

SHOPVISION MARKET INTELLIGENCE

Skincare Black Friday Benchmark:

How 21 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?

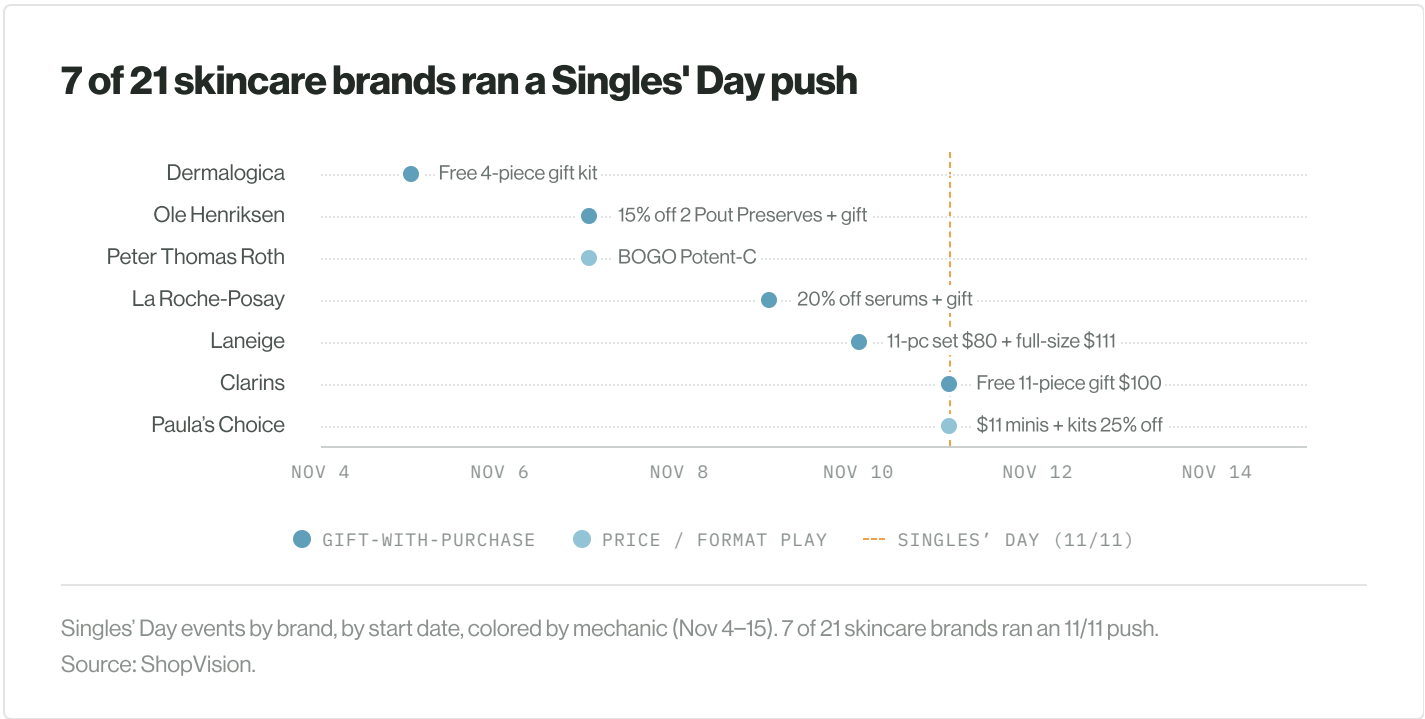
Across 13 weeks of Q4 2025, we tracked every promotional move 21 skincare brands made — when they moved, how deep they cut, their gift incentives, and the mechanics they used to pull the shopper in. It's a peer-informed playbook to equip you for your own 2026 planning.

- **Singles' Day was a legitimate play.** 7 of 21 ran an 11/11 push — and, as on Black Friday, most led with a free gift rather than a deep cut.
- **2 brands moved in October.** Most sale-live dates landed Nov 19 to 28, but Paula's Choice and Murad opened the season early with 'Black Friday Preview' events.
- **17 of 21 ran a sitewide-style discount.** Flat sitewide rates clustered between 15% and 30%, with 30% the modal rate.
- **Only 2 brands refrained from percentage discounts.** Dermalogica made its Black Friday a gift escalation (\$177 in gifts at \$150); Augustinus Bader offered double loyalty points and a \$350-threshold gift.
- **52% kept an event running after Christmas.** 11 of 21 carried a discount or gift into the Dec 24 to 31 stretch, splitting between deepened year-end clearance and a sustained sitewide rate.
- **The Black Friday inbox saw 235 emails over 15 days (Nov 19 to Dec 3).** 25 sends landed on Black Friday, 26 on Cyber Monday. Most brands sent 1-2 emails per day during this period.
- **After Cyber Monday, the inbox pivoted from discount to gift.** 177 more sends across Dec 4 to 24 traded percentages for presents — free minis, gift sets, ship-by countdowns — led by Dermalogica, which ran no discount at all; 1 brand went dark for the gifting weeks and re-emerged Dec 25.

21	13	8,000+	Q4 2025
SKINCARE BRANDS	WEEKS TRACKED	DATA POINTS ANALYZED	OBSERVATION WINDOW

Singles' Day: the season's first gifting moment

The season's first gifting moment was a self-gifting occasion — Singles' Day. 7 of the 21 brands ran an explicit Nov 11 push, clustered across the week of Nov 5–11, before the main event began.



The mechanic split previews what the rest of the quarter would show: the gift, not the discount, carried the moment. 5 of the 7 led with a free set or kit; only **Paula's Choice** (\$11 minis) and **Peter Thomas Roth** (buy-one-get-one) led on price.

Started	Brand	Singles' Day offer
Nov 5	Dermalogica	Free 4-piece self-care gift kit at tiered spend — the heaviest 11/11 investment
Nov 7	Ole Henriksen	'Singles' Day Mixer' — 15% off any 2 Pout Preserves + phone-grip gift at \$80
Nov 7	Peter Thomas Roth	Buy one, get one free (Potent-C favorites)
Nov 9	La Roche-Posay	20% off all serums + complimentary travel pouch at \$100
Nov 10	Laneige	11-piece set at \$80 + full-size Glaze Craze at \$111
Nov 11	Clarins	Free 11-piece gift at \$100 (code SINGLES25), one day only
Nov 11	Paula's Choice	Singles' Day '\$11 Minis' + holiday kits from 25% off

The other 14 brands sat 11/11 out, saving their move for the Black Friday window — including every prestige and clinical holdout (Aesop, Augustinus Bader, SK-II, Dr Barbara Sturm).

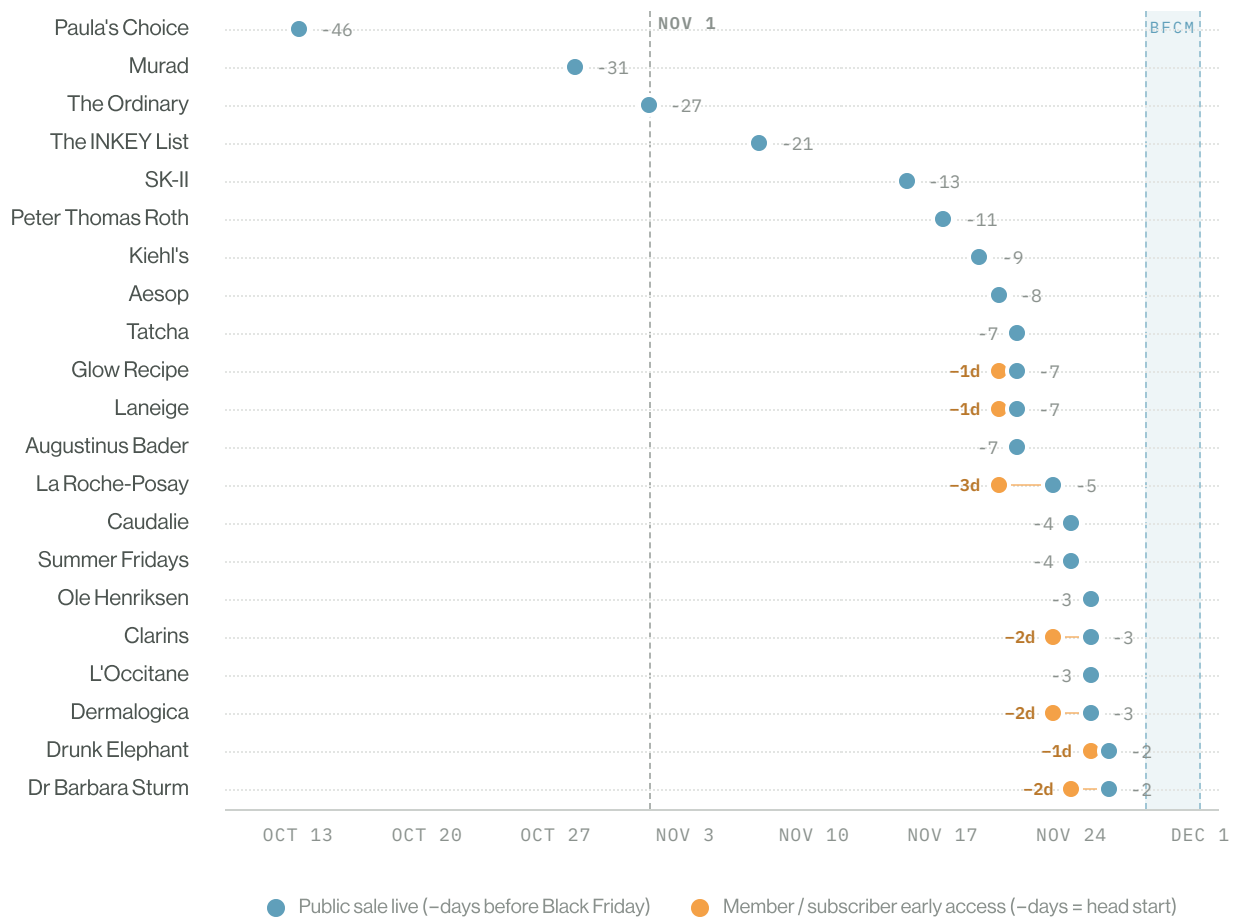
TAKE INTO 2026 PLANNING

- **Will 11/11 earn a beat in your merchandising calendar?** Singles' Day is a growing marketing trend and a great excuse to send an email offer on 11/11 — and the offer can be as simple as a hero product at 11% off or an \$11 mini. Self-gifting is always in fashion, whether you're partnered or solo. Will you test a Singles' Day beat on your promotional calendar this year?

The pre-Black Friday market moves

Every brand in the set ran a Black Friday or Holiday-framed offer at some point in the quarter — there was no true holdout. Nearly all were live before Black Friday itself, most in the days just ahead of it — **L'Occitane** alone waited until the day after.

2 of 21 skincare brands ran Black Friday 2025 offers in October



Public sale-live date by brand. Orange dot = member or subscriber early access. Excludes non-Holiday Q4 sales.

Source: ShopVision.

The 2 October movers ran previews, not sustained sales:

- **Paula's Choice.** A Black Friday Preview — 25% off plus a gift at \$90, 30% at \$120 — live Oct 13, its earliest Holiday-framed move.
- **Murad.** A 2-day preview at 30% off sitewide on Oct 28–29, then pulled and reopened at the same rate on Nov 17.

2 brands moved early in a way no one else did:

- **Tatcha.** A 1-day premier access at 25% off on Nov 4, laddered to early access Nov 17 and public Nov 21 — the longest run-up in the set.
- **The Ordinary.** A flat 23%-off-everything from Nov 1, held for 5 straight weeks — the widest single window in the market.

A third of the set let members in first

7 of 21 brands let members or subscribers shop Black Friday early — the same offer, a few days sooner:

- **La Roche-Posay.** Subscribers unlocked its 25% 3 days before the public sale (code VIP25).
- **Glow Recipe and Laneige.** Loyalty members got a Nov 20 head start on a Nov 21 public sale.
- **Drunk Elephant.** VIP members opened a day ahead of the Nov 26 public sale.
- **Dermalogica.** Members picked their gifts 2 days before the Nov 25 gift event opened publicly.
- **Clarins.** Email subscribers — not loyalty members — got a 2-day head start ahead of its Nov 25 public sale.
- **Dr Barbara Sturm.** Email subscribers unlocked a 48-hour early access to its 25% before the public sale.

A smaller group gave loyalty members a sweeter deal:

- **Kiehl's.** Rewards members got a flat 50% off — the deep end of its public “up to 50%” — and a members-only 25–30% carried through December.
- **Augustinus Bader.** No public discount at all: the offer was double loyalty points across the Nov 21–24 weekend, plus a complimentary 4-piece regimen at \$350.

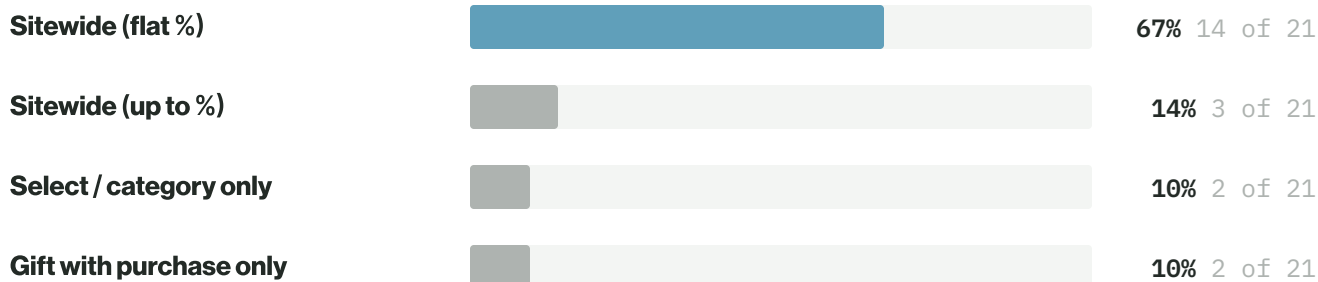
TAKE INTO 2026 PLANNING

- 1 **When do you flip the switch?** Only 2 of 21 opened Black Friday before November with a real Holiday-framed offer. The pre-Thanksgiving window is close to empty in this set — is 2026 the year you test a super-early sale event?
- 2 **Does early access earn its keep?** 7 of the 21 gave members or subscribers a head start, but almost all of it was the same rate a few days sooner. If your loyalty program is the vehicle for your first move, is a timing perk enough, or does the member need a different deal to feel the difference?

How the market anchored its discounts

Most brands ran a sitewide-style discount, the rates were shallow, and 2 brands refused to cut a percentage at all.

How 21 skincare brands discounted for Black Friday 2025



Each brand placed once by primary public-facing Black Friday mechanic (Nov 19 to Dec 2 window).

Source: ShopVision.

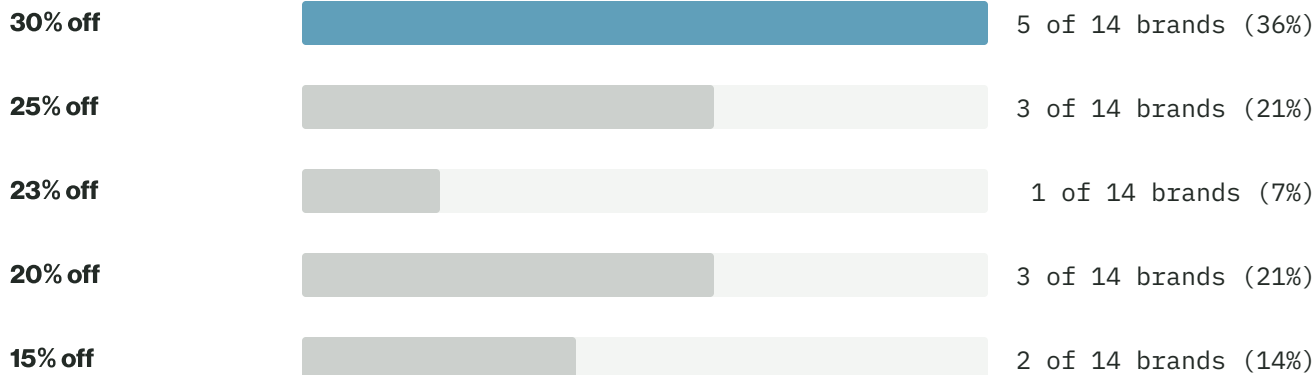
The 2 gift-only brands:

- **Dermalogica.** No percentage at all — its Black Friday was a tiered gift reaching 6 free gifts plus a travel bag, up to \$177 in value, at \$150.
- **Augustinus Bader.** Double loyalty points across the Nov 21–24 weekend and a complimentary 4-piece regimen at \$350, with no published discount.

Sitewide offers peaked at 30%

30% was the deepest flat sitewide rate anyone in the set ran, and 5 brands sat there: **Murad, Drunk Elephant, Ole Henriksen, Paula's Choice,** and **Peter Thomas Roth.**

Sitewide discount depth across 14 skincare brands, Black Friday 2025



Distribution of peak flat sitewide discount rates across the 14 of 21 skincare brands that ran a public sitewide discount for Black Friday 2025. Source: ShopVision.

The deeper headlines were limited to select products and markdowns:

- **Kiehl's and The INKEY List.** Advertised up to 50%, applied to marked-down stock rather than the full catalog.
- **Caudalie.** Up to 50% off select products only.
- **SK-II.** The lowest sitewide offer in the set, with a 15% rate capped to the first 6 items per product.

Peter Thomas Roth ran the most interesting timing of any discount. It put a 30% sitewide live Nov 18–20, then — through Black Friday week itself, when the rest of the market was cutting — dropped sitewide discounting entirely and ran a rotating single-product play (\$38 for a supersize creme that lists at \$120–200). It moved early, then abstained from the weekend everyone else fought over.

Genuine price-on-price sweeteners were rare — **Clarins** stacked a deeper 25% on orders over \$150 on top of its 20% sitewide, and **The INKEY List** added an extra 20% off at 5+ items in the Cyber Week tail. Where membership mattered, it mostly bought earlier access, not a better number.

Every brand's headline offer

Ordered by the date each brand's public sale went live.

Live	Brand	Black Friday offer
Nov 1	The Ordinary	23% off everything (through Dec 7)
Nov 7	The INKEY List	Up to 30% off everything (30% for members); 40% off Mystery Bundle

Live	Brand	Black Friday offer
Nov 15	SK-II	15% off (first 6 items per product), plus tiered gifts from \$200
Nov 17	Murad	30% off sitewide, plus a full-size gift at \$150
Nov 18	Peter Thomas Roth	30% off sitewide (Nov 18–20), then single-product deals for Black Friday week
Nov 19	Kiehl's	Up to 50% off sitewide, plus 30% off holiday sets
Nov 20	Aesop	15% off sitewide (Nov 20–23); never branded Black Friday
Nov 20	La Roche-Posay	25% off sitewide, plus deluxe samples
Nov 21	Glow Recipe	20% off sitewide, plus 30% off select faves
Nov 21	Laneige	Up to 20% off skincare, plus up to 30% off holiday sets
Nov 21	Tatcha	25% off sitewide, plus tiered gift duos from \$100
Nov 21	Augustinus Bader	No discount — double loyalty points, plus a 4-piece gift at \$350
Nov 23	Dr Barbara Sturm	25% off sitewide, plus tiered gifts from \$200
Nov 24	Caudalie	Up to 50% off select products (Cyber Sale)
Nov 24	Summer Fridays	20% off select, plus 30% off Dream Lip Oil
Nov 25	Clarins	20% off sitewide, or 25% off orders \$150+
Nov 25	Dermalogica	No discount — up to \$177 in tiered gifts at \$150
Nov 25	Drunk Elephant	25% off sitewide, plus free minis at \$125+
Nov 25	Ole Henriksen	30% off sitewide (up to 50% Cyber Monday); 50% off Banana Bright Serum
Nov 25	L'Occitane	20% off full-price sitewide
Nov 28	Paula's Choice	30% off sitewide, or 30% off orders \$120+

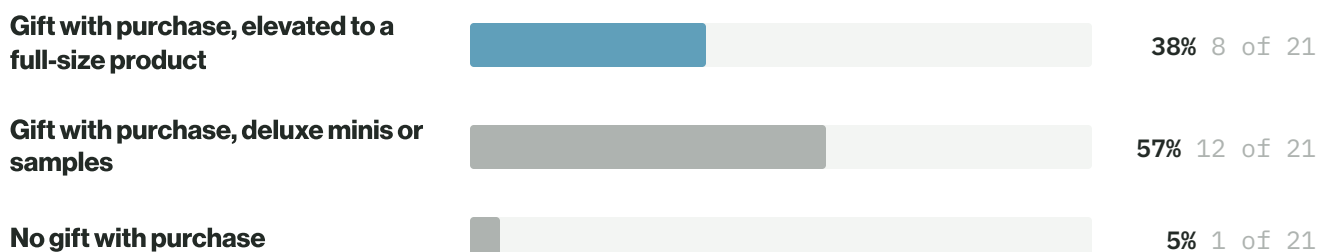
TAKE INTO 2026 PLANNING

- 1 Is sitewide on the table?** The majority of skincare brands are signaling a simple offer that's easy for shoppers to understand: 15%, 25% or 30% off sitewide. How does your offer stack up against your closest competitor?
- 2 Is a percentage even the move?** 2 brands ran a strong Holiday with no price cut, and Peter Thomas Roth sat out Black Friday itself. If your margin can't absorb a deep cut, this set shows the gift and the loyalty perk carrying the offer for prestige names. Is that a posture your customer would accept from you?

GWP: 20 of 21 brands offered at least one.

The mechanic that defined this market wasn't the discount — it was the gift. Every brand except **Peter Thomas Roth** ran a gift-with-purchase during the Black Friday window. It's the one play nearly everyone shared, and for the 2 brands running no percentage at all, it was the only Black Friday offer.

20 of 21 skincare brands ran a gift-with-purchase for Black Friday 2025



Brands running at least 1 gift-with-purchase during the Black Friday window, and those elevating to a full-size gift.

Source: ShopVision.

3 tiers of gift ran across the set:

- **Deluxe-mini / sample.** The default — Caudalie's mini duo at \$110, The INKEY List's deluxe mini at \$35, La Roche-Posay's 4 deluxe samples at \$75.
- **Full-size product.** The step up (8 brands) — Murad's full-size Retinal Eye Lift (\$93 value) at \$150, Laneige's full-size Glaze Craze at \$111, Clarins' 2 full-size lip oils.
- **Hard-good keepsake.** The premium variant — Tatcha's filled travel case at \$350, Summer Fridays' mini travel tote at \$75, Caudalie's woven tote at \$140.

The value-to-spend equation

The value ratio tells a deeper story. The brands posting the highest 'value' numbers stack many small deluxe minis into a big sticker total — **Dermalogica's** up to \$177 is 6 gifts and a bag, a 2.08x value-to-spend on its \$80 set — while brands giving a single full-size product show a lower ratio (**Murad** \$65 at \$100, **Drunk Elephant** \$60 at \$125). A high value-to-spend usually means more pieces, not a more generous single gift.

Every observed GWP offer

Brand	Gift-with-purchase
Aesop	Premium fragrance sample at \$150
Augustinus Bader	4-piece mini regimen at \$350
Caudalie	Mini duo at \$110; woven tote at \$140
Clarins	9-piece gift (\$168 value) at \$100
Dermalogica	2 minis at \$50, 4 at \$100, 6 minis + travel bag (\$177 value) at \$150
Dr Barbara Sturm	Face cream at \$200, glow drops at \$250, night cream at \$300
Drunk Elephant	Full-size Therabu Hand Cream (\$24) at \$110; 5-piece bag (\$38–46) at \$65
Glow Recipe	Free gifts at \$85; full-size Hue Drops (\$57) on Cyber Monday
Kiehl's	5-piece gift at \$125
La Roche-Posay	4 deluxe samples at \$75; travel pouch at \$100
L'Occitane	\$20 gift at \$55; gift at \$135
Laneige	Full-size Glaze Craze at \$111; 6-piece set + pouch (\$54) at \$80
Murad	Full-size Retinal Eye Lift (\$93 value) at \$150; 4-piece (\$79) at \$125
Ole Henriksen	Free set (\$44–45 value) at \$90
Paula's Choice	Full-size cleanser at \$90; 2 full-size gifts (\$102 value) at \$125
Peter Thomas Roth	No gift-with-purchase
SK-II	4-piece (\$115 value) at \$200; 6-piece (\$147 value) at \$300
Summer Fridays	Mini travel tote at \$75
Tatcha	Treatment duo at \$100; 3 duos + filled travel case at \$350
The INKEY List	Free full-size cleanser; deluxe mini at \$35
The Ordinary	Mini serum at \$25

TAKE INTO 2026 PLANNING

- **GWP sweetens sitewide offers.** 86% of brands stacked gifts with their Black Friday discounts, allowing both benefits on a single order. In a market where all but 2 brands are shaving up to 30% off, the value-added bonus is becoming the new competitive standard.

How hard skincare brands pushed the Black Friday inbox

Across the 15-day Black Friday window (Nov 19 – Dec 3), 15 skincare brands sent 235 emails. **Tatcha** led at 27 sends; **Dr Barbara Sturm** sent only 5.

Skincare email send volume for Black Friday 2025



Email sends per brand during the Black Friday 2025 window (Nov 19 – Dec 3), for 15 brands in the peer set.

Source: ShopVision.

Excluding Glow Recipe, Kiehl's, L'Occitane, Ole Henriksen, Paula's Choice, and The Ordinary.

Where the sending heat landed

Unsurprisingly, email sends by brand were hottest across the Cyber 5, with most brands sending 1–2 emails per day.

Skincare email cadence by day for Black Friday 2025 (Nov 19 – Dec 3)

	19	20	21	22	23	24	25	26	27	BF 28	29	30	CM 1	2	3	TOT
Tatcha	2	2	2	2	2	2	2	3	1	2	2	2	2	1		27
Dermalogica	3		2	1			1	2	2	2	3	3	3	2	1	25
La Roche-Posay	1	1	2	2	1	1	1	1	2	2	2	2	2	2	1	23
Drunk Elephant	1	1	1			2	2	2	2	2	3	1	2	3		22
Murad	1	2	1	2	1	1	2	1	2	2	1	1	3	1	1	22
Laneige		2	1	1	1	1	1	1	1	3	2	1	2	2	1	20
The INKEY List	1	2	1		1	1	1	1	1	2	1	2	2	1	1	18
SK-II	1	1	1	1	1	1	1	1		2	1	1	1	1	1	15
Summer Fridays	1					1	1	1	1	2	1	2	2		1	13
Aesop	1	2	1	1	2			1		1	1		1		1	12
Clarins		1			1	1	1	1	1	2		1	2		1	12
Augustinus Bader			2	1		1	1			1		1	1			8
Peter Thomas Roth		1	1			1			1	1			1	1		7
Caudalie			1					1	1	1		1	1			6
Dr Barbara Sturm		1			1		1		1				1			5
INBOX TOTAL	12	16	16	11	11	13	15	16	16	25	17	18	26	14	9	235
1 2 3 4 5 EMAILS / DAY																

Email sends per brand per day. Brands ranked by total email volume observed between Nov 19 and Dec 3, 2025.
Source: ShopVision.

The hottest senders

- **Tatcha.** The heaviest mailer in the set — 27 sends across 14 of the 15 days, peaking at 3 in a single day.
- **La Roche-Posay and Murad.** The most consistent cadence — the only 2 brands that mailed every single day of the window, a steady 1 to 2 sends a day without a gap.
- **Laneige.** Front-loaded onto Black Friday itself — 3 sends on Nov 28, more than any brand managed that day — then held 2 a day through Cyber Monday.
- **Dr Barbara Sturm and Caudalie.** The clearest restraint — 5 and 6 sends across the whole window, and Dr Barbara Sturm skipped Black Friday day entirely. Against a field mailing daily, a near-quiet inbox reads as a deliberate brand decision.

* Full list of BFCM email sends in Appendix A of this report. Full archive of email creatives available in ShopVision.

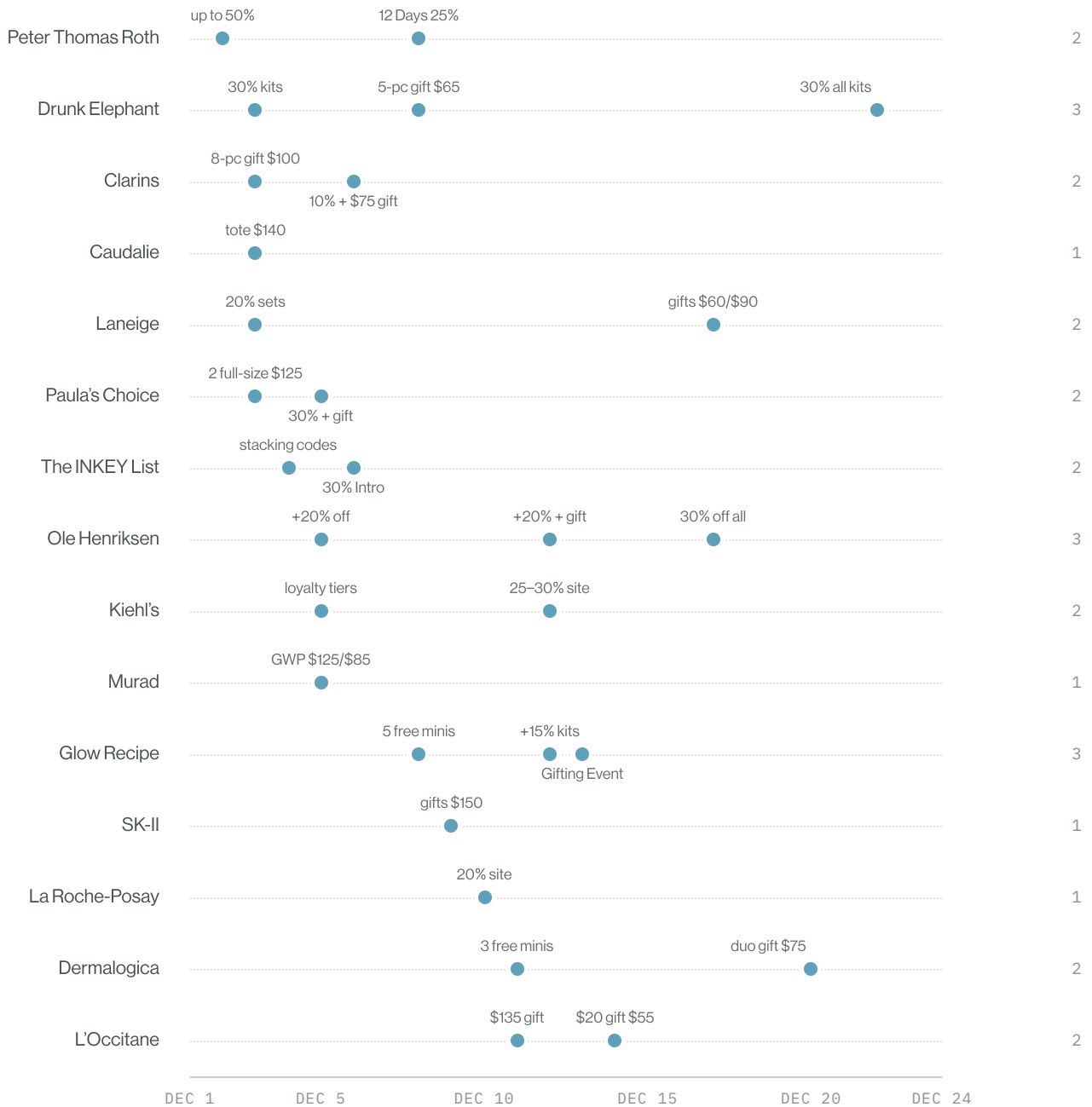
TAKE INTO 2026 PLANNING

- **Will your email playbook change?** Now that you see the market head-to-head, where do you want to compete harder for the inbox? Most brands send at least 1 message daily. BFCM may warrant re-sends to non-openers to maintain visibility.

What kept momentum after Cyber Monday

After Cyber Monday, the promotions kept coming.

How often skincare brands refreshed their offer through December 2025



New promotions started per brand during the December gifting weeks (Dec 2–23), by start date; count at row end. Brands not shown had wrapped their Holiday discount by early December. Source: ShopVision.

2 brands ran against the grain:

- **Peter Thomas Roth.** Launched its deepest event of the season after Cyber Monday — a Cyber Week up to 50% off run Dec 2–7, inverting the usual calendar.
- **The INKEY List.** Alone in getting deeper into December, adding buy-more stacking codes (extra 10% at 3+ items, extra 20% at 5+) on top of its up-to-50% — the only real sale-on-sale escalation in the set.

For most brands, December was a gift-with-purchase month with the percentage retired. Once the shipping cutoffs neared, the offers shifted from save-X% to free-gift and ships-in-time.

What each brand ran through December

Started	Brand	Promotion
Dec 2	Peter Thomas Roth	Cyber Week — up to 50% off select
Dec 3	Drunk Elephant	30% off holiday kits
Dec 3	Clarins	Free 8-piece gift at \$100
Dec 3	Caudalie	Limited-edition tote bag at \$140
Dec 3	Laneige	Up to 20% off holiday sets
Dec 3	Paula's Choice	2 full-size gifts at \$125
Dec 4	The INKEY List	Cyber stacking codes (extra 10% at 3+, 20% at 5+)
Dec 5	Paula's Choice	30% off sitewide + free gift (\$102 value)
Dec 5	Ole Henriksen	Extra 20% off
Dec 5	Kiehl's	Loyalty tiers (25 / 20 / 15% off)
Dec 5	Murad	Gift-with-purchase (\$125 / \$85 thresholds)
Dec 6	Clarins	10% off + free 8-piece gift at \$75
Dec 6	The INKEY List	30% off Intro Routines
Dec 8	Drunk Elephant	Free 5-piece gift bags at \$65
Dec 8	Peter Thomas Roth	12 Days of Deals (25% off)
Dec 8	Glow Recipe	5 free minis at \$85
Dec 9	SK-II	Free gifts at \$150
Dec 10	La Roche-Posay	20% off sitewide
Dec 11	Dermalogica	3 free minis at \$100
Dec 11	L'Occitane	Weekend free shipping + \$135 gift
Dec 12	Ole Henriksen	Extra 20% off duos + free set
Dec 12	Kiehl's	25–30% off sitewide
Dec 12	Glow Recipe	Extra 15% off kits
Dec 13	Glow Recipe	Gifting Event (\$114 value)
Dec 14	L'Occitane	\$20 gift at \$55
Dec 17	Ole Henriksen	30% off all
Dec 17	Laneige	Free travel gifts at \$60 / \$90
Dec 20	Dermalogica	Hydration duo gift at \$75
Dec 22	Drunk Elephant	30% off all holiday kits

6 brands ran no new December promotion — Aesop, Augustinus Bader, Dr Barbara Sturm, Summer Fridays, Tatcha, and The Ordinary had wrapped by early December.

TAKE INTO 2026 PLANNING

- **Where does your December beat go?** This set split 3 ways after Cyber Monday — hold the rate, pivot to gifting, or go dark. The brands that stayed loud in December mostly did it with the gift, not a deeper cut, and only 1 escalated the discount. If your customer is still buying skincare as gifts into mid-December, is a sustained gift-with-purchase a better use of the weeks than a second price event?

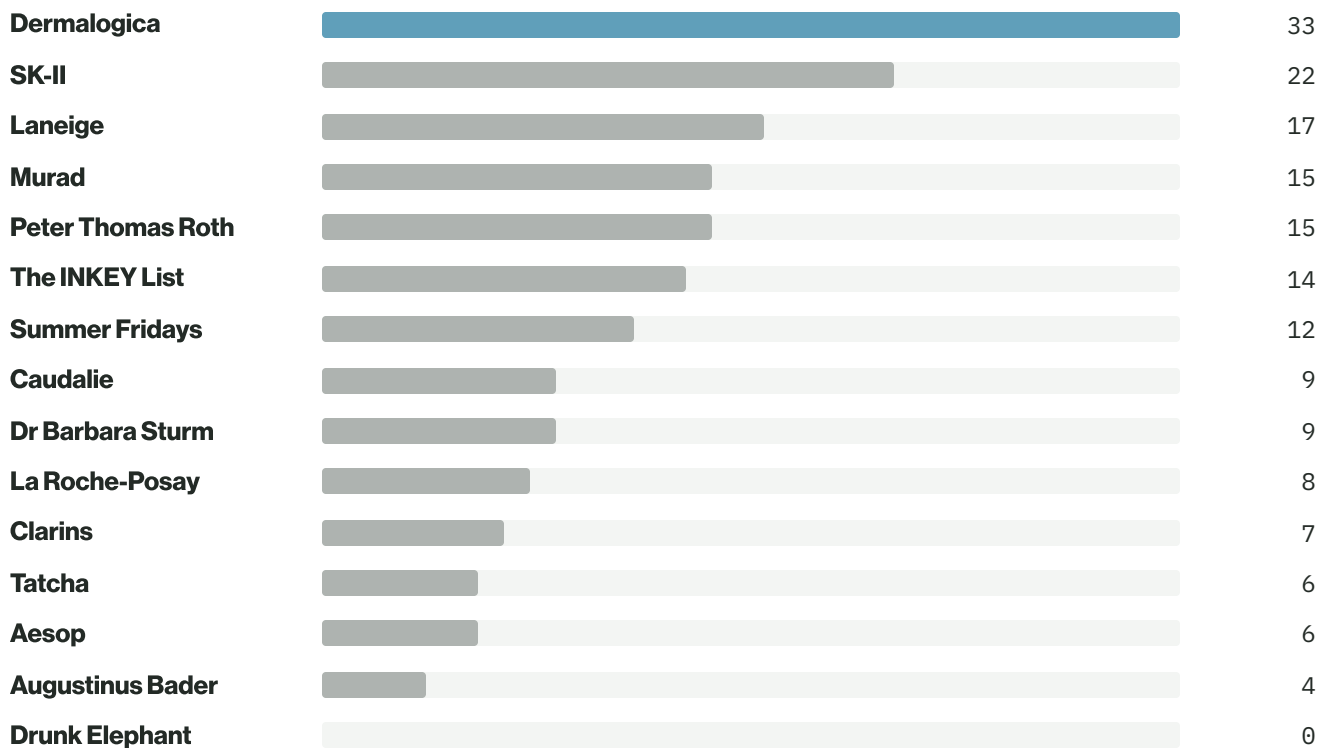
The post-Cyber-Monday inbox

Discounts didn't carry the inbox after Cyber Monday — gift with purchase did.

How the inbox pivoted from discount to gift

Across Dec 4–24, 15 brands in the set sent 177 more emails, and the subject lines flipped from percentages to presents: free minis, gift sets, ship-by countdowns, and FSA/HSA reminders.

Skincare holiday email volume after Cyber Monday (Dec 4–24)

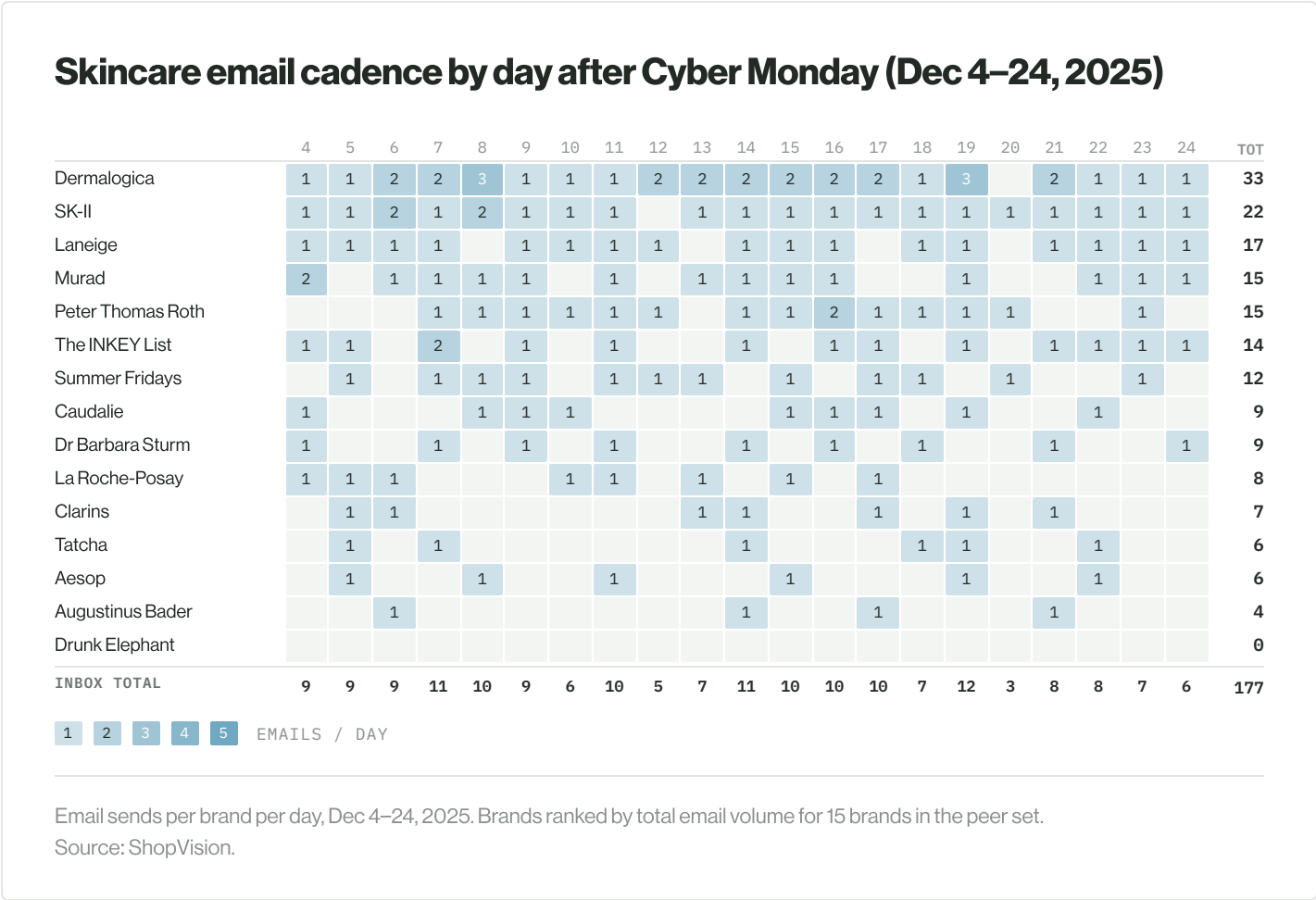


Email sends per brand, Dec 4–24, 2025, for 15 brands in the peer set. Source: ShopVision.

2 brands broke the gifting consensus. **Peter Thomas Roth** ran a '12 Days of Deals' engine — a fresh daily offer every day (BOGO, a \$38 hero, 40% off) — and **The INKEY List** held its discount deep, stacking up to 50% with an extra 20% and a 40%-off mystery bundle. At the other pole, **Drunk Elephant** went completely dark through the gifting weeks, then re-emerged on Dec 25 with a 20–30% year-end sale — a pivot that carries straight into the post-Christmas chapter.

A steady rhythm through the gifting weeks

Where Black Friday spiked, December ground on. The set kept up a steady daily rhythm for 3 straight weeks — no twin peaks, no single dominant date, just a sustained gifting drumbeat. Volume edged to its high on Dec 19 as shipping deadlines closed in, then tapered into Christmas. **Dermalogica** mailed on nearly every day of the window; **Drunk Elephant**, alone in the set, stayed completely dark.

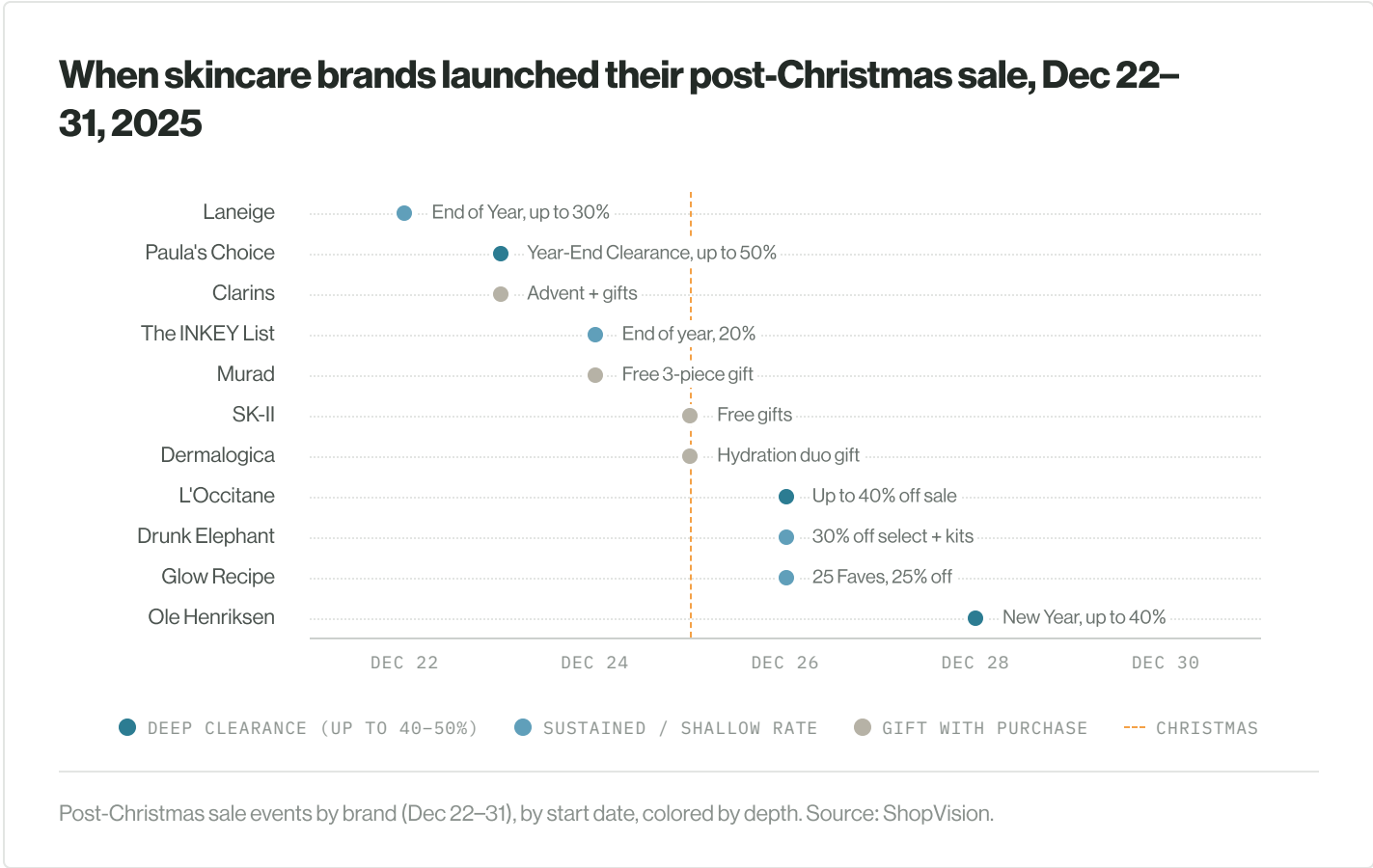


TAKE INTO 2026 PLANNING

- **What carries your inbox once the discount ends?** In this set the gift did — by Dec 4 nearly every brand had flipped from percentages to presents, and the loudest December senders led with free gifts, ship-by countdowns, and FSA/HSA reminders, not price. Is your December inbox built to move margin-friendly gifts, or to keep discounting into the new year?

After Christmas, the year-end pivot

The last week of the year wasn't a lull. 11 of 21 brands ran a distinct discount or gift event across Dec 24 to 31 — most of them the same brands that had kept December warm.



What each brand pivoted to

How the merchandising calendar looked through December.

Brand	Post-Christmas event (Dec 24–31)
Paula's Choice	Year-End Clearance — up to 50% off
Ole Henriksen	New Year sale — up to 40% off
L'Occitane	Up to 40% off sale
Laneige	End of Year Sale — up to 30% off
Drunk Elephant	End-of-year — 30% off select and holiday kits

Brand	Post-Christmas event (Dec 24–31)
The INKEY List	End of year sale — 20% off
Glow Recipe	25 Faves — 25% off
Murad	Free 3-piece gift at \$85
SK-II	Free gifts at \$150
Clarins	12-Day advent calendar; free samples
Dermalogica	Hydration duo gift at \$75

The remaining brands had wrapped by Christmas.

TAKE INTO 2026 PLANNING

- **Is your post-Christmas week a clearance vehicle or a fresh start?** This set used it mostly to clear. If your customers shop across your peers, a good chunk of them saw end-of-year deals in their inbox. Will they discover yours?

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.

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Data source. ShopVision tracked every promotional event across 21 skincare brands over the Q4 2025 observation window, classified from each brand's own public-facing copy.

Window. October 1 to December 31, 2025 (92 days; 13 weeks). The Black Friday event window is Nov 19 to Dec 2; the December gifting window is Dec 4 to 24; the post-Christmas window is Dec 24 to 31.

Holiday-framing filter. Timing counts only events a brand framed as Holiday, Black Friday, or Cyber, or that ran inside the Black Friday window as a sitewide, category, or threshold discount. Non-Holiday Q4 sales and standing offers are excluded from the timing read.

Classification. Standing baseline offers — sign-up incentives, year-round free-shipping thresholds, standing loyalty and subscription rates, and verification discounts — are treated as baseline and excluded. Pre-set gift sets sold at a standing value price are treated as products, not promotions.

Peer set

Aesop	aesop.com	Augustinus Bader	augustinusbader.com
Caudalie	us.caudalie.com	Clarins	clarinsusa.com
Dermalogica	dermalogica.com	Dr Barbara Sturm	drsturm.com
Drunk Elephant	drunkelephant.com	Glow Recipe	glowrecipe.com
Kiehl's	kiehls.com	L'Occitane	loccitane.com
La Roche-Posay	laroche-posay.us	Laneige	us.laneige.com
Murad	murad.com	Ole Henriksen	olehenriksen.com
Paula's Choice	paulaschoice.com	Peter Thomas Roth	peterthomasroth.com
SK-II	sk-ii.com	Summer Fridays	summerfridays.com
Tatcha	tatcha.com	The INKEY List	theinkeylist.com
The Ordinary	theordinary.com		

The Black Friday inbox, send by send.

Every marketing email sent by the peer set across the core Black Friday–Cyber Monday window, Nov 27 – Dec 3, 2025, ordered by date. Source: ShopVision.

Date	Subject
DERMALOGICA	
Nov 27	Free gifts inside — just saying
Nov 27	As a thank you... here's 7 free gifts
Nov 28	Stuff your cart with 7 free gifts
Nov 28	New gifts just dropped — claim yours fast
Nov 29	STOP — new gifts just dropped!
Nov 29	If you wait, you'll miss out on \$177 in gifts
Nov 29	Not to panic you... but time is running out
Nov 30	Technically your skin care is FREE
Nov 30	You're about to lose up to 7 free gifts
Nov 30	Sooo... skin care is a write-off now
Dec 1	More of what you love — free gifts + jumbo savings!
Dec 1	New E2 just dropped — get all 7 gifts
Dec 1	Open your Cyber Monday offer (up to \$177 value)
Dec 2	Don't scroll past — free gifts end soon
Dec 2	Hurry! Free gifts are running out
Dec 3	Final call: choose up to 7 free gifts now
DRUNK ELEPHANT	
Nov 27	Don't forget: 25% off!
Nov 27	25% off (in case you missed it earlier)

Date	Subject
Nov 28	Now you see it: 30% off!
Nov 28	Whoa, 30% off + free Therabu Hand Cream!
Nov 29	FINAL HOURS: 30% Off Sitewide + FREE Therabu Hand Cream!
Nov 29	30% off is still kicking!
Nov 29	30% off! That's how much we love you
Nov 30	Big sale. Huge. 30% off!
Dec 1	Deal with it: 30% off for Cyber Monday!
Dec 1	30% off — no kidding!
Dec 2	Cyber Monday FINAL HOURS: 30% off sitewide
Dec 2	Final hours! For real this time!
Dec 2	30% off: Now or next year!
LA ROCHE-POSAY	
Nov 27	We rarely do this... 25% Off Anti-Aging Serums & More
Nov 27	Black Friday Got Bigger! 25% Off & Gift
Nov 28	25% OFF + FREE SHIPPING & GIFT. Black Friday Got Bigger.
Nov 28	ENDS TONIGHT! 25% OFF & 5-PIECE GIFT
Nov 29	LAST CALL! Black Friday 25% Off & 5-Piece Gift
Nov 29	You asked, We Answered! 25% OFF Black Friday Extended!
Nov 30	Lucky you! Black Friday 25% Off & Free Gift is extended.
Nov 30	Final Hours! Black Friday Ends Tonight.
Dec 1	Last Reminder! Black Friday Ends at Midnight.
Dec 1	TODAY ONLY! 25% Off & 4-Piece Gift — Cyber Monday
Dec 2	LAST CALL! Cyber Monday 25% Off + Free Shipping & Gift

Date	Subject
Dec 2	Cyber Week Steals: 25% Off Sitewide
Dec 3	NEW! Gift SPF Protected, Glowing Skin (Now 25% Off)
LANEIGE	
Nov 27	Discover Korean Skincare on Sale
Nov 28	FREE 7-Piece Gift on Orders \$80+
Nov 28	Sweet Lip Treats Up to 30% Off!
Nov 28	Sitewide Sale is Still On!
Nov 29	A 7-Piece Gift is Waiting
Nov 29	Slow-Aging Skincare Up to 30% Off
Nov 30	FREE 7-Piece Skincare Gift on Orders \$80+
Dec 1	Cyber Weekend: Up to 30% Off
Dec 1	Cyber Monday Offer Ends Tonight!
Dec 2	Up to 30% Off: EXTENDED!
Dec 2	Ends Tonight: Up to 30% Off Sitewide!
Dec 3	Choose 3 Lip Faves, Save 20%
MURAD	
Nov 27	With thanks, for you! Enjoy 30% off
Nov 27	Shop Black Friday + enjoy savings while they last
Nov 28	30% Off: It's our BIGGEST sale of the year
Nov 28	Don't play the odds: 30% off won't last forever
Nov 29	Better go all in: 30% off Black Friday ENDS TOMORROW
Nov 30	Ends TONIGHT: 30% off Black Friday
Dec 1	2 hours left: 30% off Black Friday
Dec 1	Extended: One more chance for 30% off!

Date	Subject
Dec 1	Grab 30% off before it's too late!
Dec 2	We got you something: 30% off sitewide Cyber Week Sale!
Dec 3	FINAL HOURS: 30% off sitewide for Cyber Week
TATCHA	
Nov 27	We're thankful for you
Nov 28	The perfect gift is 25% off
Nov 28	Our best Black Friday offer ever is live!
Nov 29	25% off sitewide + your choice of gifts with \$100+ orders!
Nov 29	Sets are 25% off for Cyber Week!
Nov 30	Stock up on your favorite cleanser with 25% off sitewide!
Nov 30	Ends soon! Get the best value on our most potent formulas
Dec 1	25% off sitewide ends tomorrow!
Dec 1	Ends today: 25% off sitewide + gifts with \$100+ orders
Dec 2	This is it! 25% off sitewide ends tonight.
THE INKEY LIST	
Nov 27	Thankful for you. 30% off
Nov 28	THE ONLY DEALS YOU NEED
Nov 28	We know your inbox is full...
Nov 29	Before you delete every sale message...
Nov 30	Promise this one's worth opening
Nov 30	Did we mention up to 50% off EVERYTHING?
Dec 1	NEW LINES ADDED. UP TO 50% OFF
Dec 1	Up to 50% off EVERYTHING ends tonight
Dec 2	You missed it... or did you?

Date	Subject
Dec 3	Skincare from \$4.20 is too good to miss
SUMMER FRIDAYS	
Nov 27	To Our Community
Nov 28	20% Off For Black Friday
Nov 28	20% Off Everyday Essentials
Nov 29	20% Off + Free Mini Lip Butter Balm
Nov 30	Enjoy 20% Off
Nov 30	30% Off Dream Lip Oil
Dec 1	20% Off Ends Tonight
Dec 1	Final Hours For 20% Off
Dec 3	Restocked: Lip Butter Balm Minis
CLARINS	
Nov 27	Our Thanksgiving Gift to You
Nov 28	Save on Your 5-Star Favorites
Nov 28	Up to 25% OFF Luxury Sets
Nov 30	Bigger Bottles. Bigger Savings.
Dec 1	Cyber Monday = Prize Potential
Dec 1	FINAL HOURS: WIN + SAVE
Dec 3	8 Essentials. 1 Glow-Worthy Gift.
SK-II	
Nov 28	Give Thanks & Save! Enjoy 15% Off Sitewide
Nov 28	Get Your Black Friday Glow On
Nov 29	The Biggest Sale of the Year
Nov 30	The Savings that Keep Giving

Date	Subject
Dec 1	Cyber Monday Alert: Unlock 15% Off Sitewide!
Dec 2	Cyber Monday Savings Extended! Enjoy 15% Off Sitewide.
Dec 3	Last Call to Save on Your Glow
AESOP	
Nov 28	This Friday, some complimentary gifts await you
Nov 29	Your complimentary gifts await
Dec 1	Complimentary gifts await you this Cyber Monday
Dec 3	The gift of unhurried enjoyment
CAUDALIE	
Nov 27	Thankful For Skincare
Nov 28	Cyber Sale Continues
Nov 30	Last Sale Of The Year
Dec 1	Don't Miss It: Cyber Monday Savings
PETER THOMAS ROTH	
Nov 27	Ends Soon: \$38 for Super-Size Mega-Rich Crème
Nov 28	Black Friday Steal: \$38 Super-Size Un-Wrinkle Eye
Dec 1	FINAL HOURS: \$38 Super-Size Un-Wrinkle Eye (Was \$200)
Dec 2	Cyber Week Is Here! UP TO 50% OFF
AUGUSTINUS BADER	
Nov 28	Complimentary 4-Piece Gift
Nov 30	Your 24-Hour Skincare Ritual Starts Here
Dec 1	Offer Ends Tonight: Complimentary 4-Piece Gift
DR BARBARA STURM	
Nov 27	Black Friday is Ending Soon

Date	Subject
Dec 1	Cyber Monday Ends Tomorrow