

Introduction to travel insurance

Objective

To provide a broad knowledge and understanding of travel insurance, including:

- the need for cover and its benefits;
- insurance legal principles and duties;
- product features;
- how cover is arranged and provided;
- the principles of delivering good customer service.

Summary of learning outcomes	Number of questions in the examination*
1. Understand the need for and benefit of travel insurance.	4
2. Understand the insurance legal principles and duties relating to travel insurance.	10
3. Understand the main features of travel insurance products and the market.	14
4. Understand how travel insurance is arranged and provided.	15
5. Understand the key principles of delivering good customer service.	7

* The test specification has an in-built element of flexibility. It is designed to be used as a guide for study and is not a statement of actual number of questions that will appear in every exam. However, the number of questions testing each learning outcome will generally be within the range plus or minus 2 of the number indicated.

Important notes

- Method of assessment: 50 multiple choice questions (MCQs). 1 hour is allowed for this examination.
- This syllabus will be examined from 1 January 2026 to 31 December 2026.
- Candidates will be examined on the basis of English law and practice unless otherwise stated.
- This PDF document has been designed to be accessible with screen reader technology. If for accessibility reasons you require this document in an alternative format, please contact us on online.exams@cii.co.uk to discuss your needs.

1. Understand the need for and benefit of travel insurance.

- 1.1 Explain why travel insurance is needed.
- 1.2 Describe the pooling of risk and the social value of insurance.

2. Understand the insurance legal principles and duties relating to travel insurance.

- 2.1 Describe what insurable interest is and how it arises.
- 2.2 Describe the information gathered from the customer and its purpose.
- 2.3 Explain the importance of selecting the right cover and providing the correct information.

3. Understand the main features of travel insurance products and the market.

- 3.1 Describe the different types of travel cover.
- 3.2 Describe the different core sections of travel cover and the key cover exclusions.
- 3.3 Describe the different optional extensions of travel cover.
- 3.4 Describe the general policy conditions and exclusions.

4. Understand how travel insurance is arranged and provided.

- 4.1 Describe the different methods of arranging travel insurance.
- 4.2 Explain the sales and underwriting process.
- 4.3 Describe the documentation issued when arranging travel insurance.
- 4.4 Explain the process of renewals.
- 4.5 Explain the claims process.

5. Understand the key principles of delivering good customer service.

- 5.1 Describe the main communication approaches and techniques when dealing with customers.
- 5.2 Describe the complaints process.
- 5.3 Describe Consumer Duty.
- 5.4 Describe the travel insurance regulator and ombudsman.

Additional resources

The following resources may assist you with your studies.

Note: The examination will test the syllabus alone.

Supporting information for the syllabus can be found on the unit page via the CII website. The resources found here: www.cii.co.uk/learning will help you keep up-to-date with developments and provide a wider coverage of syllabus topics.

Additional reading material can also be found referenced in an appendix within the study text.

Learning support

Introduction to travel insurance. London: CII. Study text PL2.

Knowledge Checker available at an additional cost. (delivered via RevisionMate)

Assessment information

Candidates should refer to the CII website for the latest information on changes to law and practice and when they will be examined:

- 1. Visit www.cii.co.uk/qualifications
- 2. Select the appropriate qualification
- 3. Select your unit from the list provided
- 4. Select qualification update on the right hand side of the page

Examination guide

The examination guide is available on the unit page via the CII website.

If you have a current study text enrolment, the current examination guide is included and is accessible via **RevisionMate** (ciigroup.org/login). Details of how to access RevisionMate are on the first page of your study text.

It is recommended that you study from the most recent versions of the examination guide.

Exam preparation

Exam preparation guidance and supporting exam documentation are available via the CII website: www.cii.co.uk/learning/qualifications/assessment-information