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The Modern Guide to Email Retargeting

A Modern, Privacy-First Guide for Marketers



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Email retargeting has been around for years, but how it's used today looks very different from how it started.

What began as simple cart reminder emails has evolved into a broader way for brands to re-engage people across the entire customer journey, including visitors who never identified themselves and never made it into a CRM.

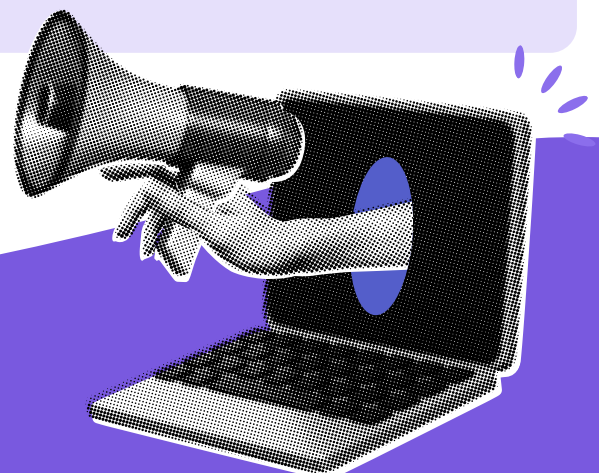
This guide explains how email retargeting works now, where it's heading, and how brands can use it responsibly in a privacy-first world

About | OPTIVO

Optivo is the UK's first GDPR compliant email retargeting solution that identifies and converts anonymous users across your whole website, not just your CRM, via email. ~95% of your website visitors land on your site, don't get into a conversion journey and leave.

Optivo helps you identify and reach those users with permissioned email, enticing them back to your site, helping you convert them into CRM leads and paying customers. Integration is simple and quick and Optivo is compatible with most enterprise CRM/CDP and ESP platforms.

With clients such as Secret Sales, Simba Sleep and Huddled Group, Optivo is laying the path for a new way to acquire and convert new audiences into customers.





What This Guide Covers

We'll cover:

How email retargeting has evolved beyond cart recovery

How brands can now retarget people outside their CRM

The difference between traditional and modern approaches

When each model makes sense

The creative, technical, and process foundations required

How privacy and consent change the rules by region

By the end, you'll understand not just what email retargeting is, but how to use it effectively without compromising trust or compliance.

Why now?

Traditional Retargeting Isn't Working Anymore

95% of advertising + data decision-makers expect continued "signal loss"

(IAB State of Data 2024)



Brands Want To Control Their Destiny

71% of brands/agencies/publishers are currently or planning to grow their first-party datasets

(IAB, 2025)



Automated Email Works

Automated messages had ~60% open rates and 3x higher clicks and 10x higher conversion rates vs traditional campaigns.

(Omnisend Ecommerce Stats 2024)





1. What is Email Retargeting, Really?

Email retargeting is the practice of using behavioural or identity signals to re-engage users via email after a meaningful interaction.

This includes:



- Someone who added a product to cart and left
- A lapsed customer who stopped engaging
- An anonymous site visitor who can later be resolved to an email identity

What it is not:



- Generic email newsletters
- Batch-and-blast promotions
- Standard segmented CRM campaigns

2. Types of Email Retargeting

Email retargeting is the practice of using behavioural or identity signals to re-engage users via email after a meaningful interaction.



Trigger-Based Retargeting



CRM Retargeting



Identity Based Retargeting



TYPE 1

Trigger-Based Retargeting (Cart and Browse Abandonment)

What it is

Automated emails triggered by on-site actions such as:

- Cart abandonment
- Product view without purchase
- Checkout drop-off

Typically executed through Email Service Providers (ESPs) or site-side platforms.

Why it works

- Captures high purchase intent
- Low creative and operational overhead
- Immediate revenue recovery

Why it breaks

- Only works on known CRM users
- Volume capped by CRM-identified site traffic, specifically those that make it to the checkout process.
- Easily saturated and ignored

Best used when

- AOV is moderate to high
- Purchase cycles are short
- You want fast, measurable wins



User lands on cart page



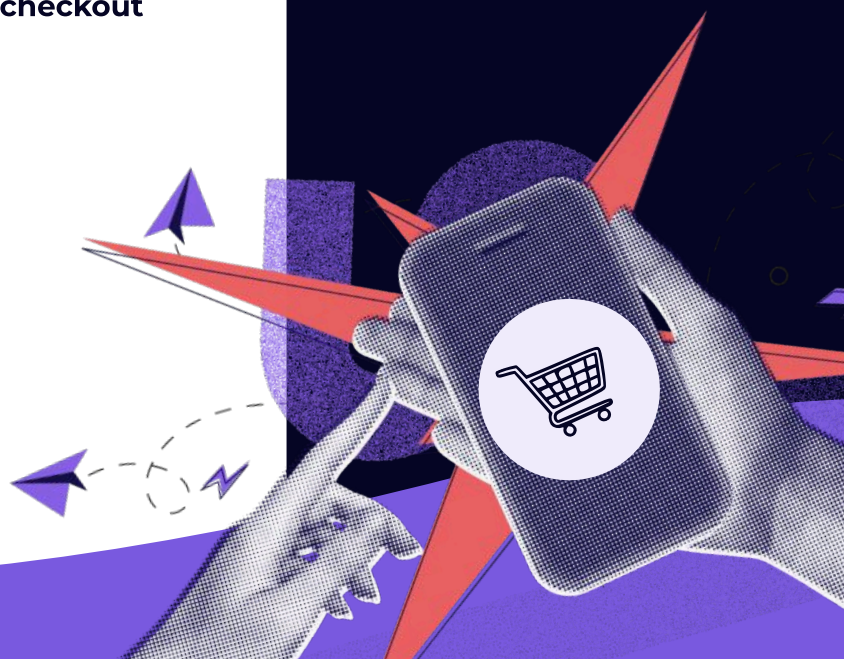
Check CRM database



The user is in CRM



Email them





TYPE 2

CRM and Lifecycle Retargeting

What it is

Using first-party CRM data to re-engage users based on:

- Time since last purchase
- Engagement decay
- Lifecycle stage

This includes win-back, replenishment, and reactivation campaigns.

Why it works

- Maximises LTV from existing customers
- Improves retention economics
- Supports long purchase cycles

Why it breaks

- Limited scale
- Dependent on data hygiene
- Slow feedback loops
- Diminishing returns if overused
- Limited incrementality

Best used when

- You have repeat purchase behaviour
- Customer data is unified
- Retention matters more than acquisition



User in CRM database



Time since purchase or last action passes



Send Email



TYPE 3

Identity-Based Email Retargeting

What it is

Resolving anonymous or partially known users to an email identity using:

- Deterministic signals
- Probabilistic matching
- Third-party identity graphs

Often positioned as new-user acquisition or site re-engagement.

Why it works

- Expands addressable audience
- Recovers value from anonymous traffic
- Extends email beyond logged-in users
- Grows CRM efforts and provides real incrementality

Where it breaks

- Legal and consent complexity. US companies often route emails identified directly to a brand's CRM. This does not work in a GDPR market.
- Regional restrictions, especially in Europe where solutions need to be GDPR compliant
- Requires good governance and messaging discipline
- Where brands have limited site traffic. The best identity-based solutions will only identify a % of your total site traffic. If you are still building your site traffic this is likely not the solution for you.

Best used when

- You have high anonymous traffic
- Paid acquisition costs are rising
- You operate primarily in permissive regions or with partners who follow privacy frameworks



User lands on site



User identified via ID resolution graph (CRM or permission DB)



User emailed by partner (GDPR)



User added to brand's CRM (non-GDPR)



3. Where Email Retargeting Is Most Valuable

Email retargeting consistently outperforms batch email in scenarios where:

- ✓ Intent is explicit
- ✓ Timing is tight
- ✓ Relevance is personal

Strong fit use cases

- E-commerce with consideration drop-off
- Subscription churn prevention
- High-AOV consumer purchases

Weak fit use cases

- Low-engagement content sites
- Brands without repeat behaviour
- Poorly instrumented stacks





4. Creative, Content & Incentives

Email retargeting is often treated like a creative exercise, subject lines, layouts, brand tone. In reality, performance is driven far more by relevance and timing than by design flair.

That doesn't mean creative and content don't matter. It means they matter in specific, constrained ways.

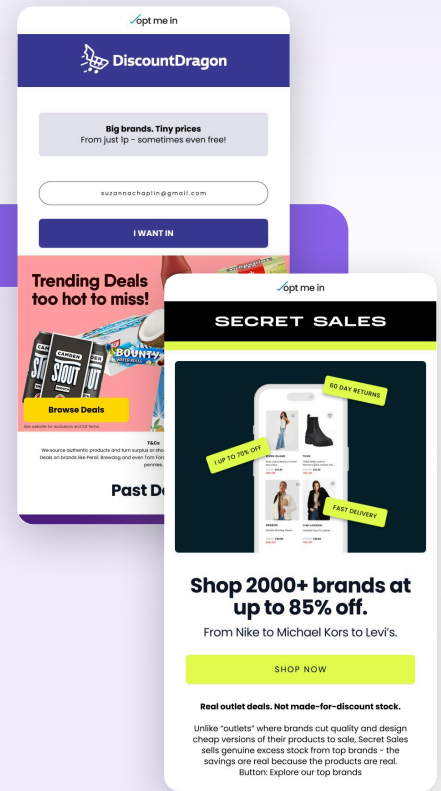
Relevance beats creativity

The most effective retargeting emails do one thing well: they clearly connect the message to the action the user just took.

That means:

- Referencing the exact product, category, or behaviour
- Making it obvious why the email was sent
- Providing a simple path back to where the user left off or the payoff for engagement

Highly designed emails with generic messaging almost always underperform simple, context-rich messages with clear CTA's.



Copy principles that work

Across cart, browse, and permissioned retargeting, the same principles apply:

Helpful > promotional

“Thought you might want to pick this up” beats “Limited time offer!”

Clarity > cleverness

The inbox is not the place for brand manifestos, when it comes to retargeting.

Short copy wins

Most high-performing retargeting emails are skimmed, not read.

Explain the ‘why’

Especially for acquisition-led retargeting, a short line explaining why the recipient is receiving the email builds trust and reduces friction.



The role of incentives (and when to use them)

For CRM-based retargeting incentives are powerful, but overused.

A common mistake is leading with a discount in the very first CRM-retargeting email. In many cases, the user didn't leave because of price. Likely, they left because they were distracted, uncertain, or not ready yet.

A more sustainable approach:

**First touch:
No incentive**

A reminder,
reassurance, or value
cue is often enough.

**Second touch:
Light incentive or
reassurance**

Free delivery,
returns, social proof,
or a small offer.

**Final touch:
Stronger incentive (if
margin allows)**

Used selectively, not
by default.

For permissioned acquisition retargeting, incentives can play a slightly different role

- ✓ They reduce perceived risk
- ✓ They signal goodwill
- ✓ They can improve first-time engagement

Content-led incentives (guides, collections, inspiration, exclusives) often perform as well as discounts, without eroding margin.

What matters less than teams expect

- Heavy visual design
- Long-form storytelling
- Overly clever subject lines
- Frequent creative refreshes

If the timing, relevance, and context are right, simple emails consistently outperform “beautiful” ones.



5. Privacy and Legal Considerations

Europe and the UK

Under GDPR:

- Consent must be explicit and informed
- Legitimate interest is narrowly interpreted
- Identity resolution without consent is high risk

Key implications

- Trigger-based emails require clear opt-in
- CRM retargeting is safest when purpose-limited
- Identity-based approaches from markets like the US must be assessed carefully, at the vendor level, for privacy law compliance.

Opt-in provenance, data minimisation, and auditability matter more than tooling.

US and Other Regions

- Consent frameworks are more flexible
- Enforcement varies by state
- Increasingly trending toward stricter regulation

The direction of travel is clear

What works today without consent will not work forever.



Final Thought

Email retargeting is not a tactic. It is a spectrum of approaches that trade off scale, intent, and risk.

The winners over the next five years will not be the loudest. They will be the most disciplined, the most compliant, and the most honest about where each method actually works.

This guide is meant to help you make those calls with open eyes.

Want to Learn More About Identity-Based Retargeting?

Discover why Optivo is used by the UK's top consumer brands to identify and convert their anonymous visitors that can't be reached by CRM.

15-30%

of all visitors identified

~2-6%

conversion rate from identified users

6-10x

ROAS

Contact us to schedule a demo:
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