

Global Pet Insurance Market: Analysis By Animal (Dog, Cat, and Other), By Policy Coverage (Accident and Illness, Accident Only, and Other), By Provider (Private and Public), By Sales Channel (Direct, Agency, Broker, Bancassurance, and Other), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

Pet insurance is a financial product that helps cover the cost of veterinary care for pets in case of accidents, illnesses, or other medical needs. Similar to health insurance for humans, pet insurance typically involves paying a monthly premium in exchange for coverage of eligible expenses, which can include surgeries, medications, and diagnostic tests. Policy terms and coverage vary depending on the provider and plan chosen, but generally, pet insurance provides peace of mind and financial assistance to pet owners facing unexpected veterinary bills. The global pet insurance market value stood at US\$9.86 billion in 2023 and is expected to reach US\$19.01 billion by 2029.

The global pet insurance market is experiencing significant growth, driven by several key factors. Increasing disposable income among pet owners, coupled with rising incidences of diseases and escalating veterinary care costs, are fueling demand for insurance coverage. A surge in pet ownership, particularly among millennials, is contributing to market expansion, with approximately 65.1 million dogs and 62 million cats in the US alone. The introduction of specialized insurance products tailored to pets needs and the growing popularity of pet insurance as an employee benefit further drive growth. Moreover, the emphasis on pet health and wellness, reflected in the shift towards premium and organic pet foods, is expected to benefit the pet insurance industry. As pet owners prioritize their pets well-being, the demand for insurance

coverage to manage preventive care, acute and chronic illnesses, and emergency medical costs is anticipated to continue rising, supporting the robust growth of the global pet insurance market. The market is expected to grow at a CAGR of 11.56 % over the projected period of 2024-2029.

Market Segmentation Analysis:

By Animal: The report provides the bifurcation of global pet insurance into three segments based on the animal: Dog, Cat, and Other Pet Insurance. Dog insurance holds the highest share of the pet insurance market due to the sheer number of dogs owned worldwide and the higher likelihood of dogs requiring medical care, including treatments for accidents and hereditary conditions. However, cat insurance is expected to be the fastest-growing segment in the forecasted period. This is primarily because cats are increasingly being seen as valued family members, leading owners to seek comprehensive medical coverage for them. Additionally, cats often have longer lifespans, increasing the likelihood of age-related illnesses requiring veterinary care. As awareness of the benefits of pet insurance grows among cat owners, coupled with the rising cost of veterinary care, the demand for cat insurance is expected to surge.

By Policy Coverage: The report provides the bifurcation of the global pet insurance market into three segments based on the policy coverage: Accident and Illness, Accident Only, and Others. Accident and Illness segment holds the highest share in the market and is expected to be the fastest-growing segment in the forecasted period as this type of insurance offers comprehensive coverage, including accidents, illnesses, and sometimes even preventive care, providing peace of mind to pet owners. Moreover, as veterinary care costs continue to rise, more owners are recognizing the importance of having insurance to offset these expenses. Additionally, with the increasing prevalence of accidents and illnesses among pets, driven by factors such as genetic predispositions and environmental hazards, there's a growing awareness of the need for robust coverage. As a result, Accident and Illness pet insurance is poised to experience significant growth in the coming years.

By Provider: The report provides the bifurcation of the global pet insurance market into two segments based on the provider: Private, and Public. The Private sector held the highest share in the market and is expected to be the fastest-growing segment in the forecasted period. Private pet insurance providers often offer more customizable plans tailored to individual pet owners' needs, leading to greater customer satisfaction and uptake. Additionally, private insurers may have more resources to invest in marketing and technological advancements, enhancing their competitive edge in the market.

Furthermore, private insurers can adapt quickly to changing consumer preferences and market dynamics, allowing them to capitalize on emerging trends and seize new opportunities.

By Sales Channel: The report provides the bifurcation of the global pet insurance market into five segments based on the sales channel: Direct, Agency, Broker, Bancassurance, and Others. The Direct segment holds the highest share in the global pet insurance market and is expected to be the fastest-growing due to several factors. Direct sales channels enable pet insurance companies to reach consumers directly, eliminating intermediaries and reducing costs. This direct-to-consumer approach allows for more personalized interactions and tailored offerings, enhancing customer satisfaction and loyalty. Moreover, advancements in digital technology have facilitated the proliferation of online platforms, making it easier for pet owners to research, compare, and purchase insurance policies directly.

By Region: The report bifurcates the global pet insurance market into four regions namely, Europe, North America, Asia Pacific, and Rest of the World. Europe dominates the Pet insurance market, with UK, Germany, and France, contributing significantly. This dominance is attributed to increasing pet ownership, rising adoption of pet insurance, and the presence of key companies. According to the European Pet Food Industry Federation (FEDIAF) study, in 2022, Europe was home to total 340 million pets, including 127 million cats and 104 million dogs, witnesses significant demand for insurance coverage. In the UK, the growth is fueled by the rising adoption of rescue dogs, driving demand for tailored insurance solutions. Similarly, in Germany, increasing pet ownership, coupled with rising veterinary expenses, emphasizes the necessity of pet insurance, fostering market growth. The Asia Pacific emerges as the fastest-growing region in the pet insurance sector, fueled by several key factors across countries like China, India, and Japan. The increasing trend of pet adoption and the region's economic development contribute significantly to this growth. Greater awareness of veterinary health and improvements in veterinary healthcare infrastructure further expand the market. In India specifically, the pet insurance market is experiencing rapid growth, positioning the country as one of the fastest-growing markets for pet insurance. Rising awareness among pet owners is prompting leading insurance players to enhance their pet insurance products, making them more accessible and affordable.

Global Pet insurance Market Dynamics:

Growth Drivers: The global Pet Insurance market growth is predicted to be supported by numerous growth drivers such as growing disposable income among pet owners, rising

incidences of diseases, increasing veterinary care costs, rising pet population, urbanization driving higher pet insurance adoption rates, introduction of innovative product inventions, growing popularity of pet insurance as an employee benefit, and many other factors. With more households welcoming pets into their families, there is a corresponding increase in the need for financial protection against unexpected veterinary expenses. As pets become integral parts of households, owners are increasingly willing to invest in their health and well-being, including seeking insurance coverage to mitigate the financial burden of accidents, illnesses, and routine healthcare needs. Additionally, the escalating incidences of diseases among pets underscore the importance of having comprehensive insurance coverage to manage the potentially high costs of diagnosis, treatment, and ongoing care. These growth drivers highlight the growing recognition of pets as valued companions and the necessity of safeguarding their health through insurance, driving the expansion of the pet insurance market.

Challenges: However, the market growth would be negatively impacted by various challenges such as complexity in pet insurance plans, breed exclusions and pre-existing conditions in pet insurance, etc. Breed exclusions limit coverage for certain breeds deemed predisposed to specific health issues, potentially leaving owners of these pets without adequate financial protection. Similarly, pre-existing conditions are often excluded from coverage, which can be particularly frustrating for pet owners facing ongoing medical needs for their animals. These limitations may deter pet owners from investing in insurance or lead to dissatisfaction if they discover their pet's condition is not covered.

Trends: The market is projected to grow at a fast pace during the forecasted period, due to market trends such as pet humanization, increased awareness of preemptive pet insurance purchases, expansion of pet insurance coverage, adoption of telemedicine and virtual vet consultations, increasing utilization of data analytics, customizable insurance plans, integration of mobile apps, etc. Pet humanization, characterized by treating pets as family members, drives demand for comprehensive insurance coverage to ensure their health and well-being. As owners increasingly prioritize their pets needs, they seek insurance plans that offer extensive coverage for a range of medical expenses. Integration of mobile apps enhances accessibility and convenience for pet owners, allowing them to manage their insurance policies, file claims, and access resources easily from their smartphones. This trend aligns with broader shifts towards digitalization and self-service in insurance, catering to the preferences of tech-savvy consumers.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic initially brought uncertainty to the pet insurance market as economic instability led some pet owners to reconsider discretionary spending on insurance premiums. Restrictions on non-essential services and closures of veterinary clinics during lockdowns further impacted the market, reducing routine visits and elective procedures, resulting in fewer claims filed.

However, post-COVID, as economies stabilize and pet ownership continues to rise, the demand for pet insurance is expected to rebound. While digitization hogged the headlines, increased pet ownership rose exponentially. As a result, regulators initially played catch-up but have made rapid strides in framing laws governing the industry. While the pandemic initially disrupted some aspects of the market due to economic uncertainty, the long-term impact has been positive, with heightened awareness of pet insurance as a valuable financial tool for pet owners.

Competitive Landscape and Recent Developments:

The global Pet insurance market is fragmented, with an increasing number of large and medium-sized players accounting for the majority of the market revenue, and the presence of a substantial number of regional market players with limited business offerings and customer base.

The key players in the global Pet insurance market are:

Anicom Holdings, Inc.

MetLife, Inc. (MetLife Pet Insurance Solutions LLC)

Trupanion, Inc.

Direct Line Group

DFV Deutsche Familienversicherung AG

Animal Friends Insurance Services Limited, Petplan Ltd.

Agria Pet Insurance Ltd

Nationwide Mutual Insurance Company

Pumpkin Insurance Services Inc.

Figo Pet Insurance, LLC

Embrace Pet Insurance Agency, LLC

Healthy Paws Pet Insurance LLC

PetFirst Insurance

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