

Market ANALYSIS

PhishVision - Competitive Market Analysis 2024-2025

Executive Summary

The phishing simulation market is valued at **\$620M (2024)** and projected to reach **\$1.09B by 2032** with a 7-8% CAGR. The market is experiencing explosive growth driven by AI-powered attacks (up 1,265% since ChatGPT) and compliance requirements.

1. Competitor Analysis

1.1 KnowBe4 (Market Leader)

Market Position: 26.6% market share

Rating: 4.5 stars (Gartner)

Target: Mid-market to Enterprise

| Tier | Price/User/Year | Key Features |
|----------|-----------------|------------------------------------|
| Silver | \$18-23 | Basic training, unlimited phishing |
| Gold | \$25-30 | Training Level II |
| Platinum | \$30-35 | Training Level III |
| Diamond | \$39+ | AI tools, personalization |

Strengths:

- Largest template library
- Strong brand recognition
- Virtual Risk Officer (all tiers)

- 60+ built-in reports

Weaknesses:

- Content often outdated and generic
 - Clunky UX, limited innovation
 - Expensive for SMBs
 - Limited customization
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1.2 Gophish (Open Source)

License: MIT (Free)

Target: Technical teams, pen testers

Features:

- Full HTML template editor
- REST API with Python client
- Campaign scheduling
- Real-time tracking
- Self-hosted solution

Strengths:

- Zero cost
- High customization
- No vendor lock-in
- API-driven automation

Limitations:

- No AI-powered features
- No behavioral analytics
- No compliance reporting
- Requires technical expertise
- No managed support

1.3 Cofense (PhishMe)

Position: Enterprise-focused leader

Certifications: SOC 2 Type II

Users: 35M+ trained globally

Unique Features:

- Responsive Delivery (ONLY platform)
- Real-time threat intelligence
- Deep SOC integration
- Reporter button (one-click reporting)

Strengths:

- Proactive detection focus
- Real-world attack templates
- Strong SOC handoff workflows

Weaknesses:

- Unintuitive UI
- Limited localization
- Email-centric (limited SMS/voice)
- Higher cost

1.4 Proofpoint

Market Share: 9.8%

Rating: 4.5 stars (288 reviews)

Recognition: Gartner Leader (6 years)

Pricing: ~\$18/user/year (up to <\$2 with volume)

Features:

- Thousands of templates from threat intel
- 600+ learning modules
- PhishAlarm reporting tool
- Auto-enrollment after failures

Strengths:

- Realistic threat-based simulations
- Tight email security integration
- Multi-language support

Weaknesses:

- Complex, time-consuming setup
- Steep learning curve
- Generic training content

1.5 Barracuda PhishLine

Pricing: ~\$14.40/user/year (AWS Marketplace)

Unique: Multi-Vector Simulations

- Email phishing
- SMS (Smishing)
- Voice (Vishing)
- USB/Physical media

Features:

- 16,000+ behavior data points
- Adaptive difficulty
- Robust reporting
- REST API

Strengths:

- Multi-vector coverage

- Easy setup (~1 hour)
 - Mid-range pricing
 - Extensive behavior tracking
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1.6 Other Notable Competitors

| Platform | Focus | Price Range | Unique Feature |
|------------|------------|-------------|-------------------------------|
| Infosec IQ | Compliance | Custom | 2,000+ templates |
| SANS | Premium | Enterprise | Expert-curated, 7 tracks |
| Terranova | M365 | Custom | Deep Microsoft integration |
| ClearPhish | Innovation | Custom | Emotional Vulnerability Index |

2. Feature Comparison Matrix

Campaign Management

| Feature | KnowBe4 | Gophish | Cofense | Proofpoint | PhishVision |
|---------------------|---------|---------|---------|------------|-------------|
| Unlimited Campaigns | ✓ | ✓ | ✓ | ✓ | ✓ |
| Campaign Scheduling | ✓ | ✓ | ✓ | ✓ | ⚠ Basic |
| A/B Testing | ✓ | ✗ | ⚠ | ✓ | ✗ |
| Smart Targeting | ✓ | ✗ | ✓ | ✓ | ✗ |
| Auto-enrollment | ✓ | ✗ | ✓ | ✓ | ✗ |

Email Analysis

| Feature | KnowBe4 | Gophish | Cofense | Proofpoint | PhishVision |
|---------|---------|---------|---------|------------|-------------|
| | | | | | |

| | | | | | | |
|---------------------|---------------------------------------|------------------------------------|---------------------------------------|--------------------------------------|---------------------------------------|---------|
| NLP Detection | ! | X | ! | ✓ | ✓ | |
| SPF/DKIM/DMARC | ! | X | ✓ | ✓ | ✓ | |
| URL Analysis | ✓ | X | ✓ | ✓ | ✓ | |
| Attachment Analysis | ✓ | X | ✓ | ✓ | ✓ | |
| ML Classification | ! | X | ! | ✓ | ! | Planned |

SOC Features

| | | | | | | |
|-------------------------------------|---------------------------------------|------------------------------------|--------------------------------------|---------------------------------------|---------------------------------------|---------|
| Feature | KnowBe4 | Gophish | Cofense | Proofpoint | PhishVision | |
| ----- ----- ----- ----- ----- ----- | | | | | | |
| SOC Dashboard | ! | X | ✓ | ✓ | ! | Planned |
| SIEM Integration | ! | X | ✓ | ✓ | X | |
| Response Timeline | X | X | ✓ | ! | ! | Planned |
| Incident Tracking | ! | X | ✓ | ✓ | X | |
| Risk Scoring | ✓ | X | ✓ | ✓ | ! | Planned |

Template Capabilities

| | | | | | | |
|-------------------------------------|---------------------------------------|--------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|------------|
| Feature | KnowBe4 | Gophish | Cofense | Proofpoint | PhishVision | |
| ----- ----- ----- ----- ----- ----- | | | | | | |
| Template Count | Large | DIY | Large | 1000s | 10+ | |
| Custom Templates | ! | ✓ | ✓ | ✓ | ✓ | |
| AI Generation | ! | X | X | X | ✓ | |
| Multi-language | ✓ | ✓ | ! | ✓ | ✓ | (AZ,TR,EN) |
| Visual Builder | ! | X | ! | ! | ! | Planned |

3. Market Trends 2024-2025

3.1 AI in Phishing Attacks

Statistics:

- 82.6% of phishing emails use AI-generated content
- 1,265% surge in AI-linked attacks since ChatGPT
- 4,151% increase in total phishing volume since 2022
- 54% vs 12% click rate for AI vs human-crafted phishing

Implication: Platforms must fight AI with AI

3.2 Behavioral Analytics

Industry Standard Features:

- Individual user risk scores (/100)
- Department-level heatmaps
- Trend analysis over time
- Adaptive training difficulty

Innovation (2025):

- Emotional Vulnerability Index (EVI)
- 16,000+ data points tracking (Barracuda)
- Predictive risk modeling

3.3 SOC Integration

Requirements:

- SIEM/SOAR connectors
- Incident response automation
- Threat intelligence feeds
- Real-time alerting

Leading Platforms:

- Microsoft Sentinel integration
- Splunk Add-ons
- CrowdStrike Falcon

3.4 Compliance Requirements

| Framework | Phishing Simulation Required? |

|-----|-----|

| SOC 2 | Yes (annual + frequent campaigns) |

| ISO 27001 | Yes (HR policies & training) |

| HIPAA | Recommended |

| PCI DSS | Recommended |

| GDPR | Indirect (breach prevention) |

Best Practices:

- 6-10 simulations per employee per year
- 40-60 day intervals
- All activities logged for audit

4. PhishVision Competitive Position

Current Strengths

| Strength | Description | Competitor Comparison |

|-----|-----|-----|

| AI Templates | Gemini-powered generation | Unique feature |

| NLP Analyzer | 719 lines, comprehensive | Better than Gophish |

| Multi-language | AZ, TR, EN support | Rare feature |

| Modern UI | React + Tailwind | Better than KnowBe4 |

| Open Architecture | Flask + REST API | Like Gophish |

Gaps to Address

| Gap | Current | Target | Priority |

|-----|-----|-----|-----|

| | | | |
|-------------------|--|---------------------|--------|
| SOC Timeline | X Missing | Full implementation | HIGH |
| Risk Scoring | X Missing | Per-user scores | HIGH |
| ML Classification | Basic NLP | scikit-learn model | MEDIUM |
| SIEM Integration | X Missing | REST API + webhooks | LOW |
| Multi-tenant | X Missing | Tenant isolation | FUTURE |

Differentiation Strategy

Positioning: "AI-Native, SOC-Ready Phishing Simulation"

Key Differentiators:

1. **AI-First:** Built for the age of AI phishing (82.6%)
 2. **SOC Integration:** Security tool, not just training
 3. **Modern Stack:** React + Flask (vs legacy platforms)
 4. **Multi-language:** Local market advantage (AZ/TR)
 5. **Fair Pricing:** Enterprise features at SMB prices
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5. Market Opportunity

Total Addressable Market

| Year | Market Size | Growth |
|------|-------------|--------|
| 2024 | \$620M | - |
| 2025 | \$700M | 13% |
| 2027 | \$850M | 21% |
| 2032 | \$1.09B | 76% |

Target Segments

| Segment | Size | PhishVision Fit | Priority |
|---------|------|-----------------|----------|
| | | | |

| |
|---|
| Mid-Market (100-1000 users) \$200-300M High 1 |
| MSP/MSSP \$620M→\$1.09B Medium 2 |
| SOC Teams Subset High 3 |
| Compliance-driven Growing Medium 4 |

Revenue Projection (Conservative)

| Year | Users | Avg Price | ARR |
|------------------------------|-------|-----------|-------|
| ----- | ----- | ----- | ----- |
| 1 5,000 \$15 \$75K | | | |
| 2 25,000 \$18 \$450K | | | |
| 3 100,000 \$20 \$2M | | | |
| 5 500,000 \$25 \$12.5M | | | |

6. Pricing Strategy

Recommended Tiers

| Tier | Price/User/Year | Target | Features |
|---|-----------------|--------|----------|
| ----- | ----- | ----- | ----- |
| Free \$0 1-10 users 5 templates, basic tracking | | | |
| Starter \$12 11-100 20 templates, reports | | | |
| Professional \$18 101-1000 AI, advanced analytics | | | |
| Enterprise \$30 1000+ White-label, SIEM | | | |

Discount Structure

- Volume: 10% (100+), 20% (500+), 30% (1000+)
- Annual prepay: 15%
- Multi-year: 20-25%

- Non-profit/Education: 30%
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7. Competitive Responses

If Asked "Why not KnowBe4?"

- "Modern, intuitive interface vs clunky legacy UI"
- "AI template generation included (not Diamond-only)"
- "Multi-language support for regional markets"
- "Fair, transparent pricing"

If Asked "Why not Gophish?"

- "AI-powered templates out of box"
- "Built-in NLP email analyzer"
- "SOC dashboard included"
- "No technical setup required"

If Asked "Why not Cofense?"

- "SMB-friendly pricing"
 - "Modern React architecture"
 - "Easy self-deployment"
 - "Local language support"
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8. Key Takeaways

1. **Market is growing** - \$620M → \$1.09B opportunity
 2. **AI is critical** - 82.6% of phishing is AI-generated
 3. **SOC integration is expected** - Especially for enterprise
 4. **Compliance drives adoption** - SOC 2, ISO 27001 require simulations
 5. **Mid-market is underserved** - KnowBe4 expensive, Gophish too basic
 6. **MSP channel is massive** - Multi-tenant unlocks \$1B market
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Sources

Competitors:

- KnowBe4 Pricing Guide 2025
- Gophish GitHub Repository
- Cofense PhishMe Gartner Reviews
- Proofpoint Security Awareness Training
- Barracuda PhishLine Documentation

Market Data:

- Global Growth Insights 2024
- Coherent Market Insights 2024
- Archive Market Research 2024

Trends:

- SlashNext AI Phishing Report 2025
- Hoxhunt Phishing Trends Report 2025
- CybelAngel AI Threat Analysis 2025
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