

## **Travel Insurance Market Size, Share, Trends and Forecast by Insurance Type, Coverage, Distribution Channel, End User, and Region, 2026-2034**

Market Report | 2026-02-01 | 148 pages | IMARC Group

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### **Report description:**

The global travel insurance market size is anticipated to reach USD 22.1 Billion in 2025. Looking forward, IMARC Group estimates the market to reach USD 56.5 Billion by 2034, exhibiting a CAGR of 10.40% from 2026-2034. The market is driven by rising international tourism, increasing travel risks, and growing awareness of travel-related financial protection.

### **MARKET SIZE & FORECASTS:**

- The travel insurance market size is anticipated to reach USD 22.1 Billion in 2025.
- o The market is projected to reach USD 56.5 Billion by 2034, at a CAGR of 10.40% from 2026-2034.

### **DOMINANT SEGMENTS:**

- o Insurance Type: Based on the travel insurance market forecast, the single-trip travel insurance leads the market share in 2025 with 69.2% of the market share. Single-trip travel insurance is a critical segment of the travel insurance industry, offering coverage for individuals undertaking one-off journeys.
- o Coverage: Medical expenses lead the market with 41.0% of the market share in 2025. Travel agents and brokers act as insurance intermediaries by offering advice and recommendations according to the specific needs and preferences of travelers.
- o Distribution Channel: Insurance intermediaries lead the market with 35.5% of the market share in 2025. Insurance intermediaries such as travel agents and brokers provide personalized advice and recommendations based on the specific needs and preferences of travelers.

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- o End User: Senior citizens lead the market with 31.0% of the market share in 2025. They represent a vital end-user segment in the travel insurance industry due to their increased vulnerability to health-related issues while traveling.

- o Region: Europe accounted for the largest regional segment with 36.0% of the market share. Europe has a high volume of international travel and diverse consumer base. With millions of residents traveling both within the continent and globally, the demand for comprehensive coverage-such as medical assistance, trip cancellations, and lost luggage protection-remains strong.

#### KEY PLAYERS:

- o Major players in the travel insurance market include Allianz SE, American Express Company, Aviva plc, AXA SA, Berkshire Hathaway Specialty Insurance Company, Generali Global Assistance & Insurance Services, InsureandGo UK, Seven Corners Inc., Tata AIG General Insurance Company Limited, Travel Insured International Inc. (Crum & Forster Holdings Corp.), USI Affinity (USI Insurance Services), Zurich Insurance Group Ltd, etc.

#### KEY DRIVERS OF MARKET GROWTH:

- o Rising Risk Awareness: Travelers are more aware of trip disruptions like cancellations, delays, or health issues, driving demand for insurance that provides financial protection and peace of mind during journeys.

- o Digital and Online Sales Growth: Travel insurance is now easily accessible through travel booking websites, mobile apps, and online platforms, making it simple and convenient for consumers to purchase coverage while planning trips.

- o Flexible Policy Offerings: Insurers are offering customizable and event-based insurance plans, allowing travelers to select coverages that suit their specific trip needs, such as medical emergencies, trip interruptions, or baggage loss.

- o Technological Advancements: Use of mobile apps, AI tools, and digital claims processing has simplified policy management, improved customer service, and increased trust by providing fast, user-friendly insurance solutions to travelers.

- o Expanding Global Travel Demands: Growing international travel and new traveler segments like millennials and solo tourists are creating higher demand for tailored insurance solutions that match evolving travel preferences and risk profiles.

#### FUTURE OUTLOOK:

- o Strong Growth Outlook: The market will continue expanding as travelers prioritize safety, flexibility, and digital convenience, encouraging insurers to offer more personalized, accessible, and integrated travel protection solutions.

- o Market Evolution: Travel insurance will evolve with AI-driven personalization, eco-conscious coverage options, instant digital claims, and stronger partnerships with travel platforms to deliver seamless, embedded protection to customers worldwide.

The global market is majorly driven by the accelerating awareness among travelers toward unforeseen risks during a trip, such as medical emergencies, cancellations, and loss of belongings. In addition to this, the ease of international travel, as well as the growing disposable income levels of the middle-class population are increasing the penetration of comprehensive travel insurance policies, thereby propelling the market. Moreover, the rising demand for niche insurance plans tailored to meet specific needs of travelers, such as adventure sports or business travel, is fostering the growth of the market. Besides, the integration of digital platforms that offer rapid policy purchase and quick settlement of claims is also easing the user experience, thereby providing a boost to the market. Apart from this, strategic partnerships between insurers and travel agents are also ensuring wider availability of insurance products, supporting the travel insurance market growth. Also, the growing adoption of mobile applications and

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online channels to purchase travel insurance is also further facilitating ease of interaction with customers, which in turn is bolstering the market. As per the market analysis, the growing coverage of travel insurance policies for pandemic-related expenses is also in line with the current needs of consumers, thereby strengthening the market. Furthermore, an enhanced focus on delivering real-time assistance and support through technology-driven services is expanding the scope of the market.

The United States stands out as a key regional market due to the increasing awareness of travel risks, including medical emergencies, trip cancellations, and delays. Also, the inclusion of pandemic-related coverage and partnerships with airlines and travel agencies are further fueling adoption. For instance, as of December 2024, the Centers for Disease Control and Prevention (CDC) published Travel Health Notices (THNs) to alert travelers about potential health risks abroad, including disease outbreaks and natural disasters. These notices advise travelers on precautions necessary to avoid illness while traveling. The CDC categorizes THNs into levels, such as Level 1 (Practice Usual Precautions) and Level 2 (Practice Enhanced Precautions), to denote the severity of health risks in specific destinations. Moreover, the accelerating demand for customized policies for adventure activities and business travel is broadening the scope of the market. In addition to this, the growing availability of digital platforms for purchasing policies and processing claims is improving accessibility and convenience, which in turn is providing an impetus to the market. Some of the other factors, such as regulatory guidelines for international travel, the integration of advanced technologies such as AI and IoT and inflating disposable income levels of the masses are fostering market expansion.

#### TRAVEL INSURANCE MARKET TRENDS:

##### Rising Focus on Enhanced Convenience

The increasing focus on improved convenience in terms of purchasing, managing, and utilizing travel insurance is propelling the market growth. Insurance companies are offering online platforms and mobile apps that allow individuals to purchase policies, file claims, and manage their coverage anytime and anywhere. People can easily compare different policies and get instant quotes, enabling informed decision-making with minimal hassle. In addition, many insurers are offering multilingual support to assist travelers in their preferred language, which is offering a favorable travel insurance market outlook. Furthermore, there is a rise in the demand for digital claims filing procedures as they minimize paperwork, speed up claim decisions, and improve user satisfaction. However, as per industry reports, human interaction remains paramount, as 55% of travelers still prefer engaging with customer support teams via phone conversations to address their queries. Major competitors in the market are launching different insurance packages to give individuals improved convenience. For instance, the 'Travel Guard Plus' travel insurance plan was introduced by TATA AIG General Insurance on March 18, 2024. It offers coverage for up to one year through numerous or single journeys. Optional assistance services, such as Care at Home, Baggage tracking, and Lost Passport tracking are added to improve convenience for travelers.

##### Favorable Government Initiatives

Another significant travel insurance market trend is the governing agencies of various countries that are implementing regulations to standardize travel insurance policies, ensuring that they meet minimum coverage requirements and provide adequate protection for individuals, which is propelling the travel insurance market growth. They are mandating travel insurance for entry, especially for international travelers. This guarantees the travelers coverings for unanticipated circumstances, medical crises, and repatriation. Governing authorities are mandating proof of travel insurance to individuals when applying for visas to maintain transparency and reduce fraud. For instance, on 1 January 2023, India's Insurance Regulatory and Development Authority (IRDAI) mandated Know Your Customer (KYC) verification for all motor insurance users. Aadhaar-based KYC, digital KYC, video KYC, and central KYC (CKYC) are all acceptable forms of verifying an individual's identity. Not only motor insurance, but new health, travel, and home insurance policies also need KYC documents irrespective of the premium amount. It aims to detect and reduce the insurance-related impact, including crimes such as money laundering.

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## Increasing Demand for Personalized Traveling Solutions

The rising focus on personalized traveling solutions among consumers is significantly bolstering the travel insurance market size. In addition to this, to avoid being under- or overinsured, travelers can select coverage limits based on their risk tolerance and trip budget. Travelers can also add or subtract coverage components such as trip cancellation, baggage loss, or medical crises, from insurers' modular plans according to their specific needs. Apart from this, companies are allowing travelers to modify their coverage in real time through digital platforms or mobile apps to increase their travel insurance market revenue. For instance, on 7 August 2024, Gigasure, an Insurtech platform, announced its official launch with travel, backpackers, and car hire excess insurance. Travelers can utilize the platform to personalize their insurance policies and meet their unique demands while on the road. Gigasure policyholders can add or remove advantages using the app as per their demands and financial constraints. The platform also offers real time assistance for flight and baggage delays and on-demand customization. Gigasure provides new features, flexibility, and seamless claims through the app, thereby giving consumers complete control over their insurance.

### TRAVEL INSURANCE INDUSTRY SEGMENTATION:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2026-2034. Our report has categorized the market based on insurance type, coverage, distribution channel, and end user.

#### Analysis by Insurance Type:

- Single-Trip Travel Insurance
  - o Annual Multi-Trip Insurance
  - o Long-Stay Travel Insurance

Based on the travel insurance market forecast, the single-trip travel insurance leads the market share in 2025 with 69.2% of the market share. Single-trip travel insurance is a critical segment of the travel insurance industry, offering coverage for individuals undertaking one-off journeys. It provides protection against unforeseen events such as medical emergencies, trip cancellations, lost luggage, or flight delays. This type of insurance is particularly appealing to leisure travelers or business professionals who do not travel frequently, offering a cost-effective and tailored solution. As travel risks can vary, single-trip policies provide peace of mind by addressing specific needs for each individual trip.

#### Analysis by Coverage:

- Medical Expenses
- Trip Cancellation
  - o Trip Delay
- Property Damage
- Others

Medical expenses lead the market with 41.0% of the market share in 2025. Travel agents and brokers act as insurance

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intermediaries by offering advice and recommendations according to the specific needs and preferences of travelers. While traveling, there is a chance of getting sick or having an accident, therefore having insurance is necessary to deal with unanticipated medical needs. The market is expanding as people are becoming more conscious of the possible health concerns associated with travel. Travel insurance companies are covering medical expenses in their coverage to provide improved convenience to individuals.

#### Analysis by Distribution Channel:

- o Insurance Intermediaries
- Banks
- o Insurance Companies
- o Insurance Aggregators
- o Insurance Brokers
- o Others

Insurance intermediaries lead the market with 35.5% of the market share in 2025. Insurance intermediaries such as travel agents and brokers provide personalized advice and recommendations based on the specific needs and preferences of travelers. They help consumers navigate the complexities of different travel insurance policies, ensuring they choose the most suitable coverage. Intermediaries often have extensive networks and partnerships with multiple insurance providers, giving them access to a wide range of products and options, which contribute to the travel insurance market outlook.

#### Analysis by End User:

- Senior Citizens
- Education Travelers
- o Business Travelers
- o Family Travelers
- o Others

Senior citizens lead the market with 31.0% of the market share in 2025. They represent a vital end-user segment in the travel insurance industry due to their increased vulnerability to health-related issues while traveling. As they are more likely to experience medical emergencies or require assistance during their trips, specialized travel insurance policies offer essential coverage, including medical evacuation, trip cancellations, and coverage for pre-existing conditions. This demographic often travels for leisure or to visit family, making tailored insurance products essential to ensure both security and peace of mind during their travels.

#### Regional Analysis:

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- North America United States Canada
  - o United States
  - o Canada
  - o Asia Pacific China Japan India South Korea Australia Indonesia Others
- China
- Japan
- India
- South Korea
- Australia
- Indonesia
- o Others
  - o Europe Germany France United Kingdom Italy Spain Russia Others
- Germany
- France
  - o United Kingdom
- Italy
- Spain
- Russia
  - o Others
  - o Latin America Brazil Mexico Others
- Brazil
- Mexico
  - o Others
- Middle East and Africa

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- o United States
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In 2025, Europe accounted for the largest regional segment with 36.0% of the market share. Europe has a high volume of international travel and diverse consumer base. With millions of residents traveling both within the continent and globally, the demand for comprehensive coverage-such as medical assistance, trip cancellations, and lost luggage protection-remains strong. Furthermore, Europe's well-established tourism sector and cross-border mobility heighten the need for tailored insurance solutions, making it a key market for insurers seeking to expand their global footprint and customer reach. For instance, on 26 June 2024, Zurich Insurance Group (Zurich), a major player in the European insurance market, announced an agreement to acquire AIG's global personal travel insurance and assistance business (AIG Travel) for USD 600 Million, plus a potential additional earn-out payment. The business will be combined with Zurich's travel insurance provider Cover-More Group. Cover-More and Zurich will

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expand its footprint in the US. The acquisition gives Zurich access to a new global retail consumer base and makes it a leading travel insurer worldwide.

#### KEY REGIONAL TAKEAWAYS:

##### UNITED STATES TRAVEL INSURANCE MARKET ANALYSIS

In 2025, the US accounted for 75.30% of the total North America travel insurance market. The United States travel insurance market has consistently been growing with awareness about the need to have complete protection for travels. U.S. Travel Insurance Association (USTIA) 2020-2022 said that American citizens spent roughly USD 4.27 Billion on a wide variety of different types of protection plans during the period. Most were purchased through travel agents, online aggregators, travel suppliers, insurance providers, and agents. In this time, over 49.3 million plans covered about 77 million people, which points to a growth trend in the market.

The U.S. Department of State also recommends that travelers purchase travel insurance with emergency medical benefits, trip cancellation coverage, and coverage for lost or stolen luggage. This recommendation has greatly influenced the demand for travel insurance policies, as more and more travelers increasingly prefer coverage for unexpected events and emergencies while traveling. With growing awareness of the significance of such protections, especially amid uncertainties such as health risks, flight cancellations, and lost baggage, the U.S. travel insurance market is expanding significantly. In the coming times, it would further rise as more customers get to understand the value of holistic travel insurance.

##### EUROPE TRAVEL INSURANCE MARKET ANALYSIS

Europe's status as a global tourist destination, offering a rich blend of history, diverse cultures, and breathtaking natural landscapes, is a major propeller to the Europe travel insurance market. Europe is home to 44 countries, which comprises 27 member states of the European Union (EU). This continent remains the world's most popular travel destination. In 2019 alone, France welcomed 89.4 million international visitors, making it the most visited country in Europe, as per an industry report. Collectively, the region accounts for 50% of all international tourist arrivals around the world, a feature that is unmatched.

According to an industrial report, the travel and tourism sector contributed a substantial amount of USD 1,450 Billion to Europe's GDP in 2021, emphasizing the economic importance of tourism in the region. The steady flow of international tourists highlights the increased requirement for travel insurance to mitigate potential risks such as trip cancellations, medical emergencies, and lost or delayed baggage.

As Europe rebounds from travel post-pandemic, demand for complete travel insurance coverage is going to increase due to a rising awareness level of benefits offered by insurance and growing expectations of travelers in the marketplace for bespoke, reliable insurance solutions. This scenario will be very crucial to Europe for its travel insurance growth prospects.

##### ASIA PACIFIC TRAVEL INSURANCE MARKET ANALYSIS

One of the significant growth drivers of the travel insurance market in the Asia Pacific region is the rapid recovery of international tourism. International tourist arrivals to India, according to the country's tourism statistics, were 1.57% in 2020, and the country itself accounted for 10.67% of the region's total arrivals. International visitor arrivals to the region in 2023 had a remarkable 94.3% increase and stood at 522 million across 47 destinations. This is the biggest rebound that has been recorded since the pandemic, with IVAs close to the pre-2019 numbers. Destinations such as China did very well, welcoming more than 82 million visitors, while accounting for 15.7% of the area's total. As travelers seek protection and peace of mind, there is higher demand for travel insurance as tourism picks up. Rising international tourist visits across the region and rising awareness of travel-related

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risks are expected to foster the demand for customized, flexible, and affordable travel insurance plans. This trend provides enormous opportunities for travel insurance companies in the Asia Pacific market.

#### LATIN AMERICA TRAVEL INSURANCE MARKET ANALYSIS

The Latin America travel insurance market is growing rapidly. Domestically, robust travel in Brazil, the economy of the region, sustains the growth. Industry sources report that 81% of the potential travelers chose internal trips in Brazil in 2021, which underscores why domestic travel is very well preferred to explore various diversified destinations in the country. Brazil stretches 2,730 miles (4,395 kilometers) from north to south, and has something to offer for all visitors, such as Porto Seguro (Bahia), Maragogi (Alagoas), and Porto de Galinhas (Pernambuco).

Domestic tourism in Brazil has always been higher than international tourism, even before the pandemic. This trend continues to fuel the demand for travel insurance, in Brazil reporting a 10% growth in travel insurance demand between 2018 and 2019, as per an industry report. Notably, domestic tourism accounted for 47% of the company's total travel insurance sales, up from 37% in the prior year.

The steady growth of domestic tourism across Brazil and the rising awareness of the risks associated with traveling make the adoption of travel insurance a key factor for strong expansion in the Latin America market.

#### MIDDLE EAST AND AFRICA TRAVEL INSURANCE MARKET ANALYSIS

The Middle East and Africa travel insurance market is experiencing significant growth, driven by an increase in outbound travel from the region. The World Tourism Organization (UNWTO) reports that by 2030, the region is expected to generate outbound travel of approximately 80 million visitors from the Middle East and Africa. Such growth reflects the change in this region's status to become one of the world's fastest-growing tourist-generating areas with its outbound travel to the Middle East quadrupling over the past two decades.

Middle Eastern travelers' travel preferences depict this trend further. According to 2018 figures, 64% of Middle Eastern travelers had traveled internationally in the last 12 months. Europe proved to be one of the preferred destinations, which accounted for 27% of these international travelers. Thus, increased international trips reflect increasing awareness about travel risks and the growing need for travel insurance, which would be required for protection against events that one might not anticipate.

Demand in comprehensive travel insurance plans from medical emergencies, trip cancellation, and baggage loss should help drive the growth of this market, further fostering its importance in the Middle East and Africa region.

#### COMPETITIVE LANDSCAPE:

Key players in the market are developing specialized policies, integrating digital platforms, expanding product portfolios, and engaging in partnerships with other firms. All of these are providing travel insurance market recent opportunities. Companies are investing in digital platforms and mobile apps that allow individuals to purchase, manage, and claim travel insurance easily and conveniently. They are focusing on offering round-the-clock client support to assist travelers with emergencies, claims, and other inquiries. Moreover, they are partnering with travel agencies, airlines, and online travel booking platforms to offer comprehensive travel insurance products. Furthermore, companies are expanding their market reach by undertaking many initiatives. For instance, on 4 May 2023, Travel insurance aggregator InsureMyTrip expanded its product offerings in Canada. Traveling Canadians and visitors to the country can use online portals to visit InsureMyTrip.ca to quote, compare, and purchase travel insurance.

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## KEY QUESTIONS ANSWERED IN THIS REPORT

1. What is travel insurance?
2. How big is the global travel insurance market?
3. What is the expected growth rate of the global travel insurance market during 2026-2034?
4. What are the key factors driving the global travel insurance market?
5. What is the leading segment of the global travel insurance market based on the insurance type?
6. What is the leading segment of the global travel insurance market based on coverage?
7. What is the leading segment of the global travel insurance market based on distribution channel?
8. What is the leading segment of the global travel insurance market based on end user?
9. What are the key regions in the global travel insurance market?
10. Who are the key players/companies in the global travel insurance market?

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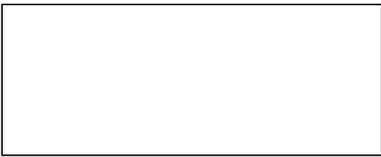
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