CROWDSTRIKE

20 25 | MARKET LEADER

Building Customer Loyalty and Retention

RECOGNIZED FOR BEST PRACTICES IN THE GLOBAL ENDPOINT SECURITY INDUSTRY

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Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. CrowdStrike excels in many of the criteria in the Endpoint Security space.

RECOGNITION CRITERIA

Growth Strategy Excellence	Technology Leverage
Implementation Excellence	Price/Performance Value
Brand Strength	Customer Ownership Experience
Product Quality	Customer Purchase Experience
Product Differentiation	Customer Service Experience

The Transformation of the Endpoint Security Industry

Endpoint security is a critical aspect of modern cybersecurity strategies, focused on protecting an organization's entire endpoint fleet against cyberthreats like ransomware, phishing, and other advanced threats. In today's threat landscape, where attacks increasingly span multiple domains, organizations require more than isolated endpoint tools—they need a comprehensive security platform with robust, battle-tested endpoint protection at its core that can also extend across identity, cloud, and data.

Modern endpoint protection platforms (EPP) are not only expected to block threats but deliver real-time, end-to-end visibility, detection, and automated response. Frost & Sullivan has observed significant expansion in the endpoint security market, fueled by escalating cyber threats and the pressure to comply with data protection regulations such as GDPR, HIPAA, and CCPA.

Vendors now offer a spectrum of capabilities that include endpoint detection and response (EDR), extended detection and response (XDR), and next-generation antivirus (NGAV), designed to identify and respond to anomalous behavior quickly. A unified platform approach enables better correlation across attack surfaces and improves the speed and accuracy of investigations.

Frost & Sullivan's own research confirms that endpoint security vendors clearly bring different strengths to the table, focusing on integration with broader security platforms, rapid threat response through new technologies, and ease of deployment. The competitive landscape continues to evolve as companies prioritize automation, AI, and unified security platforms that streamline endpoint, network, and cloud threat detection.

The endpoint security market has become increasingly crowded, reflecting the high demand for advanced protection and need to drive operational efficiency. As a result, a wide range of vendors - from established cybersecurity giants to niche startups - have entered the market offering various endpoint solutions.

Unified and Scalable Security Driving Growth

The evolution of CrowdStrike's endpoint security offering has played a key role within the vendor's broader portfolio in relation to its growth and innovation strategies. CrowdStrike continuously advances its unified EDR/XDR offering through AI-driven detection enhancements, ensuring the platform adapts to evolving adversarial tactics. By leveraging deep native telemetry and cross-domain investigation features, the company provides comprehensive protection against complex threats. A key component of this is the integration of Charlotte AI, which enriches the analyst experience by streamlining workflows and boosting operational efficiency through AI-enabled insights. With agentic capabilities, Charlotte AI automatically triages detections, conducts thorough investigations by asking and answering key security questions, and executes intelligent automated workflows - transforming even junior analysts into force multipliers for security teams while drastically reducing time to remediation.

The company's platform-centric approach also plays a vital role in its growth. As businesses look to consolidate security tools and reduce operational complexity, CrowdStrike's Falcon platform offers a compelling solution by integrating endpoint security with identity, threat intelligence, cloud, and other critical security functions. This all-in-one platform allows organizations to simplify their security infrastructure while expanding protection beyond traditional endpoints. The Falcon platform is designed to meet the demand for unified, scalable security, positioning CrowdStrike to capitalize on the market trend toward tool consolidation.

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>
> *- Ozgun Pelit*
> *Sr. Industry Analyst*

CrowdStrike further strengthens its strategy by extending analyst workflows across the platform to tackle cross-domain threats through a centralized, cloud-native console. This includes seamless integration of multiple security domains such as identity, SaaS applications, cloud, mobile, IoT/OT, data protection, and threat intelligence. The inclusion of Falcon Next-Gen SIEM enhances detection of multi-vector attacks, with the added benefit of 10 GB/day of free third-party data ingest to extend visibility across the security ecosystem. Coupled with ongoing investments in AI and automation, CrowdStrike aims to further accelerate threat response, lower analyst workloads, and deliver a proactive, intuitive security experience that clearly differentiates it in a competitive cybersecurity landscape.

An All-Encompassing Strategy for Market Leadership

To broaden its market reach, CrowdStrike extended its enterprise-level security to small and mid-sized businesses (SMBs) with Falcon Go: a streamlined solution focused on ease of use and minimal setup. This offering delivers the same AI-powered protection that large enterprises use, but in a more accessible format for SMBs. With automated protections, device control, mobile threat protection, and minimal configuration required, Falcon Go makes sophisticated cybersecurity available to organizations without dedicated IT teams. This allows CrowdStrike to target a previously underserved market segment, positioning its solution as both powerful and simple to deploy.

Beyond technology, CrowdStrike offers unparalleled human expertise through managed detection and response (Falcon Complete), proactive threat hunting (Falcon Adversary OverWatch), and incident response services. This tight feedback loop between frontline experts and the Falcon platform creates a continuous improvement cycle that strengthens the entire solution.

CrowdStrike's go-to-market strategy is heavily content- and education-driven, aiming to demonstrate the superiority of its endpoint protection compared to traditional tools. The company invests in a broad range of digital and physical engagement channels to build awareness and drive adoption. These include customized demos, webinars, workshops, targeted digital advertising, and free trials. Additionally, CrowdStrike extends its marketing programs to partners, helping scale outreach and engagement through a global network. By combining strong educational content with multi-channel outreach, CrowdStrike effectively guides prospects through the buyer journey and reinforces its leadership in modern endpoint security.

CrowdStrike boasts an ecosystem of over 5,000 partnerships through its Alliances Accelerate Program, strategically developing relationships with global system integrators (GSIs), resellers, MSPs, MSSPs, and technology integrators. Leading partners such as Deloitte, EY, Cognizant, HCL, Accenture, and Tata have built complete SOC transformation practices on the Falcon platform, facilitating market expansion and exponentially feeding the technology ecosystem.

CrowdStrike delivers high-quality customer service experience by actively integrating user feedback into its product development and support processes. Through platforms like the Customer and Technical Advisory Boards and the CrowdStrike Ideas Portal, which consists of over 10,000 customer-submitted ideas, the company ensures its solutions continuously evolve based on real-world needs. Dedicated success teams provide personalized onboarding, training, and check-ins to support customers throughout their journey. Additionally, community-building initiatives like the annual Fal.Con conference and the CrowdStrike Support Community create spaces for collaboration, innovation, and knowledge sharing, all of which contribute to strong customer engagement and retention.

CrowdStrike's all-encompassing strategies led to consistent revenue growth across all segments, with the company recording the highest share in the Endpoint Security market two years in a row. Based on Frost & Sullivan's 2025 Global Endpoint Security research, CrowdStrike is the vendor with the largest market share, accounting for 17.1% of the Endpoint Security market. Furthermore, the

company has increased its customer base in the last years by five-fold - from less than 5,500 at the end of 2020 to more than 29,000 by the end of 2024.

Conclusion

Frost & Sullivan applauds CrowdStrike for its comprehensive growth and innovation strategies, which purposefully target the needs of the ever-changing market and its various segments. Through the application of innovative solutions and business models, CrowdStrike consistently grew its customer base and holds the largest market share in the Endpoint Security market.

With its strong overall performance, CrowdStrike earns the 2025 Frost & Sullivan Global Market Leadership Recognition in the endpoint security industry.

What You Need to Know about the Market Leadership Recognition

Frost & Sullivan's Market Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Market Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Growth Strategy Excellence: Company demonstrates an ability to consistently identify, prioritize, and pursue emerging growth opportunities

Implementation Excellence: Company processes support efficient and consistent implementation of tactics designed to support the strategy

Brand Strength: Company is respected, recognized, and remembered

Product Quality: Products or services receive high marks for performance, functionality, and reliability at every stage of the life cycle

Product Differentiation: Products or services address a market niche through a combination of price, quality, or uniqueness that other companies cannot easily replicate

Technology Leverage: Company is committed to incorporating leading-edge technologies into product offerings to enhance product performance and value

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Purchase experience quality assures customers that they are buying the optimal solution for their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

VALUE IMPACT

STEP		WHAT	WHY
1	Opportunity Universe	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	Transformational Model	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	Ecosystem	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	Growth Generator	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	Growth Opportunities	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	Frost Radar	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	Best Practices	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	Companies to Action	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

The Growth Pipeline Engine™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

Learn more.

Key Impacts:

- **Growth Pipeline:** *Continuous Flow of Growth Opportunities*
- **Growth Strategies:** *Proven Best Practices*
- **Innovation Culture:** *Optimized Customer Experience*
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** *Industry Leadership*

The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- Mega Trend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)