

Cybersecurity Insurance Market by Component (Solutions and Services), Type (Standalone & Packaged), Coverage (Data Breach & Cyber Liability), Compliance Requirement, End User (Technology & Insurance) and Region - Global Forecast to 2028

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Abstracts

The Cybersecurity insurance market is estimated at USD 14.4 billion in 2023 and is projected to reach USD 33.4 billion by 2028, at a CAGR of 18.3% from 2023 to 2028. Cybersecurity insurance has become increasingly important for organizations due to stricter data protection and privacy regulations like GDPR in Europe and CCPA in California. These regulations place a higher responsibility on businesses to safeguard sensitive data. Cybersecurity insurance helps organizations comply with these regulations and provides financial protection in the event of non-compliance.

By end users, the insurance providers segment to hold the largest market size during the forecast period.

The increasing complexity of cyber risks due to the widespread use of connected devices emphasizes the significance of cybersecurity insurance solutions and services. This growing demand for insurance coverage has motivated providers to offer tailored cyber policies that address the unique needs of organizations. The majority of these insurance providers are based in the United States and include reputable companies such as Berkshire Hathaway, Fairfax Financial, Sompo International, Hartford, Tokio Marine, Zurich, Liberty Mutual, BCS Insurance, AXIS, CNA, Beazley, Travelers Insurance, AIG, AXA XL, and Chubb. These providers offer a diverse range of customizable cyber coverage options, ensuring organizations can find policies that align with their specific requirements. In addition, they provide round-the-clock claims filing services and valuable resources to aid in the recovery process following large-scale

cyberattacks.

Based on services, the security awareness training segment is expected to register the fastest growth rate during the forecast period.

Security awareness training plays a crucial role in the emerging cybersecurity insurance market, as it helps to educate end users about the importance of this type of coverage. In August 2019, Cofense, a provider of intelligent phishing defense solutions, partnered with CNA, a property and casualty insurance company. As part of this collaboration, CNA policyholders gained access to Cofense solutions, including security awareness training. This training was integrated into CNA's suite of cyber liability insurance products to enhance policyholders' understanding of cybersecurity risks. Another example is Zeguro, which offers a Security Training module that delivers monthly training modules, automated security training, and evaluates the cybersecurity knowledge of enterprises. This training assists employees in achieving compliance goals for regulations such as PCI-DSS, HIPAA, and GDPR.

'Asia Pacific to register the highest growth rate during the forecast period.'

The Asia Pacific region, including countries like China, Japan, ANZ, and Singapore, is witnessing significant growth opportunities for the cybersecurity insurance market due to increasing security concerns and technological advancements. Asia Pacific faces higher cyber risks, with insecure interfaces, data breaches, and data losses being prominent threats. The region's rapid connectivity growth and digital transformation make it vulnerable to cyber exploitation. The Chubb Asia Pacific SME Cyber Preparedness Report 2019 highlights SMEs' under-preparedness in managing cyber risks, while increasing regulatory developments drive the demand for cybersecurity insurance. Zurich Insurance predicts substantial market growth in Asia Pacific, with major players like AIG, Allianz, Chubb, and Zurich operating in the region.

Breakdown of primaries

The study contains insights from various industry experts, from solution vendors to Tier 1 companies. The break-up of the primaries is as follows:

By Company Type: Tier 1 – 55%, Tier 2 – 30%, and Tier 3 – 15%

By Designation: C-level – 40%, D-level – 25%, and Others – 35%

By Region: North America – 60%, Europe – 20%, Asia Pacific – 12%, Middle East & Africa– 6%, and Latin America– 2%.

The major players in the Cybersecurity insurance market are BitSight (US), Prevalent (US), RedSeal (US), SecurityScorecard (US), Cyber Indemnity Solutions (Australia), Cisco (US), UpGuard (US), Microsoft (US), Check Point (US), AttackIQ (US), SentinelOne (US), Broadcom (US), Accenture (Ireland), Cylance (US), FireEye (US), CyberArk (US), CYE (Israel), SecurIT360 (US), and Founder Shield (US). The insurance vendors covered in the cybersecurity insurance market are Allianz (Germany), AIG (US), Aon (UK), Arthur J. Gallagher & Co (US), Travelers Insurance (US), AXA XL (US), AXIS Capital (Bermuda), Beazley (UK), Chubb (Switzerland), CNA Financial (US), Fairfax Financial (Canada), Liberty Mutual (US), Lloyd's of London (UK), Lockton (US), Munich Re Group (Germany), and Sompo International (Bermuda). The startup vendors covered in the cybersecurity insurance market are At-Bay (US), Cybernance (US), CyberCube (US), Coalition (US), Arceo.ai (US), Kovrr (Israel), Sayata Labs (Israel), Zeguro (US), RiskSense (US), SafeBreach (US), and Cronus Cyber Technologies (Israel). These players have adopted various growth strategies, such as partnerships, agreements and collaborations, new product launches, and product enhancements, and acquisitions to expand their footprint in the Cybersecurity insurance market.

Research Coverage

The market study covers the Cybersecurity insurance market size across different segments. It aims at estimating the market size and the growth potential across different segments, including offerings (solutions, and services), insurance coverage, insurance type, compliance requirements, end user, and region. The study includes an in-depth competitive analysis of the leading market players, their company profiles, key observations related to product and business offerings, recent developments, and market strategies.

Key Benefits of Buying the Report

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the global Cybersecurity insurance market and its subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. Moreover, the report will provide insights for

stakeholders to understand the market's pulse and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Surge in mandatory cybersecurity regulations and legislations to boost demand for insurance protection, High rate of recovery of financial losses to promote growth of cybersecurity insurance market, and Increase in the frequency and sophistication of cyber threats), restraints (Lack of awareness related to cybersecurity insurance and reluctance in choosing cybersecurity insurance over cybersecurity solutions, and Soaring cybersecurity insurance costs), opportunities (Exclusion of cybersecurity insurance cover from Property and Casualty (P&C) insurance, and Adoption of artificial intelligence and blockchain technology for risk analytics), and challenges (Cyber insurers grapple to gain traction despite soaring cybersecurity risks, Data privacy concerns, and Lack of understanding, technical knowledge, and absence of historical cyber data for effective underwriting) influencing the growth of the Cybersecurity insurance market. Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the Cybersecurity insurance market. Market Development: Comprehensive information about lucrative markets – the report analyses the Cybersecurity insurance market across various regions. Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the Cybersecurity insurance market. Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like BitSight (US), Prevalent (US), RedSeal (US), SecurityScorecard (US), Cyber Indemnity Solutions (Australia), Cisco (US), UpGuard (US), Microsoft (US), Check Point (US), AttackIQ (US), SentinelOne (US), Broadcom (US), Accenture (Ireland), Cylance (US), FireEye (US), CyberArk (US), CYE (Israel), SecurIT360 (US).

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Details on Business Overview, Products/Solutions/Services Offered, Recent Developments, MnM view (Key strengths/Right to win, Strategic choices made, Weakness/competitive threats) might not be captured in case of unlisted companies.

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