



THE CONFIDENCE ECONOMY

In DIY, Confidence Is the Currency.

It decides what projects people attempt, whether they believe DIY saved them money, who they trust when it gets hard, and which brands they come back to. Everything else is downstream of it.

THE PREMISE

Confidence Predicts Everything.

Before someone picks up a tool, before they buy a product, before they trust a brand, they run a confidence calculation. This report is about where that calculation succeeds, where it breaks, and what brands can do about it.

THE CONFIDENCE LADDER: Q3 2026 SAMPLE

Heavy DIYer

42%

Broad project portfolio, high task confidence, cost is the barrier.

Light DIYer

39%

Narrow task set, confidence concentrated on paint and lawn. Fear is the barrier.

Aspirational

13%

Hires out now but wants to do more. Needs coaching, not just product.

DIFM

6%

Hires out most work, but 73% still influence brand choice.

These aren't demographics. They're confidence tiers based on what people do, what they hire out, and what they feel ready to attempt.

THE SURFACE

On the Surface, Q3 Is a Good Quarter.

Trips are up. Baskets are up. Projects are getting done. If you looked only at the top line, you'd think the category is humming. Confidence, though, is doing complicated things underneath.

31%

VISITING STORES
MORE OFTEN THIS
QUARTER

39%

SPENDING MORE
PER TRIP VS. 12%
LESS

52%

COMPLETED A
PROJECT
IN THE LAST 90
DAYS

90%

WOULD DO THEIR
PROJECT AGAIN

But look closer: big projects are being deferred, the savings story is cracking on high-spend jobs, and a generation is burning out. The activity is real. The confidence is uneven.

THE PROJECT

What You're Willing to Attempt Is Who You Are in This Category.

The difference between a Light and Heavy DIYer isn't time or budget. It's confidence across a wider range of tasks. Breadth is the funnel. What people dare to do maps exactly to where they sit on the confidence ladder.

Completion separates the tiers too. Heavy DIYers finish at 61% vs. 42% for Light. Light DIYers carry more planned-but-unstarted and abandoned work. Confidence falters before the project even begins.

TASK CONFIDENCE: HEAVY DIYERS VS. LIGHT DIYERS

Outdoor Maintenance



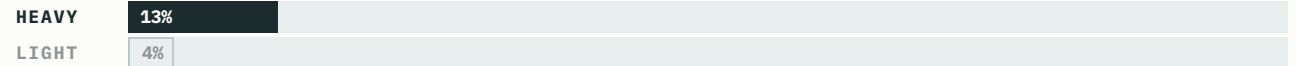
Light Plumbing



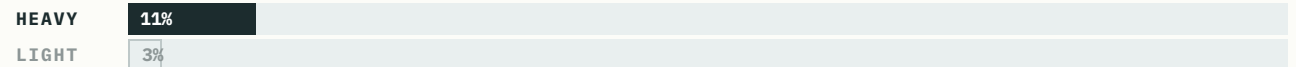
Flooring or Drywall



Cabinet or Vanity Install



Major Plumbing



Boomers Have It. Younger DIYers Are Building Without It.

74% of Boomers say they DIY because they wanted to. 38% of Gen Z would have hired out if money were no object. Same category, opposite emotional experience.

GEN Z

57%

SAID PROJECT WAS MORE
MENTALLY DRAINING THAN EXPECTED

42%

CONSIDERED GIVING UP

55%

MORE SKILL REQUIRED
THAN EXPECTED

BOOMER

12%

SAID PROJECT WAS MORE
MENTALLY DRAINING THAN EXPECTED

11%

CONSIDERED GIVING UP

32%

SAID NOTHING
WAS FRUSTRATING

The silver lining: **90% would do their project again. 88% are proud of the result.** The growth audience is also the most stressed - but reducing friction for younger DIYers isn't just empathy. It's the category's biggest confidence-building opportunity.

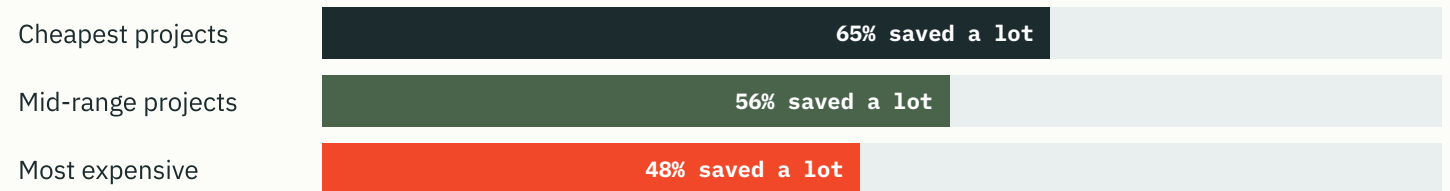
THE SAVINGS STORY

85%

say DIY saved them money on their last project.

On Small Jobs, They're Right. On Big Jobs, It Falls Apart.

The savings belief is the emotional engine of the category. But it thins as project spend rises, and on the most expensive jobs, roughly 1 in 5 homeowners broke even or lost money. Confidence in the ROI erodes exactly where the stakes are highest.



When it costs more: materials exceeding budget (46%) and needing more materials than estimated (26%) are the top culprits. A clear messaging opening for brands around first-time accuracy and avoiding rework.

DIYers Don't Trust AI to Do the Job. They Trust It to Make Them Feel Ready For It.

AI has earned a seat at the table not because it's powerful, but because it shows up exactly when doubt does, before the project starts.

MOST-USED HELP SOURCES DURING PROJECTS

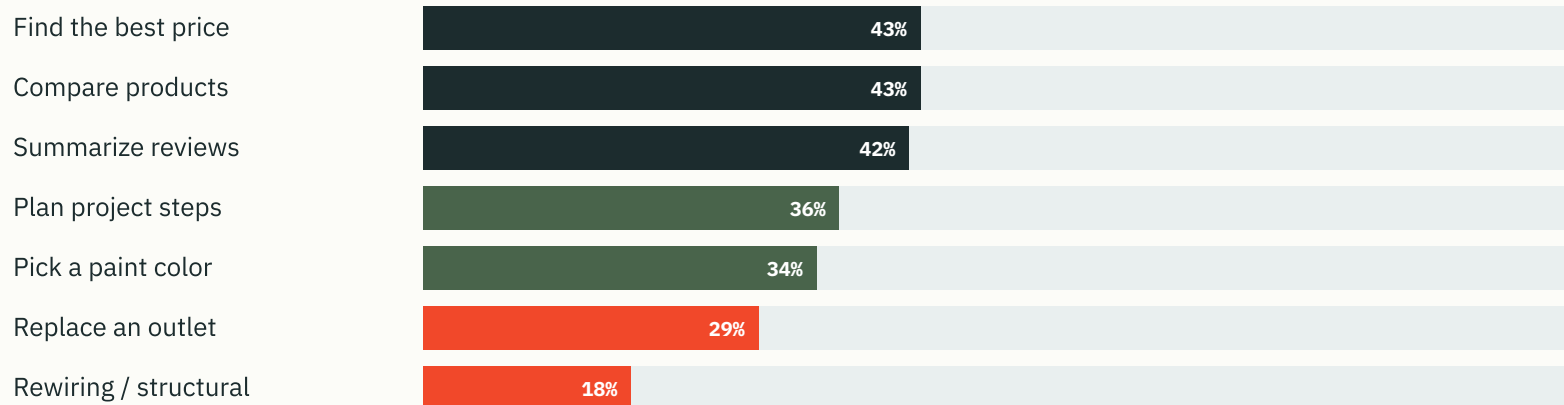
- 1 YouTube
- 2 Friends & Family
- 3 Prior Experience
- 4 **AI: 18% overall, 24% Heavy DIYers**
- 5 In-Store Associates

35% TRUST AI MORE THAN A YEAR AGO • ONLY 6% TRUST IT LESS

GEN Z PLANNING TRUST: 53% VS. BOOMER 20%

TRUST TRACKS THE RISK: EXACTLY AS EXPECTED

What DIYers Trust AI to Guide



AI is a confidence prosthetic, trusted exactly where the homeowner already has a base of confidence, and distrusted where they don't. The play: be found at the shortlist stage, not the build stage.

The Category Is Active. The Big Commitments Are On Hold.

Materials inflation doesn't just raise prices. It taxes confidence in the ROI of doing it yourself. Homeowners aren't sure the math works anymore, and they're hesitating at exactly the moment brands need them to commit.

SHOWING UP

31%

visiting stores more often this quarter

+ 39% spending more per trip vs. 12% spending less

BUT

HOLDING BACK

45%

delayed, downsized, or canceled a major project

+ 40% also put off a large single purchase

They Keep the Brand. They're Done Being Loyal to the Store.

BRAND LOYALTY

97%

will reuse a brand they've tried. Brand loyalty is stored confidence, a memory of competence that's nearly impossible to displace.

RETAILER LOYALTY

27%

changed their retailer behavior this year, mostly spreading across more stores. No confidence equity built with any single chain.

The shift is **overwhelmingly young**: 41% of Gen Z and 30% of Millennials are spreading purchases vs. just 7% of Boomers. The battleground is the channel, not the brand shelf, and it's being contested by under-40s chasing price.

BRAND DRIVER

52%

PRICE

BRAND DRIVER

30%

BRAND REPUTATION

3 in 4

SHOP MOSTLY OR ENTIRELY IN
STORE

The Funnel Has Two Different Locks.

The DIY consideration funnel has two different locks. Fear and skill keep aspirational consumers from starting. Cost keeps heavy DIYers from doing more. A single "do more DIY" message won't open either one.

● LIGHT DIYERS: FEAR & SKILL BLOCKERS

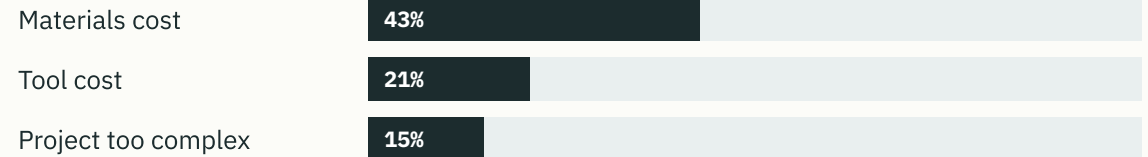


Interior paint confidence: Light 59% vs. Heavy 84%. Caulking: 32% vs. 68%. Major electrical: 6% vs. 27%. Confidence falls off a cliff as complexity rises.

ASPIRATIONAL DIYERS WANT

A coach (34%), more confidence (27%), step-by-step guidance (26%), and real-time AI help (18%). The mentor they want *is increasingly AI*, on exactly the tasks where AI is already trusted.

● HEAVY DIYERS: COST BLOCKERS



Heavy DIYers run a broad portfolio: caulking 35%, light plumbing 28%, flooring 21%, cabinet install 13%. Breadth is confidence made visible.

Don't overlook DIFM: ~73% of homeowners who hire out still influence which brands their pro uses. Confidence in a brand travels even when the homeowner doesn't pick up the tool.

SO WHAT DOES THIS MEAN?

Every Brand in This Category Is Either **Building Confidence** or Losing to Someone Who Is.

THE MESSAGE BRIEF

Don't sell the product. Sell the feeling of competence it delivers. The emotional ROI of a successful project is the most powerful brand asset in this category.

THE AUDIENCE BRIEF

Different audiences, different keys: teach and de-risk for Light DIYers, manage cost and prove value for Heavy DIYers. One message cannot move both.

THE CHANNEL BRIEF

Brand loyalty is protected. Retailer loyalty is fragmenting, fastest among Gen Z. The battleground is the channel, and it's being fought on price and availability.



Connecting Your Brand to **Hardworkin' Hands.**

Sales Factory is the retail growth partner for durable brands in the home improvement, hardware, and construction space. We dig deeper, move faster, and solve problems for your prime prospects.

IN-HOUSE RESEARCH

Including our Trades ProPulse™, a proprietary panel of professional tradespeople.

4-PART PROCESS™

A disciplined growth framework for building brands by solving end user problems.

SELL-IN + SELL-THROUGH

We help brands earn the shelf and move product off it, working both sides to drive retail sales.