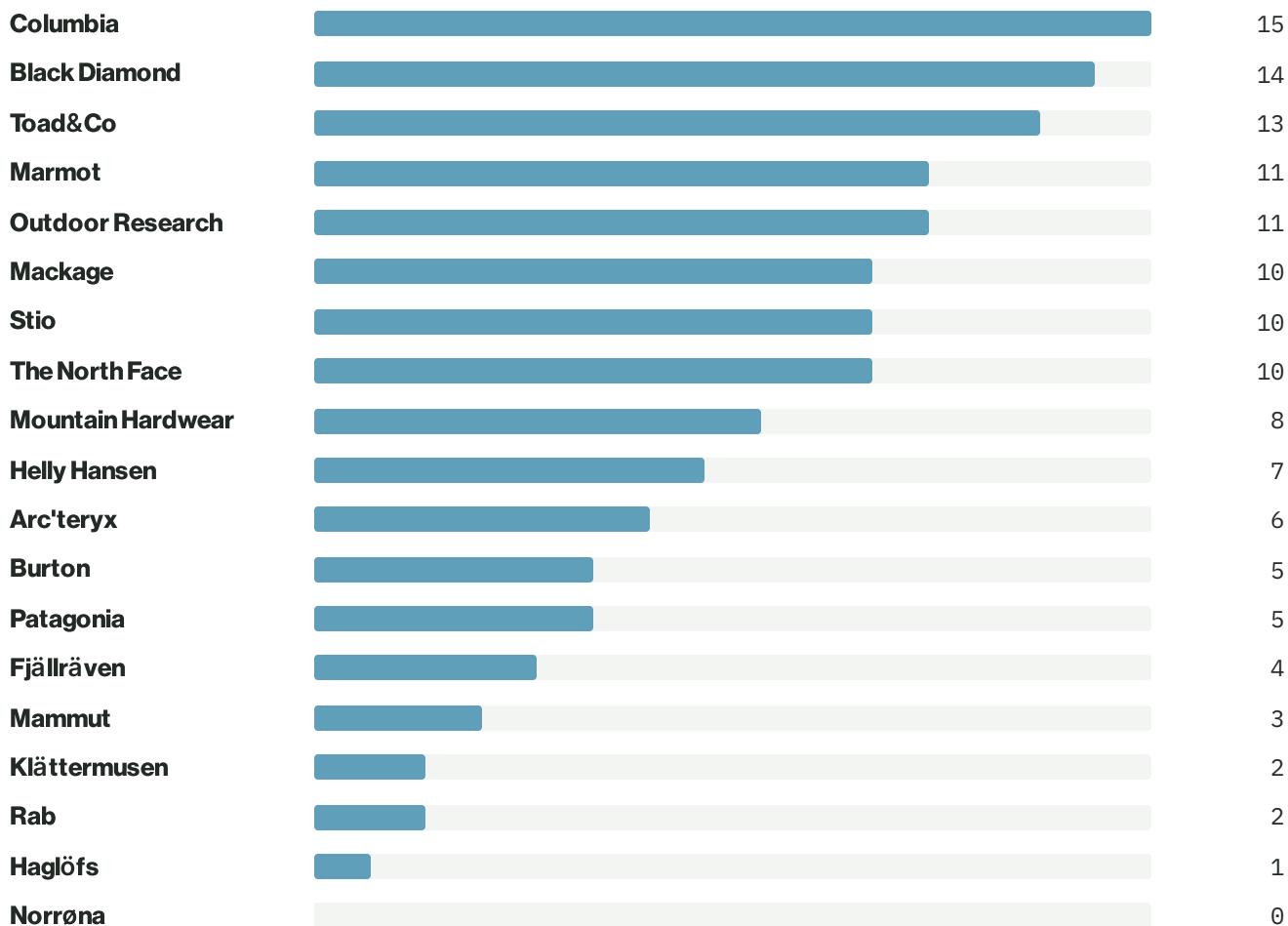
TAKE INTO 2026 PLANNING

- **Is the flash your room to stand out?** Only a quarter of the field leveraged this mechanic, leaving "today only" energy relatively uncontested — which categories, product lines or hero styles deserve their own dedicated event?

The outdoor inbox, by the numbers.

Across the 6-day Black Friday–Cyber Monday core, 19 brands sent 137 distinct marketing emails — 22.8 a day — led by Columbia, Black Diamond, and Toad&Co.

Outdoor apparel email send volume for Black Friday 2025



Email sends per brand across Black Friday–Cyber Monday core, Nov 27 – Dec 2. Source: ShopVision.

Where the sending heat landed

Cyber Monday was the single heaviest day at 27 sends, edging out Black Friday and Cyber Weekend. Columbia (15), Black Diamond (14), and Toad&Co (13) drove the volume, stacking 3 sends on peak days — the same brands that ran the deepest offers.

Outdoor apparel inbox by day: Black Friday – Cyber Monday 2025

	27	BF 28	29	30	CM 1	2	TOT
Columbia	2	2	3	2	3	3	15
Black Diamond	1	3	3	2	3	2	14
Toad&Co	2	2	3	2	2	2	13
Marmot	1	2	2	2	1	3	11
Outdoor Research	2	1	1	2	3	2	11
Mackage	1	2	2	1	2	2	10
Stio	1	1	2	2	2	2	10
The North Face	1	2	2	1	2	2	10
Mountain Hardwear	1	2	1	1	3		8
Helly Hansen	1	1	2	1	1	1	7
Arc'teryx		1	1	1	2	1	6
Burton		1	1	1	1	1	5
Patagonia		1	1	1	1	1	5
Fjällräven	1	1		1	1		4
Mammut		1		1		1	3
Klättermusen	1			1			2
Rab	1					1	2
Haglöfs				1			1
Norrøna							0
INBOX TOTAL	16	23	24	23	27	24	137
1 2 3 4 5 EMAILS / DAY							

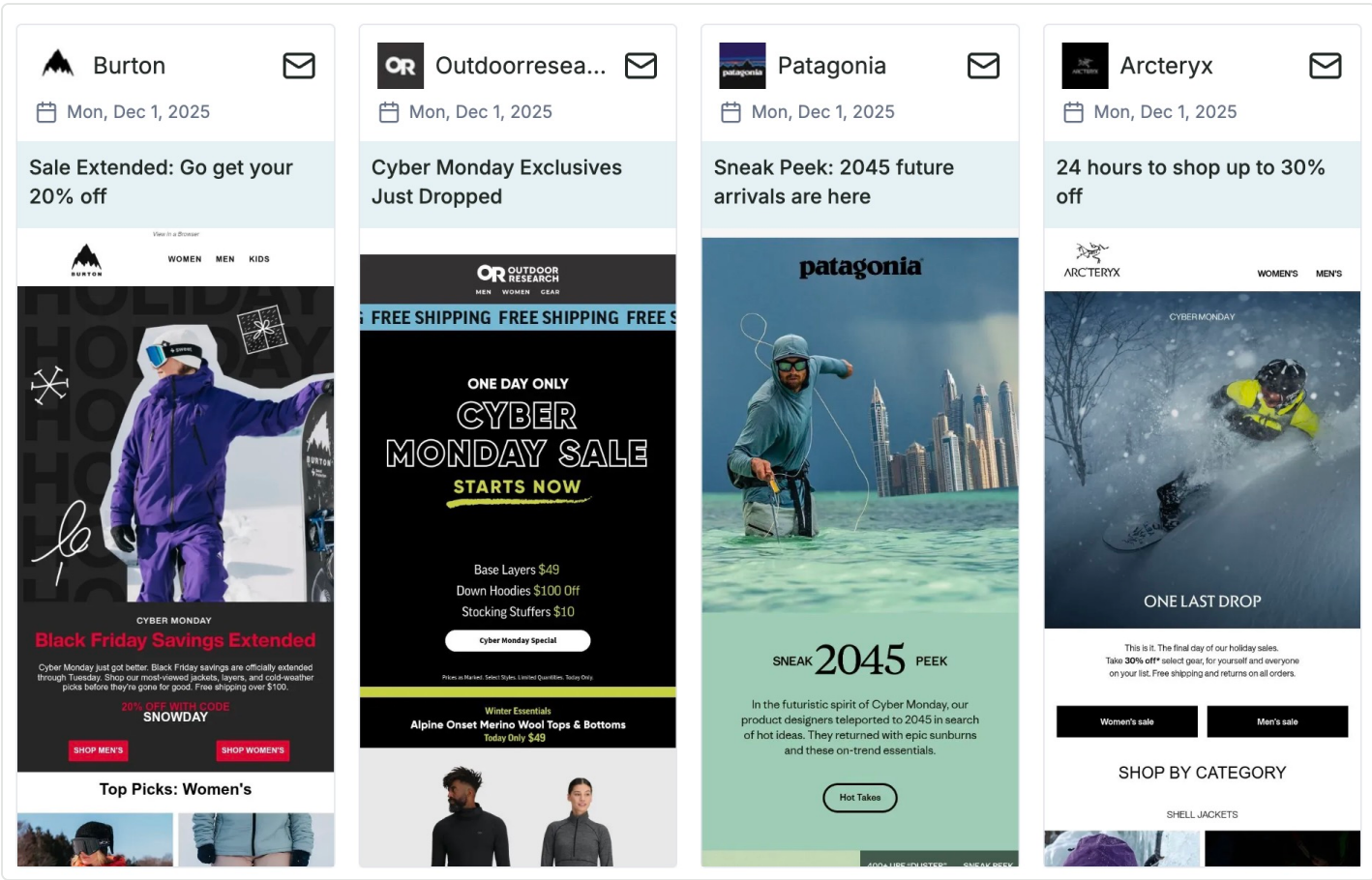
Distinct email creatives per brand per day over the Black Friday-Cyber Monday core. Source: ShopVision.

Standout Cyber Monday subject lines

The subject lines trace the arc — from "deals are live" through "Final Hours" to "ends tonight." A sample of the range on the heaviest day:

Brand	Cyber Monday subject line
Columbia	Cyber Monday: 50% off Doorbusters!
Black Diamond	Up to 70% Off: Low Stock Alert
Outdoor Research	Cyber Monday Exclusives Just Dropped
Burton	Sale Extended: Go get your 20% off
Arc'teryx	24 hours to shop up to 30% off
Marmot	LAST DAY: Doorbusters \$60 & under! + Extra 30% OFF Sale
Patagonia	Sneak Peek: 2045 future arrivals are here

Full table of email sends and subject lines, by brand, in **Appendix A: The BFCM Inbox in Full**.



A slice of the Cyber Monday inbox, December 1, 2025: Burton, Outdoor Research, Patagonia, and Arc'teryx. Full archive of email creatives available in ShopVision Email Explorer.

TAKE INTO 2026 PLANNING

- 1 If your discount looks like everyone else's, what differentiates it?** The offers here were nearly interchangeable, so the inbox carried the brand. Beside 3 competitors at the same percentage off, what makes yours unmistakably yours, the voice, the point of view, the reason to care beyond the number?
- 2 Is your peak-week ceiling set by your offer, or your creative pipeline?** The brands that owned this inbox filled a week with distinct creative. Before you set a 2026 send calendar, ask whether your team is built to fill it with new work.

42% of brands kept sale moments going after Christmas.

The week after Christmas wasn't a tail for everyone — 8 of the 19 kept moving, splitting between clearing inventory and resetting toward January. The other 11 went quiet.

Brand	Posture	Signature move
Black Diamond	Clearance	End-of-Year Clearance, up to 60% off (outlet, plus a Dec 26 email), running through Dec 31 — the deepest ceiling still live.
Columbia	Clearance	Holiday Deals up to 50% off through Dec 25, then the Annual Winter Sale at up to 40% off from Dec 26.
Helly Hansen	Clearance	Winter Sale, up to 50% off select styles, from Dec 26.
Mackage	Clearance	End of Season Sale, up to 40% off, running across the window.
Haglöfs	Clearance + bundle	End of Season up to 40% off, plus a members' 15%-off ski-set bundle through Dec 28.
Klättermusen	Bundle	A brief up-to-40% season sale on Dec 24, then a 20%-off ski and base-layer bundle.
Toad&Co	Bundle	Bundle 3+ tees for 20% off (Dec 26 – Jan 4), plus category discounts Dec 24–25.
Marmot	Gift-with-purchase	A free beanie on \$200+ orders, expiring the morning of Dec 24.

Clearance wasn't the only year-end play. A few brands (Haglöfs, Klättermusen, Toad&Co) promoted bundle offers, and Marmot ran a gift-with-purchase perk. While clearance acceleration is a no-brainer event for end-of-season, if you experiment with other mechanics, you're not alone.

TAKE INTO 2026 PLANNING

- 1 Is the empty week a gap in your plan, or a gift?** Most of this market treated the days after Christmas as the end of the season and went dark, leaving the few who moved with the field to themselves. If you go quiet then too, is that a read on a tired shopper, or the calendar running out before your planning did?
- 2 What's the first thing a shopper sees from you in January?** The brands that used the week split between clearing inventory and setting a clean new-year tone, very different opening statements for 2026. Which is your Dec 26 self making?

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 →

The BFCM inbox in full.

Every distinct marketing send across the 6-day core — 137 emails, deduplicated to unique creatives (panel-capture duplicates collapsed by email ID). Read top to bottom for the full arc. The daily counts match the heatmap in Insight 05. Norrøna sent nothing in this window.

Brand	Subject line
NOV 27 • 16 SENDS	
Toad&Co	Rarely on Sale, Now Up to 50% Off
Stio	Don't Miss It: Up To 30% Off
Outdoor Research	25% Off Adventure-Ready Gifts
Marmot	Up to 50% Off past-season gear, 30% Off almost everything else
Columbia	50% off essential fleece!
Mackage	Seasonal Sale New Styles Added
Toad&Co	Today Only: Earn 2X Loyalty Points
Mountain Hardwear	Your next summit just got 25% closer
Fjällräven	It's here: up to 40% off for Black Friday
Rab	When the mercury plummets.
Helly Hansen	25% off almost all ski gear
Black Diamond	BLACK FRIDAY IS LIVE
Klättermusen	Archive Sale Top Categories
Outdoor Research	Thank You for Being Part of Our OR Community
Columbia	Almost everything on sale!
The North Face	XPLR Pass members: Get 30% off \$250+.
NOV 28 • BLACK FRIDAY • 23 SENDS	
Toad&Co	Up To 50% Off + Double Loyalty Points Today

Brand	Subject line
Marmot	🔥 Doorbuster Deals \$60 & under!
Mackage	Don't Miss Out: Seasonal Sale
Columbia	New Black Friday Doorbusters at 50% off!
Toad&Co	\$99 Puffer Jacket + Up To 50% Off
Stio	Black Friday Only: Up To 30% Off Lifestyle Favorites
Mountain Hardwear	50% Off Ghost Shadow™. One Day Only.
The North Face	Black Friday starts now: Get 30% off \$250+.
Fjällräven	40% off? Sounds good to us too.
Marmot	30-50% OFF ALMOST everything
Mammut	Don't forget about our Black Friday Sale 🔥
Black Diamond	BLACK FRIDAY: Up to 70% off
Patagonia	Our Black Friday
Burton	 Fresh Drop. Black Friday Prices.
Arc'teryx	Black Friday deals are going fast
Helly Hansen	25% off almost all gear + 50% off past-season
Black Diamond	Up to 70% off
The North Face	Get 30% off \$250+ for Black Friday
Columbia	Going FAST: 50% off new Doorbusters.
Outdoor Research	Free Shipping this Weekend Only! (No min, No code Needed)
Mackage	Don't Wait — Sale Styles Are Selling Out Fast
Black Diamond	Going Fast: The Best of Black Friday
Mountain Hardwear	Last Chance: 50% off Ghost Shadow ENDS TONIGHT.

NOV 29 • 24 SENDS

Brand	Subject line
Helly Hansen	25% off almost ALL gear. Happening now.
Columbia	50% off and going fast.
Marmot	30-50% Off ALMOST everything. The BIG day is here.
Toad&Co	Today Only: \$99 for the "Perfect Jacket"!
Stio	Last Chance For Extra Black Friday Savings
The North Face	Don't miss out on 30% off \$250+
Outdoor Research	25% Off Sitewide On Gear You Can Trust
Columbia	Miss out on 50% off? No way!
Mackage	Best Sale of the Season
Stio	Our Warmest Down, Now For Less
Toad&Co	Support Small By Shopping Toad Locally
The North Face	Ending soon: Members, get 30% off \$250+
Mountain Hardware	Holiday deals are just getting started.
Marmot	Final Day: 30-50% OFF almost everything + EXTRA 25% OFF Sale
Burton	LOW STOCK ALERT: Select [ak] Styles
Black Diamond	Sale Extended: Up to 70% off
Patagonia	Small businesses are vital
Helly Hansen	High-demand gear—25% off. Here now, not for long.
Arc'teryx	Don't miss Cyber Week at the Outlet
Black Diamond	Cyber Weekend Deals Are Happening Now
Mackage	Still Time to Shop Our Best Sale
Columbia	Get 50% off gear in all sizes.
Toad&Co	Gifts Made Easy: 25% Off New, 50% Off Sale

Brand	Subject line
Black Diamond	Get Moving: Up to 70% off
NOV 30 • 23 SENDS	
Marmot	FINAL HOURS: 30-50% OFF almost everything + 25% EXTRA OFF Sale
Outdoor Research	Ends Soon: 25% Off Sitewide + Free Shipping
Stio	Don't Miss This Deal On Down!
Haglöfs	20% off accessories & tees
Columbia	Black Friday ends today! 🙄
Mackage	Sale Ends Soon: Don't Miss Out
Stio	Our Coziest Daily Drop
Mountain Hardwear	Weekend Picks: 40% Off Select Styles
Fjällräven	Ends soon: up to 40% off gift-ready gear
Marmot	Cyber Monday: big deals, only online
Toad&Co	Going Fast (And On Sale!)
Mammut	Still time to enjoy up to 40% off 🕒
Black Diamond	Happening Now: Up to 70% off
Patagonia	Meet the Nano Puff's burly cousin
Klättermusen	Archive Sale Last Chance
Helly Hansen	Don't miss this: 25% off won't be here long
Arc'teryx	Sale ends December 1
Black Diamond	Only 2 Days Left: The Holiday Sale
Burton	Final Hours: Black Friday Ends Tonight
Columbia	Hurry, Black Friday deals END SOON! 🕒
Outdoor Research	Ends Tomorrow: 25% Off + Free Shipping

Brand	Subject line
The North Face	Last chance: Get 30% off \$250+
Toad&Co	Almost Gone! But Still On Sale
DEC 1 • CYBER MONDAY • 27 SENDS	
Black Diamond	Up to 70% Off: Low Stock Alert
Stio	Reminder: Extra Fleece Savings End Tonight
Columbia	LAST CALL for Black Friday.
Outdoor Research	25% Off Ends Tomorrow!
Columbia	Cyber Monday: 50% off Doorbusters!
Mackage	Cyber Monday Now Live
Stio	It All Ends Tonight
Mountain Hardwear	Down Jackets For Under \$110.
Toad&Co	Extra \$5 Off Today Only + Last Chance For Sale
The North Face	Cyber Monday: Extra Savings starts now
Fjällräven	Last chance for up to 40% off
Marmot	LAST DAY: Doorbusters \$60 & under! + Extra 30% OFF Sale
Black Diamond	Cyber Monday Deals Start Now
Helly Hansen	Ends tomorrow—25% off almost all gear
Arc'teryx	24 hours to shop up to 30% off
Patagonia	Sneak Peek: 2045 future arrivals are here
Outdoor Research	Cyber Monday Exclusives Just Dropped
Burton	Sale Extended: Go get your 20% off
Black Diamond	Cyber Monday: Last Day For 25% off Sitewide
The North Face	Ends today: Cyber Monday deals

Brand	Subject line
Mountain Hardware	Don't miss out on Cyber Monday Deals.
Columbia	Don't wait! 50% Doorbusters won't last.
Toad&Co	Last Chance For Up To 50% Off
Mackage	Now Live: New Styles & Deeper Markdowns
Outdoor Research	Hurry! \$100 Off Our Best-Seller TODAY ONLY
Arc'teryx	Final hours: shop 30% off
Mountain Hardware	Last Chance: Cyber Monday Deals
DEC 2 • 24 SENDS	
Marmot	Wait... 30-50% OFF almost everything ends today?
Toad&Co	Everything on Sale Ends Tonight!!
Black Diamond	LAST CALL: Sitewide Savings
Columbia	Cyber Monday deals in your size!
Stio	Holiday Sale Ends At Midnight
The North Face	Final hours: Cyber Monday deals
Outdoor Research	 BEST Sale of the Year Ends Tonight 
Marmot	Final Hour! \$60 & under Doorbusters + EXTRA 30% OFF Sale
Columbia	ENDS TODAY: Extra 15% off for members!
Stio	We're Giving \$10K to Protect Our Winters
Mammut	Last call: up to 40% off 
The North Face	We heard you like neutrals...
Toad&Co	200 S'mores 
Marmot	SURPRISE: \$60 & Under Doorbusters Extended!
Patagonia	Help us protect public lands

Brand	Subject line
Black Diamond	Our Partner in Protecting What Matters
Rab	Snow alert.
Mackage	Going Fast
Burton	Don't Freeze: Last Chance to Save
Outdoor Research	Giving Tuesday 2025—Supporting Adaptive Outdoor Access
Helly Hansen	Hours left: 25% off almost all gear
Arc'teryx	Our latest drop is here
Columbia	LAST DAY for an extra 15% off!
Mackage	Up to 40% off

How this report was built.

19 outdoor and technical apparel brands across 13 weeks of Q4 2025.

Window

October 1– December 31, 2025 (92 days, 13 weeks). Black Friday event window Nov 19 – Dec 2. Black Friday fell on Nov 28, Cyber Monday on Dec 1.

Classification

Every promotional event captured was tagged against an outdoor-and-apparel mechanic taxonomy: sitewide, category or collection, select-products, spend threshold, flash, gift-with-purchase, member or loyalty, and stacked or sale-on-sale, and tagged for scope and holiday positioning. Outlet-channel events were excluded. Classification was read from each brand's own public offer copy.

Peer set

Arc'teryx	arcteryx.com	Black Diamond	blackdiamondequipment.com
Burton	burton.com	Columbia	columbia.com
Fjällräven	fjallraven.com	Haglöfs	haglofs.com
Helly Hansen	hellyhansen.com	Klättermusen	klattermusen.com
Mackage	mackage.com	Mammut	mammut.com
Marmot	marmot.com	Mountain Hardwear	mountainhardwear.com
Norrøna	norrøna.com	Outdoor Research	outdoorresearch.com
Patagonia	patagonia.com	Rab	rab.equipment
Stio	stio.com	The North Face	thenorthface.com
Toad&Co	toadandco.com		