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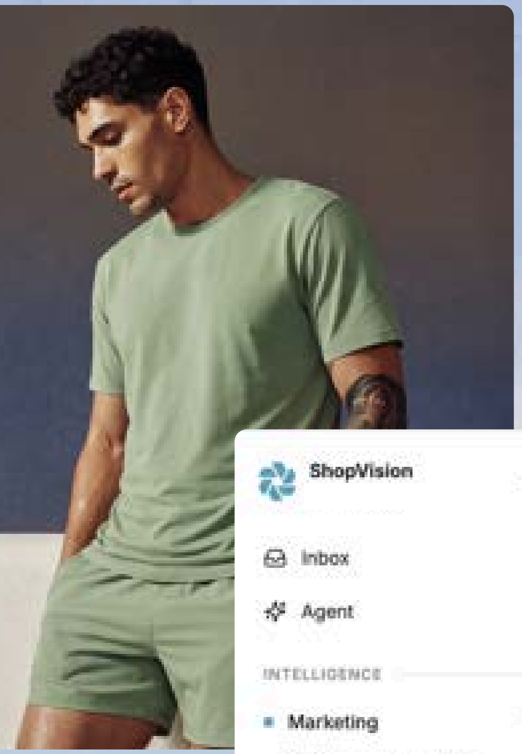
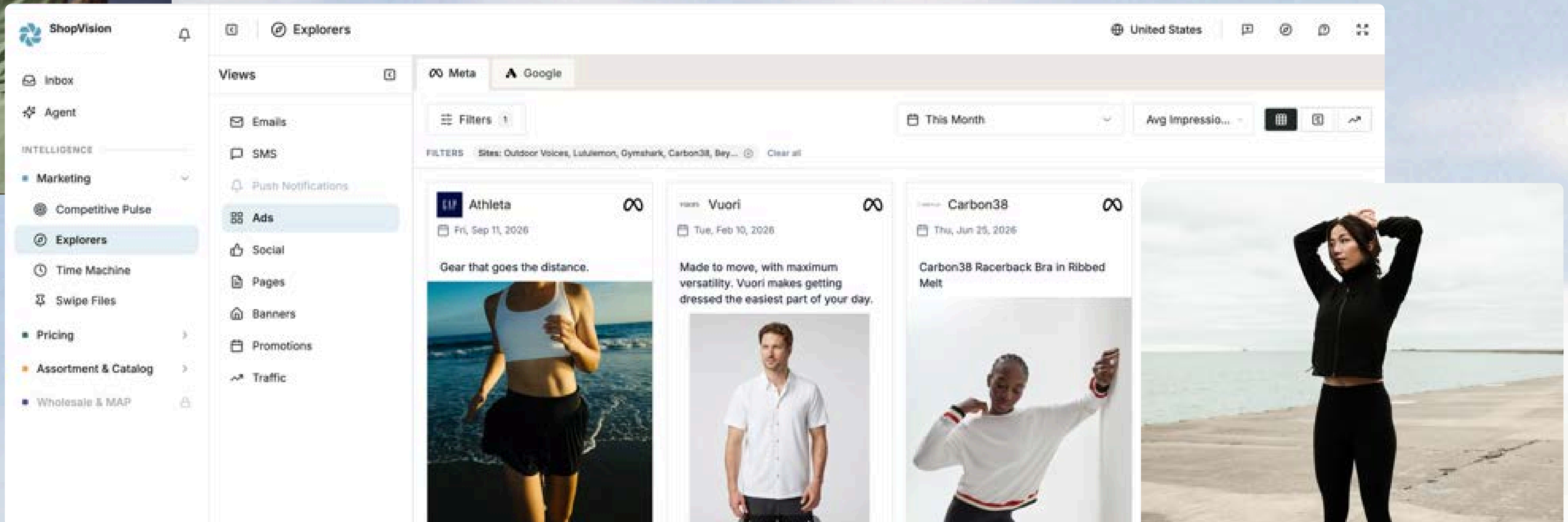
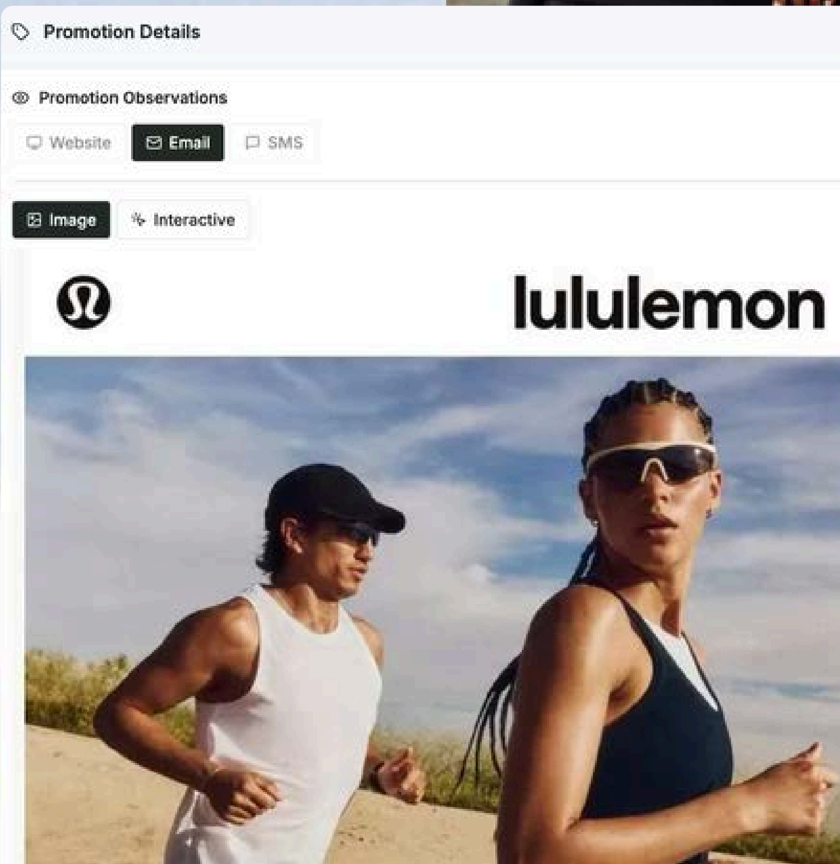
How to win BFCM 2026

The Athleisure Playbook







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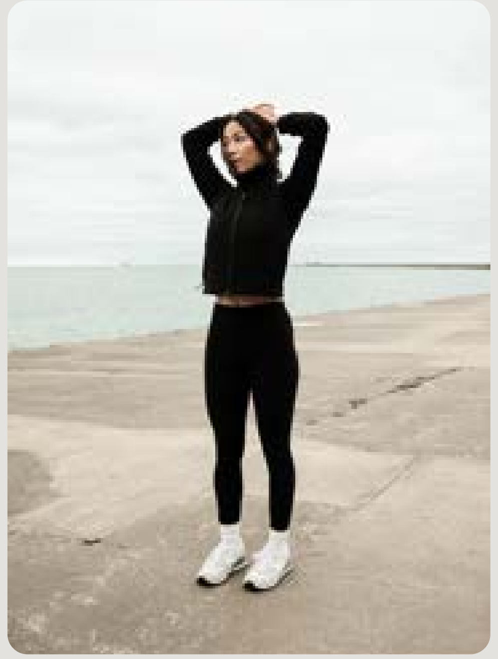
What your category did, and *what you do next.*

The follow-up to the Athleisure Black Friday Benchmark.

You've seen how 19 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 19 athleisure brands made across 13 weeks of Q4: 8,500+ data points on timing, depth, mechanics, email, and clearance. 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.



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Play 1: Claim the early window before the cluster hits

What 2025 told us.

Only 1 of 19 brands made a Black Friday move before November, and 7 didn't move until Black Friday week itself. The two earliest movers, Alo Yoga and Athleta, both gated their early events behind a loyalty program rather than running a public sitewide cut.

What we're seeing in 2026.

No brand in the tracked set has sent a Black Friday-framed message yet as of mid-September, which is normal for the date. The gates are being built, though. Lululemon has already rehearsed members-first early access twice this year (an app-gated product drop in April, Summer Sale early access on June 22) and is running members-first Fall 2026 access right now. And Gap Inc. launched the Encore loyalty program in February, which means Athleta walks into Black Friday with a cross-brand membership base nine months deep. The 2025 early movers are building bigger doors for 2026.

Play 1: Your winning move

- Decide your launch date now, not in November. Late October and early November were quiet in 2025; that window is available until someone takes it.
- If you move early, anchor it in your membership or loyalty program. An early loyalty-gated event reads as a member benefit. An early public sitewide cut reads as desperation.
- Set an alert on your five closest competitors' first Black Friday-framed message. Whoever breaks first resets the clock for everyone.

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Play 2: Know where your discount sits before you set it

What 2025 told us.

30% off was the market rate: 9 of the 13 brands running a public sitewide landed exactly there. Three brands cut through at 40 to 50%. The one brand under 30% (Rhone, at 25%) paired it with a spend tier to give shoppers a path deeper.

What we're seeing in 2026.

Depth is holding steady year over year across most of the tracked set: Athleta's summer and Labor Day events matched 2025 (up to 60% plus extra 30% on sale), Beyond Yoga held at up to 75% plus extra 25%, and Gymshark held at up to 50% plus a stackable 20% code. Three brands moved. Outdoor Voices swapped its 2025 GWP-led posture for deep percentage events (up to 70% off summer clearance, up to 60% at Labor Day). Beyond Yoga tested price-cap framing at Labor Day ($59.99 leggings) instead of a percentage. And Lululemon's UK and DE sites added a stackable extra-10% code not seen in their 2025 records, a new tool that could travel to BFCM.

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Play 2: Your winning move

- Benchmark your planned rate against the 2025 rates of the five brands your customer cross-shops. At 30% you match the market. At 40 to 50% you buy attention with margin. Below 30% you need a pairing: a ladder, a member benefit, or a category cut that earns the attention the rate won't.

- Write the "why this depth" rationale into the plan now, so you're not negotiating it against a competitor's live rate in week three of November.

Play 3: Sitewide is the default, not the only posture

What 2025 told us.

13 of 19 brands ran a public sitewide, but the other six ran four different mechanics: members-only depth (Alo Yoga, Fabletics), select or up-to-X% (Lululemon, Varley, Gymshark), and a designer-collab gift with purchase and no markdown at all (Vuori). The brands that skipped a public discount had a holiday story that didn't depend on one.

What we're seeing in 2026.

The loyalty infrastructure moved this year. Gap Inc. launched Encore on February 24, a unified program across its four brands including Athleta, the biggest structural loyalty move in the set. Lululemon spent Q2 and Q3 deepening its three-tier membership with tier-exclusive drops, a members-only event, and steady onboarding emails. Vuori is still running gift-with-purchase on spend thresholds, its 2025 BFCM mechanic, unchanged. No change detected at Alo Yoga.

Play 3: Your winning move

- If you're running sitewide, run it cleanly: decide up front whether sale items stack, and say so in the copy. In 2025 the stacking brands and the excluding brands both won by being explicit.

- If you're considering a non-discount play, you need the substitute story locked by September: a collab, a hero product, or a membership deep enough to carry the whole event. Vuori and Alo could hold the line because the alternative was already built.

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Play 4: Decide if you tease your sale, and how

What 2025 told us.

10 of 19 brands launched cold, with no public tease at all. Of the brands that teased, most landed in a 5 to 6 day window: long enough to build anticipation, short enough not to fatigue the inbox. And the sharpest move wasn't a tease at all: SKIMS reframed an already-running sale as "a head start on Black Friday," turning an unrelated promo into holiday anticipation with one line of body copy.

What we're seeing in 2026.

No public Black Friday tease from anyone in the tracked set yet. What is already live is the machinery a tease hangs on: Lululemon ran full gift-guide editorial for Mother's Day and Father's Day this year, and Vuori ran multi-email GWP gifting series for both. Lululemon's "Summer Sale: Early Access tomorrow" send in June is the tease template to expect them to reuse in November: one day out, member-gated, app-first.

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Play 4: Your winning move

- Don't tease out of habit. Half the market ran silent and lost nothing. If you tease, a week out is the proven window.

- If you're running any sale in October or early November, borrow the SKIMS move: one sentence connecting it to Black Friday gives shoppers permission to buy now instead of waiting for your deepest rate.

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Play 5: Set your email volume on purpose

What 2025 told us.

The peer set spread 11x apart on cadence. Athleta sent 4.1 emails a day; Gymshark sent 5 emails across the entire window. Most brands landed between one and two sends a day, and both extremes were deliberate positions, not accidents.

What we're seeing in 2026.

The cadence spread is widening. January 1 to September 14, year over year: Lululemon US nearly doubled its sends (102 to 201), driven by membership onboarding, gift guides, and drop announcements, and Gymshark more than doubled off a small base (27 to 60). The other direction: Carbon38 cut volume 64% (639 to 228) and Vuori cut 51% (537 to 261), shifting its mix toward product drops over discount pushes. Athleta pulled back about 12% and remains the volume leader in the set. Outdoor Voices sent exactly the same count both years.

Play 5: Your winning move

- Pick your position: one to two sends a day matches the market. Above that, you're betting inbox presence beats restraint, and you should know why. Below one a day, your restraint should be visible brand discipline, not an understaffed calendar.

- Watch your closest competitors' cadence in real time through the window. A rival doubling their sends mid-week is a signal their headline isn't converting.

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Play 6: Keep the calendar moving after Cyber Monday

What 2025 told us.

The brands that stayed interesting in December did it two ways. Six used 24-hour flash events to create new headlines after the main offer cooled; Ten Thousand ran a rotating daily flash December 13 to 20 and owned a week nobody else was contesting. And 10 brands held their new drops until after Cyber Monday, launching into the full-price gift window instead of diluting them inside the sale.

What we're seeing in 2026.

The drop engines are already running. Alo Yoga is on a near-weekly rhythm of a member Early Access send followed by the public drop within 48 hours. Vuori shipped two named drops in the first week of September alone. Carbon38's flash vehicle this year is the archive sale, 3 to 5 day events at up to 75% off, the likely shape of its BFCM urgency play. And Lululemon ran a designer collab drop in the UK in June, a hint its international BFCM may carry a capsule.

Play 6: Your winning move

- Put at least one post-Cyber Monday beat on the calendar now: a flash event, a hero-product moment, or a full-price drop. In 2025 this space was nearly empty. It probably still is.

- If a launch and the sale window collide, decide the posture in advance: sweep the launch into the sale rate, or carve it out at full price the way Lululemon did. Both work. Improvising doesn't.

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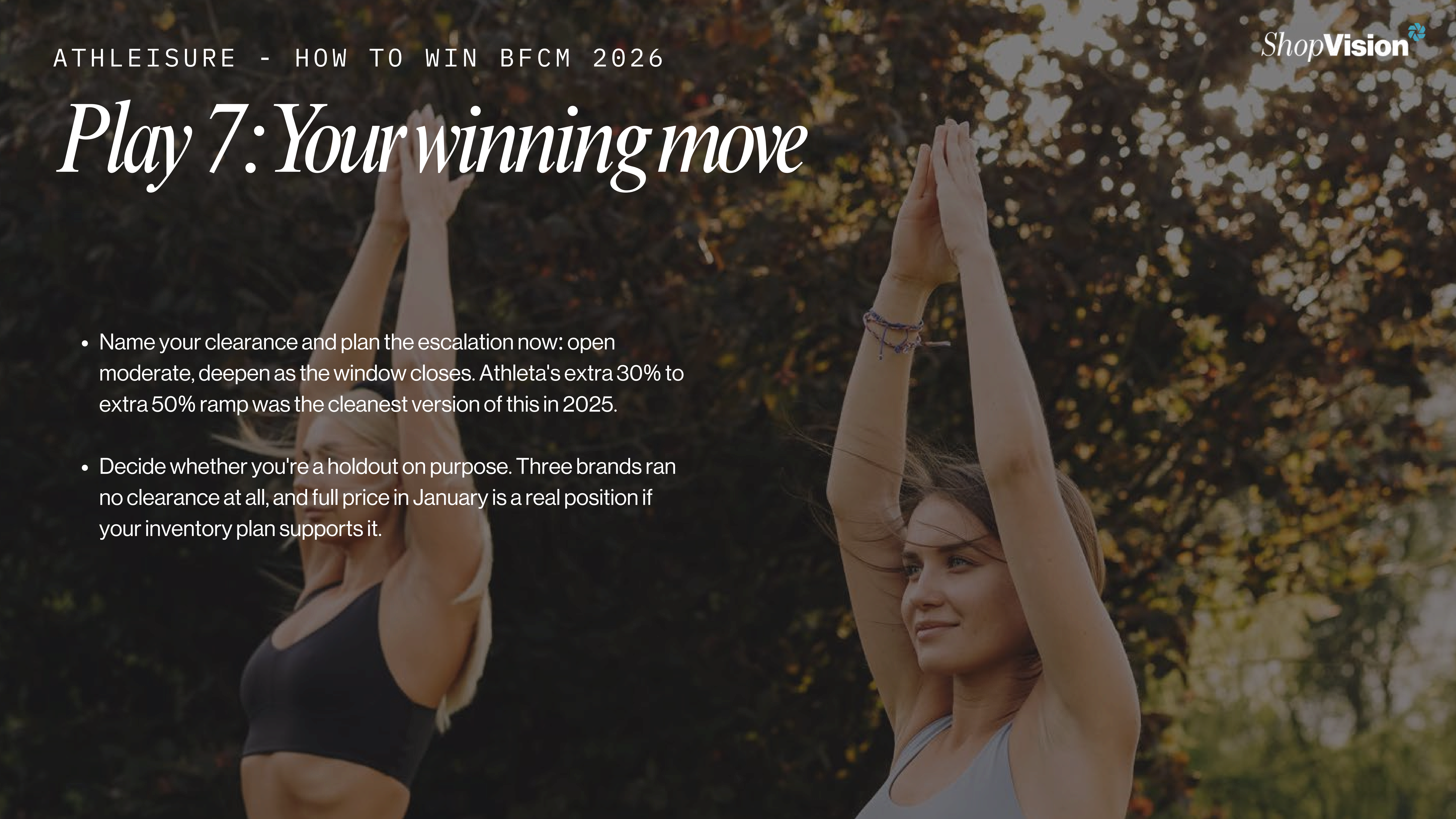
Play 7: Treat clearance as a named event, not a quiet markdown

What 2025 told us.

15 of 19 brands ran a post-Christmas clearance, with the bulk at 50 to 60% off and the deepest at 70 to 80%. Eight brands launched on December 25 or 26. The brands that got the most out of it named the moment (Winter Sale, Warehouse Sale, End of Season) and escalated depth toward January 1 instead of opening at their floor.

What we're seeing in 2026.

Too early for a 2026 clearance signal. The freshest read is from January, when Outdoor Voices closed out the 2025 season with an End of Year Sale at up to 60% off, January 1 to 4. This section updates as December approaches.



Play 7: Your winning move

- Name your clearance and plan the escalation now: open moderate, deepen as the window closes. Athleta's extra 30% to extra 50% ramp was the cleanest version of this in 2025.

- Decide whether you're a holdout on purpose. Three brands ran no clearance at all, and full price in January is a real position if your inventory plan supports it.

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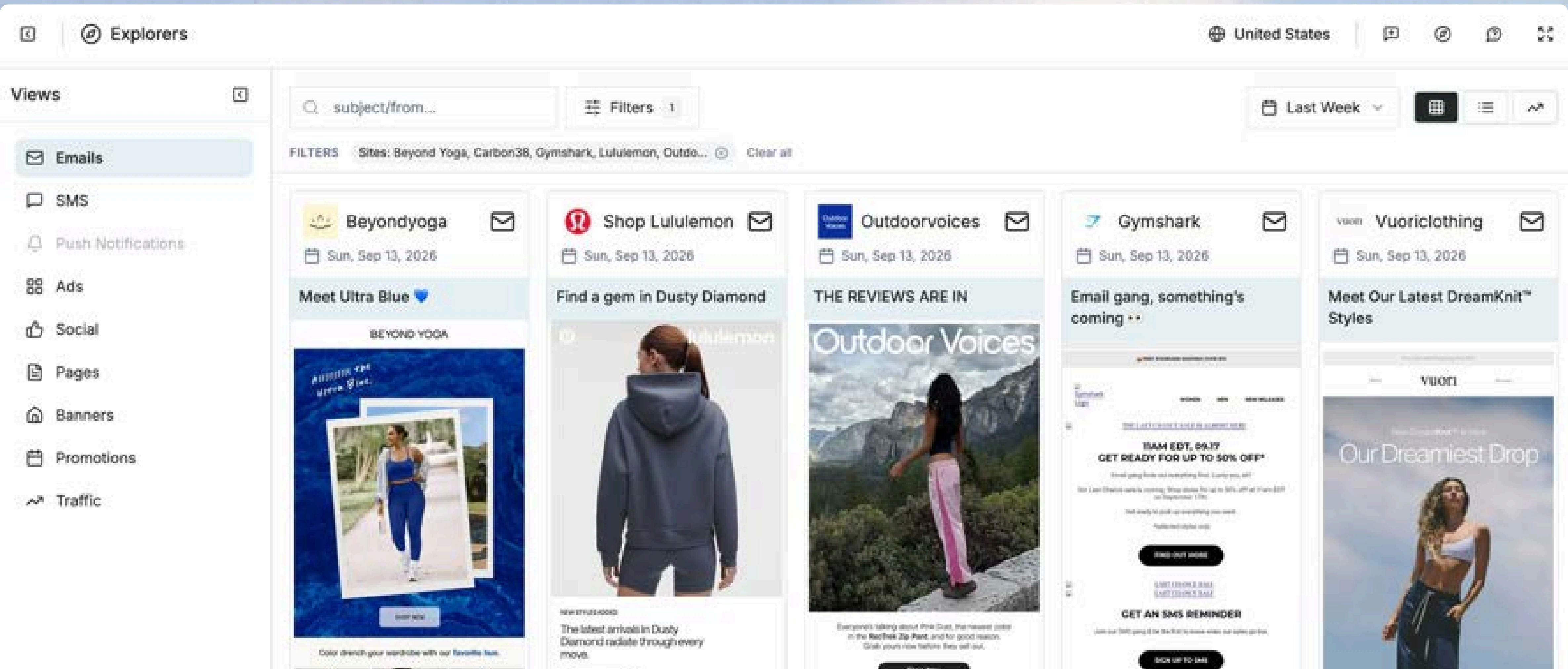
The market is already moving. *Watch it live.*



Everything in this playbook came from one thing: 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 tease, every flash, as it happens.

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