

Mobile Phone Insurance Market - A Global and Regional Analysis: Focus on Application, Product, and Regional Analysis - Analysis and Forecast, 2025-2035

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Abstracts

The mobile phone insurance market was valued at \$41.15 billion in 2024 and is projected to reach \$126.24 billion by 2035.

Market growth is primarily driven by widespread smartphone adoption across both developed and emerging economies, significantly expanding the pool of insurable users. As device prices rise and repair costs continue to increase, especially for high-end models equipped with advanced displays and integrated components, the value proposition of insurance becomes stronger. Additionally, the rapid growth of digital distribution and embedded insurance models is lowering adoption barriers. Partnerships with telecom operators, manufacturers, online retailers, and digital wallets enable seamless point-of-sale enrolment, while digital platforms and insurtech solutions make policy activation and claims more convenient, accelerating market penetration.

Introduction of Mobile Phone Insurance

The study conducted by BIS Research highlights mobile phone insurance as a financial protection service designed to cover smartphones and feature phones against a broad spectrum of risks, including physical damage, internal component failure, theft, loss, unauthorized usage, and digital security threats. These services are delivered through an integrated ecosystem of insurers, mobile network operators, device manufacturers, retailers, financial institutions, and digital-first insurtech platforms. Core market functions include underwriting, policy administration, automated and manual claims assessment, repair or replacement fulfilment, logistics and reverse-logistics coordination, fraud

management, and omnichannel customer support. This study evaluates the market across five geographic regions, i.e., North America, Europe, Asia-Pacific, the Middle East and Africa, and South America, with detailed country-level assessments to capture variations in smartphone replacement cycles, regulatory frameworks, distribution models, and consumer protection awareness. The market has been segmented by application, reflecting device usage and ownership patterns; by phone type, such as budget, mid-range, and premium smartphones, each with different risk exposures, claim frequencies, and insurance penetration rates; and by product categories, which include coverage types such as physical damage, internal component failure, theft and loss protection, virus and data protection, and other supplementary digital services. Distribution channels include direct-to-consumer insurance, OEM and retail partner programs, telecom/carrier-bundled protection plans, and additional emerging channels such as online marketplaces and fintech-embedded insurance. Market growth has been influenced by rising smartphone value, increasing repair costs, expanding 5G device adoption, digital claims automation, embedded protection at the point of sale, sustainability-focused device lifecycle programs, and ongoing product and service innovations by insurers and third-party administrators.

Market Introduction

The global smartphone market has transitioned from rapid growth to scale expansion, with over 4.4 billion users representing approximately 54% of the world's population, which has bolstered the growth of the mobile phone insurance market. This saturation milestone fundamentally alters the competitive landscape for mobile device protection products. Developed markets demonstrate near-complete penetration with concentrated demand in upgrade cycles and premium attachments, while emerging regions, particularly South Asia, Africa, and Latin America, continue experiencing substantial user acquisition driven by affordable devices, improved connectivity, and accessible financing mechanisms. India exemplifies this trajectory, with accelerating penetration rates anticipated to approach developed-market levels within the coming years, unlocking significant policyholder pools. Moreover, regulatory initiatives promoting repairability and consumer 'right-to-repair' advocacy are fundamentally restructuring claims economics. Insurers increasingly prioritize repair-first strategies through certified repair networks and same-day service delivery, substantially reducing average costs per claim. Concurrently, expanding refurbished device markets and manufacturer trade-in programs enable circular economy models that lower replacement inventory requirements while improving claim economics and environmental outcomes.

Market Introduction

The expansion of the mobile phone insurance market is reshaping the broader digital and telecom ecosystem by turning devices into recurring-revenue platforms rather than one-time hardware sales. For insurers, the category provides a high-frequency, scalable retail protection business that accelerates product innovation in embedded, subscription, and micro-insurance models. For mobile network operators, OEMs, and retailers, device protection has become a strategic value-added service that supports customer retention, upselling, and differentiation in otherwise commoditized markets. The growth of insurance-backed trade-in, upgrade, and refurbishment programs is accelerating the development of a professionalized repair and recommerce industry, deepening partnerships with authorized service providers, logistics players, and parts distributors. As claims processes digitalize, the segment is also driving investments in diagnostics, fraud analytics, and automated adjudication, which spill over into other lines of consumer insurance. At the customer level, protection products influence purchasing behavior by de-risking ownership of higher-priced devices and supporting financing-led models. Collectively, these dynamics position mobile phone insurance as an important enabler of circular economy practices, ecosystem stickiness, and margin enhancement across insurance, telecom, retail, and electronics value chains.

Market Segmentation:

Segmentation 1: by Phone Type

Budget Phones

Mid-Range Phones

Premium Smartphones

Premium Smartphones to Lead the Market (by Phone Type)

The premium smartphones segment is expected to lead the global mobile phone insurance market by phone type. The rising adoption of premium smartphones, characterized by advanced features and higher price points, is driving a surge in insurance demand within the mobile phone sector. Consumers are increasingly seeking comprehensive protection against accidental damage, theft, and malfunction as device replacement costs escalate. This trend is further amplified by the expanding ecosystem of digital lifestyles, manufacturer partnerships, and the growing prevalence of

installment-based smartphone ownership, making insurance coverage for high-end devices a pivotal market growth driver. As a result, premium smartphones are expected to dominate mobile phone insurance uptake, shaping product innovation and distribution strategies across the industry.

Segmentation 2: by Coverage Type

Physical Damage

Internal Component Failure

Theft and Loss Protection

Virus and Data Protection

Others

Physical Damage to Dominate the Mobile Phone Insurance Market (by Coverage Type)

Physical damage coverage events, such as accidental drops, screen cracks, and liquid spills, remain the leading driver in mobile phone insurance adoption. As devices become sleeker and more advanced, their susceptibility to breakage increases, heightening consumer concern over repair or replacement costs. This trend is strengthened by rising device usage in daily life, limited warranty coverage for such incidents, and growing consumer awareness of risk mitigation. Insurers are responding with customized policies and quick-claim processes, cementing physical damage insurance as the dominant segment shaping purchase decisions and competitive differentiation in the market.

Segmentation 3: by Distribution Channel

Direct Sales (Insurer to End User)

OEM and Retail Partner Programs

Telecom/Carrier-Bundled Insurance

Others

Telecom/Carrier-Bundled Insurance to Dominate the Mobile Phone Insurance Market (by Distribution Channel)

Telecom operators and mobile carriers are increasingly positioning bundled insurance offerings as a primary distribution channel, leveraging their direct customer relationships and billing infrastructure. This bundling strategy eliminates friction in the purchase process, enabling seamless enrollment during device activation or plan renewal cycles. Carriers benefit from enhanced customer retention and increased lifetime value, while consumers gain convenience and simplified claims management integrated into existing service platforms. The proliferation of 5G networks and premium device portfolios has incentivized carriers to expand insurance bundles as value-added services, positioning telecom-facilitated insurance as a dominant market segment that reshapes competitive dynamics and customer acquisition strategies across the industry.

Segmentation 4: by Region

North America: U.S. and Canada

Europe: Germany, France, U.K., and Rest-of-Europe

Asia-Pacific: China, Japan, India, South Korea, and Rest-of-Asia-Pacific

Rest-of-the-World: Latin America and Middle East and Africa

Geographically, the mobile phone insurance market exhibits a dual-center dynamic, with the U.S. acting as the largest mature market and Asia-Pacific representing the primary long-term growth engine. The U.S. leads in absolute market size due to high penetration of premium and flagship smartphones, sophisticated carrier and retailer bundling practices, and strong consumer familiarity with extended warranties and device protection plans. Mobile operators, OEMs, and big-box retailers in the U.S. have institutionalized insurance as a standard attachment at the point of sale or within monthly service plans, supporting high average premiums and stable renewal rates. In contrast, Asia-Pacific is characterized by heterogeneous markets but collectively offers the highest structural upside. Expanding middle-income segments, urbanization, and a shift toward higher-value smartphones are increasing the perceived need for protection, especially as devices are frequently purchased via EMIs and digital financing platforms.

The rapid growth of e-commerce and super-app ecosystems in markets such as China, India, and Southeast Asia also enables embedded and app-based distribution models at scale. While North America will continue to deliver strong revenue and profitability, incremental global market growth is expected to be dominated by Asia-Pacific as awareness deepens, distribution partnerships mature, and insurers tailor products to local price sensitivities and usage patterns.

Demand - Drivers, Limitations, and Opportunities

Market Demand Drivers: Widespread Smartphone Adoption

The rapid expansion of global smartphone ownership remains one of the most powerful drivers of the mobile phone insurance market. Smartphones have become ubiquitous across both mature and emerging economies, fundamentally enlarging the potential customer base for device protection products. According to GSMA, more than half of the world's population, approximately 4.4 billion people, now owns a smartphone, underscoring the scale at which new users continue to enter the ecosystem. Each additional smartphone owner represents a prospective policyholder, particularly as devices become more technologically advanced and significantly more expensive to repair or replace. Industry sources such as Insurance Asia highlight that accelerating smartphone penetration directly fuels demand for mobile phone insurance, particularly in markets undergoing rapid digital adoption. India serves as a strong example representing a surge in first-time smartphone users who are often more risk-averse with newly acquired high-value devices. Similar patterns are emerging across Southeast Asia, Africa, and Latin America, where economic growth, declining data costs, and broader network availability continue to push smartphone adoption upward. As smartphones transition from luxury devices to essential tools for communication, finance, education, and commerce, the perceived value of device protection increases. Consumers increasingly recognize the financial risks associated with accidental damage, theft, and hardware malfunction risks amplified by heavy daily usage. This shift in consumer behavior strengthens the insurance market's fundamentals, expanding both the addressable market and product uptake rates. Collectively, the global rise in smartphone ownership not only drives sustained demand for basic device protection but also opens avenues for more sophisticated insurance add-ons, extended warranties, and bundled service offerings.

Market Challenges: Low Insurance Penetration and Limited Awareness

Low insurance penetration in many regions, particularly in low- and middle-income

countries, remains one of the most significant structural barriers to the growth of the mobile phone insurance market. Despite rising smartphone adoption, insurance as a financial tool is still unfamiliar to large portions of the global population. Nearly 90% of individuals in low-income countries do not have any form of private insurance, indicating a deep gap in financial inclusion and overall risk awareness. This disconnect means that millions of smartphone users, even those purchasing higher-value devices, do not explore or understand device-protection offerings simply because the concept of insurance has not been embedded into their financial habits. In countries such as Nigeria, insurance penetration stands at only around 0.5% of GDP, dramatically lower than in more mature markets like South Africa, where penetration exceeds 12%. This disparity reflects not only economic differences but also a pronounced lack of trust, exposure, and insurance literacy. Studies repeatedly show that consumers in emerging markets typically think about insurance only after suffering a loss, rather than proactively seeking protection. As a result, despite the growing cost of smartphones and the rising incidence of theft or accidental damage, insurance remains outside the consideration set for many potential buyers. Additionally, limited consumer education contributes to misconceptions regarding coverage, pricing, and claims processes. Many users are unaware that device insurance exists, assume it is expensive, or believe claims will not be honoured. This lack of awareness significantly constrains the mobile phone insurance addressable market. To overcome this barrier, insurers, mobile operators, and digital finance providers must invest in targeted awareness campaigns, embedded sales models, and simplified product messaging. Without improvements in financial literacy and trust, the market will continue to underperform its true potential despite rising device value and risk exposure.

Market Opportunities: Untapped Emerging Markets

Emerging markets represent one of the most significant long-term growth opportunities for the mobile phone insurance industry. Despite rapid digitalization and rising smartphone adoption, insurance penetration in these regions remains extremely low, creating a large pool of first-time customers who have yet to be reached. India is a prime example; with a smartphone user base of approximately 750 million today and projections indicating it will approach one billion users by 2026, the addressable market for device protection is vast. However, actual insurance uptake remains minimal, primarily due to limited awareness, affordability constraints, and fragmented distribution. As rural and low-income populations increasingly adopt smartphones, often through affordable financing schemes, the need for cost-effective protection solutions becomes more apparent. Similar patterns are emerging across Africa and Latin America, where mobile phones are essential tools for communication, banking, and commerce. These

regions offer insurers first-mover advantages, especially where mobile network operators (MNOs) dominate consumer engagement and can seamlessly integrate insurance into prepaid and postpaid plans. Government initiatives promoting digital financial services in parts of Asia-Pacific, including China, India, and Japan, further support market expansion by driving consumer trust and adoption of digital insurance products. With broader economic development, rising disposable incomes, and increasing reliance on mobile devices for daily transactions, the demand for device protection will continue to strengthen. For insurers, the opportunity lies in designing localized, affordable, and easy-to-access coverage options that resonate with these diverse markets. Micro-premium models, embedded protection at the point of sale, and partnerships with telecom operators, retailers, and fintech platforms can accelerate adoption. Companies that strategically invest in these high-growth regions stand to capture substantial market share and build long-term customer relationships before competition intensifies. Ultimately, emerging markets represent the next frontier for global expansion and sustained revenue growth.

How can this report add value to an organization?

Product/Innovation Strategy: This segment explores the diverse coverage types of mobile phone insurance across phone types, including budget phones, mid-range phones, and premium smartphones. Automakers are focusing on several product innovation strategies. Product innovation in the mobile phone insurance market is accelerating across multiple dimensions, reshaping how protection is designed, distributed, and delivered. Insurers are transitioning from standardized extended warranties toward tiered, modular offerings that segment customers by device value, usage patterns, and willingness to pay. Micro-insurance and parametric products are gaining traction in price-sensitive emerging markets, while premium, OEM-certified subscriptions with express replacement and concierge services capture high-value customer segments. Technology-enabled innovation is redefining operational delivery. API-first embedded insurance platforms allow seamless integration at checkout, activation, or within billing cycles, dramatically improving attachment rates. Real-time IMEI verification, in-app diagnostics, and automated claims adjudication are now standard differentiators, reducing friction and enabling instant payouts.

Growth/Marketing Strategy: The mobile phone insurance market offers substantial opportunities for established players and new entrants. Key growth strategies include mergers and acquisitions, strategic collaborations, new product launches, and geographic expansion. Companies have prioritized developing innovative production technologies to gain a competitive advantage.

Competitive Strategy: The report profiles major players in the mobile phone insurance market, including technology providers and integrators. A detailed competitive landscape analysis covering strategic partnerships, agreements, and technological collaborations is provided to help stakeholders identify untapped revenue opportunities. This analysis supports market participants in enhancing their position through innovation, strategic alliances, and a focus on sustainability.

Research Methodology

Factors for Data Prediction and Modelling

The base currency considered for the mobile phone insurance market analysis is the US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year.

The currency conversion rate has been taken from the historical exchange rate of the Oanda website.

Nearly all the recent developments from January 2021 to November 2025 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no major technological breakthroughs.

Market Estimation and Forecast

This research study involves the usage of extensive secondary sources, such as

certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the mobile phone insurance market.

The market engineering process involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes has been explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the market.

Primary Research

The primary sources involve industry experts from the mobile phone insurance market and various stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

- validation and triangulation of all the numbers and graphs
- validation of report segmentations and key qualitative findings
- understanding the competitive landscape
- validation of the numbers of various markets for the market type
- percentage split of individual markets for geographical analysis

Secondary Research

This research study involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the

global market. In addition to the data sources, the study has been undertaken with the help of other data sources and websites, such as the GSMA, CIA, and BankMyCell.

Secondary research has been done to obtain crucial information about the industry's value chain, revenue models, the market's monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

segmentations and percentage shares

data for market value

key industry trends of the top players of the market

qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies that are profiled in the mobile phone insurance market have been selected based on inputs gathered from primary experts, who have analyzed company coverage, product portfolio, and market penetration.

Some of the prominent names in the mobile phone insurance market are:

Asurion, LLC

MyCoverGenius Ltd.

Worth Ave. Group

O2 Insure

Likewise Corp.

Bolttech Holdings, Ltd.

SquareTrade, Inc.

Assurant, Inc.

Apple Inc.

Samsung Electronics Co., Ltd.

CPP Group Plc

Insurance2go

Vodafone Group Plc

AT&T Inc.

Verizon Communications Inc.

Companies that are not a part of the aforementioned pool have been well represented across different sections of the mobile phone insurance market report (wherever applicable).

This report can be delivered within 1 working day.

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