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2025 PPE Pain Points Study: Top Trends and Challenges

A J. J. Keller and ISEA Collaborative Study



About the Study Sponsors

International Safety Equipment Association (ISEA)

ISEA is the voice of the safety equipment industry. For 90 years, we have been a recognized leader in the development of ANSI-accredited safety equipment standards. We advocate on behalf of the industry for policies that improve worker safety, deliver actionable insights on the safety equipment market, develop critical skills for safety sales professionals, and provide a unique forum for collaboration, learning and growth.



J. J. Keller Center for Market Insights

The J. J. Keller Center for Market Insights is the collaborative research arm of J. J. Keller & Associates, Inc. The center originated in 2019 with a focus on sharing with the public trends and insights from an abundance of safety and compliance data gathered by J. J. Keller over decades serving more than 500,000 customers across the United States.

The center publishes ongoing reports to spur discussion and advancements in safe, respectful workplaces, jobsites, and highways through historical data, new proprietary studies, and partnerships with reputable, research-focused third-party organizations.



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Foreword

In this third year of the PPE Pain Points Study, the J. J. Keller Center for Market Insights undertook the project as a collaboration with ISEA (International Safety Equipment Association). Each of our organizations was founded with a focus on worker safety. Both, in different but complementary ways, advise safety professionals and industries on workplace safety standards and best practices. So it made perfect sense to work together.

When it comes to keeping employees safe, personal protective equipment (PPE) is a highly visible and critical component. However, PPE program management can be complicated. Safety managers face challenges in terms of time, resources, training, choosing the right equipment for the job, and rallying employees to comply with the PPE regulations intended to protect them.

By listening to safety managers' greatest pain points when it comes to PPE management, we can share insights with regulators, safety professionals and industry – and thereby collectively find solutions to help safety managers in their mission to send every employee home safely every day.

Best regards,



Cam Mackey
President & CEO
ISEA



Bob Larsen
Vice President of Research & Development
J. J. Keller & Associates, Inc.



Summary of Findings

In our third year of the study, we focused on four aspects of PPE management:

- **Program Development**
- **Purchasing**
- **Training**
- **Compliance**

The majority of participants have a strong PPE program development process in place. As in past years, durability and comfort are top of mind when purchasing PPE, and PPE compliance continues to be a major challenge. Looking at responses across the last three years, supply chain issues have decreased while training challenges are increasing slightly.

Anecdotally, respondents also indicate finding budget-friendly PPE and maintaining an adequate, up-to-date PPE inventory present difficulties for them.

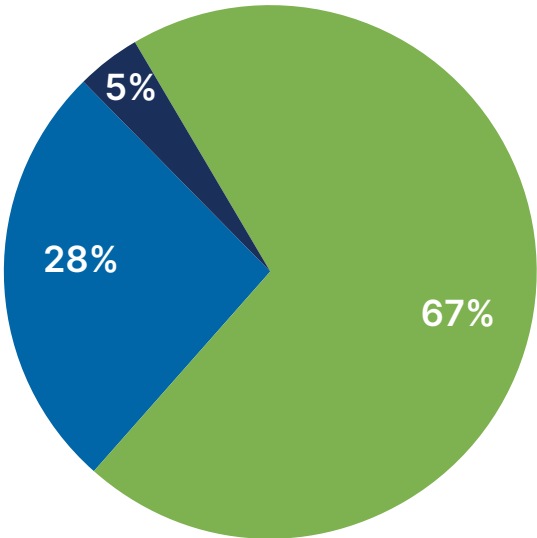


PPE Management Is Generally Strong

Safety professionals revealed that they're doing excellent work in conducting PPE hazard assessments, speaking with employees about PPE, and re-evaluating PPE programs regularly. A total of 95% of respondents completely or somewhat have the time and resources needed for a hazard assessment and 70% talk with their employees about PPE on a regular basis.

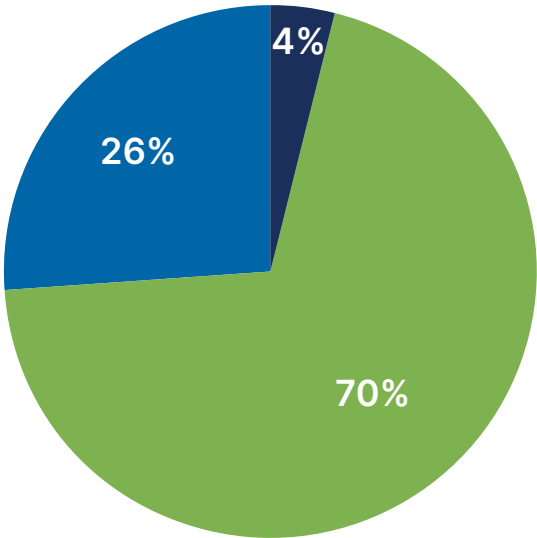
While the majority evaluate their programs on a consistent basis, 17% don't have a set schedule, which could mean employers are not keeping up with the changing landscape of PPE and new, effective technologies.

Do You Have the Time and Resources to Properly Assess PPE Needs?



● Completely ● Somewhat ● Not At All

How Often Does Your Company Talk About PPE?



● On A Regular Basis ● Once In A While ● Rarely

Expert Insight: The Rules for Performing PPE Hazard Assessments



Joe Proulx
EHS Editor

J. J. Keller & Associates, Inc.

“Anyone with the necessary skills and experience to identify hazards and select appropriate PPE can perform the PPE hazard assessment. The employer decides who performs this task, whether internally or through a third party. Also, the person doing the assessment needs to certify it in writing, including their name and the date(s) when the assessment was done.”

PPE Compliance

Getting employees to wear PPE continues to be a challenge for employers, with over three quarters of respondents experiencing difficulty at least some of the time. Top reasons for employees not wearing proper PPE include not wanting to or not feeling it was necessary to do so.

Year over year, compliance issues remained consistent, with the most common reasons for non-compliance related to individual employee preferences.

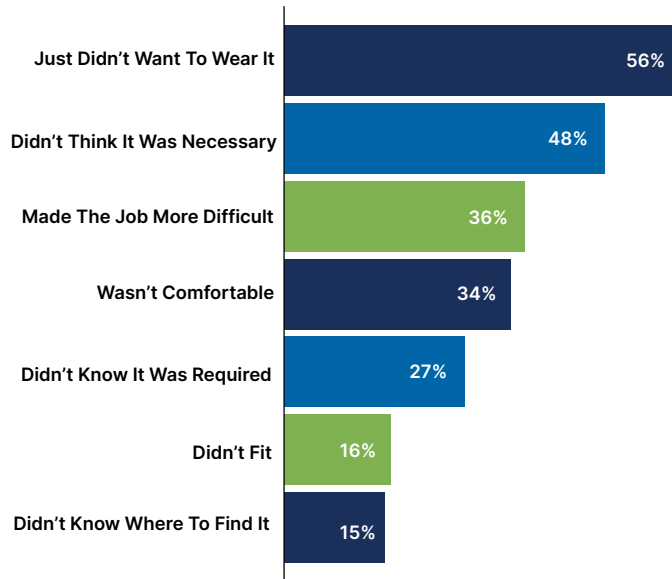
Almost all survey participants stated that they require an audit for any PPE purchased independently by employees.



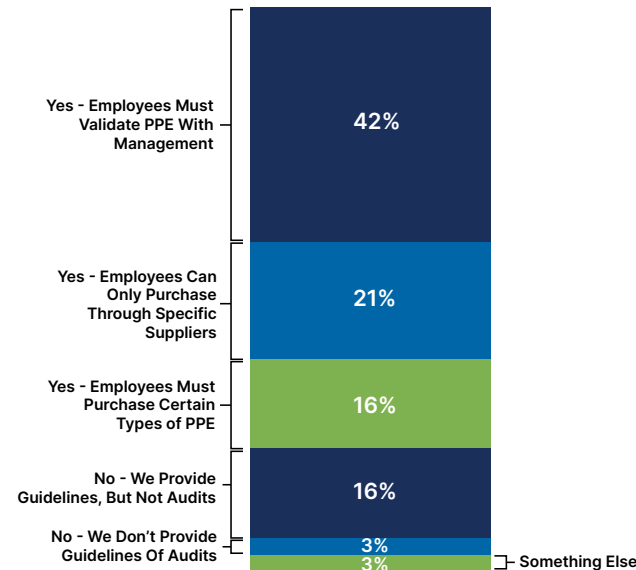
3/4
Of Companies Experience
Difficulty Following Proper PPE Protocols
At Least Some Of The Time



What Reasons Do Your Employees Give For Not Using PPE Properly?



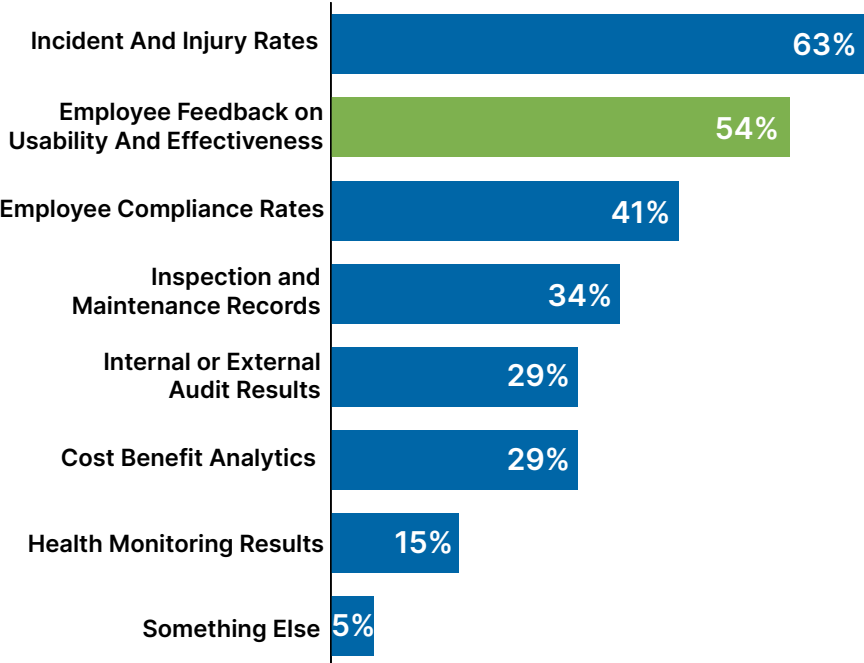
Does Your Company Audit the PPE Employees Purchase on Their Own?



PPE Program Effectiveness Measurements

This year we asked for the first time how companies measure the effectiveness of their PPE program: over 50% said they use incident and injury rates and/or employee feedback. These are lagging indicators, meaning employers are being reactive vs. proactive.

How is Your PPE Program Effectiveness Measured?



25%
of Respondents
Evaluate Their
PPE Program
ANNUALLY

Expert Insight: Proactive and Reactive Indicators



Joe Proulx
EHS Editor
J. J. Keller & Associates, Inc.

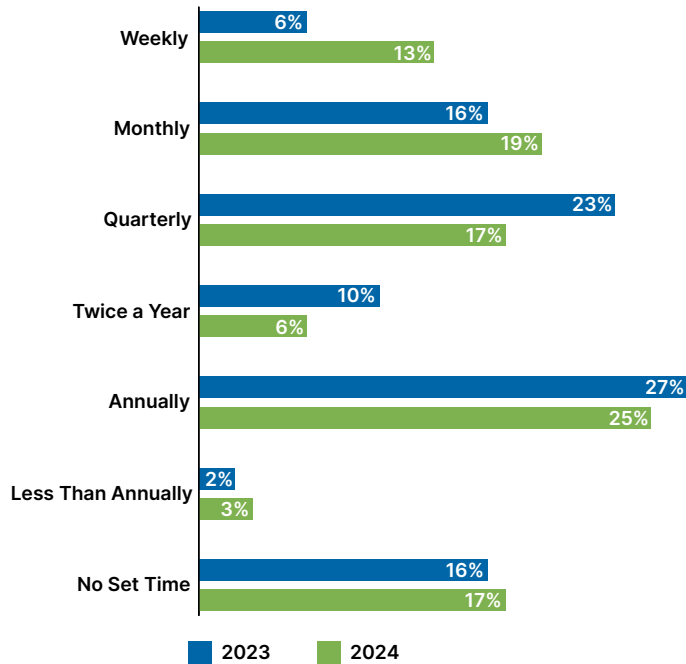
“When evaluating the effectiveness of your PPE program, it’s crucial to consider both proactive and reactive indicators. While addressing reactive indicators like injury rates and incident reports is necessary to identify and fix gaps in existing PPE programs, it’s even more important to focus on ensuring workers don’t get hurt in the first place.

By prioritizing proactive initiatives such as inspections, employee observations and feedback, and near miss reporting, we can assess and eliminate hazards related to using PPE before they get a chance to cause harm to your workers.”

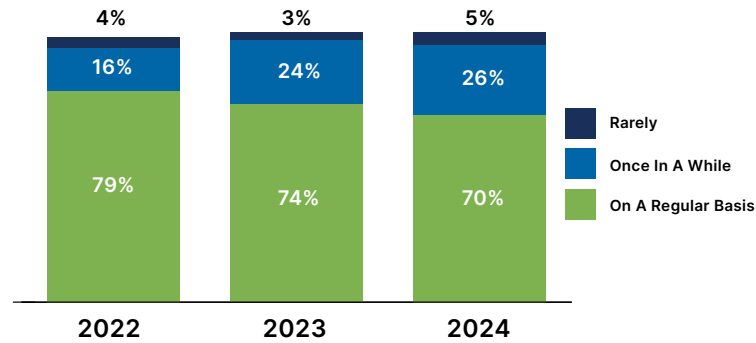
Program Management Practices Are Consistent

There is a fair amount of consistency across the years in practices for PPE program management. This suggests that companies continue to place emphasis on building and maintaining strong PPE programs.

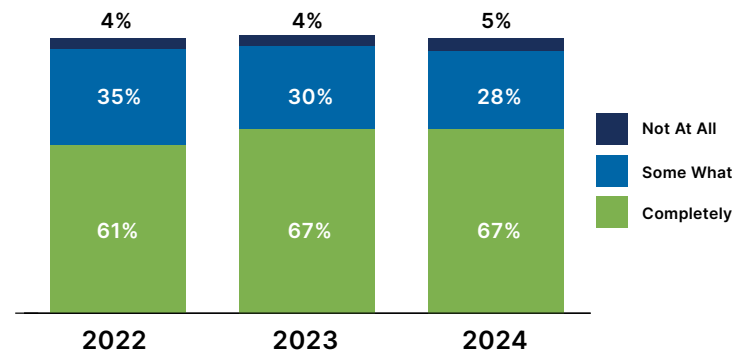
How Often Do You Re-Evaluate Your PPE Program?



How Often Does Your Company Talk With Employees About PPE Requirements, Policies, and the Importance of PPE for Staying Safe?



To What Extent Does Your Company Give You the Time and Resources Needed to Conduct Thorough PPE Hazard Assessments?



Expert Insight: Strengthening PPE Program Management



Cam Mackey
President & CEO
ISEA

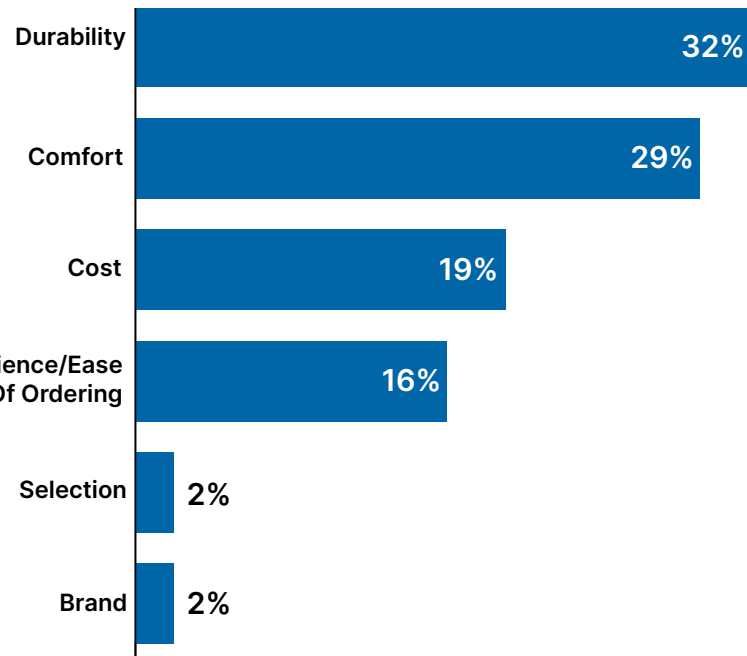
“It’s encouraging to see companies staying consistent in their focus on PPE programs — this shows real commitment to worker safety. That said, there’s always room to strengthen these efforts. By doubling down on PPE program management, companies can set an even higher standard for protecting their teams and building a strong safety culture.”

Durability Remains #1 Purchasing Criteria

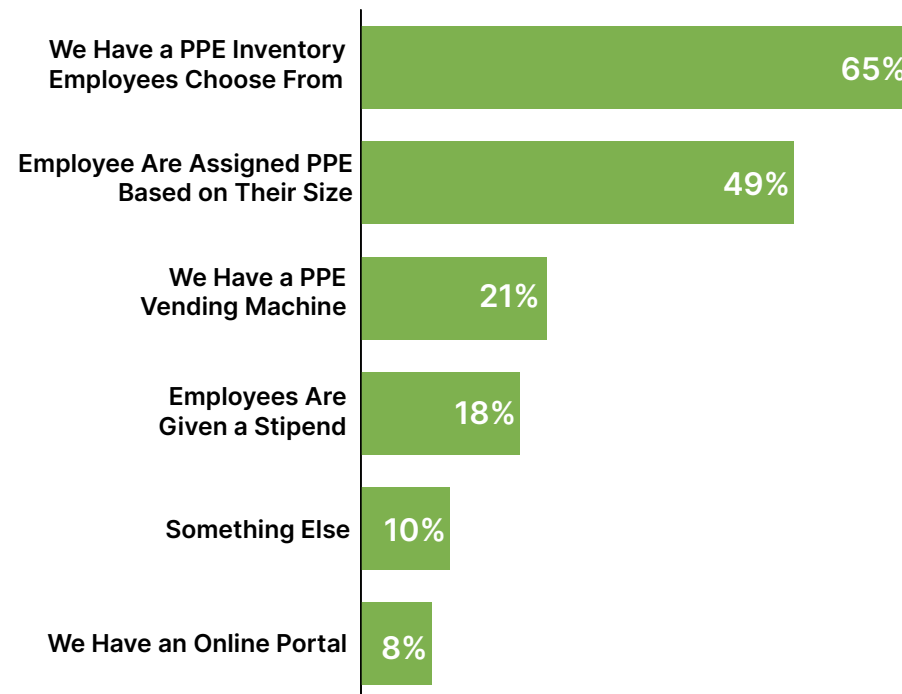
When purchasing PPE, over one-third of survey participants rated durability as the most important factor, with comfort coming in a close second at 29%. While durability also scored highest in 2022 and 2023, this was the first year the survey included comfort as an option.

Over half of companies (65%) have established a PPE inventory for employees to choose from. The next largest percentage (49%) assign employees PPE based on their size.

When Buying PPE, Which of the Following is Most Important?



How Do Your Employees Obtain PPE?



Expert Insight: Account for Size and Fit When Assigning PPE



Joe Proulx
EHS Editor

J. J. Keller & Associates, Inc.

“Assigning PPE based on size alone isn’t enough. Both size and fit need to be considered. Whether male or female, tall or short, or any other body type, these differences must be accounted for to ensure comfort and safety. PPE that doesn’t fit properly can introduce additional hazards and injuries, and in some cases, may not protect the employee at all.”

Ongoing Challenges

We asked participants to tell us about the biggest PPE challenges they're experiencing at their company. Three key challenges emerged:

- **Cost**
- **Managing Inventory**
- **Compliance**



Cost

As in previous years, finding high-quality PPE that fits within a company's budget continues to be a challenge, especially in these inflationary times.

Comments related to cost pressures included:

"Budget constraints limit purchasing power."

"Ensure everyone is outfitted as needed with quality equipment but not breaking the bank on high-end fall protection and FR clothing."

"The cost of the PPE is a continuous issue with inflation."



Managing Inventory

Respondents expressed that maintaining a proper PPE inventory is also challenging:

"Finding glasses that everyone likes."

"Getting correct PPE as per the hazards of the job."

"Getting exactly what the workers want for PPE that meets the company's standards and expectations."

"Keeping track of expiration dates and rotation of new hires."

"Making sure that PPE is in good working condition, inspected periodically, and replaced when needed."



Compliance

For the third year in a row, participants indicated that getting their employees to wear PPE is a challenge.

Comments included:

"As much as we can supply [PPE], our employees don't always utilize it."

"Everyone does not see the value in wearing all required PPE."

"I have found the biggest challenge is getting the team on board with the concept of PPE safety and therefore accountability."

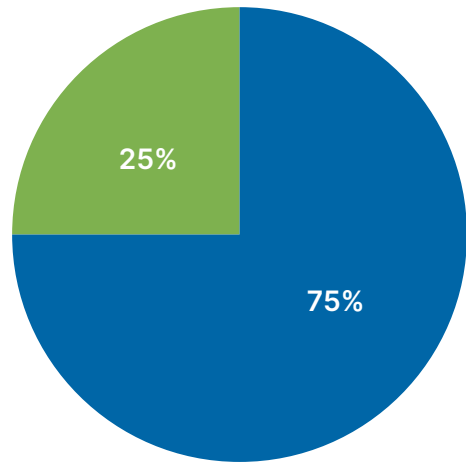
See page 15 for more detailed results on compliance.

Sizing Challenges

Three quarters of our survey respondents indicated that they have not had trouble finding PPE in the sizes they need, however, nearly one-third expressed occasionally struggling to find PPE that properly fits female employees.

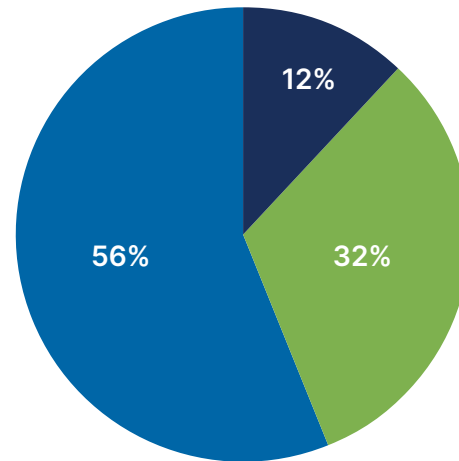
For those that are having difficulty, the responses split fairly evenly between needing larger and smaller sizes than what is currently available.

Have You Experienced Problems Buying PPE in the Sizes You Need?

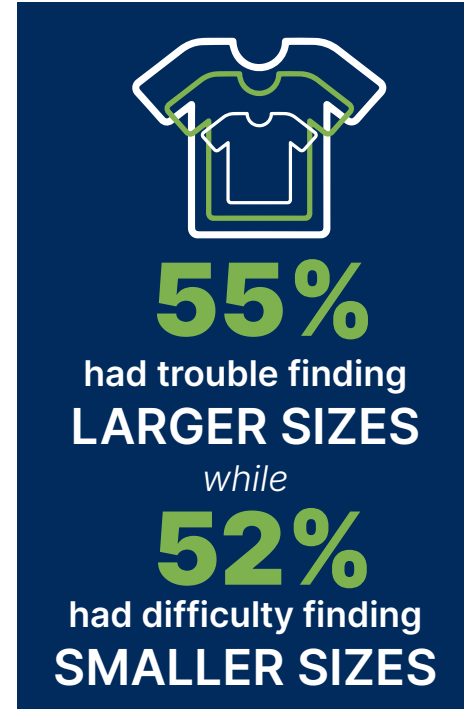


● No ● Yes

Have You Struggled Buying PPE That Properly Fits Women?



● No ● Yes, Once In A While ● Yes, Regularly



Expert Insight: PPE in Construction Rule



Ray Chishti
Senior EHS Editor
J. J. Keller & Associates, Inc.

“The final rule for OSHA’s personal protective equipment (PPE) requirements in construction became effective and enforceable January 13, 2025.

OSHA revised 1926.95(c) to state that employers must ensure all personal protective equipment is:

1. Safely designed and constructed for the work to be performed, and
2. Selected to ensure that it properly fits each affected employee.

Violating OSHA’s PPE rules in construction can lead to big fines. Serious violations, where lack of protection could cause serious injury or death, can cost up to \$16,131 per violation. Intentional or repeated violations can result in fines up to \$161,323 per violation.”

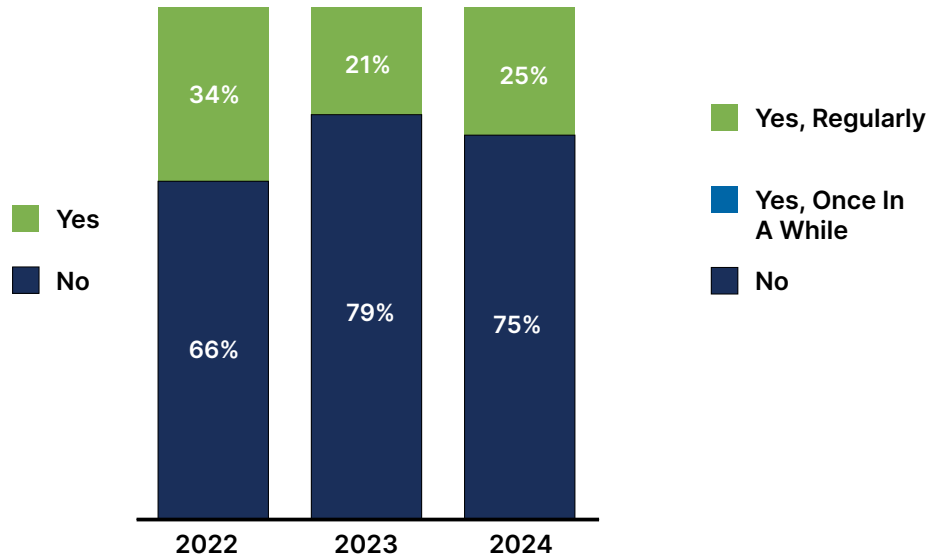
Year-Over-Year Sizing Challenges

Sizing challenges have remained mostly consistent year over year, with a slight uptick in regards to finding PPE that properly fits female employees.

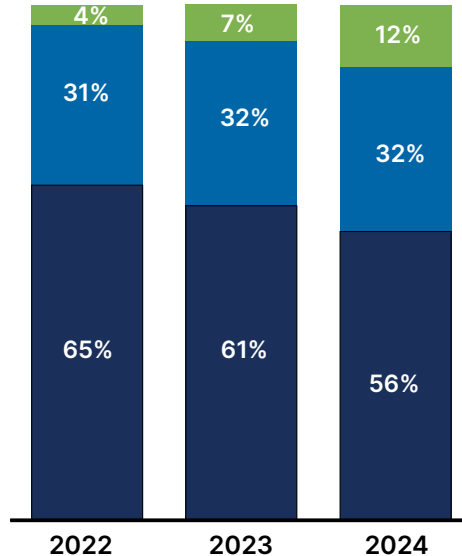


1926.95 OSHA's PPE in construction final rule (effective 1/13/25) requires employers to select PPE that properly fits each worker and is safely designed.

In The Past Year, Have You Experienced Problems Buying PPE in the Sizes Your Employees Need?



Do You Ever Struggle To Buy PPE For Your Female Employees?



Hazards Of Improper Fit

Ill-fitting PPE will result in either the employee not wearing the PPE when necessary, or the employee attempting to wear the ill-fitting PPE, which potentially introduces new hazards.



Head And Face

(e.g., hard hats, face shields, safety glasses/goggles):

Ill-fitting PPE can cause pinch points, headaches, and neck and shoulder strain. It can create gaps in coverage which can allow dust and debris to enter the eyes. It also allows safety glasses to fog easier.



Torso

(e.g., full body harness, FR shirts and pants, coveralls):

Oversized PPE introduces excess material, which can get caught in machinery. Excess material can also cause the employee to overheat in warmer conditions.



Hands

(e.g., gloves):

Oversized gloves can cause loss of dexterity. If too small, there is risk of undue pressure being placed on the hands along with increased perspiration, which can lead to fatigue and injury.



Feet

(e.g., shoes and boots):

Poorly-fit foot protection can be a tripping hazard. It can also result in repetitive strain injury, poor posture, plantar fasciitis, fallen arches and flat feet. Secondary injuries can occur to the knees, hips, and spine.

Employers should also be aware of the psychological trauma of ill-fitting PPE, which can cause the wearer to feel unprotected. This in turn may affect their productivity and can also potentially expose them to increased hazards. Findings from a collaborative study, presented by the Safety and Health Empowerment for Women in Trades, identified women as more likely than men to report PPE not fitting properly; however, they are also more likely to refrain from reporting due to "fear of being labeled a complainer by coworkers" or "fear of layoff."

Weather Is a Consideration

With record-setting temperatures occurring more frequently nationwide and OSHA's Heat Injury and Illness Prevention proposed rule on the horizon, we added survey questions related to weather for the first time. The vast majority of respondents — 84% — indicated they consider heat and cold when purchasing PPE. There is an opportunity for standards organizations and manufacturers and suppliers to provide education on the importance of weather considerations.

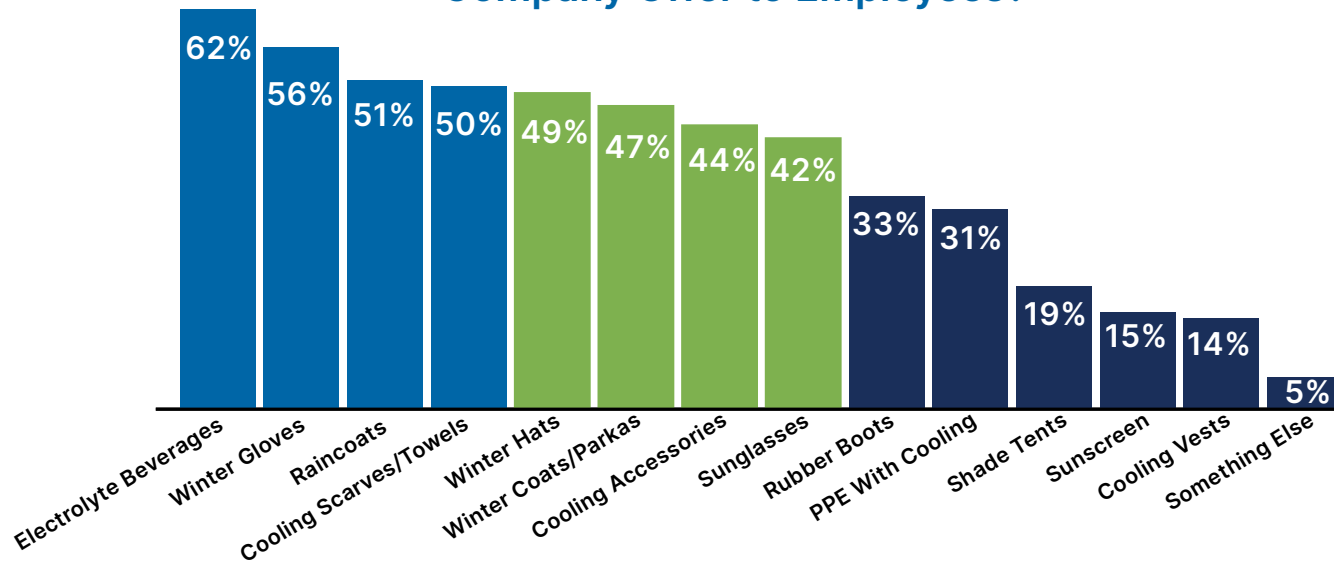
To combat heat and cold, companies most commonly offer electrolyte beverages, winter gloves, raincoats, and cooling scarves or towels to their employees.



84%
of Companies Consider
HOT & COLD
when purchasing PPE.



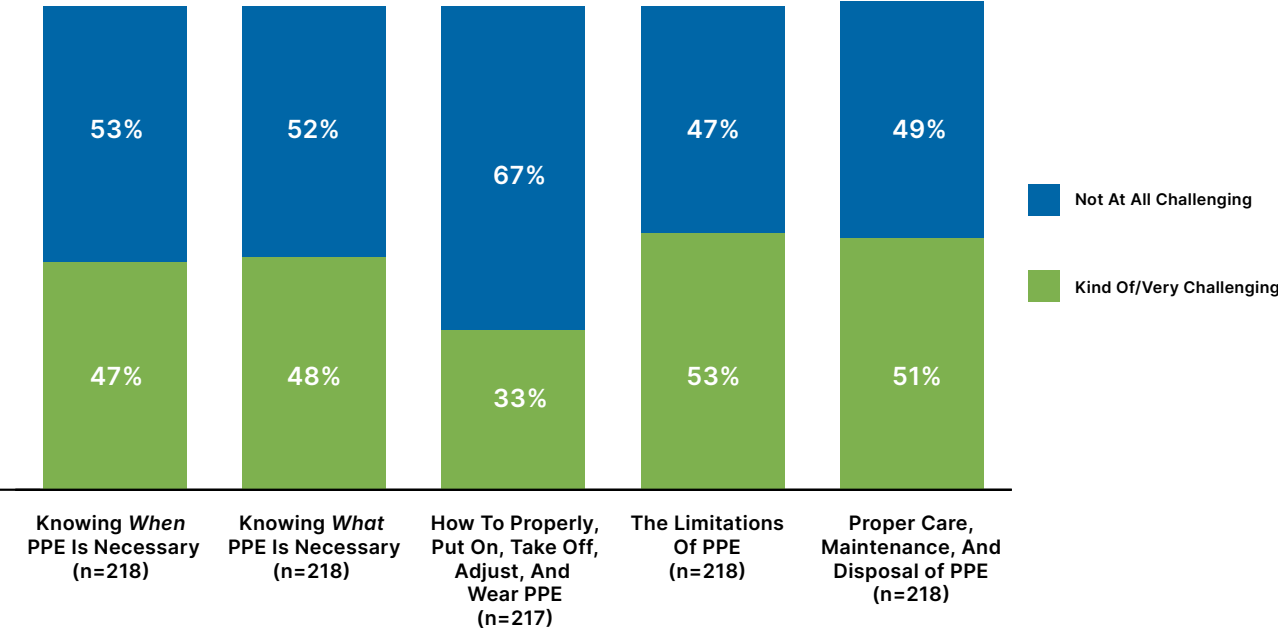
What Type of Weather-Related Protection Does Your Company Offer to Employees?



Training Is a Challenge

Nearly half of the respondents struggle with training employees in core, mission-critical aspects of PPE usage, suggesting that major attention be devoted towards developing comprehensive training programs, improving accessibility to resources, and creating standardized, practical guidelines that ensure consistent understanding and proper use of PPE across all levels of the workforce.

How Challenging Do You Find It to Train Employees on Each of These Aspects of Proper PPE Use?



Expert Insight: Training Starts With an Assessment



Joe Proulx
EHS Editor
J. J. Keller & Associates, Inc.

“Proper PPE training starts with a thorough hazard assessment to figure out what PPE is needed for the job. Workers should learn how to use and maintain the PPE, recognize when it’s no longer effective, and understand the specific hazards it protects against.

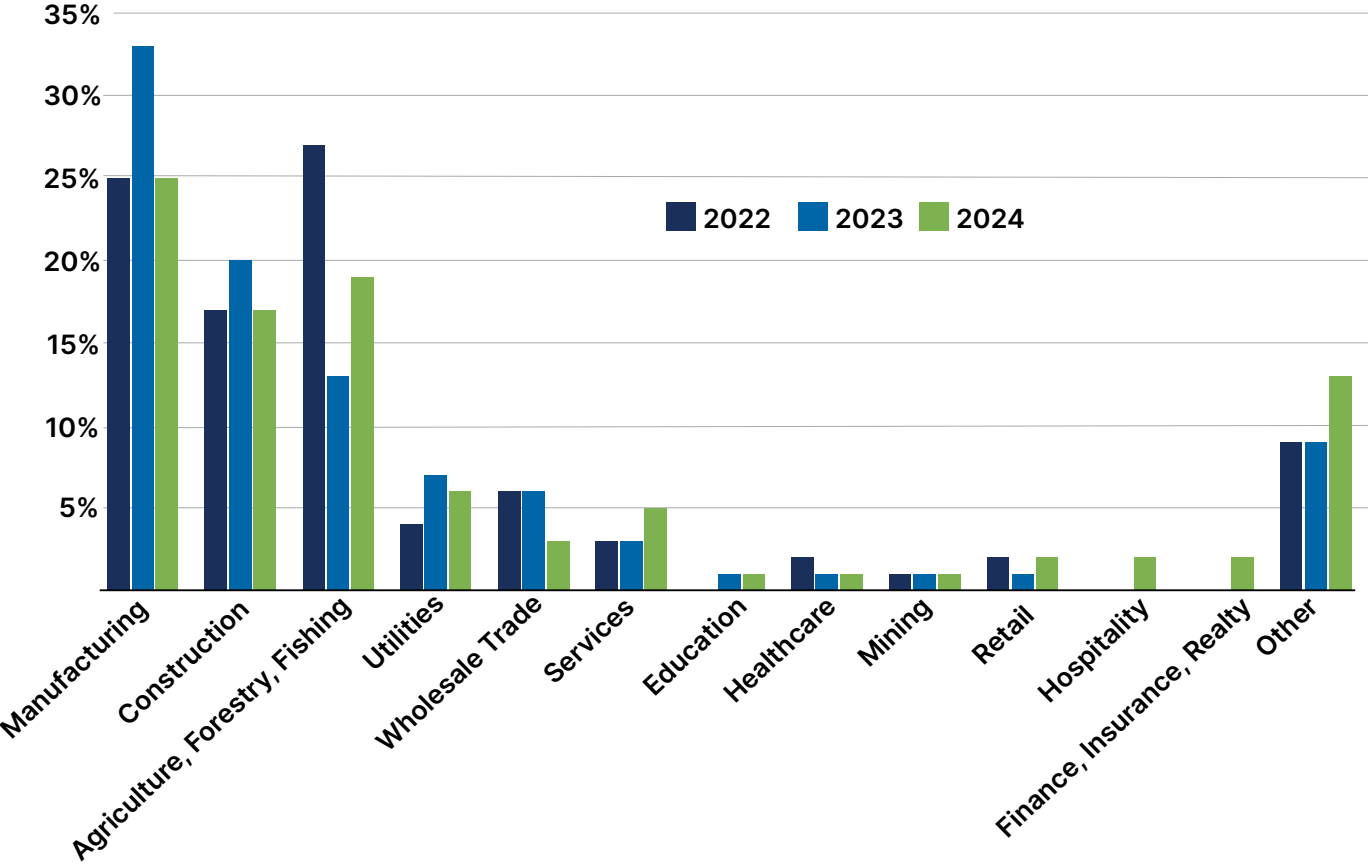
A good hazard assessment is essential because it identifies the specific risks in the workplace. This ensures the PPE chosen provides the right protection. Without it, workers might use PPE that doesn’t fully protect them, leading to possible injuries or health issues. “

Respondent Demographics

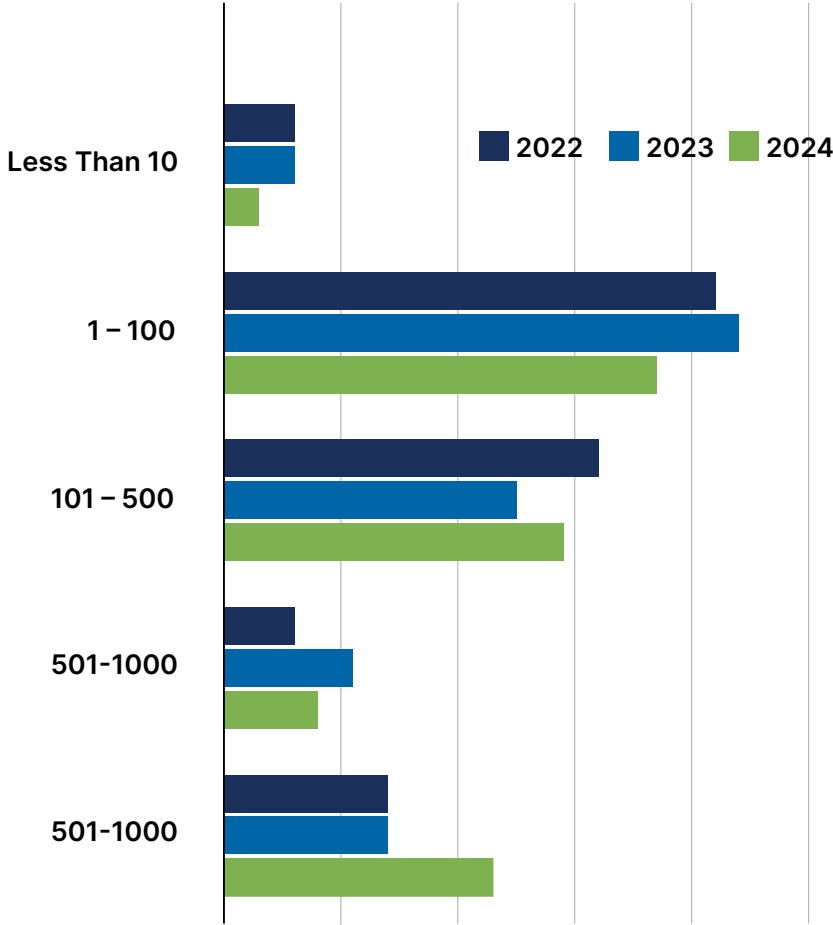
Over half of respondents hail from three industries — manufacturing (25%), transportation (19%), and construction (18%). Coming in fourth is “Other,” which comprises a wide range of industries from aircraft operations to sawmills.

As in past years (2022, 2023), the majority (70%) of survey respondents work in smaller companies of less than 500 employees. Twenty-three percent of respondents come from companies with more than 1,000 employees. These demographics are similar to past years, meaning changes in responses are likely not a result of differing sample characteristics.

Industries



Number of Employees in Company



For questions or additional information on PPE program management, see our websites or contact us.



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