

Transforming the care economy through impact investing case study:

# Homely



The Care Economy  
Knowledge Hub

[the-care-economy-knowledge-hub.org](https://the-care-economy-knowledge-hub.org)



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## FOREWORD

Vital for our society to function, the care economy – domestic work and caring for children, elderly people, and people with disabilities – as it is now, operates as one of the most pervasive structural barriers to women’s economic autonomy and gender equality.

Across the world care work is mostly done by women and girls, who perform three-quarters of unpaid care work. Representing more than 11 percent of total global employment, paid care work is also a significant source of employment, particularly for women. However, these jobs are poorly paid, in positions that fall outside of formal employment structures, and insecure due to ingrained gender and racial biases and the work’s perceived value. The precariousness of paid care work and the unequal distribution of unpaid care work restricts women’s time and mobility, as well as their equal participation in social, economic, and political life. And this dynamic is unlikely to change without collective action. The climate crisis is increasing the demand for care and domestic work globally, while the COVID-19 pandemic generated a [care crisis](#) that exacerbated pre-existing gender inequalities.

Both formal structures and informal structures (norms) hold care economy inequalities in place. Gendered norms also shape national policies on how care work is recognized and valued, and how the responsibilities between families, governments, and the private sector are distributed.

While public investment and policies must be at the core of the solution, a renewed role for the private sector is crucial. Announced as a [commitment at the Generation Equality Forum](#), in 2021 Canada’s International Development Research Centre (IDRC) and the Open Society Foundation’s impact investment arm, the Soros Economic Development Fund (SEDF), launched an [action-oriented research initiative to help Transform the Care Economy through Impact Investing](#) (TCEII). Through this partnership, IDRC continues to build on its commitment to transform the care economy and mobilize finance for gender equality.



Erin Tansey



Catherine Cax



Since its launch, a global consortium of partners has built an [extensive knowledge and evidence base](#) to mobilize capital and impact investment to address the care economy's challenges in emerging markets. The program is now launching a collection of 20 case studies on care economy social innovations and impactful businesses, which complements 59 business profiles and mapping of 165 market-based solutions operating in emerging markets in Latin America, Africa, and Asia. The [TCEI program](#) also involves care-economy businesses incubation and acceleration, research on regulatory frameworks and policies, awareness raising, and industry policy dialogues.

As we witness growing momentum and understanding of the urgency of addressing the care crisis, we hope these case studies on pioneering companies will help advance concrete strategies to move from awareness to action. These case studies help to demonstrate viable and impactful business models, ranging from building social security infrastructure to labor-saving products and services. They offer a unique and nuanced understanding of the businesses' theories of change and impact journeys. The case studies also help to share the lessons these innovators have learned on their pathways to scale, and it is our hope that they will attract more capital into the care economy for deepened impact.

We invite you to read this collection of case studies and engage with them, and the other resources and tools developed by the TCEI program, to mobilize investment into the care economy.

Together we can advance [towards a care society](#) where social innovation, entrepreneurship, and investment can be part of the solution for economic justice globally.

**Erin Tansey**

Sustainable and Inclusive Economies  
Director  
International Development Research  
Council

**Catherine Cax**

Managing Director, Investments  
Soros Economic Development Fund

## INTRODUCTION

The care economy consists of paid and unpaid labor and services that support caregiving in all its forms. In Africa, Asia, and Latin America, women spend between 3 to 5 times as many hours on unpaid care and domestic work as men. This represents 80 percent of a household's total hours devoted to unpaid care work.

Care economy enterprises can help recognize, redistribute, reduce, and reward – also known as the 4 Rs – unpaid and paid care and domestic work in the following ways:



**Recognize:** Initiatives that increase visibility and recognition of paid and unpaid care and domestic activity as "productive" work that creates real value and contributes to economies and societies.



**Redistribute:** Services and initiatives that redistribute care work from individuals to public and private sector entities, and redistribute care and domestic work within the household.



**Reduce:** Products and initiatives that reduce the time spent on and the burden of unpaid care and domestic work.



**Reward:** Products, services, and initiatives that ensure that care and domestic workers are paid fairly and have professional growth potential. This provides them with financial reward and security.

The Care Economy Knowledge Hub – the research pillar of the Transforming the Care Economy Through Impact Investing Program – aims to address the knowledge gap around care businesses by showcasing various business models and creating a resource base for relevant stakeholders. It also aims to raise awareness and increase knowledge of the state of impact-driven care economy business models and attract a broad range of funders to invest in care economy solutions by showcasing opportunities.

A curated set of 20 business case studies, of which this case study is one, has been researched and written between October 2021 and January 2024. The case study businesses were selected out of a set of 165 businesses that were mapped between October 2021 and August 2022, and then a further 59 that were profiled between September 2022 and May 2023. They present a wide variety of different ways in which care work can be recognized, rewarded, reduced, and redistributed, from different sectors and different geographies, from different stages of the growth journey and different business models, from different products and services, and different impact pathways. Each case study was

written based on extensive desk-based research, including a literature review; a review of key business documents; a series of deep conversations with founders, CEOs, and key staff; and impact-focused qualitative research with 8 - 15 consumers of business products and services.

Each case study starts with a 1-page executive summary that provides “at a glance” information on the business and Section 1 provides an introduction. Section 2 describes the ecosystem within which the business operates. The business deep dive can be found in Section 3. Section 4 presents an impact deep-dive, including customers’ own experiences of the care economy solution, and a unique set of qualitative impact data. Section 5 outlines the business’s future plans in their look forward.

Shifting attention towards and investment in the care economy is one of the single most important actions that policy makers, investors, and community leaders can take to achieve gender, racial, and climate justice. We hope that these case studies contribute to the much-needed transformation in our economic and social systems.

**Rebecca Calder**

Principal Investigator, Transforming the Care Economy Through Impact Investing  
Co-Founder and Co-CEO, Kore Global

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*This project is supported by Canada's International Development Research Center, in partnership with the Soros Economic Development Fund at the Open Society Foundations. Building on their track record and commitment to transforming the care economy and mobilizing finance for gender equality, they are jointly supporting this action research program to help transform the care economy through impact focused business and investment. This case study is a joint research product, developed by a consortium led by Kore Global, including Intellectap, Core Woman, Busara, Sagana, and Volta Capital. Copy editing and graphic design were done by Big Blue Communications.*

**This particular case study should be cited as follows:**

CoreWoman, Busara Center for Behavioral Economics, Kore Global. (2024). *Transforming the care economy through impact investing: Homely case study*. Kore Global, International Development Research Centre, and Soros Economic Development Fund.



## 1 - EXECUTIVE SUMMARY

Homely is a Mexican for-profit tech-enabled company that provides professional cleaning and domestic services to households and businesses through its B2C and B2B business models. The company offers flexible work arrangements, formal employment opportunities to domestic workers, and additional benefits such as monthly bonuses and educational opportunities in digital financial education and English language courses.

Homely is currently focused on strengthening its B2B model, delivering cleaning services to a range of commercial spaces, including offices, malls, and gyms. The company has also diversified its offerings to include the sale of cleaning supplies to B2B customers, providing a comprehensive solution for their needs, and expanding its services to include wellness and fitness centers. In 2022, the company's revenue reached US\$1,281,888. It currently employs 15 people in the management and administrative team and has a staff of 2,452 registered domestic workers.



### Homely at a glance

Established	2015
Country of operations	Mexico
Offerings	Offers cleaning and domestic services for businesses and households while generating employment opportunities
Reach	<ul style="list-style-type: none"> <li>Has provided more than 150,000 services and reached 37,000+ customers 80+ businesses</li> <li>Offers employment opportunities for 2,456 women</li> </ul>
Staff	15 full-time employees
Revenue	US\$1,281,888 (2022)
Investment to date	US\$651,000 for expanding operations and platform improvements
Leadership	<a href="#">Melina Cruz</a> , Co-founder and CEO






	<a href="#">Edgar Tello</a> , Co-founder and B2B head of operations
Contact for partnerships	<a href="mailto:mel@homely.mx">mel@homely.mx</a>
Website	<a href="http://www.homely.mx">www.homely.mx</a>



## 2 - ECOSYSTEM

### 2.1 Mexico: statistical snapshot

 <p>Demographic information</p>	<p>Total population (<a href="#">World Bank, 2022</a>): 127.5 million</p> <p>Female population (<a href="#">World Bank, 2022</a>): 51.2% of total population</p> <p>Urban and rural population (<a href="#">World Bank, 2021</a>): Urban: 81.3% Rural: 18.7%</p> <p>Population by age segment (<a href="#">World Bank, 2022</a>):</p> <ul style="list-style-type: none"> <li>• 0–14 women: 12.1%   0–14 men: 12.4%</li> <li>• 15–64 women: 34.6%   15–64 men: 32.6%</li> <li>• +65 women: 4.6%   +65 men: 3.7%</li> </ul>
 <p>Unpaid and paid care and domestic work</p>	<p>Proportion of daily time spent on unpaid domestic and care work (<a href="#">ECLAC, 2019</a>): Women: 24.2%   Men: 8.8%</p> <p>Women engaged in paid care and domestic work (<a href="#">INEGI, 2022</a>): 2,335,266 domestic workers (95% women, 4.7% of employed people, 3% formalized)</p> <p>Domestic workers by age (<a href="#">INEGI, 2022</a>):</p> <ul style="list-style-type: none"> <li>• 12–17 years old: 2.9%   18–29 years old: 17.0%</li> <li>• 30–39 years old: 23.9%   40–49 years old: 27.2%</li> <li>• 50–59 years old: 20.1%   60 or more: 8.9%</li> </ul> <p>Domestic workers education attainment (<a href="#">INEGI, 2022</a>):</p> <ul style="list-style-type: none"> <li>• Incomplete elementary school: 23.8%   Completed elementary school: 33.6%</li> <li>• Completed high school: 35.6%   Technical/technological education or superior: 6.9%</li> </ul> <p>Legal protections for domestic workers:</p> <ul style="list-style-type: none"> <li>• 2019: Reform to the labor federal law "<a href="#">Ley Federal del Trabajo</a>" to regulate domestic work.</li> <li>• 2021: Ratification of the <a href="#">ILO's 189 Agreement</a> of 2011.</li> </ul>
 <p>Social &amp; economic</p>	<p>Literacy level (<a href="#">World Bank, 2020</a>):</p> <ul style="list-style-type: none"> <li>• Global: 86.3%   Latam: 94.1%</li> <li>• Women: (+15) 94.5%   Men (+15): 96.1%</li> </ul> <p>Poverty (<a href="#">ECLAC, 2020</a>): Women: 38.0%   Men: 36.7%</p> <p>Gender-based violence (<a href="#">INEGI, 2021</a>): Around 70.1% of women in Mexico reported having experienced some type of gender-based violence.</p>



Women's work,  
labor, and  
entrepreneurship

**Labor force participation** ([World Bank, 2021](#)):

Women: 43.8% | Men: 75.4%

**Informal employment** ([World Bank, 2021](#)):

Women: 55.2% | Men: 57.1%

**Unemployment** ([INEGI, 2021](#)):

Women: 5.5% | Men: 4.1%

**Women-owned businesses** ([World Bank, 2010](#)):

- Firms with at least 1 woman with participation in ownership: 25.7%
- Firms with women in top management:<sup>1</sup> 14.6%

**Entrepreneurship** ([GEM, 2019](#)):

Female/Male TEA Ratio:<sup>2</sup> 0.91

**Gender pay gap** ([Statista, 2021](#)):

Gender gap (0=unequal, 1=equal): 0.51

**Financial inclusion** ([World Bank, 2017](#)):

Women aged 15+ with a bank account: 33.3% | Men aged 15+ with a bank account: 41.1%

## 2.2 Context analysis

### Care economy context

Mexico has approximately 2.3 million domestic workers, 90% of whom are women.<sup>3</sup> Around 97% operate in the informal sector, meaning they have no contracts or essential employee benefits. Regulations regarding the formalization of domestic work are relatively new in Mexico. In 2020, basic labor rights such as an 8-hour workday, vacation time, year-end bonus, and mandatory social security were finally granted to domestic workers. Yet it was not until 2 years later, in 2022, that the Mexican Congress approved a law making it mandatory for every person who hires a domestic worker, whether hourly, live-in, or by shift, to register them with the Mexican Social Security Institute (IMSS). This registration grants them

access to public healthcare services, sick leave, disability pension, retirement fund, and eligibility for social benefits, including public daycare allowance. Nonetheless, only 3% of nearly 2.3 million domestic workers have a contract and are enrolled with the IMSS to receive such benefits. Anecdotal evidence suggests that labor rights are often violated, and domestic workers often work long shifts without receiving overtime or additional time off.

Mexico's households and businesses face considerable difficulties securing trustworthy, reliable, and high-quality cleaning and domestic service providers. The scarcity of these services leads many to rely on recommendations from friends or informal work agencies as a solution, which may not always result in satisfactory experiences. Additionally, the high informality of the domestic work



industry can lead to a lack of transparency and quality control, making it difficult to assess the reliability and trustworthiness of individual providers. As a result, households and businesses must invest significant effort and resources in finding suitable cleaning and domestic service providers.

The lack of understanding regarding the care economy, and the social and

economic value of care and domestic work poses a significant obstacle to progress in this field. This lack of awareness hinders government actions toward improving working conditions, labor rights, and access to essential employee benefits for domestic workers and deters private investments in this sector. Melina Cruz, the CEO of Homely, elaborated on this in an interview for this case study.



*There is no specific idea of what the care economy is. Although there are activities carried out daily, people do not know that this is a productive sector of the economy leveraged by many people, not only care workers. Likewise, the implications of outsourcing domestic and care work are unclear to potential customers (someone who has the need or desire for a product or service that a company offers but has not yet made a purchase). Many employers often don't see the benefit of providing a formal job to their household workers and perceive it as an additional cost. (...). We observed that we need to raise more awareness of household workers' job formalization in some geographic regions than in others. Some cities in Mexico still have the embedded idea of the "maid," but gradually, people are becoming more conscious of household workers' rights and the impact of formalization in their lives.*

**Melina Cruz, CEO of Homely**



## Market opportunity

The global cleaning and domestic services market was estimated to be worth US\$69.8 billion in 2022 and is expected to continue growing over the forecast period of 2023–2028 with an expected compound annual growth rate (CAGR)<sup>4</sup> of 6.4%. By 2028, the market is projected to reach nearly US\$101.28 billion. Revenues in the cleaning services sector alone in Mexico, excluding domestic services for lack of data, amount to US\$750 million, and the market is expected to grow 4.3% annually (CAGR 2022–2026).<sup>5</sup> In Mexico, nearly 6.4% of households hire cleaning and domestic services, spending an average of 5.1% of their monthly income on these.<sup>6</sup> Additionally, since the COVID-

19 pandemic, cleaning and disinfection services have become critical. Demand has risen among businesses seeking to ensure biosafe spaces for their employees and, in tandem, so has demand for care workers and healthcare professionals.

According to the International Cleaning Association in Mexico, the country's cleaning and domestic services sector comprises over 3,000 businesses. Still, around 80% of these are informal companies with an estimated value of over US\$1.2 billion.<sup>7</sup> Mexico's cleaning and domestic services market presents ample growth opportunities, driven by companies outsourcing cleaning services to concentrate on their core operations, urbanization, rising disposable incomes, and an expanding middle class.



*At Homely, we have focused on how to shape the market from within and started focusing on formalizing those already working there. There is definitely a geographic predominance as to where customers and domestic workers are located. Homely's customers and domestic workers are primarily located in metropolitan areas, where access to transportation and socioeconomic opportunities are easier. This reflects the realities of the Mexican job market and the potential for technology to facilitate access to formal employment for domestic workers.*

**Melina Cruz, CEO of Homely**





## 3 - BUSINESS DEEP DIVE

### 3.1 Business headline

Homely is a one-stop solution platform designed to address household and business cleaning and domestic work needs. By using Homely, customers can effortlessly connect with reliable, skilled domestic workers who have been meticulously screened, background-checked, and trained. Homely has recently centered its efforts on enhancing its B2B services, curating high-quality cleaning solutions for a range of commercial spaces including small offices, corporate buildings, stores, malls, restaurants, gyms, and short-term rentals.

The company has recently created a new business line, providing cleaning supplies to its B2B clients. This strategic move aligns with the needs of clients who are seeking comprehensive solutions and positions Homely as a trusted provider in the industry. Homely has also strategically redefined its digital tech framework, enhancing efficiency in booking its services specifically within the B2B sector.

Homely has established Aliada as a distinct brand within the B2C segment. Unlike Homely's B2B offerings, Aliada targets the B2C market by providing unique booking options. Homely concentrates on mid- to long-term arrangements and recurring contracts, whereas Aliada specializes in immediate and flexible solutions for households. This deliberate differentiation of services is crucial for each brand's growth and effective service delivery.

The company allows domestic workers to choose from full-time, part-time, independent, or per-hour work arrangements, depending on availability. Full-time and part-time employees receive formal contracts, while all workers benefit from competitive salaries, additional perks such as monthly bonuses, and educational opportunities. Thanks to a partnership with Platzi,<sup>8</sup> the company provides digital and financial education as well as English language courses to all its domestic workers.

Homely has established itself as an industry leader and advocate for domestic workers rights<sup>9</sup> by proactively offering formal employment and social benefits to all employees, including part-time and independent workers, ahead of the 2022 legal mandates. The company's commitment to promoting fair labor practices and supporting domestic workers' rights extends to raising awareness through media engagements and business events. Being a champion that fosters public understanding of the value and respect toward domestic workers sets Homely apart from its competitors and positions the company as a force for positive transformation in the care economy.

Homely offers an exceptional opportunity for investors, as it provides customers with a safe and user-friendly platform that guarantees a smooth and hassle-free experience to access top-tier cleaning and domestic services. The company's commitment to workers' rights and

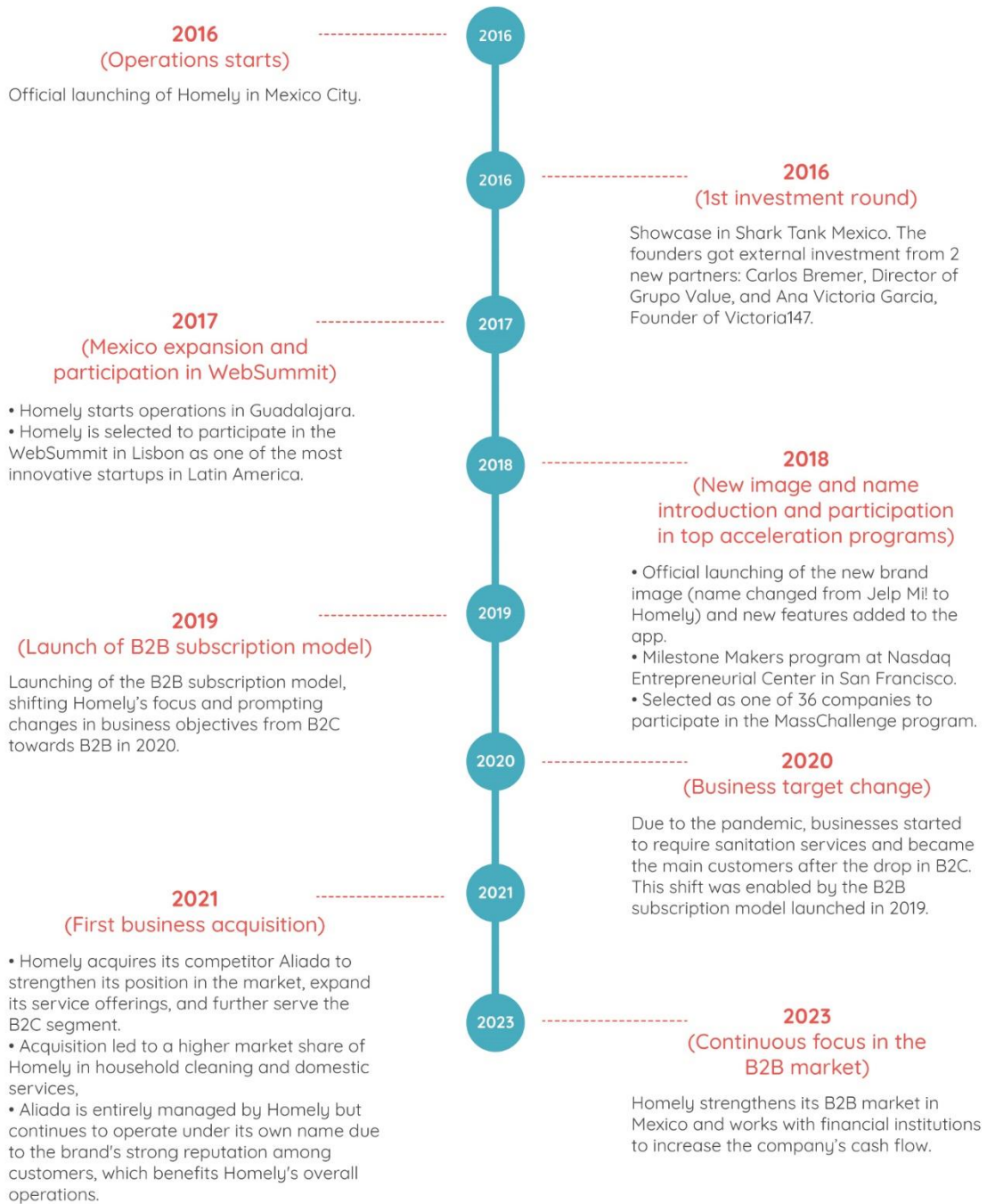


well-being ensures that customers benefit from motivated domestic workers who adhere to the highest industry standards and have undergone rigorous psychometric evaluations to guarantee honesty, responsibility, punctuality, reliability, and positive relationships with employers.

Leveraging advanced technology, Homely enables customers to rate and review domestic workers, maintaining a high standard of service consistently. In its last investment round in 2021, Homely raised US\$417,000 to develop Homely Safe, a disinfection service for businesses and households, as well as to maintain operations during the beginning of the pandemic when demand for cleaning services decreased. Homely is engaged in active collaboration with financial institutions that are affiliated with impact-driven organizations. The objective of these strategic partnerships is to boost the company's cash flow by leveraging debt while staying true to its social impact mission.



## Homely's journey





## 3.2 Founder story

### Founders of Homely



Edgar Tello and Melina Cruz

Melina Cruz Villafaña is a business entrepreneur from Mexico with a Bachelor's in Business Administration from ITAM (Mexico City) and HEC (Paris). Before becoming an entrepreneur, she worked as Financial Analyst at the Hewlett Packard (HP) headquarters for Mexico and Latin America. Thanks to her exceptional leadership as CEO of Homely, her financial acumen, and her strategic vision, she has been recognized as one of the top female entrepreneurs in Mexico.

Edgar Tello is a tech entrepreneur who previously sold a successful online business called Clothie, one of the first Mexican brands to reach young audiences through social media networks. Edgar is the current COO of Homely and a visionary entrepreneur deeply committed to harnessing technology's potential to create a positive social impact. Edgar brings his technical expertise and creativity to the company, driving its development and growth.

Together, Melina and Edgar make a dynamic team that has successfully created a tech-based solution with the power to transform the care economy in Mexico and Latin America.

Melina and Edgar initially had plans to start a business in the food industry, but their plans changed after a conversation with a domestic worker, Constanza. Her story inspired Melina and Edgar to pivot and create a solution that would help improve the quality of life for domestic workers through better work opportunities.

Prior to that conversation, Melina had a strong personal connection to the subject. Her grandmother, who migrated from Paso de Arena, Guerrero State, to Mexico City and worked as a domestic worker for many years, was able to secure a better life through her work but faced poor work conditions and mistreatment in the households she cleaned. Despite her challenges and hardships, Melina's grandmother achieved her dream of homeownership and gave her children a quality education. This experience left a lasting



impact on Melina, fueling her passion for improving the lives of domestic workers in Mexico through Homely.

### 3.3 Business model



#### Services

**Homely Pro for Businesses (B2B):** Offers cleaning and disinfection services to address the needs of small offices, corporate buildings, independent stores, malls, restaurants, gyms, and short-term rentals. Additionally, Homely offers include the sale of cleaning supplies to B2B customers.

**Homely Home for Households (B2C):** Homely offers a convenient platform for households to subscribe and access a range of cleaning and domestic services. Users can book these services through either the website or the app. The services provided by Homely are categorized based on factors such as frequency of use, home size, and specific requirements. These categories include cleaning, ironing, laundry, and pet care. While the Homely app is exclusively used for part-time and long-term bookings, Aliada is relied upon for last-minute and infrequent service arrangements.

**Homely Safe:** Offers COVID-19 disinfection services for businesses and households that follow the guidelines of the World Health Organization and the Center for Disease and Control and Prevention. With the decrease in COVID-19 cases, the demand for this service has also decreased, but some businesses still require it, so Homely still provides it.

**CareMe:** Matches care workers and qualified health professionals with patients needing hospital care, post-operative nursing care, or home care.



#### Value proposition

- Easy and safe selection process with technology.
- Ensures all domestic workers earn more than minimum wage and are on social security.
- Technology enables customers to rate and review cleaning professionals, thus incentivizing a higher quality service.
- Provides specialized training for domestic workers working with businesses in the hospitality industry to ensure they are welcoming (for the B2B segment).
- Service requests take only 60-90 seconds, and domestic workers can arrive within 2 hours.
- Domestic workers are trustworthy, as they undergo psychometric testing for honesty, responsibility, punctuality, reliability, and relationship with employers.
- Automated with AI for a faster and more efficient hiring process.
- Secure payment process.
- On-demand service that suits the flexibility needs of customers.



 <p>Competitive advantage</p>	<ul style="list-style-type: none"><li>• One of the few tech-enabled companies in the cleaning and domestic sector in Mexico and Latin America capable of guaranteeing reliable and high-quality cleaning and domestic services to customers.</li><li>• Services are provided by highly satisfied domestic workers who are rewarded for their work and efforts.</li><li>• Industry leader with exceptional work conditions and fair pay, and ensuring high-quality service.</li><li>• Vocal advocate for domestic workers' dignity, enhancing its brand reputation, and attracting customers who value social responsibility.</li></ul>
 <p>Pricing and payment methods</p>	<p>For businesses, prices vary according to businesses' needs, and packages are tailored to the number of subsidiaries, locations, building sizes, hours, and days per week. The company offers weekly or monthly plans to retain more customers, starting at US\$3.64 per hour. Homely bills businesses on a monthly basis based on the cleaning packages consumed, allowing for a cost-effective and flexible solution for businesses.</p> <p>For households, the company offers weekly or monthly plans starting from US\$5 per hour, including the social security fee. For CareMe, based on the patient's clinical history, hourly fees range from US\$15 -US\$24, depending on the care worker or healthcare professional's qualifications. Households make all payments directly through the Homely payment processor available on the website and mobile app.</p>
 <p>Revenue streams</p>	<p>Most of Homely's income stream originates from its B2B operations (90%), catering to the business sector, while only a 10% share from its B2C operations, serving households.</p>
 <p>Cost structure</p>	<p>The majority of the company's budget is allocated towards personnel expenses (70%), followed by technology and marketing expenses (10% each), miscellaneous expenses such as stationery and transportation (8%), and rent and other operational expenses (2%).</p>

### 3.4 Homely's growth story

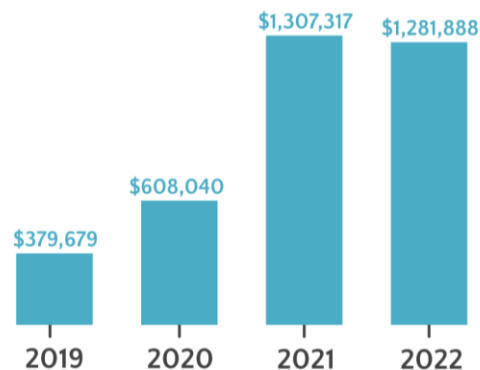
Established to offer comprehensive cleaning services while ensuring fair wages and social protection benefits for domestic workers, Homely began operations in 2016, assembling and supporting a team of 15 informal domestic workers. By offering domestic workers full-time contracts, access to social security benefits, and other forms of assistance, Homely enhanced their income and job security.



Homely's service lines have evolved since its inception, initially catering to a wide range of clients in both B2B and B2C sectors. The company's current focus is on expanding its B2B services, targeting small offices, corporate buildings, stores, malls, restaurants, gyms, and short-term rentals. To enhance its presence in the B2B sector, Homely introduced a new line of cleaning supplies for B2B clients and revamped its digital platform to streamline service bookings, affirming its role as a comprehensive solutions provider. This strategic shift has resulted in a significant increase in B2B contribution to Homely's total revenue. Simultaneously, Homely continues to serve the B2C market. It offers longer-term household services via the Homely app and has developed Aliada, a dedicated brand that specializes in providing immediate and flexible cleaning solutions for household clients.

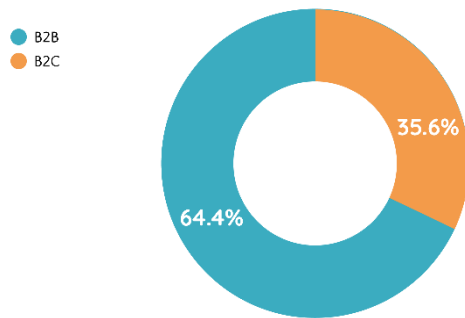
The company's revenue experienced a 60.1% increase from 2019 to 2020 and 115% growth from 2020 to 2021. To date, Homely has reached profitability. 2022 was a critical year for Homely's operational efficiency improvement, with revenues reaching US\$1,281,888. Additionally, the company reaffirmed its commitment to the B2B segment, which represented 64% of Homely's sales in that year. It is worth highlighting that 91% of these sales were made to recurring customers, with only 6% being one-time purchasers. This demonstrates the high level of loyalty among businesses who find Homely an efficient solution for their cleaning needs.

Homely's revenue (in USD) from 2019 to 2022

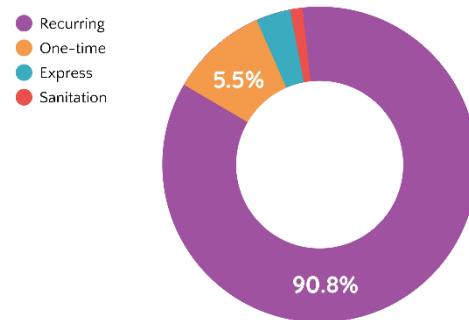




Distribution of sales 2022



B2B sales distribution 2022



Since launching in 2016, Homely has catered to the needs of 38,000 clients and delivered over 180,000 services.

Homely is currently directing its efforts towards enhancing its B2B services, delivering high-quality cleaning services to a range of commercial spaces including offices, malls, and gyms. The company has also diversified its offerings to include the sale of cleaning supplies to B2B customers, providing a comprehensive solution for their needs and expanding its services to include wellness and fitness centers. In the B2C market, Homely and Aliada stand out by providing unique booking options: Homely offers mid- to long-term plans, while Aliada provides speedy and adaptable solutions, enabling both brands to grow and deliver their services efficiently.

### 3.5 People and governance

#### 2X Criteria<sup>10</sup>

The leadership breakdown in Homely is as follows:

- 50% of the founders are women.
- 25% of C-Suite and senior management positions are women.
- 27% of full-time employees in the administrative team are women.
- 25% of the board of directors are women.

Homely has a team consisting of 2,452 registered domestic workers in Mexico. Out of these, 542 are actively assigned to domestic work shifts. Among them, 378 are independent domestic workers, while 164 work full-time with Homely. The company reports to maintain a 98.3% retention rate.

Homely is a **gender-intentional** business.<sup>11</sup>

Homely is committed to fostering a positive work environment through a suite of employee-centric policies, including HR policies, Equal Pay for Equivalent Work, Maternity/Paternity



Leave, and safeguarding measures for vulnerable groups. Homely has not previously emphasized structured career progression or onboarding programs, but the company is expecting to adopt a more comprehensive approach to onboarding and career development in the future.

### 3.6 Support received to date

The investment and non-financial support Homely has received to date, which are essential to understanding the company's progress and growth, has unfolded in the following manner:

Financial	
Homely's growth has been fueled by a series of investments	
Co-founders and early-stage investors	Homely was founded in 2016 with personal savings from the co-founders and early-stage investment from Mexican investors Carlos Bremer and Ana Victoria Garcia.
Angel investors	In 2017, Homely secured US\$105,000 in capital from 3 angel investors.
	In 2019, Homely received US\$129,000 in capital from angel investors through a special purpose vehicle (SPV).
Aliada	In 2020, Homely acquired its largest competitor, Aliada.
Toushka Capital, Claudio Picus, and other angel investors	During 2020–2021, Homely raised US\$417,000 for their seed round capital from Toushka Capital, Claudio Picus, and other angel investors.



## Non-financial

Homely has received non-financial support from various incubators and social entrepreneurship programs, including

<b>Victoria 147</b>	In 2017, Homely went through a women-focused social entrepreneurship program at Victoria 147, focused on building a profitable structure for the company.
<b>IKEA Social Entrepreneurship Program</b>	The 2017 IKEA Social Entrepreneurship Program helped the company to design and grow its B2B segment.
<b>MassChallenge Mexico</b>	In 2018, MassChallenge Mexico played a critical role in the company's evolution and growth by assisting with branding and establishing KPIs.
<b>Cherie Blair Foundation</b>	In 2018, the Cherie Blair Foundation helped Homely to refine strategies to reach profitability.



*All of the incubators and social entrepreneurship programs that Homely has participated in, including Victoria147 (2017), The IKEA Social Entrepreneurship Program (2017), MassChallenge Mexico (2018), and the Cherie Blair Foundation (2018), have played a critical role in the company's evolution and have propelled it to new heights, far surpassing where it was before each program's involvement.*

**Melina Cruz, CEO of Homely**







## 3.7 Challenges to growth and key business drivers

### Challenges to growth

Care work is typically performed by women and is "invisible" labor, undervalued and underpaid. This undervaluation results in a lack of legislation to protect domestic workers and a lack of investment in the care sector, leading to a shortage of quality care providers and services, inadequate wages and working conditions, and limited access to care for those who need it.

In Mexico, most people see domestic and care work as second-class employment and fail to acknowledge the economic and social significance of the sector. The Mexican National Survey of Discrimination reveals that 62% of respondents believe that there is little to no respect for the rights of domestic workers, and 92% think their work is underappreciated. These negative perceptions and attitudes make it difficult for companies like Homely to expand their customer base and increase recognition of the value of care work.

These societal norms are related to another challenge faced by Homely to achieve scalable growth in Mexico: the competition from the informal sector of domestic workers, which the government has largely ignored until recently. It was only in October 2022 that Mexico's congress finally passed the Social Security Law, which mandates employers to enroll their domestic workers in the national social security system including full-time and part-time or independent workers. This late adoption of the legislation partially explains why only 3% of household workers were formally employed by 2020.<sup>12</sup> Since informal domestic services are typically cheaper, customers are financially incentivized to rely on informal and poorly compensated domestic workers, which creates obstacles for companies like Homely seeking to expand.

Domestic workers' lack of digital inclusion and skills has been a major challenge to Homely since services, training, and payments are done through their platform. Only 75% of the Mexican population uses a cellphone, while internet usage is lower at 71.3% for women and 72.7% for men. The digital divide is especially evident in rural areas, where only 50.4% of the population uses internet.<sup>13</sup> Domestic workers, who are primarily women and from rural areas, are at a disadvantage in this context. To overcome this, Homely developed a Telegram bot for bidding services<sup>14</sup> and coordinating with domestic workers on a day-to-day basis, making communication and coordination more accessible and streamlined.

### Key business drivers

The implementation of the Social Security Law, nevertheless, represents a new opportunity for Homely's growth, as households and businesses complying with the Law should increasingly look for formal cleaning and domestic services. Over time, as is happening in other countries of the region (like Colombia, Argentina, and Chile), if well implemented, communicated, and advocated, the legal reform can promote changes in the social value given to domestic workers, strengthening the need for Homely's services.

Homely has also been fortunate to interact and benefit from individual advisers and organizations that have helped to access funding, reach new and diverse customer segments, forge valuable partnerships, and acquire a deep understanding of the industry and its complexities. For instance, the initial investment from CodeStream, a New York-based company known for revolutionizing the way code is written through



collaborative development tools, was instrumental in addressing Homely's technology challenges from the early stages. In addition, investors from Mexico's Shark Tank, Ana Victoria Garcia and Carlos Bremer, not only became financial partners but acted as mentors, introducing Homely to business networks and potential customers while leveraging the business exposure on national media.



*We leverage our partnerships and networks in the care economy ecosystem as a world of opportunities for domestic workers and Homely. In 2018-19, the Mexican Institute of Social Security (IMSS) started considering regulating the domestic worker market. We connected with the IMSS because of our contacts and networks and played a fundamental role in piloting the enrollment of domestic workers into the social security system. (...) As part of **Platzi DemoDay 2021**, the company received early-stage funding and partnered with Platzi to educate domestic workers through Platzi's platform free of charge. These, and many other scenarios, have allowed us to open up the conversation about domestic workers' working conditions and opened business opportunities for Homely while creating awareness around changing the status quo for domestic workers in the industry.*



**Melina Cruz, CEO of Homely**



## 4 - IMPACT DEEP DIVE

### 4.1 The impact theory of change of the enterprise

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#### Mission statement

*Homely's mission is to provide better recognition and improved working conditions for domestic workers. This is done by answering the needs of households and businesses for flexible, quality, domestic, and care services. Through their platform, Homely aims to contribute to care and domestic workers' economic well-being and financial independence.*

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#### Theory of change

Homely's theory of change revolves around 3 key pathways – reward, recognize, and reduce – to empower domestic workers and transform their lives. Together, these interconnected approaches aim to cultivate an atmosphere of pride, dignity, and improved quality of life for domestic workers while also benefiting their customers.



## Reward pathway

By formalizing domestic workers - the focus of the reward pathways - Homely strives to ensure economic autonomy, decent work conditions, and legal protection, ultimately leading to improved financial inclusion and income levels.

<b>Long-term result(s)</b>	Increase in domestic workers' with economic independence and capabilities to transform their lives.		
<b>Medium-term result(s)</b>	Increased formalization for domestic workers.	Increased financial inclusion and income of domestic workers.	
<b>Short-term result(s)</b>	Increased awareness and knowledge amongst domestic workers of formalization processes and digital education opportunities.	Increase in access to individual bank accounts, credit and other financial products.	Increase in more secure jobs with time flexibility for domestic workers.
<b>Product(s)</b>	Formalization Assistance - Contracts signed. - Labor benefits (full timers). - IMSS affiliations. - Support in tax regularization. - Platzi subscriptions.	Support in opening bank accounts and building knowledge of other financial products.	Provision of liability insurance to protect both workers and users.
<b>CEKH Impact Axes</b>	<b>Reward</b>		



### Recognize pathway

The recognize pathway emphasizes the importance of acknowledging domestic work's value, fostering self-esteem, and advocating for better policies and regulations to create a respectful and dignified environment for these workers.

<b>Long-term result(s)</b>	Increased recognition of the value of domestic work and more respect for domestic workers.	Greater sense of pride, dignity, and quality of life amongst domestic workers.	
<b>Medium-term result(s)</b>	Improved policy formulation and decision-making to support formalized and informal domestic workers.	Increased regulation for domestic workers to claim their labor rights.	Improvements to domestic workers' self-esteem.
<b>Short-term result(s)</b>	Improved knowledge, awareness, and attitudes among policy makers and key stakeholders related to recognizing domestic workers' formal status.		Participation in formal organizational processes and integration within an organizational culture.
<b>Product(s) and service(s)</b>	Participation in national and international forums and engagement in public policy pilots to guarantee domestic workers' rights.	Dissemination of information and evidence (e.g. this case study).	Communications strategies and approaches that recognize the worth of domestic workers' economic contributions (internal campaigns).
<b>CEKH Impact Axes</b>	<b>Recognize</b>		



### Reduce pathway

The reduce pathway focuses on easing barriers to job opportunities by streamlining the job search process, simplifying connections between domestic workers and employers, and fostering a mutually beneficial situation for all parties involved.

Long-term result(s)	Improved quality of life of both domestic workers and households using Homely services.	
Medium-term result(s)	Improved efficiency of processes associated with formal domestic workers' access to jobs and households' access to domestic services.	
Short-term result(s)	Increased awareness, knowledge, and adoption of technology among domestic workers as they use Homely to access job opportunities.	Reduced commuting time for domestic workers to their workplace.
Product(s) and service(s)	Cutting-edge application to meet supply and demand for domestic services, including conducting background checks of domestic workers.	Allocation of work shifts closer to domestic workers' homes to reduce commuting distance and time.
CEKH Impact axes	Reduce	

### 4.2 Current impact and measurement practices

Homely relies on indicators such as the number of active domestic workers, formalization, and financial inclusion to measure their impact. They use a combination of qualitative and quantitative evidence, including anecdotes and surveys, collected every month. Homely currently conducts informal satisfaction surveys with domestic workers, but it plans to standardize the measurement process to enable its internal team to understand operations



better. However, Homely believes that the most important evidence of impact is the income the company helps to generate for domestic workers to promote their financial independence, particularly those who are self-employed, compared to the minimum wage,<sup>15</sup> while providing them with flexibility and social security benefits.

Homely currently has a workforce of 2,452 total domestic workers. Among them, 22% are actively engaged, enjoying consistent work opportunities without any month-to-month inactivity. Of the 542 active domestic workers, 164 work full-time, while 378 operate independently. According to internal data, Homely has emerged as an attractive employer within the domestic worker industry due to the competitive salaries offered to its affiliated workers. On average, full-time and independent domestic workers affiliated with Homely earn more than the official minimum salary for domestic workers in 2022, which was US\$113 per month. Full-time domestic workers benefit from salaries that are approximately 40% higher than the minimum wage, making the company a compelling choice for those seeking stable employment in the sector. Independent domestic workers, on the other hand, typically provide 3-4 services per month and earn an income equivalent to about 44% of what a full-time domestic worker would make. This offers a flexible earning opportunity for those who prefer a less committed work arrangement.

Homely is committed to measuring its impact on domestic workers' lives. Key metrics include financial inclusion, and improved worker and household well-being and livelihoods. A total of 89% of Homely's workforce have opened bank accounts, and 85% are experiencing improved family situations due to reduced work hours and fair income in the formal sector. As of 2022, 4 women have moved on from Homely to pursue higher education, and 5 have launched their own businesses, demonstrating the company's influence on improving domestic workers' well-being.

While monitoring, evaluation, and learning efforts are critical to business success, Homely has not received any support in this area nor allocated any organizational resources to this. The company is aware of certain impact measurement challenges such as determining the right indicators and metrics to use, which can vary depending on the product or service offered, collecting and analyzing data consistently and reliably, and producing high-quality evaluations. Homely remains committed to continuous evaluation, particularly in aspects related to product enhancements and operational improvements. The focus remains on validating growth, especially from the B2B perspective, to ensure sustained improvement in domestic workers' conditions and customer satisfaction.

The following section uses qualitative data from interviews with domestic workers to fill evidence gaps in the theory of change, particularly documenting experiential and impact data that Homely has not previously documented.





### 4.3 Domestic workers' own experiences of the solution

Understanding the social context, emotional needs, preferences, and barriers faced by domestic workers affiliated with Homely is key for potential investors to understand where Homely excels and where it has room to grow. The following sections provide insights into the foundation of the business market success and its impact on the lives of domestic workers, with the aim of helping investors make informed decisions.

To inform this analysis, the research team conducted 9 in-depth interviews with domestic workers who use the Homely platform to gather insights into their lived experiences and realities.<sup>16</sup> This section presents the results of the qualitative impact deep dive, starting with a snapshot of the domestic workers, followed by an examination of different types of workers or “personas” and their journey working with Homely. This section concludes with a qualitative overview of Homely’s impact, as experienced by domestic workers in their daily lives.

#### 4.3.1 Domestic workers snapshot

Homely’s domestic workers represent a fairly diverse demographic base. Most workers are aged 25–50, with a small minority in their late 50s and 60s. According to older workers, using Homely has made it easier for them to secure employment without facing age-based discrimination, which is a common occurrence in traditional job searches. Among women interviewed, almost half were single, some were married, and the rest were separated from their partners. A majority of the domestic workers had children, with one-third of children being under the age of 18, and had an average family size of 3 household members.

*“I wanted to see if they (Homely) would accept me because of my age. They told me that my age did not matter, and they gave me an appointment [for job application] the next day.”*

**(Full-time worker, 50+ years old)**

The majority of domestic workers had at least some high school education, and a few had enrolled in university technical courses, but had not completed them. Interest in and intention to learn, coupled with limited opportunities so far, suggests many domestic workers would be interested in and benefit from training or educational opportunities provided by Homely.

Average household incomes for Homely domestic workers varied from 10,000MXN to 20,000MXN (US\$ 527–1,053)<sup>17</sup> per month. A majority of domestic workers reported that their household income is less than 10,000MXN (US\$527) per month for a family of 3, which is higher than the US\$325 monthly minimum wage in Mexico. A minority of respondents reported their household income to be more than 20,000MXN (US\$1053) per month. This suggests that the Homely platform caters to a wide range of earning goals, with some domestic workers



choosing more hours for greater compensation and others choosing to work fewer hours in order to prioritize other family or personal needs. Overall, compensation at Homely was considered competitive with other domestic work opportunities. However, some full-time workers did still cite desire for better pay.

When current Homely domestic workers were asked who else they thought could benefit from employment through the platform, most women described profiles with similar characteristics to themselves, including young adults with limited education, older individuals who struggled to find or return to work, and women who needed flexibility to handle family responsibilities while earning an income. Overall, there does not seem to be significant differences between the current domestic workers and potential domestic workers using Homely. There are 2 likely explanations: (1) Domestic workers are most familiar with their own needs and experiences and thus draw inspiration from themselves when imagining new domestic workers (a phenomenon known as self-reference bias); (2) Homely is already targeting and attracting the right people who would benefit from domestic employment via their platform. As the business grows, this will need to be considered, and the company will need to make a concerted effort to expand its network of referrers to include new communities



### 4.3.2 Customer personas

The qualitative research revealed 3 distinct Homely domestic worker personas, based on their employment type within the platform.

- ❖ **Full-time workers** who work 8 hours a day
- ❖ **Part-time workers** who work 4 hours a day
- ❖ **Hourly/Independent** workers who work flexible, undefined hours

Homely offers the flexibility for domestic workers to choose between full-time, part-time, or independent work. Among its 2,452 domestic workers, 6.7% are employed full-time, 2% part-time, and 15.4% are independent workers or self-employed.

These distinct personas are created through a qualitative understanding of domestic workers' characteristics, motivations, beliefs, and behaviors. Each persona is descriptive, actionable, and unique, reflecting challenges and awareness of benefits they receive from Homely. These personas offer a snapshot into why and how domestic workers choose to affiliate with Homely. By understanding these nuances, the Homely team can better tailor services to cater to domestic workers' needs.

Below is an in-depth examination of these 3 distinct personas.



### Maria's Bio

Maria is a 30-year-old woman who has experience as a cleaner. She is married with children and actively sought employment that offered benefits such as daycare and social security. She discovered vacancies at Homely through Facebook ads.

At Homely, Maria works 8 hours a day for 5 days a week and earns around 1,300MXN per week, which is roughly US\$68 per week or US\$274 per month. She earns higher than the minimum wage for domestic workers in Mexico, which is US\$113 per month.

### Maria Pérez

#### The Full-Time Worker

She works 8 hours per day for 5 days a week.

#### Demographic information *(of the persona she represents)*

**Age:** 30-50 years old

**Family status:** Likely to be married

**Education:** High school

**Monthly Household Income:** <10,000MXN (US\$527)

**Last Job:** Cleaner in homes or construction sites

**Job at Homely:** Office cleaner *(cleaning office space, entrance, arranging furniture, cleaning, washing dishes, etc.)*

### Perception of the benefits she receives

- **Contract:** Has signed a written contract with Homely.
- **Paid Vacation:** Lacks comprehensive information, acknowledges having paid vacation, but unable to provide specific details.
- **Maternity leave:** Lacks clarity on eligibility for this benefit.
- **Sick Leave:** Inaccurate and incomplete knowledge.
- **Work Bonus:** Aware that she can receive a bonus of 300MXN.

*There has been a positive change in my life because I have been relaxed and calm. I do my job to the best of my ability, and I feel understood by both my bosses - the client and Homely.*

**Full-time worker, 50+ years old**



### Gloria's Bio

Gloria is a 45-year-old woman who works part-time as a cleaner at Homely. She was actively seeking better job opportunities and found Homely on job boards and recommendations from friends.

At Homely, Gloria works 4 hours a day and earns approximately 890MXN (US\$47) per week, equivalent to 3560MXN (US\$188) per month, which is higher than the average monthly earnings of domestic workers (US\$113) in Mexico. She values the flexible work schedule offered by Homely, which allows her to manage her health issues or other commitments outside of work.

### Gloria Garcia

#### The Part-Time Worker

She works 4 hours per day for 5 days a week.

#### Demographic information *(of the persona she represents)*

**Age:** 45-54 years old

**Family status:** Likely to be separated and with children above 18 years old

**Education:** Unfinished (technical) college

**Monthly Household Income:** <10,000MXN (US\$527)

**Last Job:** Cleaner in either homes or offices

**Job at Homely:** Cleaner *(cleaning offices or apartments)*

### Perception of the benefits she receives

- **Contract:** Have signed a written contract with Homely.
- **Paid Vacation:** Lacks comprehensive information, acknowledges having paid vacation but unable to provide specific details.
- **Maternity leave:** Lacks clarity on eligibility for this benefit.
- **Sick leave:** Inaccurate and incomplete knowledge.
- **Work Bonus:** is aware of punctuality and quality. service bonus, but lacks clarity on the exact amount.
- **Christmas Bonus:** received 150MXN (US\$8).

*I feel valued in my work here, unlike my previous jobs where my job as a cleaner was not appreciated. At Homely, clients have given me positive feedback and even tips, which makes a big difference to me*

**Part-time worker, 40 years old**



### Sara's Bio

Sara Hernandez is a 37-year-old single mother with experience in the informal sector working as a cleaner on construction sites and as a waitress. She was seeking better job opportunities with flexible working hours when she found a Homely advertisement on Facebook.

At Homely, Sara works on a flexible schedule without a defined number of hours. Some weeks she works 8 hours per day for 2 days, while in other weeks, she works fewer hours. On average, she earns 1120MXN per week (US\$59), equivalent to 4480MXN per month (US\$236). Sara's income exceeds the average monthly earnings of a domestic worker (US\$113) in Mexico, and she has the flexibility to choose her working hours, allowing her to optimize her income.

### Sara Hernandez

#### The Hourly/Independent Worker

She chooses her hours depending on her income requirement and availability to work.

#### Demographic information (of the persona she represents)

**Age:** 26-62 years old

**Family status:** Likely to be single or separated and with children

**Education:** High school

**Monthly Household Income:** <10,000MXN (US\$527)

**Last Job:** Cleaner in homes or construction sites

### Perception of the benefits she receives

- **Contract:** Has signed a privacy notice with Homely.
- **Legal benefits:** Has accurate information that she is not entitled to any benefits such as paid vacation, sick, or maternity leave.
- **Social Security:** Mistakenly thinks that she is not eligible for this benefit, although she is.
- **Work Bonus:** Unaware of any additional bonuses available for her work.
- **Christmas Bonus:** Lacks accurate and comprehensive information, uncertain about her eligibility to receive this benefit.

*What happens is that one chooses the days one can work, the schedules, and the places close to their homes, which I think is also very good.*

**Independent worker, 62 years old**



### 4.3.3 Persona journey










The personas are illustrative of how different domestic worker groups make decisions and take up the services offered by Homely. In the following section, journey maps are used to add additional detail to describe the step-by-step emotional experience that domestic workers undergo from their initial introduction to Homely to their eventual integration and utilization of its services.












Journey maps are a visual representation of the highs and lows experienced by current domestic workers as they engage with Homely. Journey maps can guide Homely to identify opportunities for improvement and ensure that the diverse needs, wants, and constraints of domestic workers are considered in expansion and refinement of their services or reach.








The journey to joining Homely starts with motivation to look for a new job either passively or actively, followed by awareness, where domestic workers discover the company. Consideration follows as they weigh their options and gather more information. Decisions are made in the fourth stage, where both Homely and the domestic workers agree to move forward with the job application process and job offer. The fifth stage, use, marks the official onboarding of domestic workers and the start of their work. This is where they directly start working and engaging with the clients in their day-to-day work. The journey ends with loyalty and advocacy, where domestic workers remain active users of Homely and recommend it to others within their social circle.



**Table 1:** The process a domestic worker undertakes to secure an employment with Homely

Stage	 Activities	 Domestic worker goals	 Touchpoints	 Emotions	 Barriers	 Levers
<b>Motivation</b>	<p>Think about job opportunities either actively or passively</p>	<p>Find a job that provides benefits like social security, day care services (full-time worker).</p> <p>Find a job that allows flexible working arrangements (part-time and independent worker).</p>		 Stressed and anxious	<p>Homely's lack of (physical and/or online) presence in certain places.</p>	<p>Encourage existing workers to recommend Homely to active job seekers using social media, by creating trendy hashtags, etc.</p> <p>Boost Homely's advertising and online visibility to attract workers and increase job applications.</p> <p>Highlight Homely's benefits to entice passive job seekers to apply (independent worker).</p>
<b>Awareness</b>	<p>Hear from friends, see online ads</p>	<p>No goals at this point.</p>	<p>Facebook ads (full-time worker)</p> <p>Former colleague, job boards (part time worker)</p> <p>Family and friends (independent worker)</p>	 Interested, curious	<p>Lack of awareness of benefits and bonuses that Homely provides.</p>	<p>Leverage positive referrals from friends and family.</p> <p>Increase online visibility by promoting targeted online advertisements among potential domestic workers.</p>
<b>Consideration</b>	<p>Compare and evaluate alternatives</p>	<p>Understand Homely and their process for job application.</p>	<p>Phone, WhatsApp</p>	 Requires effort but excited	<p>Complexity of job application that requires an interview and/or test.</p> <p>Low technological literacy makes using the Homely app daunting.</p>	<p>Make different types of job opportunities (full-time, part-time, and independent workers) and their associated benefits salient in Homely's ads.</p> <p>Highlight freedom from discrimination against older workers in hiring process.</p> <p>Clear ads and communication about the channels to inquire about vacancies and work at Homely.</p>

Stage	 Activities	 Domestic worker goals	 Touchpoints	 Emotions	 Barriers	 Levers
Decision	Job application	Submit a job application.	In-person meeting or WhatsApp	 Excited but nervous	Fear of failing the job application process.  Lack of availability of jobs with Homely.	Information about required documents and timeline for application review and decision should be easily available in vacancy ads.  Providing personal assistance during application process via WhatsApp or calls.
	Application review	Invited for an interview and/or a psychometric test.	In-person meeting with Homely	 Anxiety about the interview, requires effort and time	Lack of confidence in taking the psychometric test.  Lack of time to appear for tests due to other competing priorities.	Reassurance from interviewer.  Clear explanation about psychometric test and interview process.  Clarify amount of time needed to process application.
	Acceptance	Get their job application approved.	Phone, WhatsApp	 Happy and excited	Lack of time and cognitive capacity to review contracts to know their benefits, rights, and obligations.	
Usage of the platform	Onboarding	Accept the offer and learn about the job.	Virtual or in-person training at Homely's office	 Slightly disappointed	Lack of proper training during onboarding.	Training and onboarding by Homely HR specifically to discuss Homely, their contracts, and benefits.  Training and guidance from an experienced Homely worker specifically about the job.
	Work with the client <i>(Direct interaction and engagement with the clients)</i>	Start working.	In-person at client's space (either apartments, houses, or offices)	 Satisfied	Lack of transport allowance for those who live far away (full-time worker).  Lack of supervision and proper communication with Homely (part-time worker).	Encourage clients to be respectful to the workers, their time, and scope of work.  Improved economic conditions after working with Homely due to higher earnings (independent workers).  Improved physical health conditions, as they have more time to rest and relax.  Ease of finding jobs as per worker's schedule (part-time and independent workers).

Stage	 Activities	 Domestic worker goals	 Touchpoints	 Emotions	 Barriers	 Levers
Loyalty & advocacy	Sustained use of Homely	<p>Continually have a good experience at work.</p> <p>Good relationship with both Homely and the clients.</p>	<p>Virtual connection with Homely via the platform and WhatsApp</p> <p>In-person at client's space (either apartments, houses, or offices)</p>	 Satisfied	<p>Clients make requests that are outside the scope of worker's job (independent worker).</p> <p>Inaccurate perception that no access to training programs for skill development (independent worker).</p> <p>Lack of supervision and proper communication with Homely.</p> <p>Clients do not respect worker's schedule and time.</p>	<p>Communicate that online training sessions (Platzi subscriptions) are available to all employees.</p> <p>Promote benefits available to all workers during onboarding and in the Homely app.</p> <p>Promote the value of benefits such as social security, insurance, and leave.</p>



### 4.3.4 Homely’s impact on the lives of domestic workers

This section features the impact of Homely on the lives of domestic workers, as expressed in their own words during the qualitative interviews.

The impact of working with Homely varies based on their employment status, with full-time, part-time, and independent workers experiencing changes differently. However, most workers reported positive changes, including improvements in quality of work, finances, and physical health since joining Homely.

#### Qualitative evidence of theory of change for the reward pathway

**Long-term result(s):** LTO1: Increase in domestic workers’ economic independence and capabilities to transform their lives

- **Life satisfaction and self-esteem:** All workers, regardless of their employment status, have reported positive changes in both their life satisfaction and self-esteem since joining Homely. They feel valued and appreciated for their work, and acknowledged by their clients through positive feedback. Both full-time and independent workers reported an improvement in life satisfaction as they felt relaxed, calm, and understood by their supervisors.

*“Because, as I said, I mean here [Homely], the work we do is valued. Because there were even comments from some clients, well, thank you very much for what you do. They even left us a tip. In the other job, my work was not valued. And here, well, at least, if I saw both the client and Homely, I mean, those good comments about the work I was doing then. Well, yes, it does help you a lot.”*

**Part-time worker, 40 years old**

**Medium-term result(s):** MTO1: Increased formalization of domestic workers  
MTO2: Increased financial inclusion and income of domestic workers

- **Job satisfaction:** When asked to rate their job with Homely on a scale of 1 to 4<sup>18</sup>, both full-time and part-time workers gave it an average of 2.5. In contrast, independent workers rated their jobs an average of 3 on the same scale. This indicates that independent workers typically consider their jobs to be “somewhat good” and are largely satisfied.

*“Yes, it is quality work because they don’t pressure me. I can do my work at my own pace. They never ask me to complete it abruptly, I can take my time to finish it.”*

**Part-time worker, 40 years old**

*“There has been a positive change in my life because I have been relaxed and calm. I do my job to the best of my ability, and I feel understood by both of my bosses - the client and Homely.”*

**Full-time worker, 50+ years old**

*“This job makes it possible for me to manage my time and the days I want to work.”*

**Independent worker, 26 years old**

- **Skills development:** Most workers, regardless of their employment status, are unaware of the various training programs, such as financial education, offered by Homely. Thus, they have not taken the courses to learn any transferable skills.



■ **Earnings:**

- Full-time workers earned an average of 1300MXN (US\$68) per week, viewing it as lower than previous jobs, yet they favored Homely for added benefits such as social security and daycare.
- Part-time workers, working around 4 hours daily, earned between 800–980MXN (US\$42–47) per week, and they recognize that the lower earnings are due to reduced working hours.
- Independent workers, with the highest salary satisfaction, averaged 1120MXN (US\$59) per week. They value the flexibility to control their working hours and potentially boost earnings.

*“I find the earnings in Homely to be better than other jobs. In a regular job, you have a fixed salary, like 3600MXN. But in Homely with the flexible schedule, I can work the hours I want and earn that salary in a shorter amount of time. For instance, by working 12 hours a day, I can earn the same amount in just 1 week.”*

**Independent worker, 26 years old**

■ **Savings:**

- Full-time workers reported difficulty in saving, as their salary is lower compared to their previous earnings.
- Part-time workers also found it challenging to save due to their lower salary in comparison to their previous earnings. They attributed it to their short working hours (4 hours a day) rather than the rate of pay.
- Independent workers reported an average of 500MXN (US\$26) savings per week.

**Short-term result(s):**

**STO1:** Increased awareness and knowledge amongst domestic workers of formalization processes and digital education opportunities.

**STO2:** Increase in access to individual bank accounts, credit and other financial products.

**STO3:** increase in more secure jobs with time flexibility for domestic workers.

- **Mental health:** The well-being of domestic workers, irrespective of their employment status, appears to benefit positively from working with Homely. Nearly all part-time and independent workers expressed feeling more relaxed and at ease since joining Homely. They attribute this to a supportive work environment where they do not feel pressured by supervisors and can work at their own pace.

*“I am already calmer. And that I am now in one place (working with repeat clients). I am not harassed by the bosses; they are not on top of me. And pressuring me for things that the others didn't do.”*

**Part-time worker, 54 years old**

- **Physical health:** Full-time workers reported a decline in physical health due to lengthy commutes, resulting in less self-care time. Meanwhile, part-time workers noticed no significant change in their health, and the experience of independent workers varied, with some enjoying more relaxation time while others felt no substantial difference.

*“Due to the long commute, I feel my health has worsened as I don't have time to adequately sleep and eat.”*

**Full-time worker, 30 years old**

*“Since I have joined Homely, I have less fatigue. I have more free time that I use to rest.”*

**Independent worker, 37 years old**

- **Availability of free time:** While those working full-time reported no change in free time and even noted more time spent on commuting, independent and part-time workers experienced increased free hours due to the flexibility in choosing their work schedules to suit their needs.



*"I have more time now. That's what I like about it here. My work is not as hectic."*

**Part-time worker, 50 years old**

- **Utilization of free time:** Regardless of employment status, women reported using any additional free time on other household tasks. They dedicated this time to cleaning, fixing things, making meals, and caring for children and/or grandparents.

*"I spend my time doing things around the house. For example, washing, cleaning, and cooking. On days when I work in the morning, I have my afternoons free, and I can go to the movies or go out with one of my children."*

**Independent worker, 62 years old**

- **Social life:** Full-time workers observed no significant shifts in their social life. Part-time workers, benefiting from flexible hours, found it easier to plan visits with friends and family. Independent workers noted improved social lives, with increased time for rest, relaxation, and quality time with family and friends.

*"Well, before I could not, I had to work on legal days. And now, I decide if I want to work, I want to take the day off to go out to events with my family."*

**Independent worker, 26 years old**

**Product(s)**

- Formalization assistance
  - Contracts signed
  - Labor benefits (full timers)
  - IMSS affiliations
  - Support in tax regularization
  - Platzi subscriptions
- Support in opening bank accounts and building knowledge of other financial products
- Provision of liability insurance to protect both workers and users

- **Formalization and benefits:** Detailed information about the specifics of the products - such as labor benefits, contracts - and workers' perception of them is available in Table 2 below.

*During the interviews, we did not collect any information about Homely's assistance with tax authorization, and none of the domestic workers, irrespective of their employment status, brought it up. While we didn't explicitly ask about their awareness or use of Platzi subscriptions, their limited knowledge of Homely's training implies that they might either not be subscribed or are unfamiliar with the service.*

### 4.3.5 Level of awareness about the policies and benefits among the domestic workers

The qualitative research reveals that full- and part-time workers at Homely possess an incomplete or inaccurate understanding of their legal entitlements, including benefits such as sick leave, maternity leave, paid vacation, worker's compensation, childcare, life insurance, and severance pay. Regardless of their employment status, workers across the



board exhibit uncertainty about their benefits, potentially influencing their view of Homely as an employer. Table 3 in the Appendix lists the benefits afforded to all domestic workers associated with Homely. In contrast, Table 2 below details worker's awareness of these benefits. Improving the onboarding process could alleviate misunderstandings regarding contract terms and benefits, leading to a clearer understanding among workers.

 Policies/benefits	Table 2: Domestic workers' knowledge of policies and benefits		
	Full-time worker	Part-time worker	Independent worker
<b>Formal contract</b>	All reported having signed a written contract.	All reported having signed a written contract.	Most of the independent workers reported having signed a written contract. The rest stated that they had only signed a "privacy notice" but not a formal contract.
<b>Paid vacation</b>	Despite being entitled to paid vacation, some of them were unaware of their eligibility and the duration of the entitlement.	None of them were able to specify their eligibility for paid leave and/or the duration they can take it for, despite being entitled to this benefit.	All of them correctly stated that as independent workers they are not entitled to any paid vacation.
<b>Sick leave</b>	About half accurately understand that they are eligible for paid sick leave.	About half correctly believed they were entitled to sick leave, while the other half reported not knowing if they had the benefit.	Almost all knew they had no legal benefits such as sick leave.
<b>Maternity leave</b>	All were unaware of maternity leave and their eligibility, despite being entitled to this benefit.	They are unsure of their eligibility for this benefit, despite having access to it.	Some correctly reported that they were not entitled to this benefit. The rest reported not knowing.
<b>Bonus for punctuality and quality service</b>	All were aware they could receive 300MXN (US\$16) for punctuality and 300MXN for quality work every month.	All were fully aware that they could receive bonuses for punctuality and quality work but there was some	None reported receiving bonuses for punctuality and quality, nor were aware that they were entitled to receive this.



		confusion around the exact amount	
<b>Christmas bonus</b>	Half of those who had previously received a Christmas bonus confirmed it. Others were not sure.	All accurately reported that they receive a Christmas bonus as part-time workers.	A few incorrectly believe that they are entitled to receive a Christmas bonus (Aguinaldo).
<b>Insurance</b>	All acknowledged having insurance, but struggled to provide a clear understanding of the coverage. In fact, they are enrolled into the IMMS and have access to public healthcare services, sick leave, disability pension, retirement fund, and eligibility for social benefits such as daycare allowance.		Half of them mistakenly think they do not have insurance, despite having access to both IMMS and private insurance. However, even those who knew they had insurance were unable to provide detailed information on the coverage, except for a general understanding that it covers general illnesses but not specialized treatments.
<b>Onboarding training</b>	All reported receiving some training as part of their onboarding.	About half reported receiving some light training, and the rest reported learning about their job by following and observing their colleagues, which they referred to as "shadowing".	A majority reported not receiving any training. The others stated they received some light training.  It is noteworthy that a few of them mentioned that they had heard about Homely offering training but assumed that they did not receive it due to the COVID-19 pandemic.





**Termination of contract**

Limited knowledge about the procedure. aware that they need to inform the supervisor of their departure, but not clear on the details of how to do so or what the notice period is.

About half reported not having any information about the process, while the rest believe they will discover the process when and if needed.

Some lacked information about the process to terminate their contract, while others reported having to communicate their intention to terminate through verbal communication or WhatsApp.



## 5 - LOOK FORWARD

### 5.1 Growth and sustainability plans

Homely has strategically realigned its priorities to achieve economic sustainability, resulting in modifications to its financial and operational strategies. The company has implemented cost-cutting measures by eliminating unnecessary expenses and adopting a more efficient operational model. While Homely plans to expand its presence to 26 cities in Mexico, international expansion has taken a backseat.

Regarding growth, Homely targets a growth in revenue of 20% in 2024. A key strategy employed by the company is leveraging credit lines to ensure smooth cash flows, a common challenge in the B2B sector. The credit line functions as a financial buffer rather than a necessity, supported by a financial institution that shares Homely's mission of making a positive impact.

Previously, Homely piloted Tasky and CareMe, platforms that connected independent workers with households in need of domestic services, child care, elderly care, and therapies. These solutions aimed to enhance the employment opportunities for care workers and other independent professionals. However, as these products primarily target the B2C market, Homely is currently deprioritizing them, as its immediate focus lies in achieving financial sustainability.

### 5.2 Ask of investors and stakeholders

Homely has adopted a distinct financial strategy that prioritizes stability through positive cash flows rather than external investments. The company's main goal is to expand its presence in Mexico by utilizing its existing resources. In addition to its financial objectives, Homely is focused on scaling its operations, enhancing its technological capabilities, and establishing strategic partnerships.

**Financial:** From a financial standpoint, Homely is currently not actively seeking investment opportunities.

**Non-financial:** On the non-financial side, Homely is seeking guidance and support to scale its operations, enhance its technology, and establish a sustainable

growth model. Additionally, the company aims to refine its measurement methods and foster more partnerships. Through these initiatives, Homely aims to generate innovative ideas that will enable the company to extend its benefits to domestic workers and their families.



### 5.3 Lessons learned

Melina has gained valuable insight into the significance of establishing a harmonious work-life equilibrium, both for herself as CEO and for employees at Homely. The company's primary objective is to empower domestic workers by offering them economic independence. Maintaining a well-balanced work atmosphere plays a pivotal role in attaining this objective. The company's logo, featuring a cheerful and welcoming smiley face, represents its commitment to providing domestic workers with the opportunity to embrace a fulfilling life.

Homely excels in cultivating a positive work environment where employees feel valued, acknowledged, and appreciated by both the organization and its customers. This is evident in the increased self-esteem and life satisfaction reported by domestic workers, as well as the sense of enjoyment the company aims for its team to experience on the job. Additional benefits such as social security and daycare services contribute to a higher level of satisfaction among full-time employees.

The company has demonstrated its dedication to the well-being and development of domestic workers, which has greatly contributed to its long-term prosperity. Nevertheless, there is room for improvement in effectively communicating and promoting accessible training initiatives, including financial education, as a significant number of domestic workers are uninformed about these valuable resources. By enhancing awareness and understanding of these programs, Homely can further bolster the growth of its domestic workers in various aspects. Reflecting on the acquired knowledge, Melina Cruz, the CEO of Homely, imparts her valuable insights.



*As I reflect, I realize that I should have been bolder in my decision making. I wish I had taken more risks, explored different business models earlier, and paid closer attention to the key players in the impact investing world. I also regret not being more confident in making Homely more visible, as visibility is critical to attracting customers and investors alike.*

**Melina Cruz, CEO of Homely**



In addition, Homely praises the crucial role stakeholders, such as investors, domestic workers, and clients, play in the company's growth and success. The CEO emphasizes the importance of their contributions, including expert opinions, resources, and valuable



insights, which have significantly influenced the company's progress. Accelerators have provided invaluable mentorship and guidance, enabling the founders to navigate the complexities of the care economy and gain a deeper understanding of the industry.

Homely's journey has been filled with valuable lessons and insights, shaping the company's approach to fostering a work-life balance for its people, especially domestic workers. By cultivating a positive work environment and actively addressing areas for improvement, Homely has demonstrated its commitment to their welfare and growth, which ultimately contributes to the company's long-term success. Melina Cruz, Homely's CEO, reflects on the importance of bold choices, embracing risk, and the vital role stakeholder engagement plays in the company's evolution.

Looking ahead, Homely aims to enrich the lives of its domestic workers, exploring innovative services and products, venture into new markets, and attract more customers and investors. Committed to learning from past experiences and backed by a supportive network of stakeholders, Homely is well positioned for ongoing expansion and making a positive difference in the care economy.

## 5.4 Recommendations for policymakers and investors

The care economy emerges as a critical focal point for both governments and investors. As policymakers work towards shaping policies that address the formalization of domestic workers, raising public awareness, and promoting entrepreneurial opportunities alongside socially responsible companies, investors should consider the care economy as a valuable investment prospect with notable potential for growth and lasting financial returns.



Governments should prioritize building a deeper understanding of the implications of policies and creating the right incentives to develop regulations in the care economy, while simultaneously focusing on formalizing domestic workers and raising public awareness about the essential role of the care economy in society's functioning. It is imperative for governments to encourage employers to provide social protection, benefits, and fair labor practices for domestic workers, which will contribute to their overall well-being. Additionally, policy makers must create opportunities for entrepreneurship that promote innovative solutions to address pressing and growing challenges in the care economy, as well as support companies that prioritize decent work practices and demonstrate social responsibility.



### Investors

Investors are urged to recognize the care economy as a promising investment opportunity. Despite facing challenges and legislative gaps, this large and growing industry offers the potential for financial returns while also positively impacting the lives of domestic and care workers. Investment in the care economy can achieve social impact while achieving substantial potential for growth and long-term financial returns.

## ENDNOTES

<sup>1</sup> Top manager refers to the highest ranking manager or CEO of the establishment. This person may be the owner if he/she works as the manager of the firm.

<sup>2</sup> Percentage of female 18–64 population who are either a nascent entrepreneur or owner–manager of a new business, divided by the equivalent percentage for their male counterparts.

<sup>3</sup> ILO. (2020). *Ratification by Mexico of Convention No. 189 on Domestic Workers*. [https://www.ilo.org/global/standards/WCMS\\_750251/lang--en/index.htm](https://www.ilo.org/global/standards/WCMS_750251/lang--en/index.htm)

<sup>4</sup> The compound annual growth rate (CAGR) is the rate of return (RoR) that would be required for an investment to grow from its beginning balance to its ending balance, assuming the profits were reinvested at the end of each period of the investment's life span. <https://www.investopedia.com/terms/c/cagr.asp>

<sup>5</sup> Statista. (2022). *Household Cleaners - Mexico*. <https://www.statista.com/outlook/cmo/home-laundry-care/household-cleaners/mexico#revenue>

<sup>6</sup> Play Business. Homely. <https://playbusiness.mx/snapshots/homely>

<sup>7</sup> Play Business. Homely. <https://playbusiness.mx/snapshots/homely>

<sup>8</sup> Platzi is one of the largest online professional education platforms in Latin America. It has 3 million active students in more than 140 countries, with thousands of courses and areas of study focused on the development of skills and knowledge. <https://platzi.com/blog/que-es-platzi/#:-:text=Qu%C3%A9%20es%20y%20qu%C3%A9%20hace%20Platzi&text=Hoy%20tenemos%203%20Millones%20de%20las%20grandes%20empresas%20del%20mundo>.

<sup>9</sup> By law, companies only need to formalize full-time workers, but not independent ones (those who work on a per hour basis).

<sup>10</sup> 2X criteria can be found [here](#).

<sup>11</sup> Businesses were assessed on a 21 point scale, with scores of 0–7 being gender unintentional, scores of 8–14 being gender intentional and 15–21 being gender transformative.

<sup>12</sup> ILO. (2020). *Ratification by Mexico of Convention No. 189 on Domestic Workers*. [https://www.ilo.org/global/standards/WCMS\\_750251/lang--en/index.htm](https://www.ilo.org/global/standards/WCMS_750251/lang--en/index.htm)

<sup>13</sup> IFT. (2020). *En México hay 84.1 millones de usuarios de internet y 88.2 millones de usuarios de teléfonos celulares: ENDUTIH 2020*. <https://www.ift.org.mx/comunicacion-y-medios/comunicados-ift/es/en-mexico-hay-841-millones-de-usuarios-de-internet-y-882-millones-de-usuarios-de-telefonos-celulares#::-:text=22%20de%20junio-.En%20M%C3%A9xico%20hay%2084.1%20millones%20de%20usuarios%20de%20internet%20y.de%20prensa>

<sup>14</sup> A Telegram bot for bidding services allows users to submit bids for a particular service through a messaging app. The bot typically operates by providing users with a list of available services or products and asking them to submit their bids for the desired service or product.



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<sup>15</sup> Mexico's general daily minimum wage rose on January 1, 2023 to \$MEX207.44 (\$US11.47) per work day, a 20% increase on the 2022 level of \$MEX172.87 (\$US9.56).

<sup>16</sup> We conducted 9 in-depth interviews with domestic workers affiliated with Homely. Homely shared a list of domestic workers who fulfilled the following criteria: female domestic workers who belong to the low-income status, and have been working with Homely for a minimum of 3 months and a maximum of 6 months. The domestic workers interviewed were selected through purposive sampling to ensure diversity in age, experience, those who provide domestic work services to households and/or businesses, and duration of affiliation with Homely, resulting in a more nuanced and in-depth analysis of their characteristics and motivations. An interview guide was used to ensure consistency in the questions asked, although some follow-up questions were added as necessary to explore topics in more detail. The interviews were conducted in Spanish, audio-recorded, and transcribed verbatim for analysis. The data collected from these interviews was analyzed thematically in Nvivo to identify key themes and patterns in participants' responses. Given the sample size of 9 participants, one of the limitations of the analysis might be the limited generalizability of the findings to the broader population of domestic workers affiliated with Homely.

<sup>17</sup> 1 USD = 18.99MXN. Retrieved 14th March 2023 from <https://fred.stlouisfed.org/series/DEXMXUS#0>.

<sup>18</sup> Domestic workers were asked to rate their job on a scale of 1 to 4, where 1 represents extremely bad and 4 represents extremely good.

## APPENDIX

In 2019, Homely became the first company in Mexico's domestic and cleaning services sector to provide social protection benefits to its full-time employees, even before it was mandatory in October 2022.

Only full- and part-time workers have formal contracts and access to legal benefits, such as sick leave, maternity leave, paid vacations, worker's compensation, childcare, life insurance, and severance pay. Those working independently or per hour can choose in what neighborhoods, how many hours, and what days of the week to work, depending on their availability, for which the Homely app offers them an auction feature to bid on available shifts. Independent workers receive some of the benefits offered by Homely. However, as they do not have an employment relationship with the company, they are not entitled to all benefits that full-time and part-time domestic workers receive. Table 3 shows the company's benefits to all the domestic workers affiliated with Homely.

Table 3: Benefits to Homely's domestic workers according to affiliation

Benefits	Full-time	Part-time	Independent
Formal contract	Yes	Yes	Terms and conditions and Privacy notice
Enrollment into the Mexican Institute of Social Security Pilot (access to public healthcare services, sick leave, disability pension, retirement fund, and eligibility for social benefits such as daycare allowance)	Yes	Yes	Yes*
Private health insurance	No	No	Yes
Tax guidance	Yes	Yes	Yes
Assistance in opening a bank account	Yes	Yes	Yes
Salaries	20% to 45% above minimum wage (adding bonuses)	35% to 45% above minimum wage (adding bonuses)	35% to 45% above minimum wage
Bonus for punctuality	Yes	Yes	Yes
Bonus for quality service	Yes	Yes	Yes
Online courses with Platzi (Financial education, English, and others)	Yes	Yes	Yes



Legal benefits			
Sick or disability leave	Yes	Yes	No
Maternity leave	Yes	Yes	No
Paid vacation	Yes	Yes	No
Daycare public allowance	Yes	Yes	No
Disability and life insurance (provides financial protection to the insured person in case of disability and to family members in case of his or her death)	Yes	Yes	No
Christmas bonus	Yes	Yes	No
Severance pay	Yes	Yes	No

\*Note: Although self-employed workers can enroll in the IMMS pilot, no defined mechanism guarantees their contributions to the system when they are inactive. In this case, their contributions will be in accordance with the period worked.



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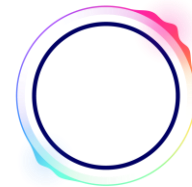
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