

US Insurance Rankings 2023:

# Home & Auto Policy Switchers



# ► Which insurers will the most Americans switch to in 2023?

The US home and auto insurance market is a highly competitive, price-sensitive segment, with leaders investing heavily in advertising and offers to entice in-market consumers.

Analyzing insurance survey data from more than 25,000 consumers,

YouGov's 2023 US Home and Auto Insurance Rankings provides an accurate view of insurance brand consideration across the general population, Americans identifying as actively in-market, and next-gen customers under 25.

# US General Population Ranking

Rank	Brand	2022 Score	Change in Rank (vs 2021)
1	State Farm	22.6	-
2	Geico	17.2	-
3	Progressive	16.5	+1
4	Allstate	16.1	-1
5	AAA	13.9	-
6	USAA	12.6	-
7	Liberty Mutual	12.4	-
8	Nationwide	11.5	+1
9	Farmers Insurance Group	10.7	-1
10	Aflac	8.1	-

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## Most considered Insurers

State Farm remained the most considered insurance brand in 2022 for the second year running, followed by Geico. Progressive has edged out Allstate for the number three spot.

YouGov BrandIndex: Brands ranked by Average Consideration score between January 1, 2022 and December 31, 2022; Change in Rank measured between that time and the previous twelve months. (N>25000)

# In-Market Ranking

Rank	Brand	2022 Score	Change in Rank (vs 2021)
1	State Farm	25.5	-
2	Geico	21.5	-
3	Progressive	20.7	-
4	Allstate	20.3	-
5	USAA	17.2	+3
6	AAA	16.8	-1
7	Liberty Mutual	15.9	-1
8	Nationwide	14.2	+1
9	Farmers Insurance Group	13.3	-2
10	Aflac	10.5	-

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## Most considered Insurers

Americans who actively search for better insurance deals

The top four remain the same among in-market consumers. USAA takes the number five spot, trending up three places year-over-year.

YouGov BrandIndex: Brands ranked by Average Consideration score between January 1, 2022 and December 31, 2022, with additional filtering by switching activeness (Very Active + Active) via YouGov Profiles; Change in Rank measured between that time and the previous twelve months. (N>3300)

# Home Insurance Switchers Ranking

Rank	Brand	2022 Score	Change in Rank (vs 2021)
1	State Farm	26.1	-
2	Allstate	23.5	+1
3	Progressive	22.3	+1
4	Geico	22.0	-2
5	Farmers Insurance Group	19.5	-
6	Liberty Mutual	18.7	+1
7	Nationwide	17.2	+2
8	USAA	16.9	-2
9	AAA	16.4	-1
10	Prudential	13.5	+2

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## Most considered Insurers

Americans switching home insurance in 2023

Among likely home insurance switchers specifically, Farmers looks to be the biggest winner, while Prudential cracks the top 10.

YouGov BrandIndex: Brands ranked by Average Consideration score between January 1, 2022 and December 31, 2022, with additional filtering by indication to switch Homeowner’s insurance in 2023 via YouGov Profiles; Change in Rank measured between that time and the previous twelve months. (N>1300)

# Auto Insurance Switchers Ranking

Rank	Brand	2022 Score	Change in Rank (vs 2021)
1	State Farm	26.8	-
2	Allstate	23.4	+1
3	Geico	22.4	-1
4	Progressive	22.4	-
5	Farmers Insurance Group	18.5	+2
6	AAA	18.3	-1
7	Liberty Mutual	17.3	-1
8	USAA	17.2	-
9	Nationwide	17.2	-
10	Travelers	11.8	-

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## Most considered Insurers

Americans switching auto insurance in 2023

Likely auto insurance switchers prefer Allstate over Geico for the number two spot. Nationwide and Travelers also make the top 10.

YouGov BrandIndex: Brands ranked by Average Consideration score between January 1, 2022 and December 31, 2022, with additional filtering by indication to switch Auto insurance in 2023 via YouGov Profiles; Change in Rank measured between that time and the previous twelve months. (N>1900)



# 18-24 Segment Ranking

Brand	Change in Rank (vs Gen Pop in 2022)	Increase in Consideration (vs Gen Pop)
AXA	+16	2.1
Allianz Life	+16	2.0
SafeAuto	+13	2.2
Guardian	+10	1.4
Hippo	+8	1.4
Lincoln Financial	+8	0.9
The General Insurance	+7	1.2
New York Life	+6	0.6
Direct Auto Insurance	+5	1.0
Auto-Owners Insurance	+5	0.7

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## Insurers winning with Americans aged 18-24

Looking at consumers aged 18-24 who may be choosing an insurer for the first time in the coming years, AXA, Allianz Life and SafeAuto all significantly over-index for consideration.

YouGov BrandIndex: Brands ranked by Average Consideration score between January 1, 2022 and December 31, 2022, with additional filtering by age via YouGov Profiles; Change in Rank measured against Average Consideration for the US General Population for the same timeframe (N>999).

# Brand Spotlight: State Farm

Consideration of State Farm among All Americans since January 2016



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● State Farm (US)

- Average Consideration: **22.2%**
- Average Ad Awareness: **37.5%**
- Average Consideration (Switchers): **24.1%**
- Average Ad Awareness (Switchers): **38.9%**

YouGov BrandIndex data on State Farm's Consideration score between January 1, 2016 and December 31, 2022; Ad Awareness measured on the same timeframe. Active switchers data available via YouGov Profiles connection.



# Methodology

This report sheds light on the insurers most considered by Americans who are likely to be in-market for insurance in 2023. To do this, YouGov analyzed insurance survey data from more than 25,000 respondents between Jan. 1 and Dec. 31, 2022, comparing against 2021 to gauge trends.

Additional filters from YouGov Profiles were applied to identify consumers considering a new insurer for

home and auto policies, as well as general attitudes toward shopping for new deals at the expiration of a policy.

By connecting brand health data from **YouGov BrandIndex** and audience intelligence data from **YouGov Profiles**, we're able to accurately measure changing consumer attitudes towards insurance brands with unrivaled granularity.

# Want a deeper analysis?

**YouGov BrandIndex** tracks 16 key brand health metrics including:



Customer Satisfaction



Quality



Aided Awareness



Ad Awareness



With **YouGov Profiles**, you can segment your analysis by:



Vehicle type owned



Sports fandom



Advertising channels

And much more

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# Thank you

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