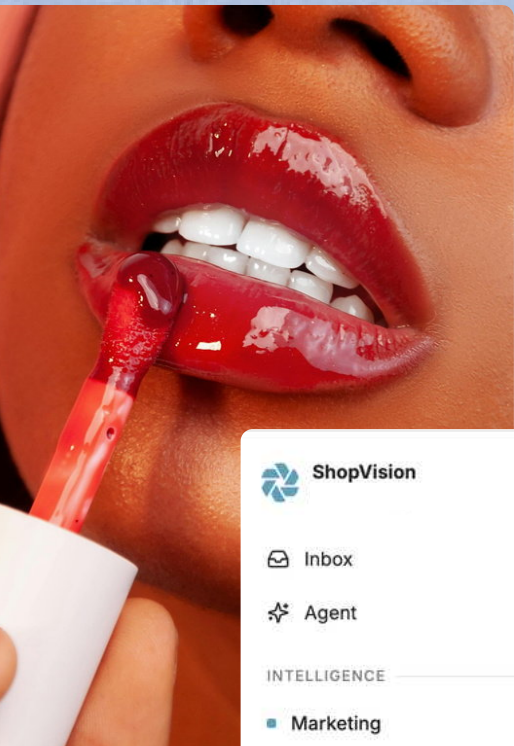


# How to win

# BFCM 2026

## The Beauty Playbook



ShopVision

Inbox

Agent

INTELLIGENCE

Marketing

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Pricing

Assortment & Catalog

Wholesale & MAP

Views

Emails

SMS

Push Notifications

Ads

Social

Pages

Banners

Promotions

Traffic

Filters 1

Sites: ILIA Beauty, Jones Road Beauty, Kosas Cosmetics, Sai...

Last Week

Jonesroadbea...

Sat, Sep 12, 2026

Makeup, Simplified

Shop by Category

100% Makeup 100% Skincare

Impressionist Multistick

Kosas

Sat, Sep 12, 2026

Cloud Set Loose Powder

100% Makeup 100% Skincare

Impressionist Multistick

Saiehellow

Sat, Sep 12, 2026

SALE

SALE

SALE

ILIA iliabeauty

Sat, Sep 12, 2026

20% Off Sitewide

Curated Favorites

Clean Makeup + Skincare Essentials

Tower28beauty

Sat, Sep 12, 2026

SALE

SALE

SALE



Promotion Details

Promotion Observations

Website

Sun, Sep 13, 2026

FREE LIP PULS DELUXE SAMPLE WITH ORDERS 100+

Kosas

NEW TRANSLUCENT Cloud Set Loose Powder

A new way to sweep away shine, not glow.

SHOP NOW

Handpicked Favorites

Kosas Cosmetics

Free Lip Puls

Promotion Details

Valid From / To

2026-09-13

Valid To / Last Date

Undetermined

Promotion Type

Free Gift

Gift Offer

FREE LIP PULS

Promotion Details

Coupon Code

NA

Seasonal Event

NA

Minimum Spend

80

Minimum Item Count

NA

Eligibility Conditions

Eligibility Actions

NA

Country Eligibility

# What your category did, and *what you do next.*

## The follow-up to the Beauty Black Friday Benchmark.

You've seen how 25 leading brands ran Holiday 2025. This is the shorter companion: the seven decisions that mattered most, what's already changing this year, and the move to make on each one.

Last year we tracked every promotional move 25 beauty brands made across 13 weeks of Q4: 9,000+ data points on timing, rates, gifts, loyalty gates, and email. The benchmark told you what the market did. This playbook is about what you do with it, updated with what we're seeing in the market right now as Holiday 2026 takes shape.



# *Play 1:* Launch before Black Friday, and plan around the retailer windows



## What 2025 told us.

92% of brands had a discount live before Black Friday, and half the set was live by November 20, the single most crowded launch day of the season. The calendar's real gatekeepers were the retailers: almost nobody launched inside the Sephora Savings Event or Ulta Hello Holidays windows, and the DTC wave opened once both had closed.

## What we're seeing in 2026.

No brand in the tracked set has sent a holiday-framed message yet, consistent with last year's late-October start. The rehearsals are running, though: ILIA's VIP Sale went live September 12 to 14 at the same 20% base rate and creative structure as its Black Friday event, and Kosas ran Friends & Family August 30 to September 7 at 25% sitewide, already at its 2025 Black Friday rate before November even starts.

# *Play 1: Your winning move*

- Map Sephora and Ulta's 2026 event dates before you pick your DTC launch day. In 2025 the set ceded early November to the retailers, then piled onto November 20; the days just after the retailer windows close are the clean air.
- If a September or October sale runs at your planned Black Friday rate, decide now what November adds. A rate the shopper already saw in September isn't an event.



# *Play 2: Treat 30% as the ceiling, not the target*



## **What 2025 told us.**

92% of brands ran sitewide, rates clustered at 20 to 30%, and 30% was a hard ceiling on the full catalog: no brand went deeper storewide. The bigger numbers (Huda's up-to-80%, Laura Geller's stacked codes) all lived on select or aged stock under a flat headline.

## **What we're seeing in 2026.**

The same band is holding in this year's sale events: Saie ran its first-ever DTC sitewide at 20% in May (it ran no DTC Black Friday discount at all in 2025, an open question for this November), ILIA is ratcheting 20% public against 25% for VIPs, Kosas hit 25%, and Tower 28 keeps returning to its brand-identity 28%. Jones Road remains the structural outlier, never running a flat rate; every 2026 sale has been a buy-more volume tier topping out at 30%.

# *Play 2: Your winning move*

- At 30% sitewide you match the majority; going deeper storewide made no one's list in 2025, so don't spend the margin there. Differentiation lives in the layers on top (Play 03), not the base rate.
- If your rate lands at 20 to 25%, pair it with a visible second deal on select items or sets. That's how the lighter-rate brands kept their headline competitive last year.

# *Play 3: Stack a gift on the discount, and keep it moving*



## **What 2025 told us.**

The gift-with-purchase was beauty's signature move: 21 of 25 brands stacked a gift on top of the sitewide rate, and 19 of the 22 gift-runners rotated it, swapping the item, moving the threshold, or running waves. The threshold told you the job: spend ladders engineered the basket, no-minimum gifts bought the customer, and daily rotation manufactured return visits.

## **What we're seeing in 2026.**

The architecture is running all year, not just in Q4. ILIA is stacking three-tier gift ladders on its sale rates (up to a \$64 full-size at \$175+), Saie runs a four-tier cumulative ladder starting at just \$65 where each threshold adds a gift rather than replacing it, Kosas gave a full-size gloss with every order on top of 20% off this summer, and MERIT has made keepsake hard goods its entire value layer, from Boll & Branch pillowcases to a Ritz-Carlton keychain, in place of any percentage sale.

# *Play 3: Your winning move*

- Design the gift ladder with the same rigor as the rate: pick the job (basket, acquisition, or return visits) and set thresholds to match. A cumulative ladder like Saie's reads more generous than a replacement ladder at the same cost.
- Plan at least one gift swap inside the window. The static single gift was the exception in 2025, and a rotation is the cheapest second headline you'll run all season.

# *Play 4: Use membership to sell earlier, not deeper*

## **What 2025 told us.**

52% of brands opened Black Friday behind a loyalty or VIP login first, but the gate almost always bought timing, not price: members got the same rate days early. Only a few reserved a deeper number (Tarte's extra 10% was the one truly member-only price), and the longest "teases" in the set were actually VIP sign-up drives, like Hourglass's 24-day early-access email drip.

## **What we're seeing in 2026.**

The programs are diverging. ILIA's VIP is the most engineered in the tracked set: a standing 5-point rate gap (25% vs 20% at sale events), 4x points on every launch, and 24-to-72-hour early access, so its Black Friday segmentation is effectively built already. Saie runs a community-led model on TYB, gating early access to content and drops rather than price. Jones Road, Kosas, and Tower 28 have no program at all, which means no mechanism for an early window when November comes.



# *Play 4: Your winning move*

- If you have a program, spend October filling it. The 2025 pattern says the sign-up drive is the tease; every VIP added before launch is a shopper you convert before the public inbox war starts.
- Decide earlier versus deeper explicitly. Earlier is the market norm and protects margin; a deeper member rate makes you the outlier in this set, which is a position, not a mistake, if loyalty economics support it.



# *Play 5: Show up in the inbox every day*



## **What 2025 told us.**

Beauty sent 410 emails in the 14-day window and daily sending was the norm; the quiet end of the set was simply invisible. Across the market 82% of sends were new creatives and 18% were re-sends to non-openers, with the mix a deliberate choice: Charlotte Tilbury sent 19 distinct creatives with zero repeats, while Tarte re-sent one creative twice a day for five days.

## **What we're seeing in 2026.**

Cadence positions are being set now. Jones Road is the most consistent sender in the tracked set at roughly six emails a week, every month, all year. MERIT has cut volume about 40% year over year, including a two-month spring blackout, doubling down on its "one sale a year" scarcity posture. Tower 28 runs the leanest program in the set but is ramping hard into its fall hero launch, a preview of how it concentrates volume around one story.

# *Play 5: Your winning move*

- Budget for at least one send a day across the window; below that you're not in the fight in this category. Then decide the mix: new creative earns opens, re-sends harvest them, and the 2025 leaders did both on purpose.
- Concentrate volume on the Cyber weekend. The 2025 inbox peaked on Cyber Monday at more than double the window's opening days, and the brands that held sends back for it owned the finish.

# *Play 6: Put new product to work in the holiday window*



## **What 2025 told us.**

Beauty didn't stop launching for the sale; it aimed launches at it. Six brands launched or teased new product in the post-Christmas week alone, using newness instead of (or alongside) markdown to re-engage, from Urban Decay's launch-week mascara to ILIA and Kosas teasing January drops.

## **What we're seeing in 2026.**

The holiday launch setups are already visible. Tower 28 bet its year on the Swipe Serum Foundation, a waitlist campaign that ran all August into a September launch, which will almost certainly anchor its November story. MERIT is seeding its Great Skin Rich Moisturizer as a "try it first" exclusive inside a mini set months before its official January launch, a gift-set play disguised as a preview. Jones Road has shipped roughly a launch a month all year, building the catalog its holiday bundles will draw from, and Saie completed its SuperSuede franchise (bronzer, blush, eyeshadow), a ready-made gift set.

# *Play 6: Your winning move*

- Pick the fall launch that carries your holiday narrative and protect it: a hero product gives shoppers a reason to buy beyond the rate every brand is matching.
- Steal the "try it first" mechanic: seeding an unreleased product inside a holiday set turns a Q1 launch into Q4 revenue and makes the set exclusive without discounting it deeper.

# *Play 7:* Plan the week after Christmas like a second Black Friday



## **What 2025 told us.**

Almost nobody went dark: 20 of 25 brands opened a fresh post-Christmas sale, and the depths ran past Black Friday's ceiling, with Tarte at up to 80%, Laura Geller and Patrick Ta at 75%, and most of the set at 50%+. Nearly every event carried its own name (Vault Sale, Pink Bag Sale, Year-End Sale), and six brands used the week to launch or tease product instead.

## **What we're seeing in 2026.**

Year-end is months away, but the two Q5 plays are already being loaded. The launch pipeline is the visible one: MERIT's January-launching moisturizer and the teaser-heavy fall calendars at ILIA and Kosas mirror exactly how brands slid into spring last year. The clearance side stays unwritten until December; this section updates as the season opens.

# *Play 7: Your winning move*

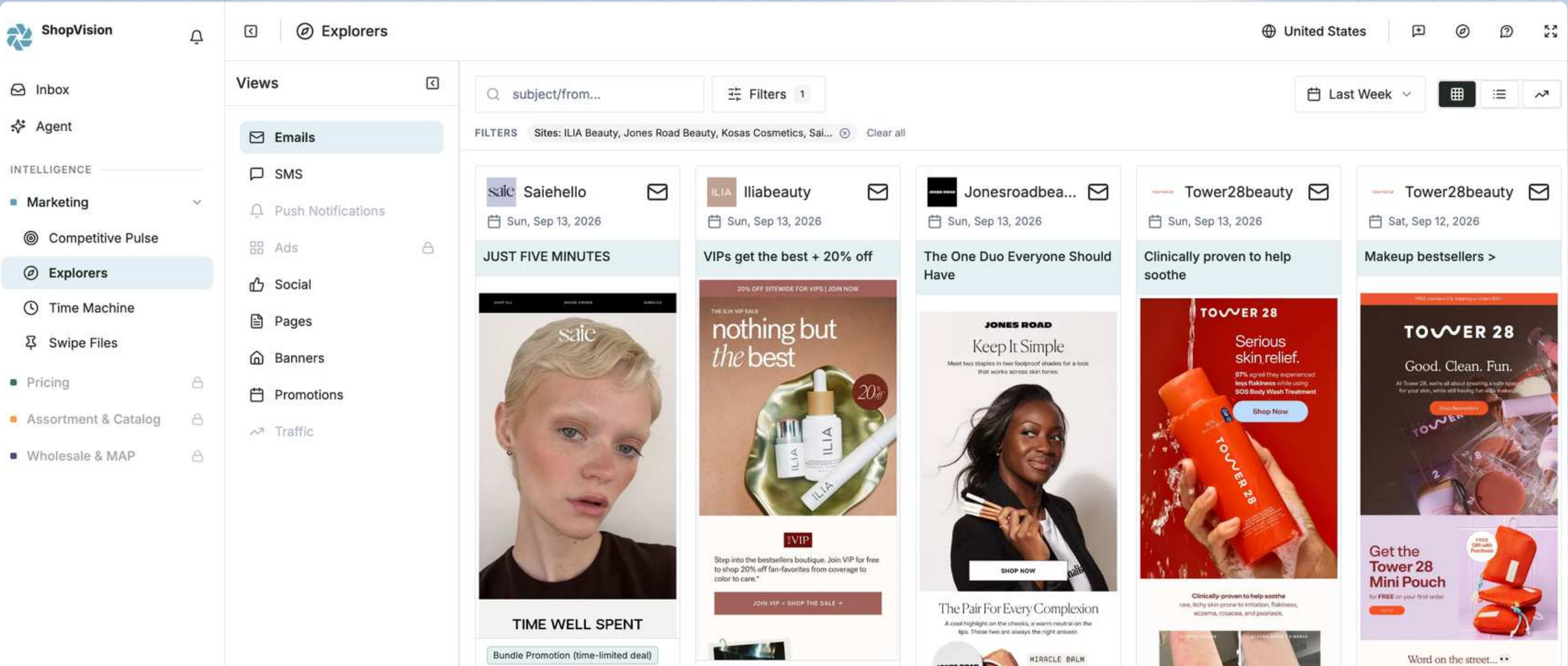
- Name your Q5 event now and hold inventory for it. In this category the week after Christmas is a full second event at clearance depth, not an afterthought, and an unnamed markdown competes against 20 named ones.
- If your margin can't take a second deep cut, run the launch play instead: new product in the last week of December was how ILIA, Saie, and Tower 28 stayed visible in 2025 without touching price.

# The market is already moving. *Watch it live.*

Everything in this **playbook** came from one **source of truth**: seeing what every competitor actually did, verified at the source, from their own public copy.

That's what ShopVision does every day, across 300,000+ brands, retailers, and marketplaces, with 15 million products tracked daily.

This year, don't wait for the retrospective. Track your own peer set through the whole Q4 window: every launch date, every rate, every member gate, as it happens.



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