

MEDIA LOGIC | REGIONAL HEALTH PLAN DIGITAL MARKETING

Healthcare Marketer's Starter Guide: First-Party Data

A data-driven approach to HIPAA-compliant acquisition campaigns.



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The Digital Landscape Is Shifting

The signals your acquisition campaigns depend on are evolving. Third-party data isn't dead — but using it well has gotten a lot more complicated.

Cookie Deprecation & Signal Loss

- Safari and Firefox have blocked third-party cookies for years.
- Google stepped back from full Chrome deprecation, but signal loss across programmatic is significant and accelerating.
- Therefore, third-party audience segments are thinner than they used to be; attribution gaps are widening.

Platform Restrictions Hit Health Plans Hard

- **Meta's special ad category rules** for health insurance (updated January 2025) restrict targeting and conversion signals.
- **Apple's App Tracking Transparency** and walled-garden signal limits mean that behavioral data for attribution is now partial.

The answer isn't to abandon third-party data or declare it dead. It's to stop relying on it passively — and start using first-party data to make it dramatically more effective.

First-party data drives better results on its own — and makes third-party data work.

It's accurate, consented, durable and owned — a proprietary asset that compounds in value and isn't subject to PHI-sharing restrictions that make standard pixels risky.

It also unlocks higher-quality third-party activation: your CRM data generates better lookalike and modeled audiences than off-the-shelf segments.

Third-party data isn't going away — but using it well now requires a first-party foundation, the right technology stack and internal alignment.



2.9x
revenue uplift

for brands using first-party data

— Google + BCG, 2020

83%

better acquisition costs

+73% conversions, +72% ROI via first-party behavioral data

— Forrester Consulting, 2024

HIPAA Boundary for First-Party Data

What you can and can't use for marketing — the line between compliant first-party signals and protected health information.

Compliant For Advertising

- Website navigation patterns
- Email engagement data
- Form submissions & content downloads
- Quote requests & plan comparison page visits
- Event attendance & call center inquiry records
- Non-clinical pages only — nothing that reveals health status

Off-limits Under HIPAA — Always

- Diagnoses & treatment history
- Prescription records or claims data
- Health status information of any kind
- Any data revealing why someone needs insurance
- Any PHI — even if accessible within your organization

Audience Tier Framework

You can't activate every segment equally. A handful of high-intent audiences drive most conversions — start there.

TIER 1

Highest Intent |

Activate Now

Who: Quote requesters, abandoned enrollment forms, plan comparison downloaders, inbound callers — all within the last 30 days

Why it converts: These prospects are in an active decision window

How: Retargeting via Custom Audiences (Meta/Google), high-frequency messaging, enrollment urgency creative

TIER 2

Engaged, Not Yet In-Market |

Nurture and Seed

Who: Webinar/seminar attendees, Medicare 101 content visitors, AEP email openers not yet at high-intent action

Why it converts: Best seed audience for lookalike modeling — the Tier 2 investment today compounds into Tier 3 reach tomorrow

How: Sustained nurture, educational content, low-frequency brand-building campaigns

TIER 3

Modeled & Expanded Reach |

Prospect

Who: Audiences built by modeling Tier 1 & 2 profiles — cold prospects who resemble your best converters

Why it converts: Shaped by real first-party signals, not purchased demographic proxies

How: Built lookalike audiences extended through specialized platforms, like Resonate, to add richer behavioral data & expand reach

Healthcare-Compliant Platforms

These platforms bridge the gap between where your data is now and where it needs to be — while you build owned capabilities.

CONSUMER INSIGHTS TOOLS

Privacy-Safe Behavioral Segments

How it works: Builds audience segments from survey and behavioral data using privacy-assured methodology.

Use cases: Value-conscious healthcare shoppers, Medicare transition planners (ages 63-66), employer benefit decision makers

HEALTH DATA SOLUTIONS

Healthcare-Specific Modeled Audiences

How it works: Leverages massive healthcare datasets with privacy protections to create modeled audiences based on anonymized behaviors.

Use cases: Condition management populations (without PHI), healthcare decision-makers by role, pharmacy-engaged consumers

DATA COLLABORATION

Identity Resolution Middleware

How it works: Matches hashed identifiers to anonymized users across the open web, creating persistent identifiers as cookies disappear.

Use cases: Extending first-party data reach beyond walled gardens, activating CRM data in programmatic campaigns, connecting online and offline data

Measurement: When Platforms Hide the Data

The measurement problem is just as significant as the targeting problem.
The answer isn't to accept less visibility — it's to build your own measurement infrastructure.

Server-side Tracking

Server-side tracking moves data collection to a server you control, capturing conversion events that browser restrictions and ad blockers would otherwise block — giving you a more complete, reliable data set to measure true campaign performance.

CRM Progression Velocity

Are prospects moving inquiry → quote → enrollment faster during campaign windows? CRM velocity is a durable, platform-independent signal.

Email Engagement Post-exposure

Are retargeted prospects more likely to open and click your next enrollment email? Post-exposure engagement confirms campaign impact independent of platform attribution.

Branded Search + Inbound Calls

Spikes in branded search volume and inbound call volume correlated with campaign activity provide multi-source evidence of impact independent of platform reporting.

When multiple signals trend positive simultaneously, you have a defensible case for campaign effectiveness. Build this architecture before campaigns launch — not after.

Four actions you can take right now.

1

Ask your analytics team: Are you using server-side conversion tracking, or relying entirely on browser pixels?

2

Pull a count of your consented prospect list. Is it being activated in paid media? If not, why not?

3

Identify one content asset you could gate to collect email leads from prospects.

4

Check whether your CRM and email platform vendors have signed BAAs where PHI may be present.

Tip: This isn't a marketing-only initiative. Server-side tracking requires IT. CRM activation requires legal sign-off. Start the cross-functional conversation now — before AEP forces it.

Ready to build your first-party data strategy?

Learn more at
medialogic.com/blog/healthcare-marketing

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