

MFA Coverage Gap: Full Methodology & Sources

Fortune 500 device-dependency analysis — why 80% of the global workforce is unreachable by device-bound MFA, and why Deviceless MFA is the category that closes the gap.

Purpose

Rank 20 major Fortune 500 industries by device-based MFA reach — the share of workers who have a company-issued or personal device that can run an MFA authenticator. Industries with the lowest office/desk share (highest frontline share) appear first, because those are where traditional device-based MFA covers the smallest portion of the workforce.

Definitions

Field / Frontline Worker

Deskless employees whose primary work is on a store floor, plant floor, construction site, rig, field route, vehicle, patient room, or similar — and who typically do NOT have a dedicated company-issued computing device suitable for device-bound MFA.

Office / Desk Worker

Employees with a dedicated workstation (laptop or desktop) and typically a company email account and company-managed device — the population that device-based MFA can actually reach.

Device MFA Reach

Equal to the Office / Desk percentage. This is the ceiling for how much of the workforce can be protected by device-bound MFA without adopting alternate factors.

How the Percentages Were Derived

- 1. Industry list:** Based on Fortune 500 industry categories (2025 list) and Wikipedia's 'List of largest companies in the United States by revenue.' Industries were consolidated where Fortune uses multiple narrow codes.
- 2. Field vs. office splits:** Research-backed estimates anchored to published studies of the deskless workforce from Emergence Capital, BCG, Gartner, Simpplr, WGU Labs, Quinyx, and Firstup.
- 3. Fortune 500 adjustment:** Fortune 500 companies tend to have somewhat larger corporate HQ functions than the industry average, so office percentages are nudged upward 2-5 points from raw industry deskless ratios.
- 4. Special cases:** Government/Military and K-12/Higher Ed are included as reference categories (not Fortune 500). Aerospace & Defense and Government/Military are device-restricted for security reasons (SCIFs, classified areas) rather than economic ones.

Confidence & Caveats

These percentages are estimates at the industry level, not audited company counts. Actual splits vary significantly within an industry (e.g., a pure-play e-commerce retailer is far more office-heavy than a grocery chain, yet both are 'Retail'). For a production roadmap, validate per target account using LinkedIn Sales Navigator employee function filters, 10-K employee disclosures, or direct discovery calls.

Full Industry Data — 20 Fortune 500 Industries

#	Industry	Companies	Field %	Office %	MFA Reach	Notes
1	Food Services & Restaurants	McDonald's, Starbucks, Yum Brands, Chipotle	95%	5%	5%	Store crews, line cooks, servers — no corporate device at shift level.
2	Hospitality & Lodging	Marriott, Hilton, Hyatt, MGM Resorts	93%	7%	5%	Housekeeping, front desk, F&B;; maintenance — mostly shared terminals.
3	Specialty & General Retail	Walmart, Target, Home Depot, Lowe's, Kroger	92%	8%	7%	Store associates, cashiers, stockers.
4	Construction & Engineering	Fluor, Jacobs, AECOM, Quanta Services	90%	10%	8%	Crews, site supervisors, equipment operators.
5	Agriculture & Food Production	Tyson Foods, ADM, Cargill	90%	10%	10%	Plant-floor processors, farm workers, drivers.
6	Transportation & Logistics	UPS, FedEx, Union Pacific, Ryder	88%	12%	10%	Drivers, warehouse, rail/port crews.
7	Oil, Gas & Energy Services	ExxonMobil, Chevron, Halliburton	85%	15%	12%	Rig, refinery, pipeline, field service techs.
8	Manufacturing (Industrial)	Caterpillar, Deere, 3M, Honeywell, GE	85%	15%	15%	Plant-floor operators, maintenance, QA.
9	Automotive Manufacturing	Ford, GM, Stellantis, Tesla	85%	15%	15%	Plant workers, body shop, paint, assembly.
10	Healthcare Delivery	HCA, CVS Health, Kaiser, UnitedHealth	82%	18%	15%	Nurses, techs, pharmacy, home health.
11	Utilities (Electric, Gas, Water)	Duke Energy, NextEra, Exelon, PG&E;	80%	20%	18%	Lineworkers, meter readers, plant operators.
12	Airlines & Air Transport	Delta, American, United, Southwest	78%	22%	20%	Pilots, FAs, ramp, gate, maintenance.
13	Aerospace & Defense	Lockheed Martin, Boeing, RTX, Northrop	70%	30%	25%	Factory floor + classified areas restrict devices.
14	Telecommunications	AT&T;, Verizon, T-Mobile, Comcast	68%	32%	30%	Field techs, installers, call center, retail.
15	Pharmaceutical & Biotech	J&J;, Pfizer, Merck, Eli Lilly	60%	40%	32%	Manufacturing + lab + sales force.
16	Media & Entertainment	Disney, Warner Bros., Paramount	55%	45%	40%	Parks, studios, broadcast crews.
17	Insurance	Berkshire, State Farm, Progressive	25%	75%	45%	Mostly underwriters, claims, actuarial.
18	Legal & Professional Services	Deloitte, PwC, CBRE, Accenture	22%	78%	78%	Mostly knowledge workers.
19	Banking & Financial Services	JPMorgan, Goldman Sachs, BofA, Citi	18%	82%	82%	Mostly desk-based; branch tellers on shared terminals.
20	Software & Cloud Technology	Microsoft, Salesforce, Google, Oracle	15%	85%	88%	Highest MFA reach. Data center/facilities gaps remain.

Sources

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