

# North America Phishing Protection Market Report (2021-2031) by Scope, Segmentation, Dynamics, and Competitive Analysis

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## Abstracts

The North America phishing protection market was valued at approximately \$878.79 million in 2023 and is projected to grow to around \$2,203.85 million by 2031, reflecting a compound annual growth rate (CAGR) of 12.2% during the forecast period.

### Increasing Threats Drive Market Growth

The rise in sophistication and frequency of phishing attacks is a significant driver for the growth of the phishing protection market in North America. Attackers are now employing advanced techniques, including artificial intelligence (AI) to craft convincing phishing emails and deepfake technology for voice phishing. They also utilize social media to gather detailed information about their targets. The financial impact of phishing has escalated dramatically, with business email compromise (BEC) scams leading to substantial losses. In 2022, the FBI's Internet Crime Complaint Center (IC3) reported 21,832 BEC complaints, resulting in adjusted losses exceeding \$2.7 billion, highlighting the urgent need for enhanced phishing protection solutions.

High-profile incidents, such as the 2022 Uber data breach, which stemmed from social engineering tactics, and the 2021 Colonial Pipeline ransomware attack, which began with a phishing email, underscore the critical nature of this threat. A report from Zscaler in 2024 noted a 60% increase in global phishing attacks over the previous year, while ThreatLabz's 2024 Phishing Report documented 2 billion blocked phishing transactions in 2023. Additionally, Check Point Research indicated a 32% rise in cyberattacks on organizations globally compared to the second quarter of 2021. These alarming statistics are prompting organizations to prioritize phishing protection.

According to SlashNext Inc., there was a staggering 1,265% increase in phishing attacks from Q4 2022 to Q3 2023. Regulatory frameworks, such as the General Data Protection Regulation (GDPR) in Europe, impose strict penalties on organizations for data breaches resulting from phishing, further driving investment in phishing protection solutions. Consequently, many enterprises are adopting machine learning (ML) and AI technologies to detect and analyze phishing patterns proactively, allowing them to anticipate attacks and automate their response strategies. Implementing email filtering solutions has proven effective in significantly reducing phishing attempts. The surge in phishing incidents has led organizations to invest heavily in comprehensive phishing protection strategies, including staff training to recognize potential phishing emails and integrating advanced threat intelligence into their security systems.

## Overview of the North America Phishing Protection Market

Phishing has emerged as a major concern on the internet, with over 300,000 phishing incidents reported in the US alone by the FBI in 2022. AI and machine learning technologies are increasingly being utilized to detect fraudulent activities before they can inflict serious damage. For example, Microsoft's Office 365 Advanced Threat Protection employs AI to analyze millions of emails for potential risks. A report by Zscaler indicated that the US, UK, and India were the most affected countries by phishing scams, accounting for 55.9%, 5.6%, and 3.9% of global incidents in 2023, respectively, likely due to the high usage of electronic devices in these regions.

Cloud-based phishing protection services are gaining traction, especially among small and medium-sized enterprises (SMEs) in North America. For instance, in 2023, the administration at Midwest University implemented Barracuda's cloud-based email security solution to protect students and faculty from cyber threats, particularly phishing. Proofpoint's 2023 State of Phishing report revealed that their services could identify and block over 10 million phishing emails daily in the US. Companies in the phishing protection sector are focusing on leveraging AI-driven behavioral analysis and enhancing user authentication methods to counter emerging threats effectively.

## Market Segmentation

The North America phishing protection market is segmented by offerings, deployment, type, enterprise size, vertical, and country:

**Offerings:** The market is divided into solutions and services, with the solutions segment holding a larger share in 2023.

**Deployment:** It is categorized into on-premises and cloud, with cloud solutions dominating the market.

**Type:** The market is split into email-based and non-email-based phishing, with email-based phishing being the larger segment.

**Enterprise Size:** It includes large enterprises and SMEs, with large enterprises holding a greater market share.

**Vertical:** The market is segmented into BFSI, media and entertainment, IT and telecom, retail and e-commerce, government and public sector, among others, with BFSI leading in market share.

**Country:** The market is divided into the US, Canada, and Mexico, with the US being the dominant player in 2023.

### Key Players in the Market

Leading companies in the North America phishing protection market include Microsoft Corp, Cisco Systems Inc, Open Text Corp, Barracuda Networks, Inc., SlashNext, Inc., Ironscales, Proofpoint Inc, Mimecast Services Limited, Paubox, Inc., and Trustwave Holdings, Inc.

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