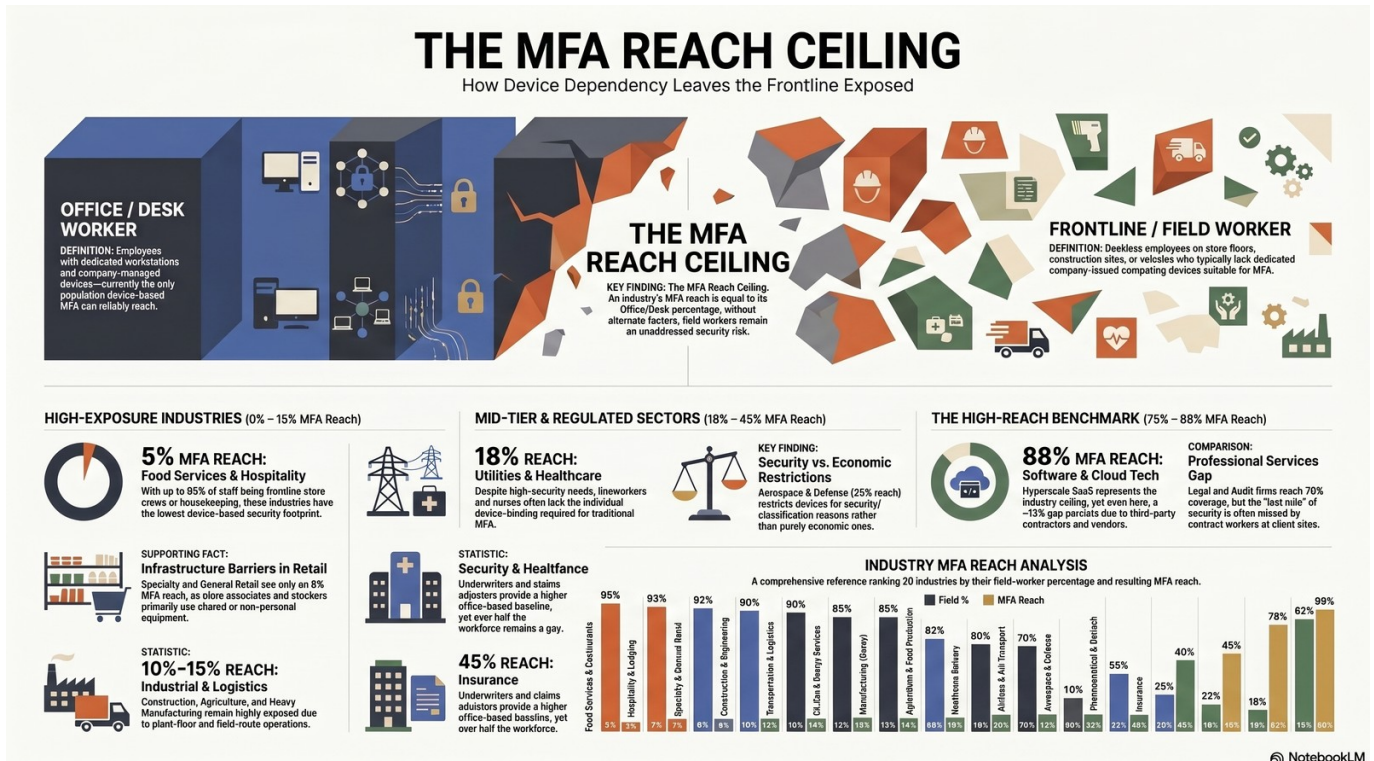


Methodology & Sources

Large-enterprise device-dependency analysis — how the 80% MFA coverage gap was derived.



The MFA Reach Ceiling — how device dependency leaves the frontline exposed.

Purpose

Rank 20 major large-enterprise 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 large-enterprise industry categories (2025 revenue-ranked U.S. company lists) cross-referenced with public company databases. Industries were consolidated where sources use multiple narrow codes.
- 2. Field vs. office splits:** Research-backed estimates anchored to published studies of the deskless workforce from enterprise venture capital research, global strategy consultancies, industry analyst firms, employee experience platforms, higher-education research labs, and workforce communications platforms.
- 3. Large-enterprise adjustment:** Large-enterprise 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 large-enterprise commercial). Aerospace & Defense and Government/Military are device-restricted for security reasons 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. For a production roadmap, validate per target account using employment-function filters, 10-K employee disclosures, or direct discovery calls.



Full Industry Data

#	Industry	Representative Categories	Field %	Office %	MFA Reach	Notes
1	Food Services & Restaurants	Global QSR & casual-dining chains	95%	5%	5%	Store crews, line cooks, servers — no corporate device at shift level.
2	Hospitality & Lodging	International hotel groups & resorts	93%	7%	5%	Housekeeping, front desk, F&B;; maintenance — mostly shared terminals.
3	Specialty & General Retail	Big-box, grocery & specialty retailers	92%	8%	7%	Store associates, cashiers, stockers.
4	Construction & Engineering	Global engineering & construction firms	90%	10%	8%	Crews, site supervisors, equipment operators.
5	Agriculture & Food Production	Major food processors & agribusiness	90%	10%	10%	Plant-floor processors, farm workers, drivers.
6	Transportation & Logistics	Parcel carriers, freight & rail operators	88%	12%	10%	Drivers, warehouse, rail/port crews.
7	Oil, Gas & Energy Services	Integrated oil majors & oilfield services	85%	15%	12%	Rig, refinery, pipeline, field service techs.
8	Manufacturing (Industrial & Heavy)	Heavy-equipment & industrial conglomerates	85%	15%	15%	Plant-floor operators, maintenance, QA.
9	Automotive Manufacturing	Global automakers & EV producers	85%	15%	15%	Plant workers, body shop, paint, assembly.
10	Healthcare Delivery (Providers)	Hospital systems, clinics & pharmacy chains	82%	18%	15%	Nurses, techs, pharmacy, home health.
11	Utilities (Electric, Gas, Water)	Investor-owned power & utility operators	80%	20%	18%	Lineworkers, meter readers, plant operators.
12	Airlines & Air Transport	Legacy & low-cost passenger carriers	78%	22%	20%	Pilots, cabin crew, ramp, gate, maintenance.
13	Aerospace & Defense	Prime defense contractors & aircraft OEMs	70%	30%	25%	Factory floor + classified areas restrict personal devices.
14	Telecommunications	National wireless & broadband carriers	68%	32%	30%	Field techs, installers, call center agents, retail stores.
15	Pharmaceutical & Biotech	Global pharma manufacturers & biotechs	60%	40%	32%	Manufacturing + lab + large sales force.
16	Media & Entertainment	Studios, streamers & live entertainment	55%	45%	40%	Parks, studios, broadcast crews vs. corporate / creative / IT.
17	Insurance	P&C; life & multi-line carriers	25%	75%	45%	Mostly underwriters, claims, actuarial, customer service.
18	Legal & Professional Services	Big-four audit, consulting & advisory firms	22%	78%	78%	Mostly knowledge workers; contract workers at client sites create gaps.



#	Industry	Representative Categories	Field %	Office %	MFA Reach	Notes
19	Banking & Financial Services	Money-center banks & investment firms	18%	82%	82%	Branch tellers on shared terminals and third-party vendors pull coverage down.
20	Software & Cloud Technology	Hyperscale cloud & enterprise SaaS	15%	85%	88%	Highest MFA reach of any industry; contractors still create a ~12% gap.

Sources

- [1] **Business publication** — 2025 ranking of largest U.S. companies by revenue, June 2, 2025.
- [2] **Open reference database** — 'List of largest companies in the United States by revenue' (2025 edition).
- [3] **Enterprise venture capital research** — 'The State of Technology for Deskless Workers' (2020).
- [4] **Global strategy consultancy** — 'Making Work Work Better for Deskless Workers', Dec 15, 2022.
- [5] **Employee experience platform research** — 'What Is a Deskless Worker?'
- [6] **Higher-education research lab** — 'Empowering Deskless Workers for Economic Mobility'.
- [7] **Workforce communications platform research** — 'Deskless Workers — Overcoming Challenges to Drive Productivity'.

