

SHOPVISION MARKET INTELLIGENCE
REPORT

Women's Contemporary Fashion Black Friday Benchmark:

How 18 leading brands
ran Holiday 2025

Insights to take into your Q4 2026 planning



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

This report reconstructs how 18 women's fashion brands ran Holiday 2025 — when they moved, how deep they cut, how offers evolved over the season, and how hard they hit the inbox. Every promotional event was verified from each brand's own public offer copy.

It's a peer-informed playbook to equip you for your own 2026 planning.

What we saw

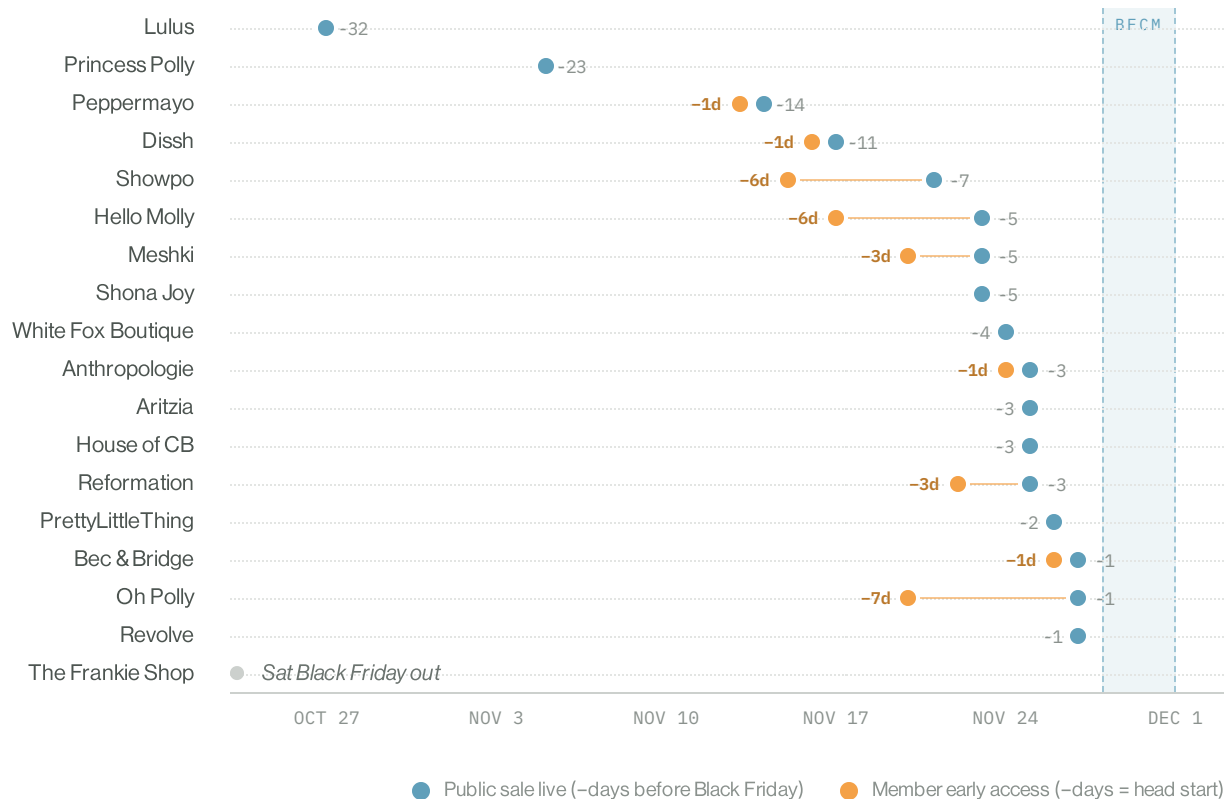
- **Only one Black Friday event launched in October.** The rest launched closer to the real BFCM weekend — and only 4 launched more than a week before Black Friday.
- **Half of the set gave email or loyalty members early access.** Head starts ran 1 to 7 days ahead of the public.
- **Most brands changed their headline offer at least once.** Only 2 held a single, static deal from warm-up through Cyber Monday; the rest deepened or stacked discounts mid-event, or mix-and-matched mechanics.
- **15 of 18 brands ran sitewide offers.** Just 2 kept their headline to select products — sitewide is the norm in this set, not the exception.
- **Of 238 emails leading up to BFCM — only 9 were re-sends.** The 2 heaviest senders fired 36 apiece, yet re-sending to non-openers stayed almost untapped across the set.
- **By mid-December only 6 of 18 had a live sale — after Christmas, all but 2.** The post-Cyber-Monday calendar ran on 6 different mechanics, from spend-tiers and gift cards to buy-one-get-one.
- **The December inbox never went quiet.** 1 brand dominated the peerset with 116 sends between Dec 3-31 — but most brands sent campaigns almost daily. December 7, 16 and 20 were the quietest dates.

18	13	5,000+	Q4 2025
WOMEN'S CONTEMPORARY FASHION BRANDS	WEEKS TRACKED	DATA POINTS ANALYZED	OBSERVATION WINDOW

Most women's contemporary fashion brands don't launch early.

“Early” is relative. All brands that ran Black Friday events launched at least one day before Black Friday proper (only The Frankie Shop sat BF out completely). But compared to other industry cohorts like beauty, bags/luggage, athleisure, casual footwear, heritage apparel, and casual menswear, this peer set starts promoting later in November.

Only 4 of 18 women's contemporary fashion brands launched Black Friday sales >7 days before BFCM



Each brand's first Black Friday-framed sale by launch date during Holiday 2025. Orange marks member early access. Source: ShopVision.

Only 4 brands launched public sales more than 7 days ahead of Black Friday, and 9 brands gave members early access, between 1 and 7 days, with Oh Polly, Showpo and Hello Molly giving the longest head starts.

Who moved first

- **Lulus (Oct 27).** A 20%-off “Early Black Friday” — the only October move in the set, open to everyone.

- **Princess Polly (Nov 5).** “Black Friday Early Deals, 40% off most wanted styles,” flipped to Buy 1, Get 160% off on Nov 10.
- **Peppermayo, Dissh (mid-Nov).** VIP and first-access windows opened the sale to members from November 13–17.

Members got the head start

9 of the 18 let members shop before the general public.

- **Oh Polly — 7 days.** Subscribers got up-to-50% off early access, a week before the public up-to-70%.
- **Hello Molly, Showpo — 6 days.** Signup and “Pink Friday” early access a week ahead of the public sale.
- **Reformation, Meshki — 3 days.** Email (Reformation) and M-List (Meshki) loyalty members got the 25% sitewide rate 3 days early.
- **Anthropologie, Peppermayo, Bec & Bridge, Dissh — 1 day.** Of these, only Anthropologie has a loyalty program. The rest offered to email subscribers.

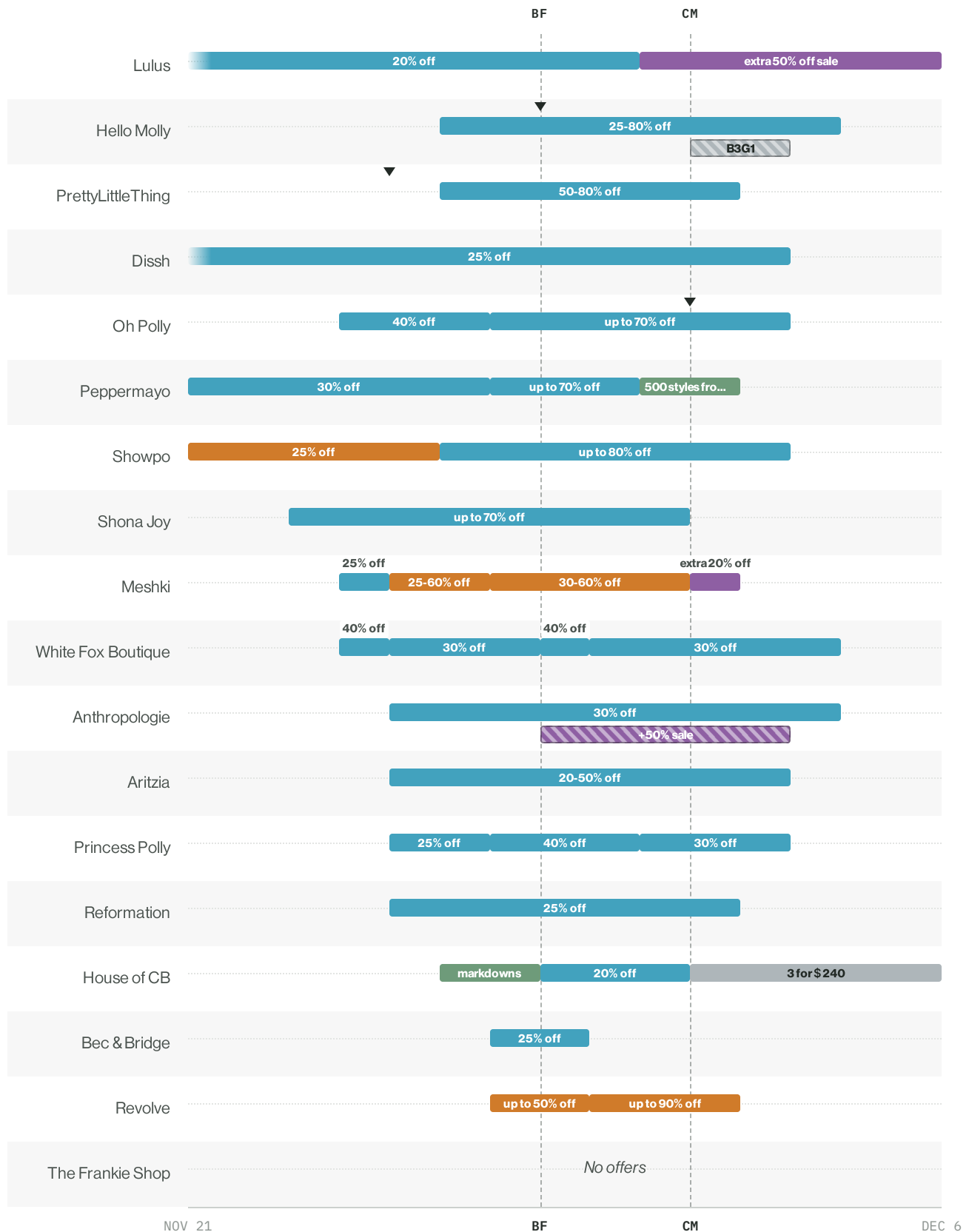
TAKE INTO 2026 PLANNING

- 1 **When do you flip the switch?** Only 1 brand moved in October and the bulk clustered into the final week — the early-to-mid-November window stayed nearly empty. There's room to move ahead of the pack without much competitor noise.
- 2 **Gated or open?** 9 brands reserved the head start for email subscribers or loyalty members — a move worth considering.

Almost no brand ran a single, static Black Friday offer.

15 of the 17 brands that ran Black Friday events changed their headline at least once between the pre-Black Friday warm-up and Cyber Monday. Only Aritzia and Dissh held a single headline offer without a pivot or additional promo layered on top.

Black Friday headline offers change frequently in women's contemporary fashion



 SITEWIDE  SELECT PRODUCTS  SALE-ON-SALE  MULTI-BUY / BOGO  MERCHANDISING FEATURE
 STACKED ON THE RUNNING OFFER ▼ EXTRA % STACKED BY CODE

Each brand's public headline offer by dates active, colored by mechanic. Nov 21-Dec 6, 2025. n=18. Triangles mark an extra 10% discount stacked by code. Source: ShopVision.

Notable moves

Hello Molly, PrettyLittleThing, Dissh, and Oh Polly's headline events were already running by November 21, and most of the set wrapped up by Cyber Monday or Tuesday. Lulus and House of CB were the only brands to extend past December 3 for a true "Cyber Week" event.

The pulsed pivots

2 brands zig-zagged their offers, stepping up then down.

- **White Fox Boutique** ran a 6-hour, 40% off everything flash event on Nov 24. Once it expired, it flipped to 30% off until Black Friday, when 40% off returned and ran through Dec 3.
- **Princess Polly** bumped 25% off sitewide to 40% Nov 27–29, stepping back down to 30% for the rest of Cyber Weekend.

The mechanic moves

5 brands mixed-and-matched promotion types to keep things interesting.

- **House of CB** shifted from "Biggest markdowns of the year" merchandising messaging to a 20% off sitewide promotion on Black Friday, pivoting again on Cyber Monday to a 3 for \$240 multi-buy through Dec 6.
- **Peppermayo** deepened its promotion from a flat 30% off sitewide (Nov 21–26) to up to 70% off sitewide (Nov 27–30), before shifting to a "500 styles from \$15" merchandising feature (Nov 30–Cyber Monday).
- **Hello Molly** increased its promotion from 25% off sitewide to 25–80% off sitewide plus an extra 10% off for Black Friday, and layered Buy 3, Get 1 Free from Dec 1–2.
- **Anthropologie** layered an extra 50% off sale event on top of its running 30% off sitewide promotion from Black Friday to Dec 2.
- **Lulus'** long-running 20% off sitewide offer ended Nov 29 and flipped to "extra 50% off all sale" from Nov 30–Dec 5 — an interesting move to pivot from sitewide (arguably a more attractive offer) to sale-on-sale only mid-BFCM weekend.

The fluctuations

4 brands kept deepening discount headlines in their sale sections.

- **PrettyLittleThing** expanded from 50–60% off sitewide to 50–80% off sitewide from Nov 26 through Cyber Monday.
- **Oh Polly's** headlines pivoted up and down — from up to 50% off down to 40% off, then up to 70% off.
- **Revolve** bumped up to 50% off select products to up to 90% off markdowns after Black Friday.
- **Meshki's** 25% off sitewide transitioned to 25–60% off select styles, then 30–60% off select styles, with an extra 20% off on Cyber Monday.

The extra 10% stacks

Interestingly, 3 brands ran single-day flashes for an extra 10% off — but all on different dates: PrettyLittleThing (Nov 25), Hello Molly (Black Friday) and Oh Polly (Cyber Monday).

Black Friday breakdown by brand

Brand	Offer	Dates
Anthropologie	30% off sitewide (excluding select items), member early access.	Nov 24
	30% off sitewide open to public.	Nov 25-Dec 3
	Extra 50% off sale.	Nov 28-Dec 2
Aritzia	20-50% off sitewide + 10% off Super Puff.	Nov 25-Dec 2
Bec & Bridge	25% off sitewide. Ended Black Friday, no further offers.	Nov 27-28
Dissh	25% off (almost) everything.	Nov 18-Dec 2
Hello Molly	25% off sitewide (6 days' early access for email subscribers, open to everyone Nov 23).	Nov 17-25
	25-80% off sitewide, with Black Friday extra 10% off with code.	Nov 26-Dec 3
	Buy 3 get 1 free, layered on top of sitewide offer.	Dec 1-2
House of CB	Biggest markdowns of the year (merchandising feature).	Nov 26-27
	20% off sitewide.	Nov 28-30
	Multi-buy 3 for \$240.	CM-Dec 6
Lulus	Standing 20% off early Black Friday sale ran Oct 27-Nov 29.	

Brand	Offer	Dates
	Extra 50% off all sale.	Nov 30-Dec 5
Meshki	25% off sitewide.	Nov 24
	From 25-60% off (select products).	Nov 25-26
	30-60% off select.	Nov 27-30
	Extra 20% off select styles.	CM
Oh Polly	Up to 50% off Black Friday Sale.	Nov 20-24
	40% off Black Friday early access.	Nov 24-26
	Up to 70% off.	Nov 27-Dec 2
	Extra 10% off with code.	Cyber Monday
Peppermayo	30% off sitewide.	Nov 21-26
	Up to 70% off sitewide.	Nov 27-30
	500 styles from \$15 (merchandising feature).	Nov 30-CM
PrettyLittleThing	50-60% off sitewide.	Nov 17-25
	extra 10% off with code.	Nov 25
	50-80% off sitewide + extra 10% off.	Nov 26-CM
Princess Polly	25% off sitewide.	Nov 25-26
	40% off sitewide.	Nov 27-29
	30% off sitewide.	Nov 30-Dec 2
Reformation	25% off everything.	Nov 25-CM
Revolve	Up to 50% off (select products).	Nov 27
	Up to 90% off (markdowns).	Nov 29-CM
ShonaJoy	Up to 70% off.	Nov 23-Nov 30
Showpo	Pink Friday (select products).	Nov 21-25

Brand	Offer	Dates
	Up to 80% off sitewide + 40% off best sellers.	Nov 26-Dec 2
The Frankie Shop	Silence.	
White Fox Boutique	40% off everything (6 hour flash).	Nov 24
	30% off sitewide.	Nov 24-27
	40% off sitewide.	BF
	30% off sitewide.	Nov 29-Dec 3

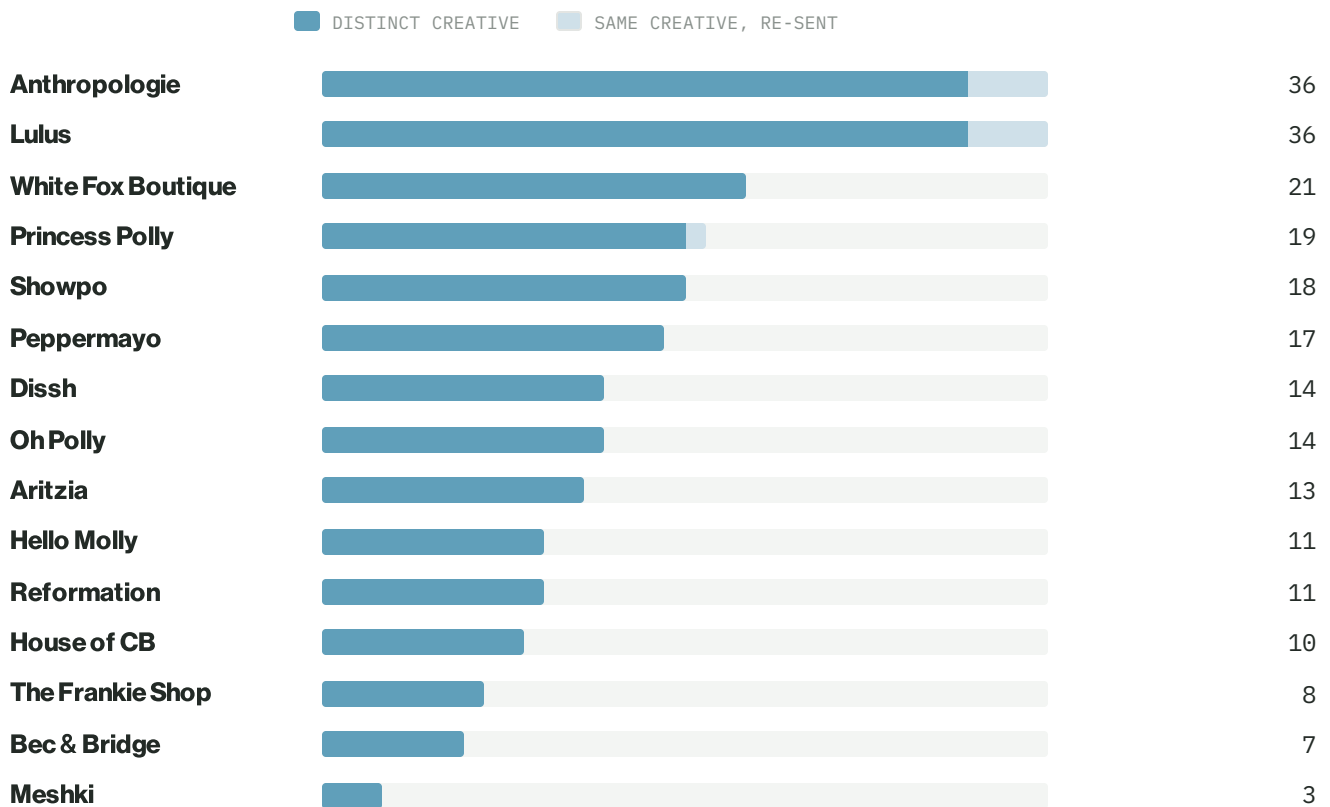
TAKE INTO 2026 PLANNING

- 1 Will your offer go sitewide?** Women's contemporary fashion leans heavier into sitewide events than other apparel segments — 'select product' sale collections are the minority. Is your headline % in line with your closest competitors?
- 2 Is BFCM one offer, or a sequence?** Only 2 brands ran static offers — most shake things up mid-way. Now that you've seen the full promo calendar at a glance, is there a mechanical move you want to 'borrow' for 2026?

Daily email sends were the norm.

Inside the 14-day Black Friday window (Nov 19–Dec 2), the peer set sent 238 emails. Most of these sends were discrete creatives — re-sends to non-openers accounted for only 9 of the 238 — lower than observed in other apparel segments.

Women's contemporary fashion email volume: BFCM 2025



Marketing emails per brand, Nov 19–Dec 2, 2025. n=15. Source: ShopVision.

Note: Excluding Revolve, Shona Joy, and Pretty Little Thing. Anthropologie's total counts its main apparel brand only; its Terrain and BHLDN sub-brands are excluded from this report.

The heavy hitters

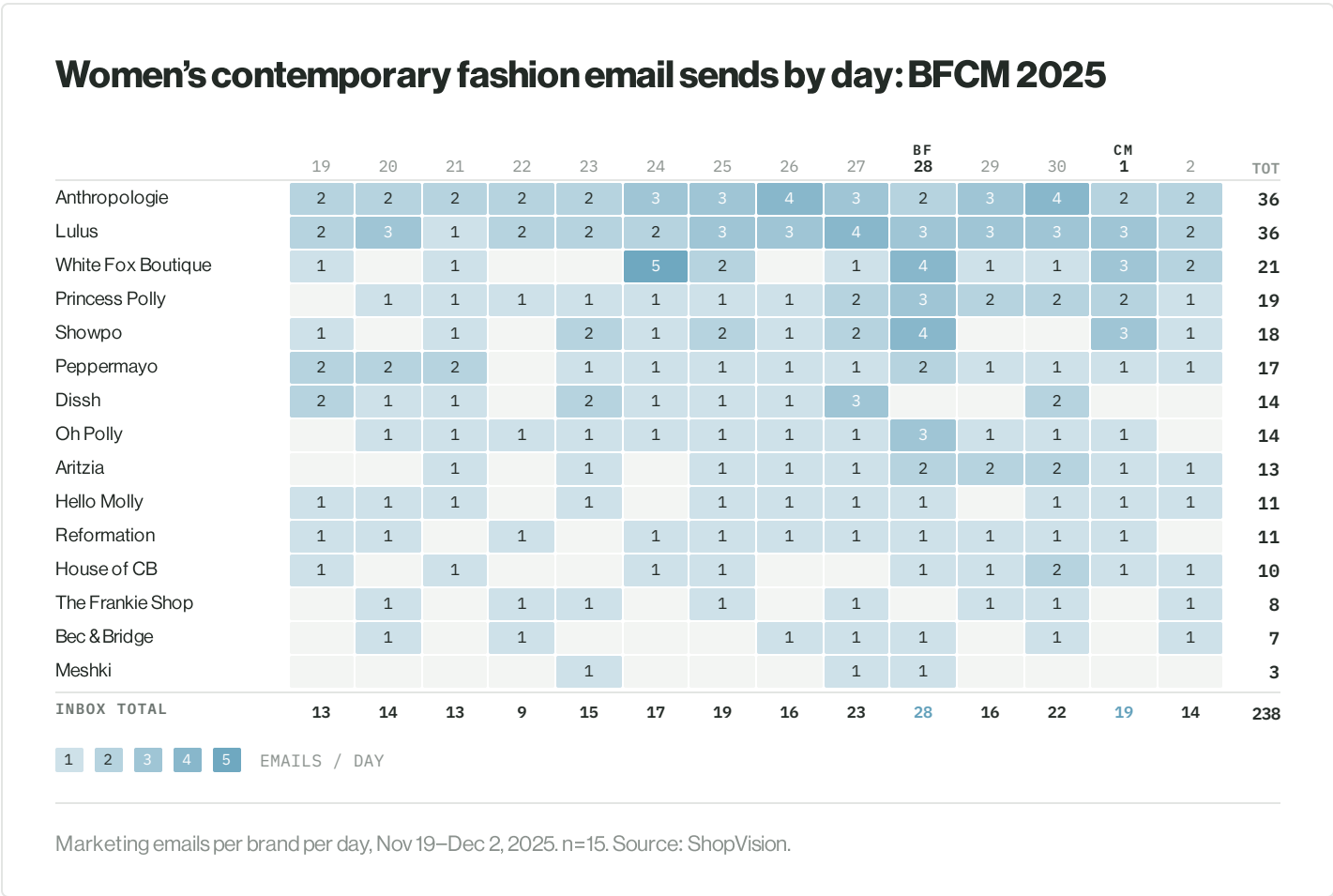
The most active brands — Lulus and Anthropologie (36 sends each) — were also the most likely to re-send to non-openers — each re-sending 4 messages. The non-opener nudge is an underleveraged tactic in this peer set. When email volume is at its highest, it's easy to get buried by other brands' offers.

White Fox Boutique (21), Princess Polly (19), and Showpo (18) rounded out the top 5. Only Princess Polly re-sent a message, and only once.

On the quiet end sat Meshki (3) and Bec & Bridge (7). Even The Frankie Shop had them beat.

Where the heat landed

Mapped by day, most brands sent at least 1 message per day, with the occasional ‘bye.’ Although Lulus and Anthropologie sent the same amount across this window, Lulus led with 8 days of 3 or more messages per day, Anthropologie with 6.



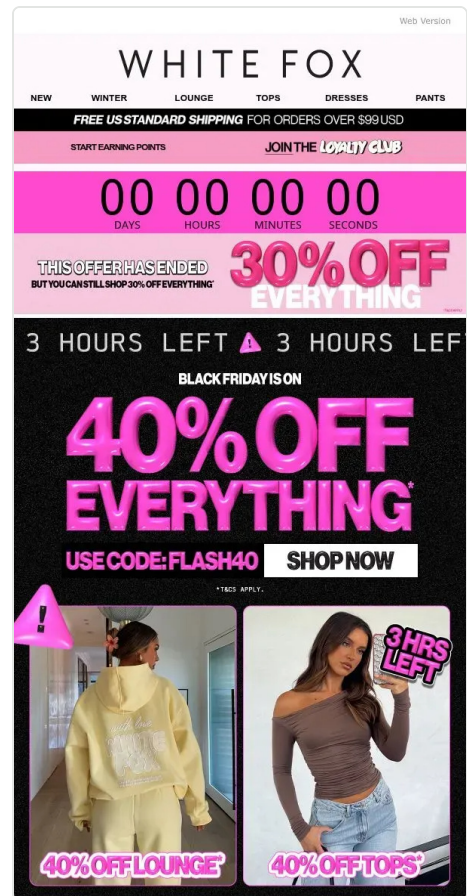
But the surprise is White Fox Boutique's Nov 24 push. Subscribers saw hourly reminders during its 6 hour flash event for 40% off everything. Not Black Friday. Not Cyber Monday. But the Monday ahead of BFCM.



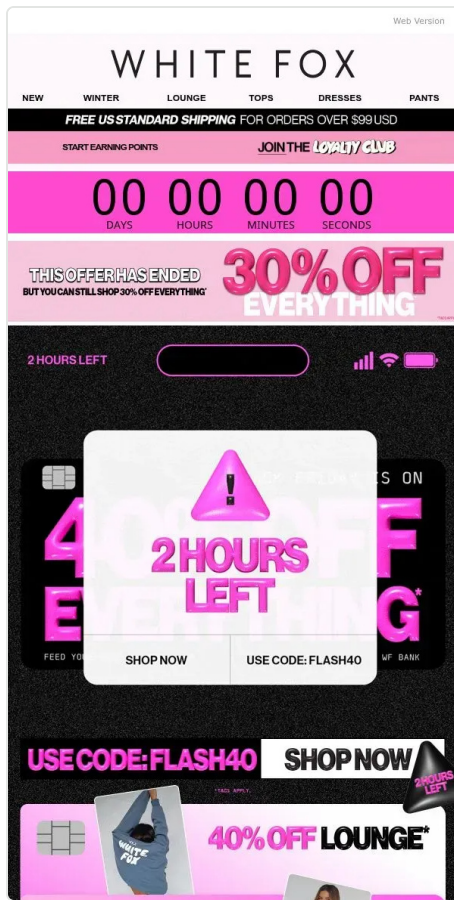
NOV 24 @ 10:56:02 AM



NOV 24 @ 11:56:58 AM



NOV 24 @ 1:51:08 PM



NOV 24 @ 03:09:49 PM



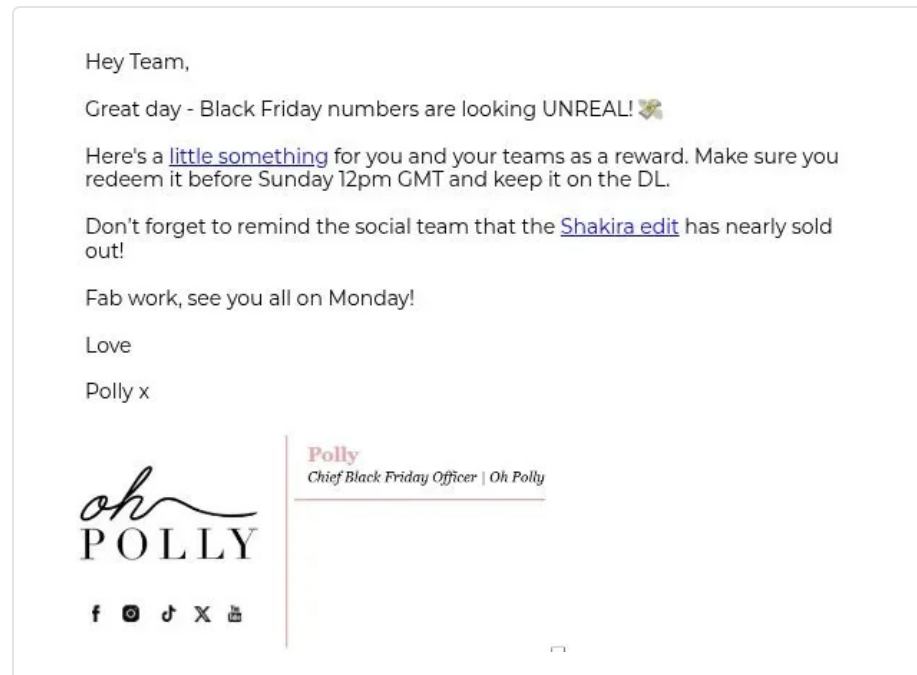
NOV 24 @ 05:14:16 PM

After the offer expired at 5pm PST, the email flipped from countdown to the stepdown offer at 30% off everything.

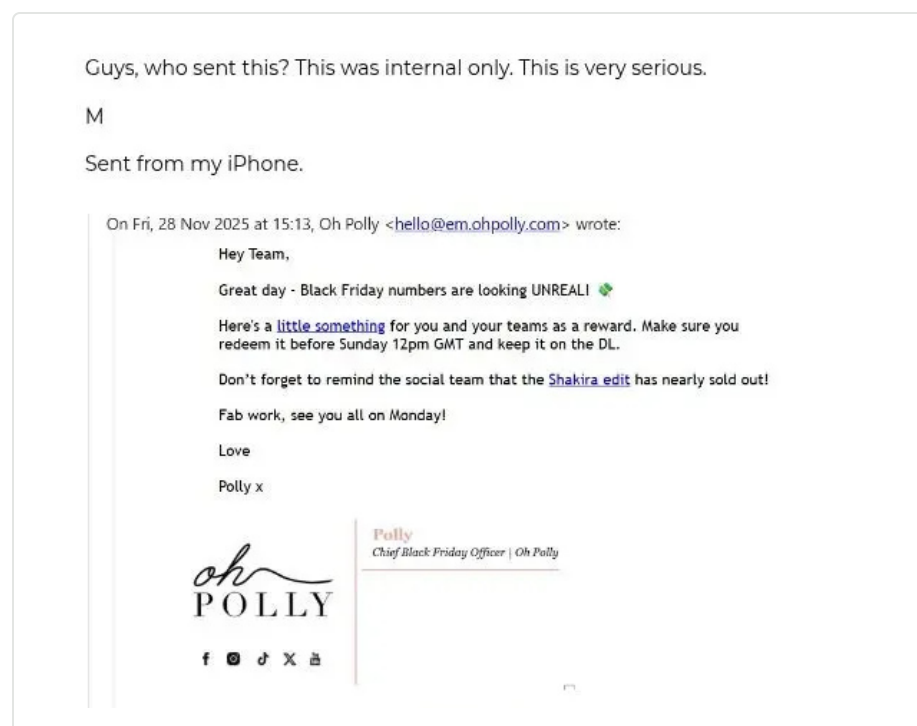
The curiosity hooks

Several brands leveraged curiosity hooks in their subject lines:

- **Princess Polly** — (1) *UNCLAIMED OFFER! and YOU HAVE (1) NEW SPICY DEAL*
- **Oh Polly** — sent a series of faux-personal threads built to look like a reply: *RE: BFCM company results update*



NOV 28 @ 7:59:57 AM



NOV 28 @ 10:02:39 AM

Sorry I was out of office on Friday – does the employee code **10CYBER** still work to get an extra 10% off sale on [this link](#)?

Karen



Karen
Accounts | Oh Polly

On Fri, 28 Nov 2025 at 15:13, Oh Polly <hello@em.ohpolly.com> wrote:

Hey Team,

Great day - Black Friday numbers are looking UNREAL! 🍀

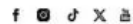
Here's a [little something](#) for you and your teams as a reward. Make sure you redeem it before Sunday 12pm GMT and keep it on the DL.

Don't forget to remind the social team that the [Shakira edit](#) has nearly sold out!

Fab work, see you all on Monday!

Love

Polly x

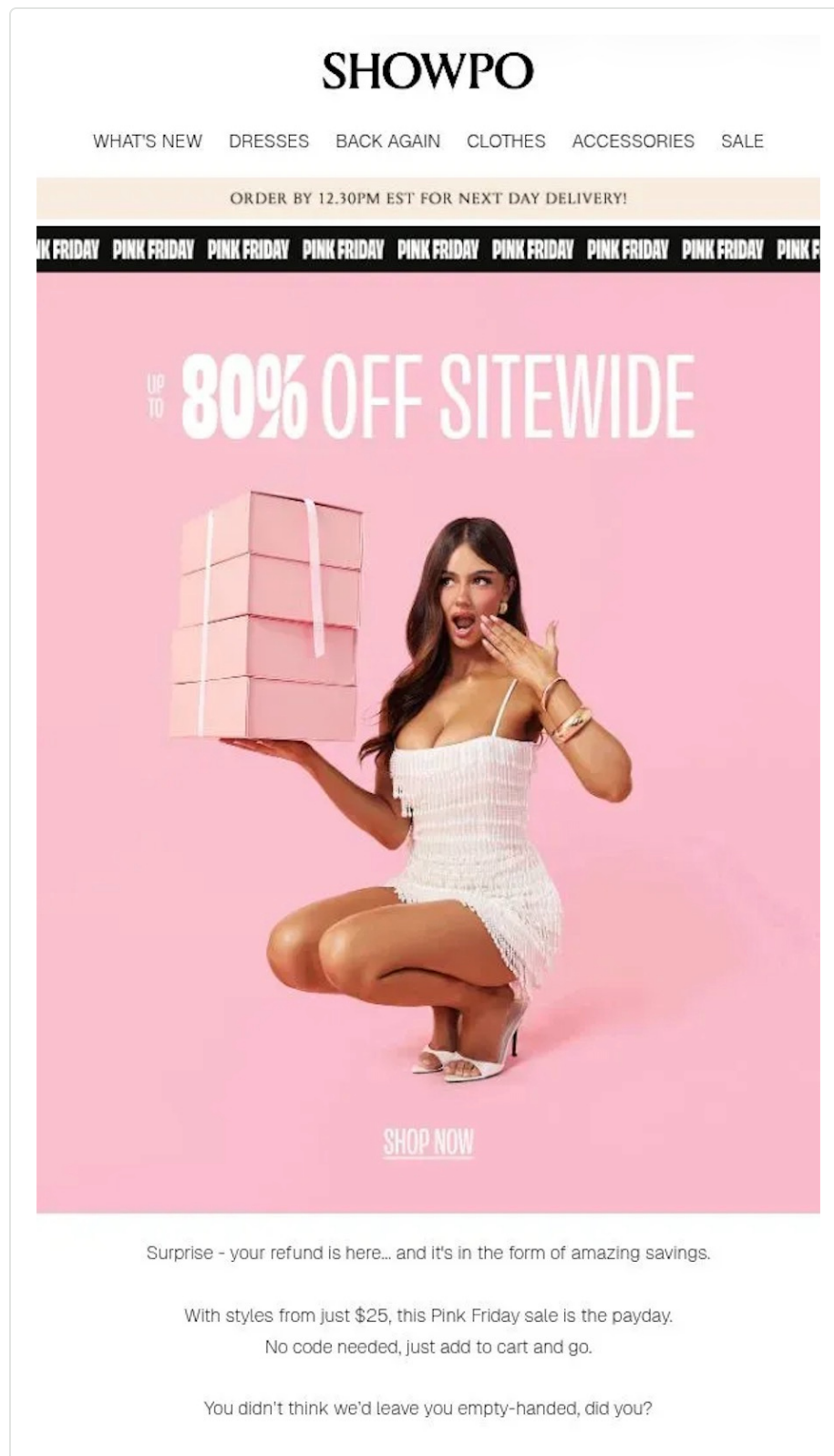


Polly
Chief Black Friday Officer | Oh Polly

NOV 30 @ 11:04:12 PM

- **White Fox Boutique**—[RE] Who approved styles from \$8*?

- **Showpo** — *Fwd: your refund has been processed.* The subject line teased the detail inside "Surprise - your refund is here... and it's in the form of amazing savings."



FWD: YOUR REFUND HAS BEEN PROCESSED.

✧ For a full list of every message sent over the BFCM weekend, see Appendix A.

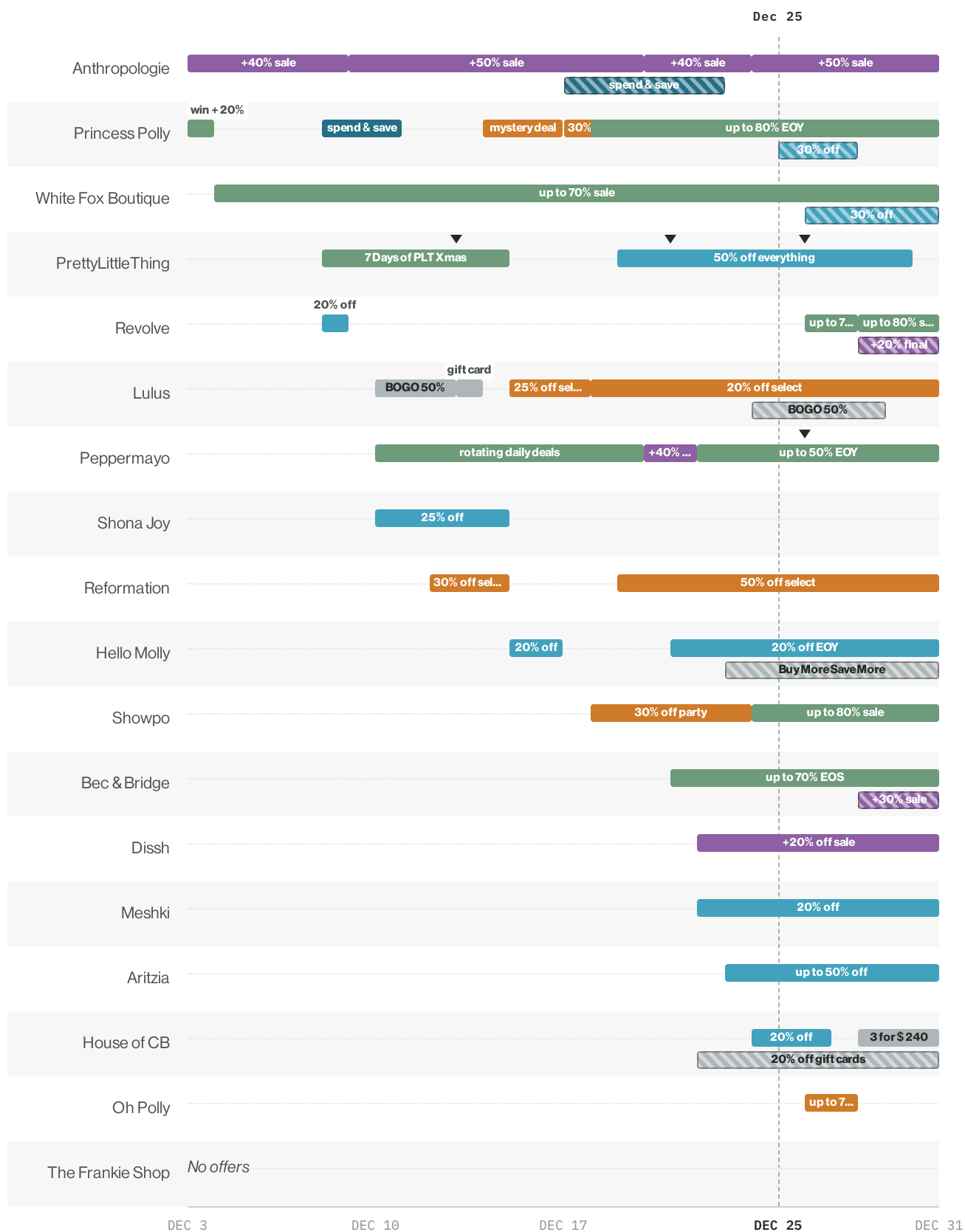
TAKE INTO 2026 PLANNING

- **Where do you want to compete for the inbox?** You're not just competing against your peer set for inbox attention. Sending 1 message per day is table stakes. 2+ messages per day is not unreasonable. Will you add more re-sends to non-openers, or create more non-sale focused merchandising edits in 2026?

The peer set split on post-Cyber Monday events.

Only a handful of women's contemporary fashion brands launched new promotions during Cyber Week, and by mid-month, only 6 brands had active sale events running. But by December 26, everyone but Shona Joy and The Frankie Shop were promoting.

Women's contemporary fashion post-Cyber Monday 2025 promotions



■ SITEWIDE
 ■ SELECT PRODUCTS
 ■ SALE-ON-SALE
 ■ MULTI-BUY / BOGO
 ■ MERCHANDISING FEATURE

Each brand's post-Cyber Monday promotional events, colored by mechanic. Triangles mark a single day extra % off coupon. Source: ShopVision.

Notable mechanics

Promotional strategies were varied, with a few interesting buckets.

The continuous promoters

2 brands never dropped the promotional ball.

- **Anthropologie** kept promotional pressure steady with extra 40% off sale Dec 3–8, bumping to 50% off sale Dec 9–19, stepping back to extra 40% off sale Dec 20–23, and returning to 50% from Dec 24 through year end. 30% off deals ran briefly throughout the period on specific categories like Jackets and Outerwear, and Lingerie and Lounge. Anthro also ran money-off deals Dec 22: \$50 off \$150, \$100 off \$300, \$150 off \$500.
- **White Fox Boutique's** up to 70% off sale banner ran from Dec 4 through year end.

The rotating deals

These brands built urgency into their calendars with daily category deals.

- **Peppermayo** ran daily flashes from Dec 10–17: 30% off tops (10th), 30% off bestsellers (11–12th), 30% off party outfits (13th), 30% off Christmas vacay outfits (14th), 20% off gift cards (15th), free shipping over \$75 (typically \$150) (16th), 30% off NYE outfits (17th).
- **PrettyLittleThing** ran '60% off or more' across rotating categories Dec 8–13: all accessories and sleepwear (8th), tops, bottoms, and denim (9th), all coats, jackets, and knitwear (10th), all dresses and co-ords (11th), athleisure (12th), then 10% off sale (13th).

The sitewide events

7 brands dared to offer cuts on everything.

- **Aritzia** ran up to 50% off everything Dec 23 through 31.
- **Meshki** gave 20% off sitewide Dec 22 to year end.
- **Revolve** ran 20% off sitewide as a 24 hr flash Dec 8.
- **Shona Joy** offered 25% off sitewide Dec 10–14, then went quiet for the rest of December.
- **Hello Molly** flashed 20% off sitewide for 24 hrs across Dec 15–16, then ran it again Dec 23 to year end — email subscribers got early access to the deal Dec 21.
- **House of CB** gave 20% off sitewide Dec 24–26.
- **White Fox Boutique** ran 30% off sitewide Dec 26 through year end.

The clearance accelerators

Only 2 brands ran public sale-on-sale events. A third — Bec & Bridge — appears in “email exclusives” below.

- **Dissh** took an extra 20% off sale Dec 22 through year end.
- **Revolve** gave an extra 20% off final sale Dec 28–31.

The gift card incentives

3 brands used gift cards as the hook — either for last-minute gifters or as buy-more-get-more.

- **House of CB** gave last-minute and late gifters 20% off gift cards Dec 22–31.
- **Lulus** promoted ‘Give a \$50 gift card, get \$10 back’ on Dec 13.
- **Hello Molly** ran ‘Buy More Save More’ Dec 23–Jan 3: Spend \$150 get \$20 e-gift card, spend \$200 get \$30, spend \$300 get \$50.

The email exclusives

2 brands sweetened the season for email subscribers.

- **Bec & Bridge** sent subscribers an exclusive code for extra 30% off sale valid Dec 28–30.
- **Princess Polly** offered a mystery discount Dec 14–16, and 30% off “Holiday Szn Styles” with code Dec 17–19.

Every brand's Post-CM promo events

Note: We chose to scope tracking for this report to Dec 31. Some offers may have run through January. Full promotional record available in ShopVision.

Brand	Offer	Dates
Anthropologie	Extra 40% off sale	Dec 3–8
	Extra 50% off sale	Dec 9–19
	Extra 40% off sale	Dec 20–23
	Extra 50% off sale	Dec 24–EOY
	\$50 off \$150, \$100 off \$300, \$150 off \$500	Dec 17–22
	Extra 50% off sale — EOY	Dec 25
Aritzia	Up to 50% off everything through Dec 31	Dec 23–EOY

Brand	Offer	Dates
Bec & Bridge	Up to 70% off end of season sale	Dec 21–EOY
	Extra 30% off sale with code EXTRA30 (email exclusive)	Dec 28–30
Dissh	Extra 20% off sale	Dec 22–EOY
Hello Molly	20% off sitewide	Dec 15–16
	20% off sitewide (email early access Dec 21–22)	Dec 23–EOY
	Spend \$150 get \$20 e-gift card; \$200 get \$30; \$300 get \$50	Dec 23–EOY
House of CB	20% off gift cards	Dec 22–31
	20% off sitewide	Dec 24–26
	3 for \$240 (select products)	Dec 28–EOY
Lulus	Buy one get one 50% off (sitewide)	Dec 10–12
	Give a \$50 gift card, get \$10 back	Dec 13
	25% off select winter and holiday faves	Dec 15–18
	20% off select styles with code	Dec 18–EOY
	Buy one get one 50% off (sitewide)	Dec 24–28
Meshki	20% off sitewide	Dec 22–EOY
Oh Polly	Up to 70% off Bo + Tee line	Dec 26–27
Peppermayo	Rotating flash deals.	Dec 10–17
	40% off 400 styles	Dec 19
	Extra 40% off sale	Dec 20–21
	Up to 50% off end of year sale (extra 20% off on Dec 26 / Boxing Day)	Dec 22–EOY
PrettyLittleThing	Up to 75% off select items + rotating daily offers (detailed above)	Dec 8–17
	Extra 10% off sale	Dec 13

Brand	Offer	Dates
	Mystery discount	Dec 14
	50% off everything	Dec 19–29
	Extra 10% off the 50% off everything with code	Dec 21
	Extra 20% off the 50% off sale with code	Dec 26
Princess Polly	Enter to win \$1000 wardrobe, get 20% off for entering	Dec 3
	\$20 off \$100, \$45 off \$200, \$75 off \$300	Dec 8–10
	48 hour mystery deal (email exclusive)	Dec 14–16
	30% off “Holiday Szn Styles” with code (email exclusive)	Dec 17–19
	End of Year sale up to 80% off (merchandising feature)	Dec 18
	30% off sitewide	Dec 25–27
	30–80% off, more styles added to sale (merchandising feature)	Dec 28
Reformation	30% off select items	Dec 12–14
	50% off select styles	Dec 19–EOY
Revolve	20% off sitewide (24 hr flash)	Dec 8
	Up to 75% off sale (merchandising feature)	Dec 26–27
	Up to 80% off + extra 20% off final sale	Dec 28–31
Shona Joy	25% off sitewide	Dec 10–14
Showpo	30% off party styles	Dec 18–23
	Up to 80% off sale (merchandising feature)	Dec 24–31
The Frankie Shop	Nil.	
White Fox Boutique	Up to 70% off (merchandising feature)	Dec 4–31
	30% off sitewide	Dec 26–31

TAKE INTO 2026 PLANNING

- **Will you mix-and-match mechanics in 2026?** Now that you've seen your post-CM peer playbook, where could your calendar use another beat? Will you layer a BOGO, mystery offer, gift card incentive, or flash event on top of your year-end sale?

The December inbox never went quiet.

Although many brands slowed their promotional roll immediately after Cyber Monday, email heat held steady.

Women's contemporary fashion email sends per day: Dec 3–23, 2025

	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	TOT
Anthropologie	4	5	3	5	3	4	4	4	4	4	5	4	4	3	4	4	4	2	5	5	3	83
Lulus	2	2	2	2	1	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	41
Princess Polly	1	1	1	1	2		3	2	1	1	1	3	1	2	2	1	2		1	2	2	30
Dissh	3	2			2	1	2	2	1	1		2	1	2		2	1		2	2	1	27
Peppermayo	1	1	2	1	1	1	2		1	1	1	2	1	1	1	1	2	1	1	2		24
Showpo		1			2	1	1	1	2			1	1	1		1	1		1	2	2	18
Aritzia			2		1	1		1		2		1	1		1		1	1	1	1	1	15
The Frankie Shop	1	1		1	1		1		1	1	1	1		1		1	1	1	1		1	15
Hello Molly	1	1		1			1	1	1		1		1	1	1			1	1	1	1	14
House of CB	1		2	1		1		1		1			1		1	1	1	1		1	1	14
Oh Polly	1	1	1			1	1		1	1		1	1		1	1	1			1	1	14
Reformation	1	1		1		1		1	1	1	1		1		1	1	1			1	1	14
Bec & Bridge		1		1			1		1		1					1				1		7
White Fox Boutique	1	2										1										4
Meshki																						0
INBOX TOTAL	17	19	13	14	13	13	18	15	16	15	13	18	15	13	14	16	17	9	15	21	16	320
1 2 3 4 5	EMAILS / DAY																					

Marketing emails per brand per day, post-Cyber Monday. Dec 3–23, 2025. n=15. Source: ShopVision.

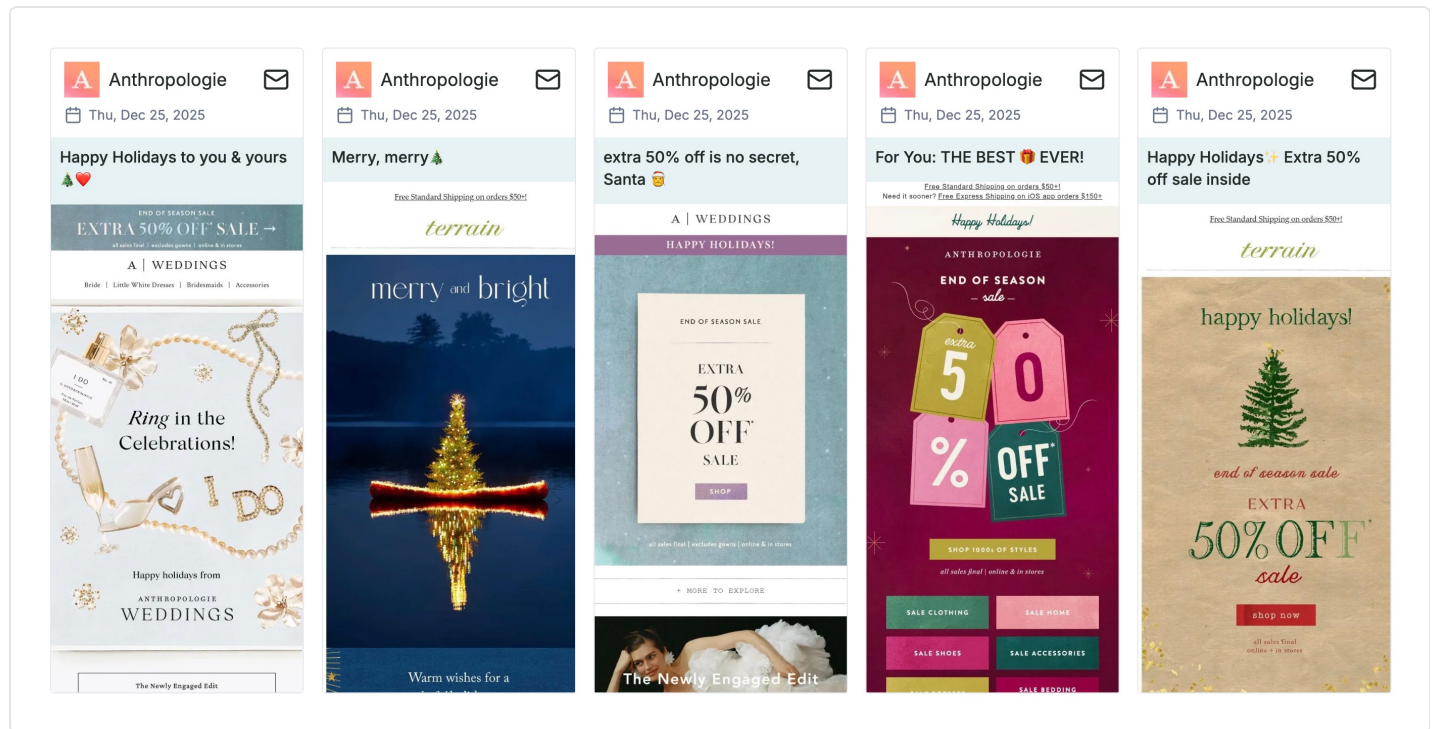
Anthropologie remained the most aggressive, followed by Lulus. Double-sends (2 discrete campaigns per day) were few and far between during the period. December 7, 16 and 20 were the quietest dates.

Women's contemporary fashion email sends per day: Dec 24–31, 2025

	24	XMAS 25	26	27	28	29	30	NYE 31	TOT
Anthropologie	5	6	5	2	3	5	3	4	33
Princess Polly	3	3	2	1		2	2	3	16
Lulus	2	1	2	2	2	2	2	1	14
Peppermayo	1	1	1	1	1	1	2	1	9
Aritzia	1	1	1	2	1		1	1	8
Dissh	1		1		1	2	1	1	7
White Fox Boutique			1	1	2		2	1	7
Showpo	1		2		1	1	1		6
House of CB	1	1	2	1					5
Hello Molly		1	1		1		1		4
Oh Polly			1		1	1	1		4
Bec & Bridge		1			1		1		3
Reformation			1			1	1		3
The Frankie Shop			1	1			1		3
Meshki									0
INBOX TOTAL	15	15	21	11	14	15	19	12	122
1 2 3 4 5 EMAILS / DAY									

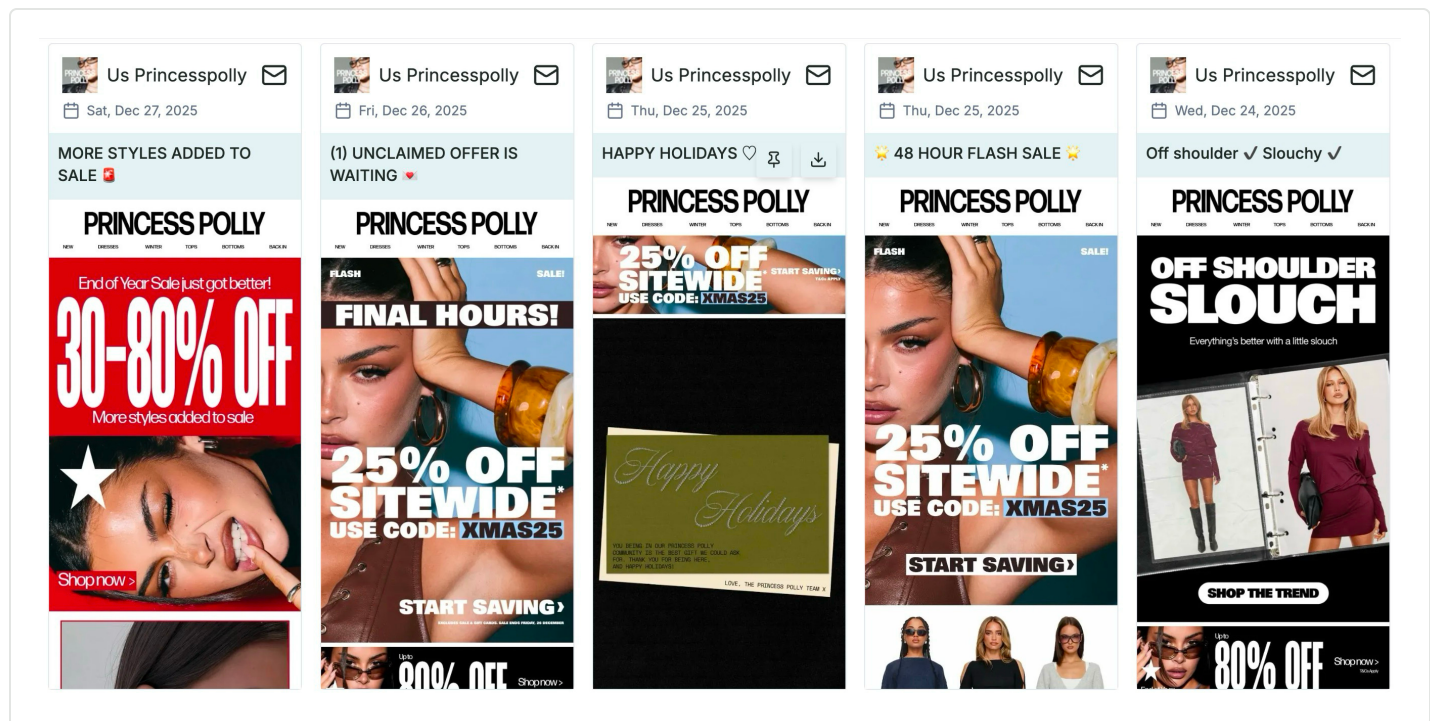
Marketing emails per brand per day. Dec 24–31, 2025. n=15. Source: ShopVision.

Anthropologie didn't give its email elves any downtime, sending 16 unique emails between Dec 24 and 26 — 6 on Christmas Day alone.



ANTHROPOLOGIE — CHRISTMAS DAY SENDS

Princess Polly leaped ahead of Lulus for second place, sending 8 messages over the same period.



PRINCESS POLLY — DEC 24-31 SENDS

Only 3 brands sent at least 1 message every day — and 3 sent only 3 messages: Bec & Bridge, Reformation, and The Frankie Shop.

The pivot to new-in

Most late-December subject lines pushed sale and clearance, but a handful featured new arrivals rather than markdowns.

- **Dissh** — Dec 24: *New Arrivals*; Dec 30: *Just Landed*
- **Anthropologie** — Dec 26: *100s of NEW ARRIVALS for a NEW YEAR*
- **Peppermayo** — Dec 28: *New Styles Added: End of Year Sale*

Who sold New Year's Eve

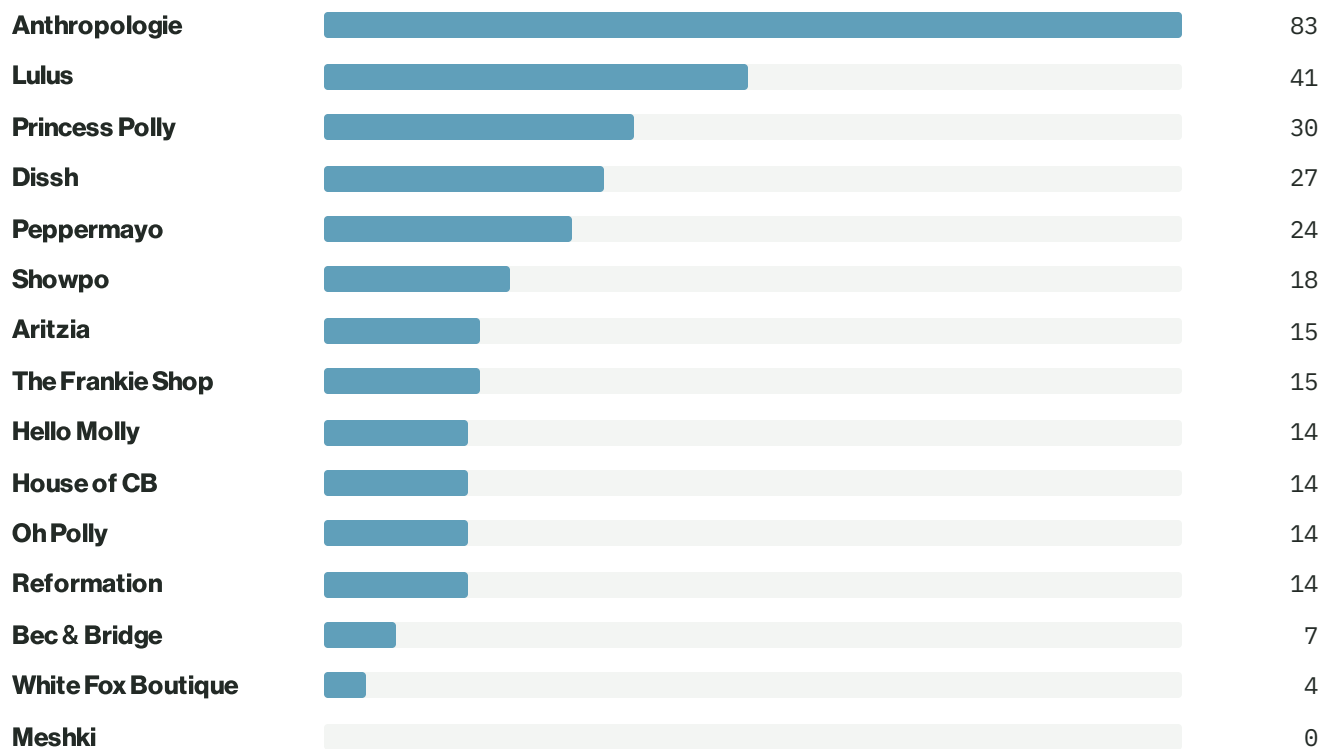
18 emails across 8 brands framed the occasion around New Year's Eve outfits.

- **Lulus (5)** the most NYE-forward — from *Your NYE Outfit = 25% Off* (Dec 16) to *GET IT BY NYE + BOGO 50% OFF* (Dec 26) and a last-chance overnight-shipping push (Dec 29).
- **Peppermayo (3)** opened December on it — *After Midnight: Your NYE Edit* (Dec 3) — and threaded NYE through its 12-day countdown.
- **Showpo (4)** *We've Found Your NYE Dress* (Dec 4) through *NEWIN: Party Dresses For NYE* (Dec 22).
- **Hello Molly (2)**, and singles from Aritzia, Anthropologie, House of CB and Reformation — one-off NYE subject lines rounding out the set.

Email volume by brand

At a glance: your email volume leaderboards, pre- and post-Christmas.

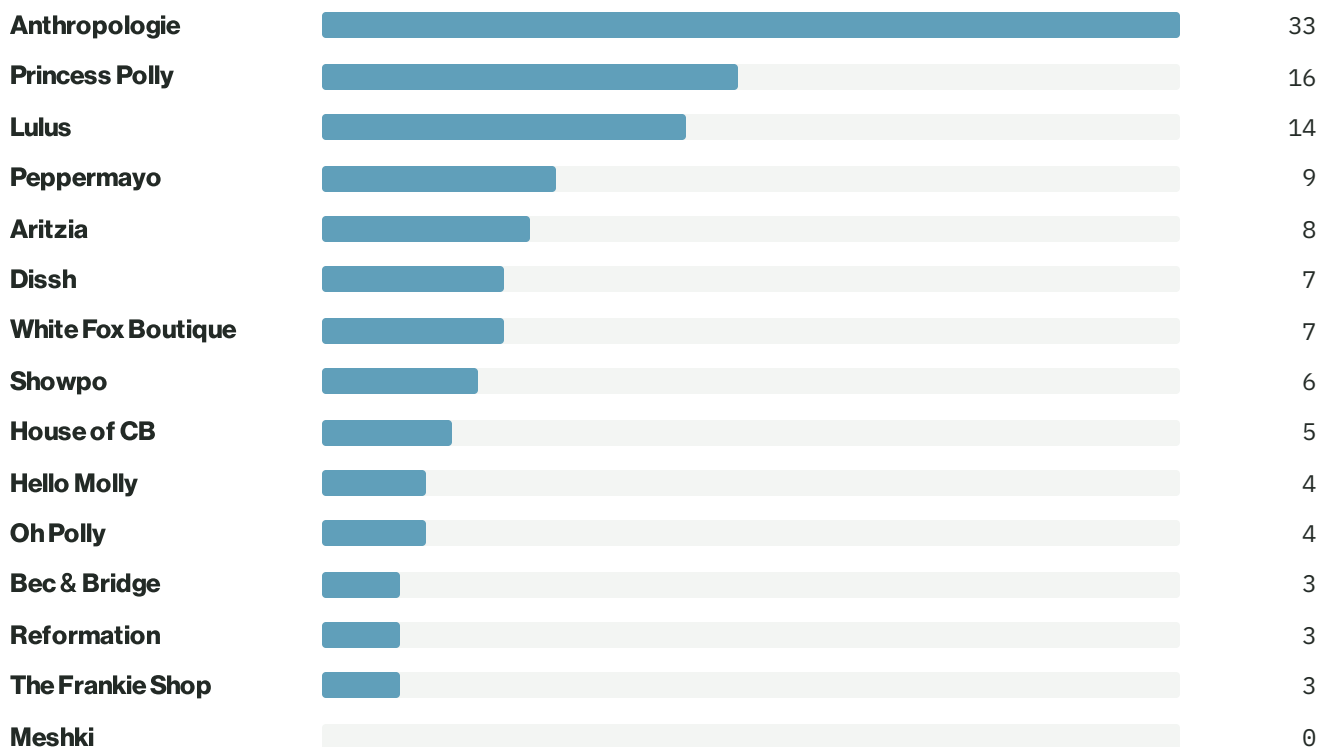
Women's contemporary fashion email volume: Dec 3–23, 2025



Marketing emails per brand, post-Cyber Monday. Dec 3–23, 2025. n=15. Source: ShopVision.

Anthropologie, by a landslide.

Women's contemporary fashion email volume: Dec 24–31, 2025



Marketing emails per brand, Dec 24–31, 2025. n=15. Source: ShopVision.

Aside from Anthropologie, the peer set sent 3–16 messages from Christmas Eve to New Year's Eve — less than half of Anthro's 33.

TAKE INTO 2026 PLANNING

- **What's your stand-out strategy after BFCM?** Q4 doesn't end on Cyber Monday. The goal is not to outsend the competition, but it helps to know where the pressure and the white space lies across December. If you want a closer look at every email and social post in your peer set to help plan creative for Q4 and beyond — they're all available in ShopVision's Explorer libraries.

Want to drill deeper into this data?

ShopVision holds one of the deepest competitive intelligence datasets 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.** Follow competitors, retail partners, wholesalers, owned brands, specific country domains, or any site you want to monitor.
- **Ask your own questions of the data.** Drill into the brands, channels, campaigns, and time periods that matter to you — then turn the findings into intelligence briefs, competitor teardowns, and data-backed slides.
- **Every season, every business case.** BFCM is one moment. ShopVision tracks competitor moves across promotions, email, ads, social, pricing, and catalog dynamics for year-round planning.

See the moves shaping your market.

ShopVision helps your team turn everyday competitor signals into sharper strategies 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.

Data source. ShopVision tracked promotional events, marketing emails, and homepage banners across 18 women's contemporary fashion brands over the Q4 2025 observation window (Oct 1–Dec 31, 2025). Every promotional event was classified from the brand's own public copy.

Classification. An event qualifies when it is Black Friday- or Holiday-framed and carries a genuine mechanic: a discount rate, a stacked “extra off sale,” a bundle or Buy-One-Get-One, or a flash. Standing “up to X%” sale-department headlines are distinguished from discrete events. Evergreen offers (sign-up, student, refer-a-friend, standing free shipping), price-point features (“\$X and under,” fixed-price dresses), and non-Holiday autumn sales are excluded.

Peer set

Anthropologie	anthropologie.com	Aritzia	aritzia.com
Bec & Bridge	becandbridge.com.au	Dissh	dissh.com
Hello Molly	hellomolly.com	House of CB	houseofcb.com
Lulus	lulus.com	Meshki	meshki.com
Oh Polly	ohpolly.com	Peppermayo	peppermayo.com
PrettyLittleThing	prettylittlething.com	Princess Polly	us.princesspolly.com
Reformation	thereformation.com	Revolve	revolve.com
Shona Joy	shonajoy.com	Showpo	showpo.com
The Frankie Shop	thefrankieshop.com	White Fox Boutique	whitefoxboutique.com

The Black Friday inbox, send by send.

Every marketing email observed across the peer set during the core Black Friday–Cyber Monday window, November 27 – December 2, 2025, grouped by brand (A–Z) and chronological within each brand. Times are UTC. Sends marked re-sent repeat an earlier creative under a new subject line. Anthropologie main brand only.

Date	Time (UTC)	Subject line
ANTHROPOLOGIE		
Nov 27	14:21	Extra 40% OFF sale = better than
Nov 27	14:39	Dig into 40% OFF SALE
Nov 27	18:20	Let's dish: 30% OFF EVERYTHING for giving (& getting!)
Nov 27	22:09	30% OFF dresses + extra 40% OFF SALE!
Nov 27	23:21	30% OFF EVERYTHING JUST IN TIME FOR DESSERT
Nov 28	13:30	EXTRA 50% OFF SALE STARTS NOW
Nov 28	14:39	SURPRISE! EXTRA 50% OFF SALE is live
Nov 28	19:27	EXTRA 50% OFF SALE's breaking the internet, not the bank.
Nov 28	22:59	EXTRA. 50%. OFF. SALE!!!
Nov 29	00:23	TGIBF! EXTRA 50% OFF!
Nov 29	13:24	ICYMI: EXTRA 50% Off SALE for BLACK FRIDAY
Nov 29	14:39	*SALE DRESSES* are now an EXTRA 50% OFF!!
Nov 29	19:23	EXTRA 50% OFF SALE = your wish come true
Nov 30	00:20	EXTRA. EXTRA! 50% OFF SALE!! RE-SEND
Nov 30	14:21	UP TO 50% OFF: CYBER MONDAY CAME EARLY!
Nov 30	15:39	EXTRA 50% OFF SALE + 30% OFF DRESSES ENDS SOON!
Nov 30	19:21	CYBER SUNDAY: up to 50% OFF
Nov 30	22:10	30% OFF + EXTRA 50% OFF SALE is glowing, glowing...

Date	Time (UTC)	Subject line
Nov 30	23:20	YOU get up to 50% off! & YOU get up to 50% off!
Dec 1	12:26	UP TO 50% OFF Happy Cyber Monday
Dec 1	14:39	ENDS TONIGHT: Extra 50% OFF SALE
Dec 1	20:22	LAST CHANCE for UP TO 50% OFF CYBER MONDAY
Dec 1	23:19	Extra 50% OFF SALE + 30% OFF!
Dec 2	00:19	FINAL HOURS: up to 50% OFF
Dec 2	14:29	Meet the Kayden Barrel Jean
Dec 2	14:59	All dressed in sequins
ARITZIA		
Nov 27	14:18	20–50% off winter essentials
Nov 28	00:16	Black Friday came early. Thankfully.
Nov 28	15:10	Black Friday must-haves are 20–50% off
Nov 29	02:10	Those styles you wanted are selling out
Nov 29	15:20	20–50% off holiday outfits
Nov 30	15:13	20–50% off everything* — the gift that keeps on giving
Nov 30	22:09	Surprise — Cyber Monday Sale starts now
Dec 1	15:16	Cyber Monday Sale. Here now, gone tonight.
Dec 2	03:05	Ends at midnight PT. 20–50% off everything.*
BEC & BRIDGE		
Nov 27	20:52	25% OFF SITEWIDE, 24 HOURS ONLY
Nov 28	04:15	AS SEEN ON, SELLING FAST
Nov 30	20:24	TAKE A FURTHER 40% OFF SALE
Dec 2	07:00	NEW MONTH, NEW DROP
DISSH		

Date	Time (UTC)	Subject line
Nov 27	06:05	These Best Sellers Are Back
Nov 27	15:06	The Best Of Black Friday
Nov 27	20:05	BLACK FRIDAY IS HERE
Nov 30	05:01	The Summer Collection Drop III
Nov 30	16:02	Final Hours, 25% Off (Almost) Everything
HELLO MOLLY		
Nov 27	15:08	@HelloMolly Mentioned You
Nov 28	17:15	25-80% OFF + EXTRA 10% OFF RN
Nov 30	16:15	25- 80% OFF absolutely EVERYTHING!!*
Dec 1	17:19	Buy 3, Get 1 Free* on styles 50-80% OFF
Dec 2	05:30	QUICK! Don't Miss Your FREE 'FIT
HOUSE OF CB		
Nov 28	10:00	Enjoy 20% off this Black Friday
Nov 29	10:00	20% Off Extended For The Weekend
Nov 30	09:00	20% Off Ends Today
Nov 30	18:00	Your last chance for 20% off
Dec 1	10:00	Shop 3 styles for £180
Dec 2	10:00	The Gift Shop is open
LULUS		
Nov 27	01:03	20% OFF ALMOST EVERYTHING
Nov 27	12:01	Act Fast: 20% Off Sitewide
Nov 27	19:01	Going Fast: 20% Off Sitewide
Nov 27	22:09	Grab 20% Off After Dinner!
Nov 28	15:11	20% OFF SITEWIDE

Date	Time (UTC)	Subject line
Nov 28	15:14	Can't Miss Styles, 20% Off RE-SEND
Nov 28	20:07	YAY! DRESSES ON SALE
Nov 29	00:06	20% Off Everything + Doorbusters Start at \$4
Nov 29	12:04	Up to 90% off new doorbusters? Say less!
Nov 29	20:03	CLOSING TIME
Nov 30	01:04	Last Chance for Black Friday, New!
Nov 30	15:08	Cyber Monday Sale
Nov 30	20:04	YES, UP TO 90% OFF
Dec 1	01:05	50% OFF EVERYTHINGGGG ON SALE
Dec 1	15:09	\$8 DOORBUSTERS?!
Dec 1	19:02	ICYMI: DOORBUSTERS UP TO 90% OFF
Dec 2	00:04	DOORBUSTER DRESSES = UP TO 90% OFF
Dec 2	15:06	OMG Doorbusters Up to 90% OFF
MESHKI		
Nov 27	16:43	30-60% OFF
Nov 28	16:39	Today's the DAY [First name]!
OH POLLY		
Nov 27	16:48	A new offer, let the chaos begin
Nov 28	08:12	Deals so wild they need supervision
Nov 28	15:59	BFCM company results update
Nov 28	18:02	RE: BFCM company results update
Nov 29	11:39	NEW LINES ADDED? You heard us
Nov 30	12:19	Tap here, or cry later
Dec 1	21:40	Cyber Monday is signing out

Date	Time (UTC)	Subject line
PEPPER MAYO		
Nov 27	00:35	UP TO 70% OFF STOREWIDE*
Nov 28	00:35	[First name], Up To 70% Off Everything
Nov 28	23:08	BLACK FRIDAY DRESS EDIT
Nov 29	21:02	Spotted In: Up To 70% Off*
Nov 30	07:00	Spotted In: Up To 70% Off*
Dec 1	00:31	CYBER MONDAY: Markdowns Added
Dec 2	01:06	Last Chance: Sale Ends Tomorrow
PRINCESS POLLY		
Nov 27	17:00	40% OFF SITEWIDE*
Nov 27	21:02	YOU. 40% OFF. NOW.
Nov 28	02:01	(1) UNCLAIMED OFFER!
Nov 28	17:11	40% OFF ENDS TONIGHT
Nov 28	21:02	Time to LOCK IN
Nov 29	02:00	FINAL HOURS TO SHOP
Nov 29	17:06	CYBER MONDAY SALE
Nov 30	02:01	30-80% OFF EVERYTHING!
Nov 30	17:03	Get in early this CYBER MONDAY
Dec 1	02:01	30-80% OFF SITEWIDE
Dec 1	17:07	DON'T MISS CYBER MONDAY
Dec 2	02:01	FINAL HOURS! 30-80% OFF
REFORMATION		
Nov 27	22:02	THANKFUL FOR SALE
Nov 28	17:25	NEW STYLES ON SALE

Date	Time (UTC)	Subject line
Nov 29	19:25	FAVORITES ON SALE
Nov 30	18:23	SALE'S SELLING FAST
Dec 1	17:33	SALE IS EVEN BETTER
SHOWPO		
Nov 27	00:02	Fwd: your refund has been processed.
Nov 27	17:06	Fwd: your refund has been processed.
Nov 28	00:03	Thank you so much, Lovely!
Nov 28	17:11	UP TO 80% OFF SITEWIDE
Nov 28	21:05	Thank you so much, Lovely!
Nov 28	23:04	Missed Out On Black Friday?
Dec 1	01:01	Tick, Tock! 40% Off Best Sellers
Dec 1	17:08	Tick, Tock! 40% Off Best Sellers
Dec 1	23:00	ATTN: Cyber Week Extended!
Dec 2	16:04	ATTN: Cyber Extended! 4 HRS LEFT
THE FRANKIE SHOP		
Nov 27	12:31	Styling for Every Hour
Nov 29	14:31	Back In Stock
Nov 30	13:03	Moving Texture
Dec 2	12:30	Own the Moment
WHITE FOX BOUTIQUE		
Nov 27	01:24	30% OFF HOODIES IS ON
Nov 28	02:21	40% OFF EVERYTHING STARTS TOMORROW
Nov 28	16:16	SURPRISE: 40% OFF EVERYTHING
Nov 28	18:13	TODAY ONLY 40% OFF BEST SELLERS

Date	Time (UTC)	Subject line
Nov 28	20:17	40% OFF LOUNGE LIMITED TIME ONLY
Nov 29	02:28	FINAL HOURS 40% OFF EVERYTHING
Nov 30	02:12	30% OFF OUR MOST IN DEMAND STYLES
Dec 1	02:11	30% OFF YOUR WINTER WARDROBE
Dec 1	16:21	CYBER MONDAY STARTS NOW
Dec 1	20:22	30% OFF THE HOTTEST LOUNGE
Dec 2	02:23	30% OFF EVERYTHING WON'T LAST FOREVER
Dec 2	17:11	[RE] Who approved styles from \$8*?