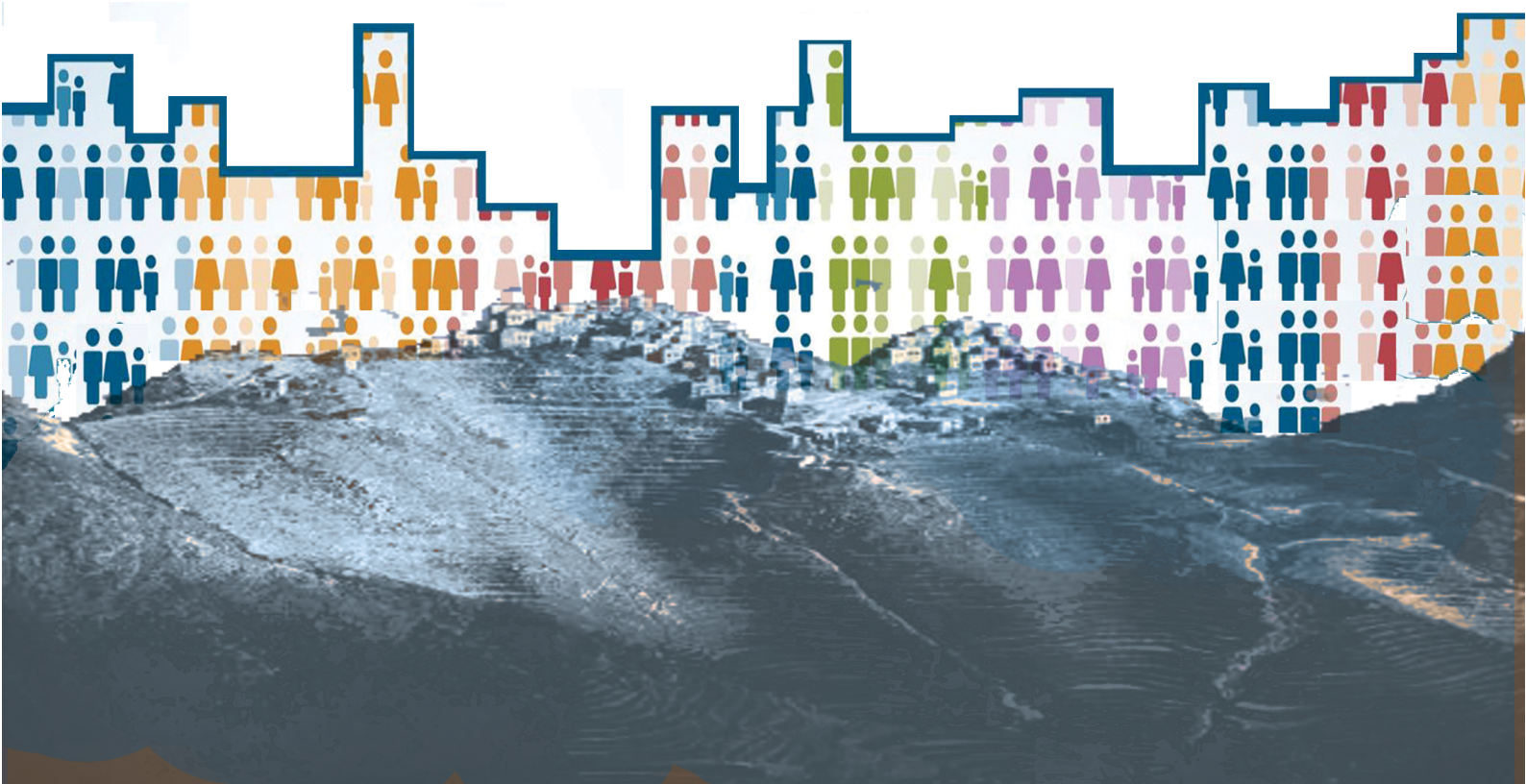


Yemen Shelter/NFI/CCCM Cluster Housing

Rental Market **Assessment**

September 2018

Ibb Governorate



SHELTER CLUSTER
تنسيق المأوى الإنساني



CCCM CLUSTER
دعم مجتمعات النازحين

YEMEN



YHF



The Samples of The assessment



Tenants
542



Landlords
201



KII
61



FGD
16



CBOs
46



Suppliers
388

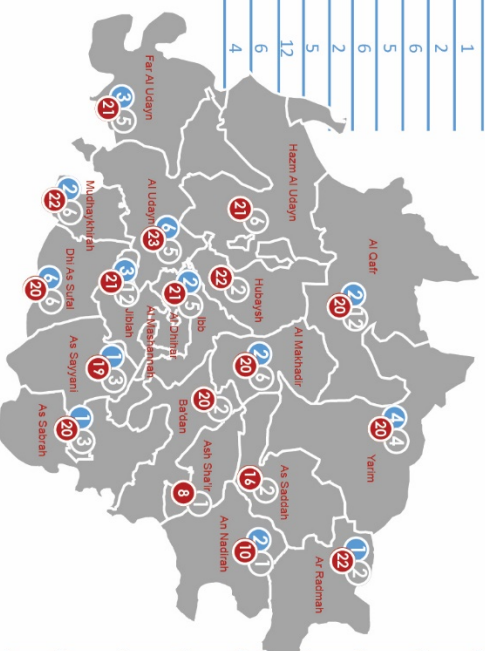


Financial Points
98

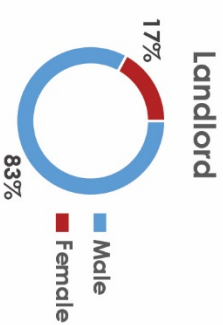
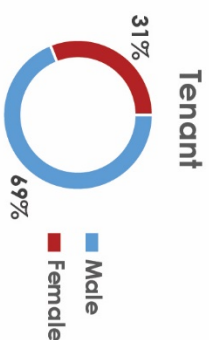
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CBOs, Suppliers, and Financial Points Sample

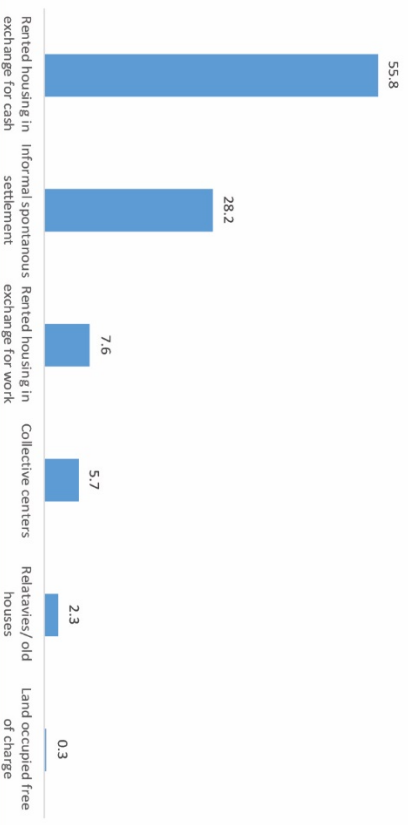
Districts Name	CBOs	Suppliers	Financial Points
Al Dhihar	6	21	6
Al Makhadir	2	20	6
Al Washannah	5	21	9
Al Qafr	2	20	12
Al Udayn	6	23	5
An Nadirah	2	10	1
Ar Radmah	1	22	2
As Sabrah	1	20	3
As Saddah	0	16	2
As Sayyami	1	19	3
Ash Sha tir	0	8	1
Baidan	0	20	2
Dhi As Sufal	6	20	5
Far Al Udayn	3	21	5
Hazm Al Udayn	0	21	6
Hubaysh	0	22	2
Ibb	2	21	5
Jiblah	3	21	12
Mudhakhkhrah	2	22	6
Yarim	4	20	4



Gender



The Majority of Housing Inhabited by the IDPs



Income and Expenses and The Crowding Index

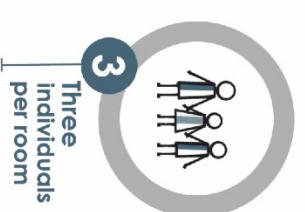
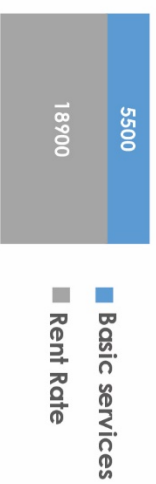


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Introduction

General Information about the Governorate:

Ibb Governorate covers an area of 6,484 km² (2,503 sq. mi). Its population, according to the 2004 Yemeni census, is “2,560,000”. The number of IDPs in the Governorate has reached (190,392) according to TEPM (Task Force on Population Movement Yemen)| 17th Report - August 2018.

What is the Objective of this Assessment?

The Preparedness Assessment is guided by a number of objectives. The main objective is to support Clusters’ priority preparedness activities through providing an independent preparedness assessment about “Housing Rental Market Assessment and Host Community Capacity Assessment”.

What is the Source of the Data?

The assessment uses primary data which is collected through qualitative and quantitative research methods. The qualitative methods are key informant interviews (KII) and Focus Group Discussions (FGD). For the quantitative data collection, a set of tools have been developed, specifically the landlords’ questionnaire, the tenants’ questionnaire, the exchange and remittance agents’ questionnaire, CBOs questionnaire, NFI/Shelter suppliers’ questionnaire, and the local authority questionnaire.

The Geographical Coverage in Ibb Governorate

There are 20 districts in Ibb Governorate which are: Al Dhihar, Al Makhadir, Al Mshnnh, Al Qafir, Al Udayn, An Nadirah, Al Radmah, As Sabrah, Al Sdh, As Sayyani, Ash Sha'ir, Ba'dan, Dhi As Sufal, Far Al Udayn, Hazm Al Udayn, Hubaysh, Ibb, Jiblah, Mudhaykhirah, and Yarim district. The assessment targeted all the districts of the Governorate.

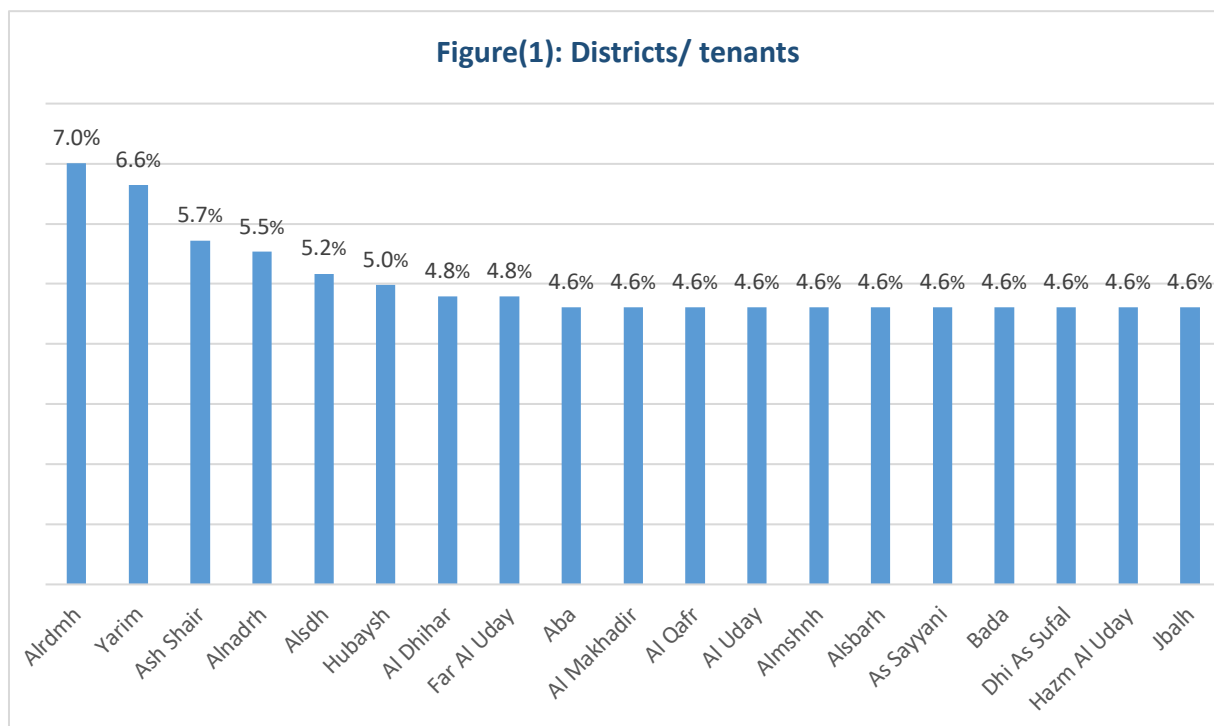


Section 1: Housing Rental Market Assessment

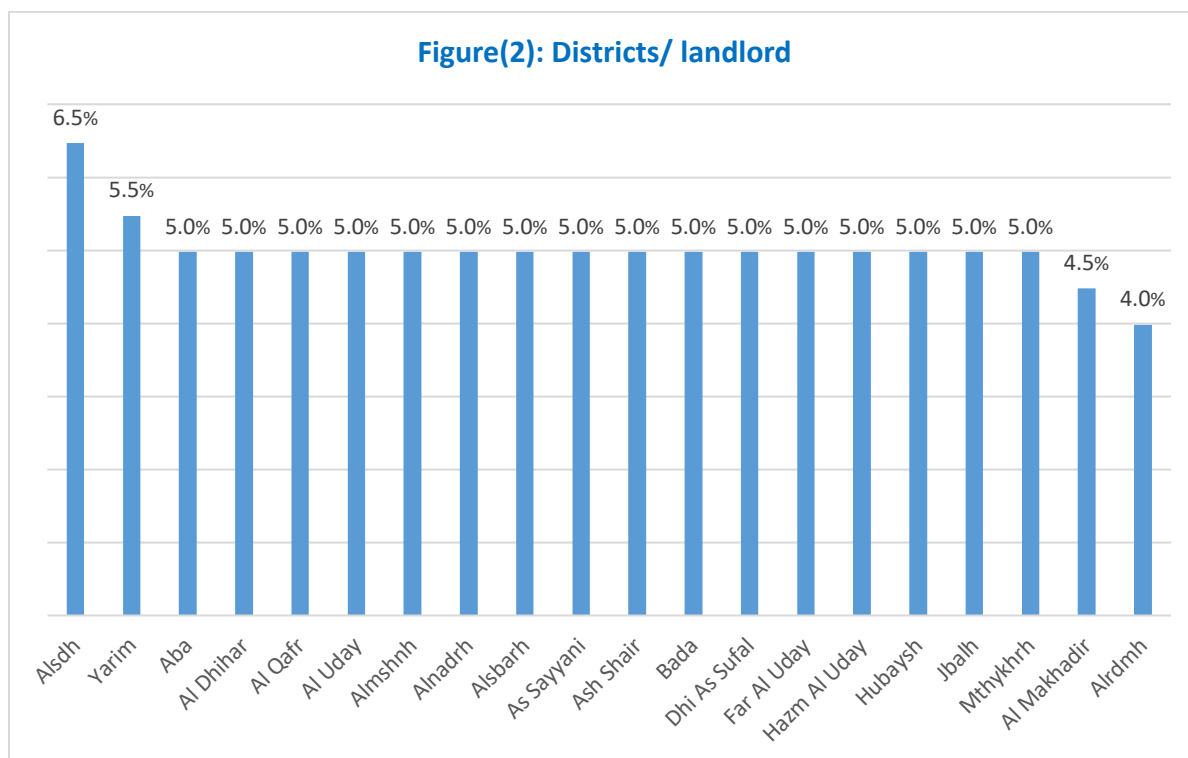
1. Demographic details

1.1 Targeted Districts

The results of the tenants' sample analysis in Ibb Governorate shows that the tenants were distributed to Ibb's districts as shown in figure (1).

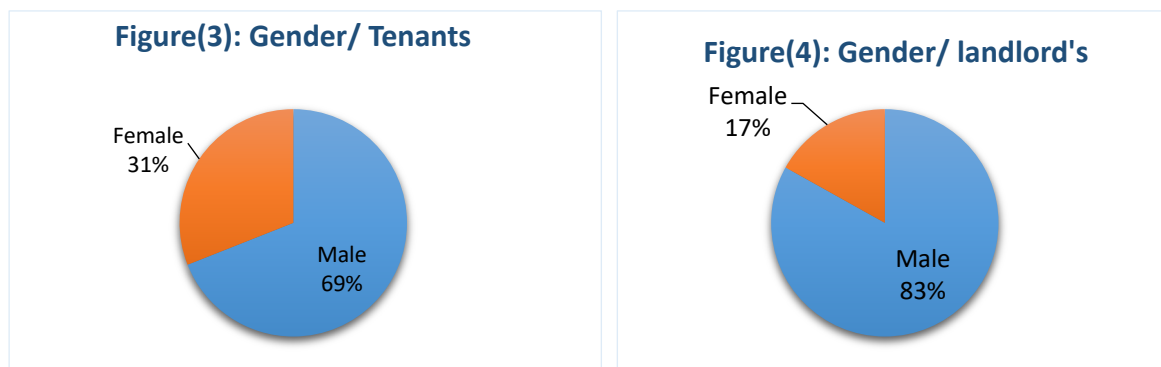


The results of the landlords' sample analysis shows that landlords were distributed to districts of Ibb as shown in Figure (2).



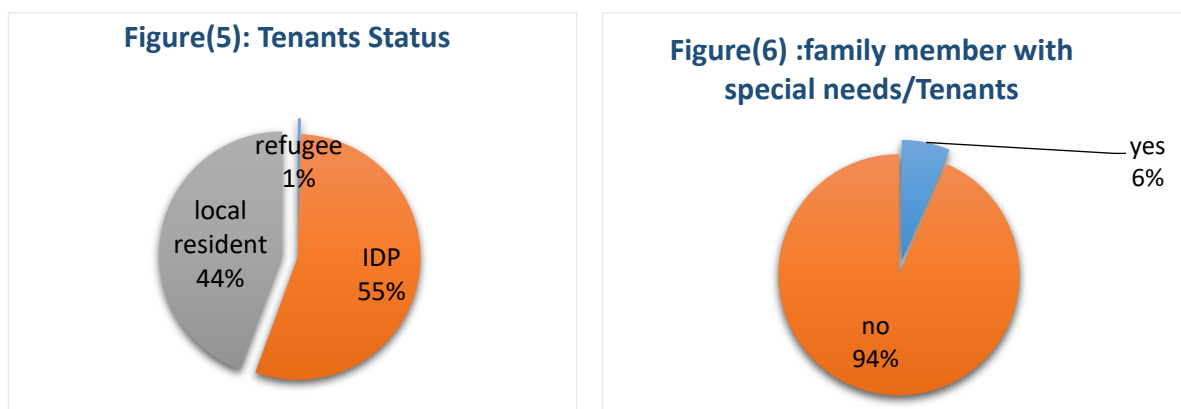
1.2 Gender (Landlords / Tenants)

Figure (3) shows the gender distribution of tenants, which is 69% males and 31% females. As for landlords, 83% are males and 17% are females (Figure 4).



1.3 Tenant Characteristics

The results of the study indicate that 44% of the tenants' sample were local residents of the area (Figure 5), and 55% were IDPs, which reflects the size of IDPs presence in this area. The study also shows that 6% of the tenants have family members with special needs (Figure 6).



1.4 Household Age Category (Tenants)

Table (1) clarifies how most tenants' family members of the targeted districts fall between the following two age groups: 39% more than 18 years to 55 years, and 42% more than 5 years to 18 years by. Followed by the category of children under five years 17% and more than 55 years 2%. The study also showed that family members of the tenants' sample are 50.83% females, and 49.17% males. These statistics reveal the magnitude of the suffering endured by the greater part of the tenants' households which are children and women, especially for IDPs families.

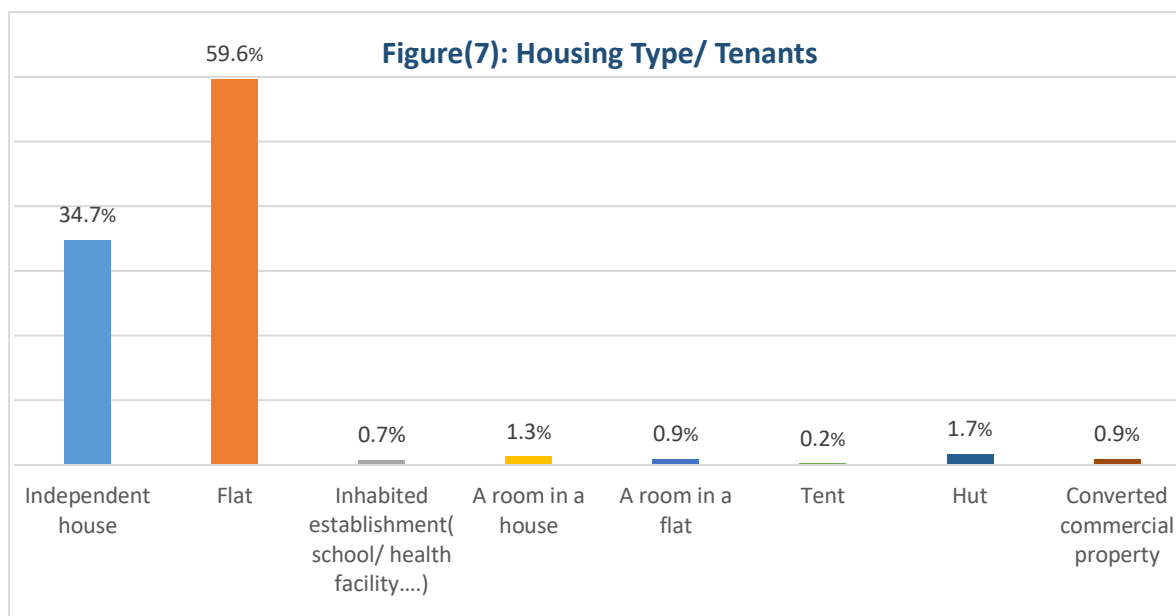
Table (1): Age and gender of the tenant family members

Gender	under 5 years		between 5 to 18 years		18 – 55 years		Older than 55 years		Total of members in the households	
	number	%	number	%	number	%	number	%	number	%
Male	307	52.48	720	48.85	654	48.37	41	45.05	1722	49.17
Female	278	47.52	754	51.15	698	51.63	50	54.95	1780	50.83
Total	585	100	1474	100	1352	100	91	100	3502	100
Within Age%	%17		%42		%39		%2		100%	

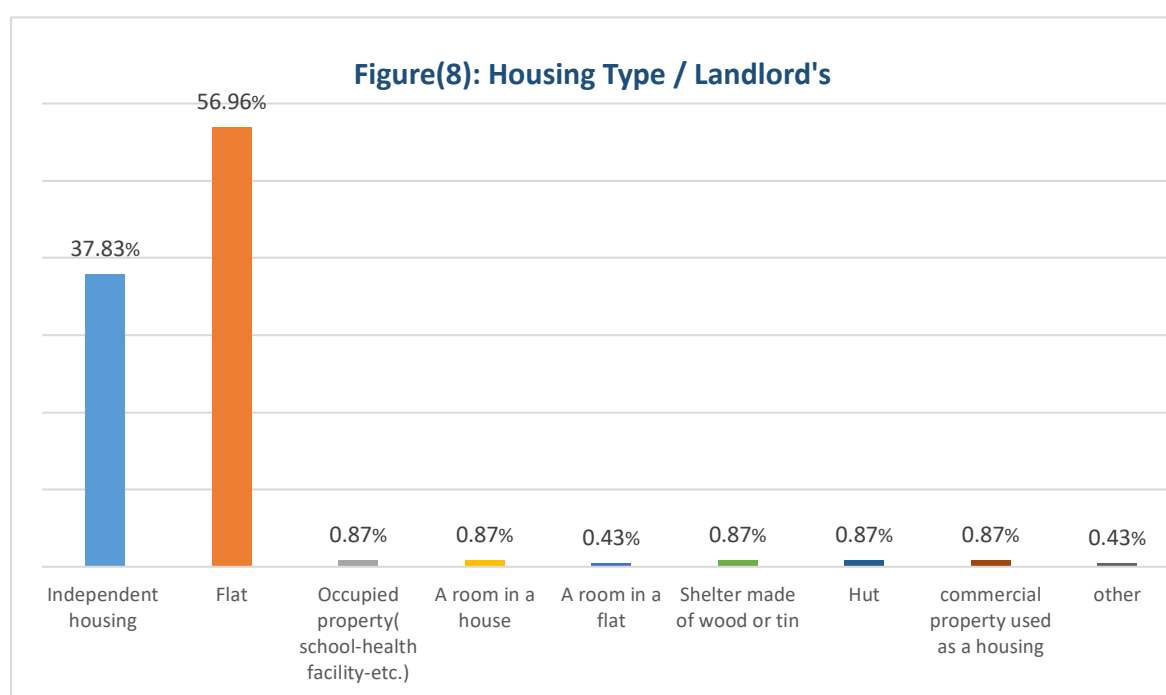
2 Details of the Rented Housing

2.1 Type of Housing (Tenants / Landlords)

Figure (7) shows types of housings rented by tenants. 59.6% flats, 34.7% independent housing, 0.7% inhabited facilities (schools, Health centers), 1.3% an independent room in a shared housing, 0.9% a single room in a flat, 0.2% live in tents, 1.7% live in huts, and 0.9% use converted commercial properties for housing.

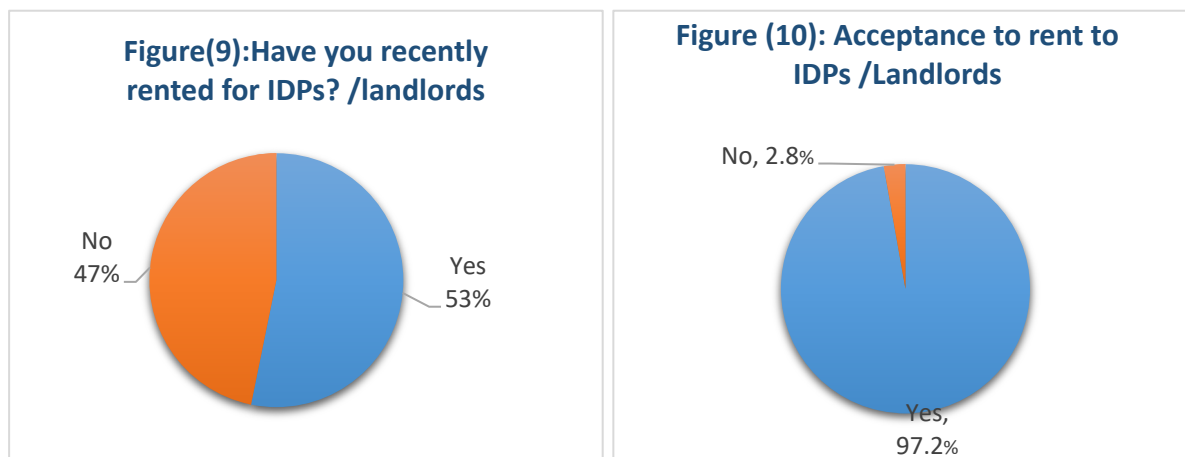


In the same context, the landlords' analysis indicated the following housing types: 56.96% flats, 37.83% independent housing, the rest of the percentage as shown in Figure (8), was distributed among occupied properties (schools, health facilities etc.), an independent room in a shared housing, tin/wood shelters, huts, converted commercial properties used as housing, a room in a flat, and 0.43% was categorized as other (abandoned housings).

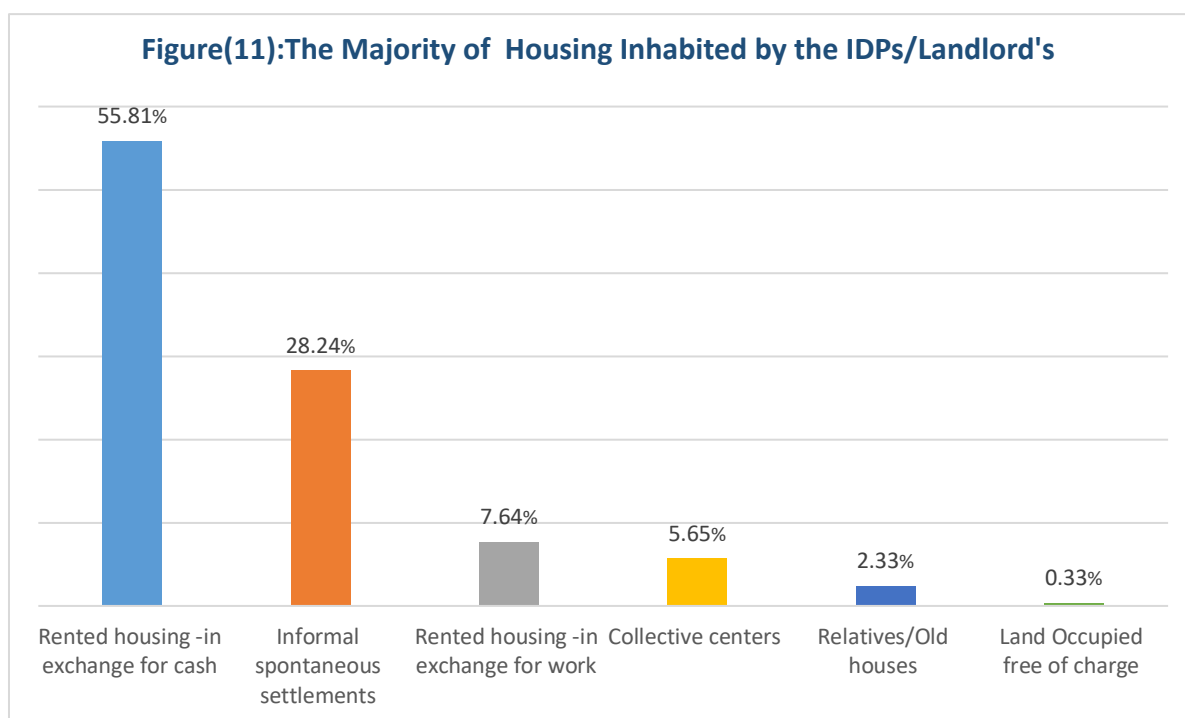


2.2 Rent for IDPs

The results of the landlords' analysis (Figure.9) show that 53% of landlords have already rented housing for IDPs, whereas 47% of landlords have not. The analysis of the landlords' data shows that 97.2% do not have a problem renting their housing to IDPs, while 2.8% of landlords do not accept to rent to IDPs (Figure.10). The high percentage of landlords who already rented to IDPs and those who confirmed their willingness to rent to IDPs indicates that there are no restrictions on renting to IDPs or any kind of discrimination against IDPs in this Governorate. However, the reason why some landlords did not accept to rent to IDPs might be due to IDPs' inability to pay rent regularly. In fact, participants in FGDs and KIIs indicated that in many cases, the host community allowed IDPs to settle down in their private lands rent free, which confirms the fact that the local community supports IDPs.

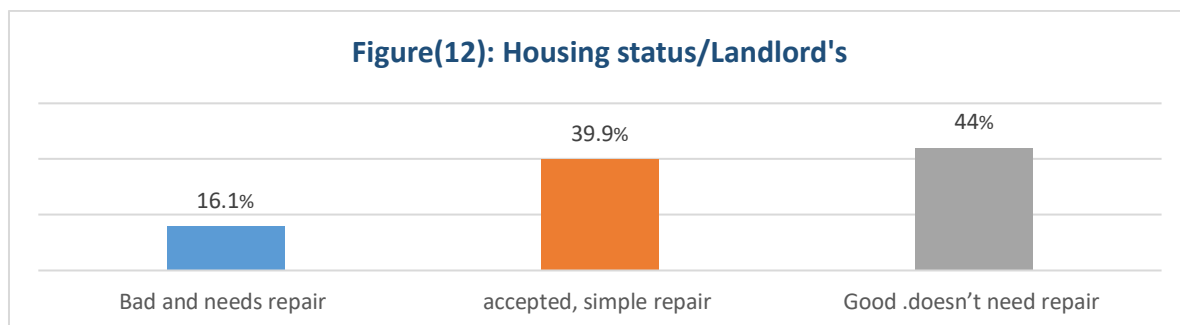


In the same context, the landlords' analysis results show that the majority of housing inhabited by IDPs are: 55.81% housing in exchange for cash, 28.24% informal spontaneous settlements, 7.64% housings in exchange for labor (working for landlords), 5.65 collective center (schools, health facilities), 2.33% live with relatives or in old housing, and 0.33% live in land rent free Figure (11).



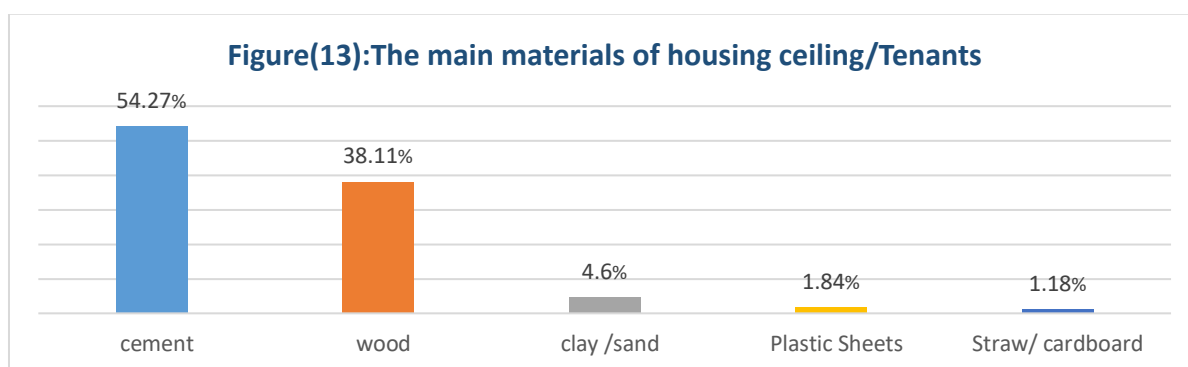
2.3 State of Housing

The landlords' sample analysis indicates that 39.9% of housing managed by landlords were in acceptable conditions and only needed minor repairs, 44% were in good conditions and did not require any maintenance, and 16.1% were in bad conditions and need repairs and maintenance, (Figure 12).



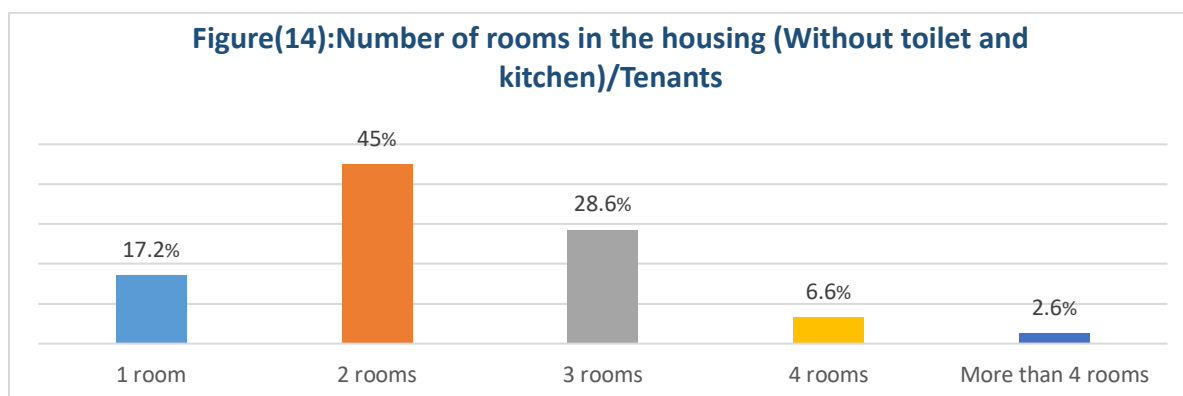
2.4 Materials used for Ceilings of Housing

Figure (13) shows that the materials used for the ceilings of the rented housing: 53.88% cement, 38.11% wood, 4.6% clay/sand, 1.84% plastic sheets, and 1.18% straw.

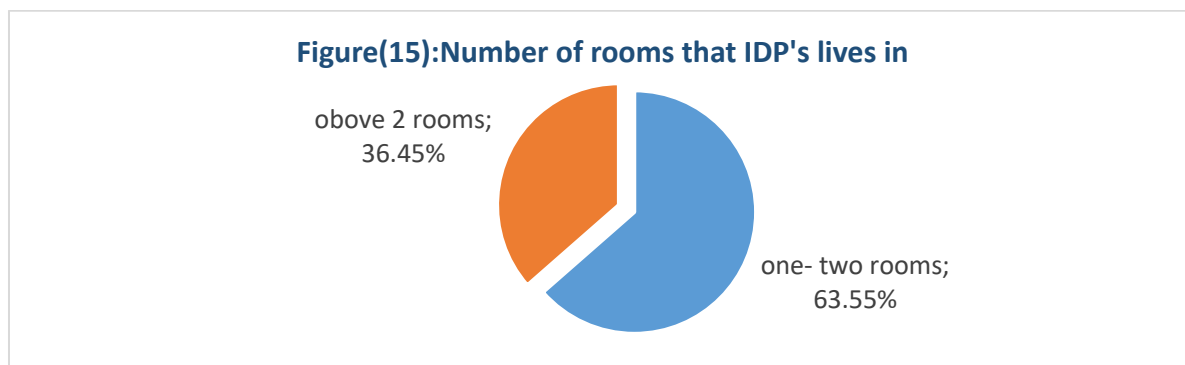


2.5 Number of Housing Rooms

The results of the analysis (Figure 14) indicate that 45% of tenants live in rented housing that consist of two rooms, 28.6% consist of three rooms, 17.2% consist of one room, 6.6% consist of four rooms, and 2.6% consist of more than four rooms. These results indicate that the majority of tenants live in housing that have two to three rooms. The crowding index in Ibb Governorate shows that every two individuals share a room according to the number of household members (3502) divided by the total number of rooms (1260) excluding kitchen and toilet, Table (1).

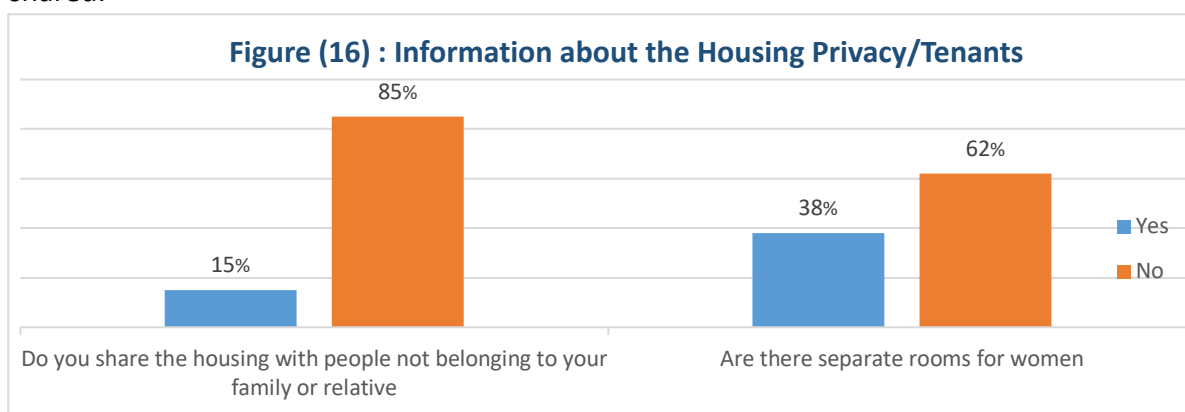


As previously mentioned, 55% of the tenants' sample in Ibb Governorate are IDP's, Figure (5), the study shows that 63.55% of them live in one to two rooms.



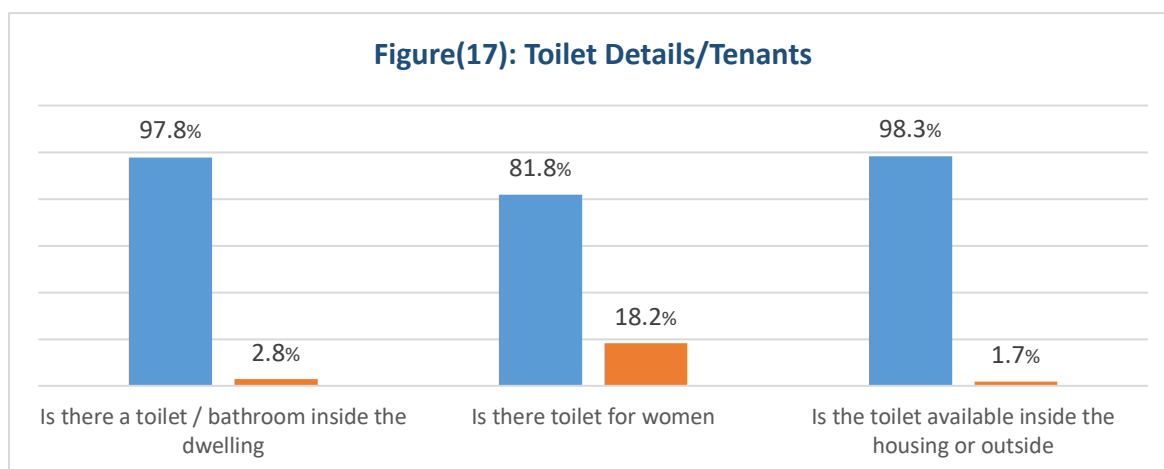
2.6 Privacy of the Housing

Figure (16) shows that 38% of housing rented by tenants have separate rooms for women, whereas 62% do not have separate rooms for women. The study also revealed that 85% of rented housing were not shared by any members from outside of the family, while 15% were shared.



2.7 Availability of Toilets in the Housing

The results of the tenants' sample analysis show that 97.8% of housing have a toilet, whereas 2.8% do not have a toilet. The study also showed that 98.3% of housing have toilets inside the housing, and 1.7% have toilets outside of the housing. As for the availability of separate toilets for women, 81.8% of rented housing did not have separate toilets for women (Figure 17).



The study shows that 95.6% of tenants did not share the toilet with other families, whereas 4.4% shared the toilet with other families. Figure (18) illustrates the number of families that shared a toilet. 44.44% of families shared a toilet with three other families, 33.33% with two other families, 18.52% with more than three families, and 3.7% shared the toilet with one other family.

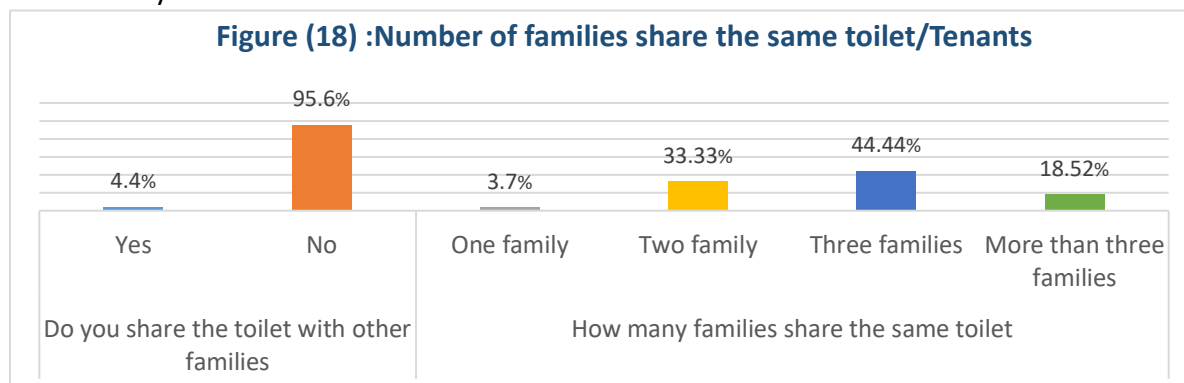
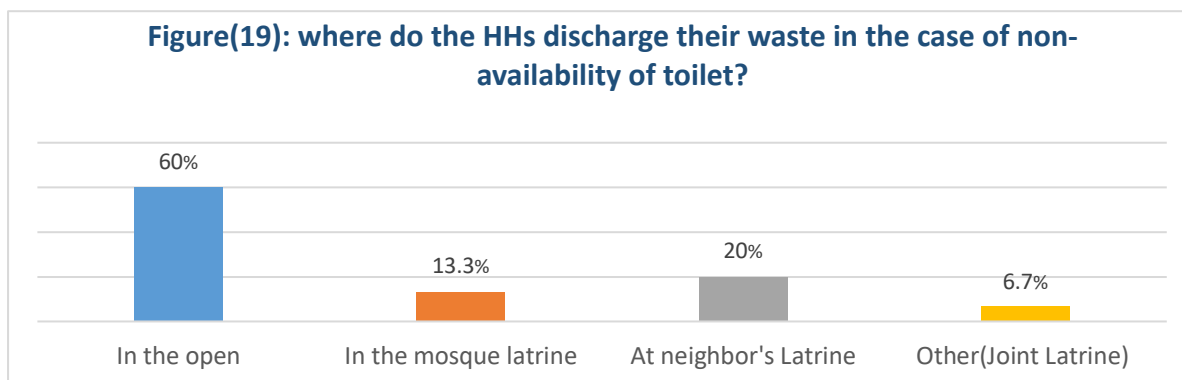
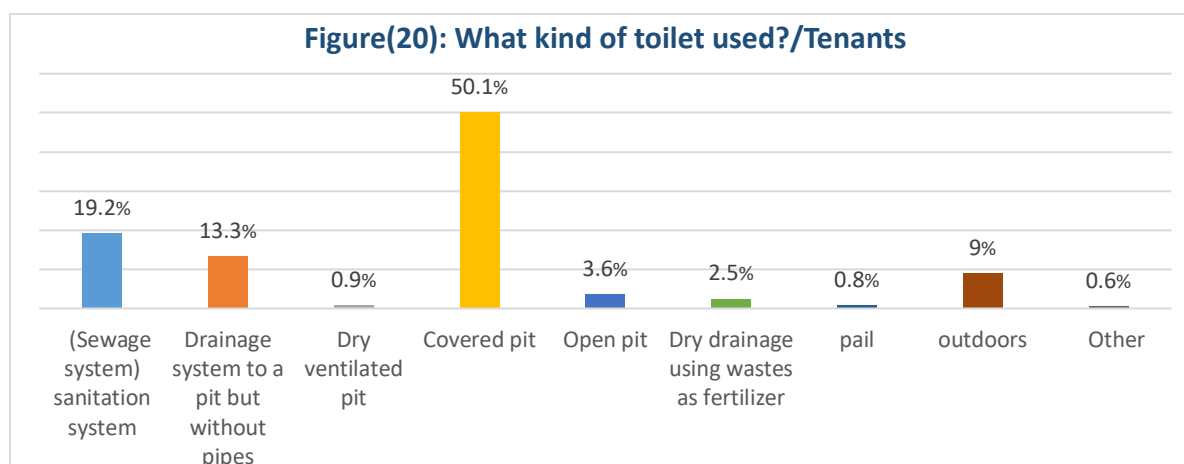


Figure (19) shows the alternatives in case of unavailability of toilets. 60% of tenants who do not have access to a toilet use the outdoor area, 20% use a neighbor's toilet, 13.3% use the mosque's toilet, and 6.7% use other (shared toilets).



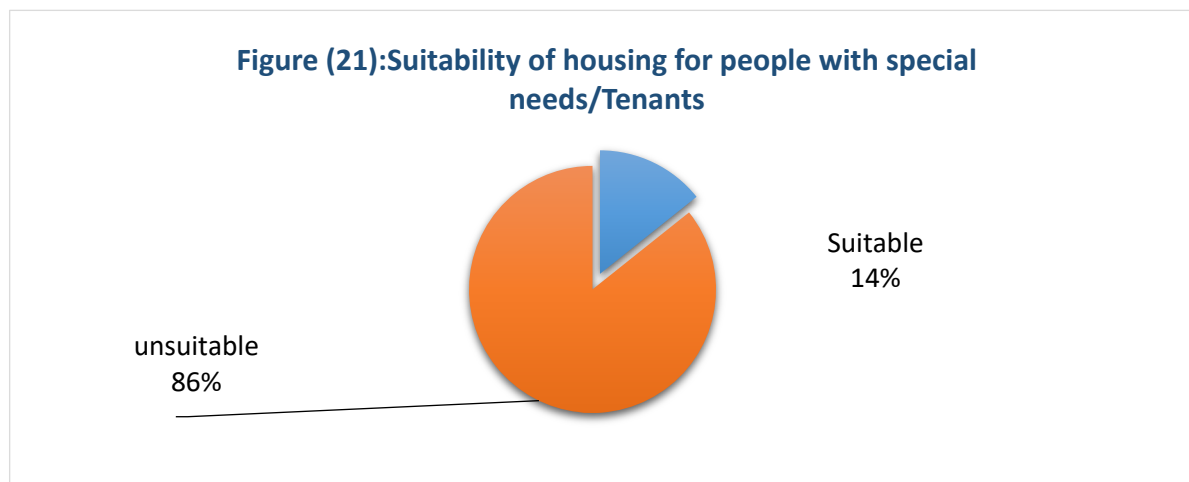
2.8 Type of Sanitation System

The results of the tenants' sample analysis show that 50.1% of tenants' housing use covered cesspit, 19.2% the proper sanitation system, 13.3% a drainage system to a cesspit but without pipes, 3.6% an open pit, 2.5% a dry drainage utilizing waste as fertilizer, 9% the outdoors, 0.9% dry ventilated pits, 0.8% pails, and 0.6% was categorized as other (Figure 20). These results indicate that the types of sanitation systems used in areas where tenants live in this Governorate are unsanitary for both the people and the environment.



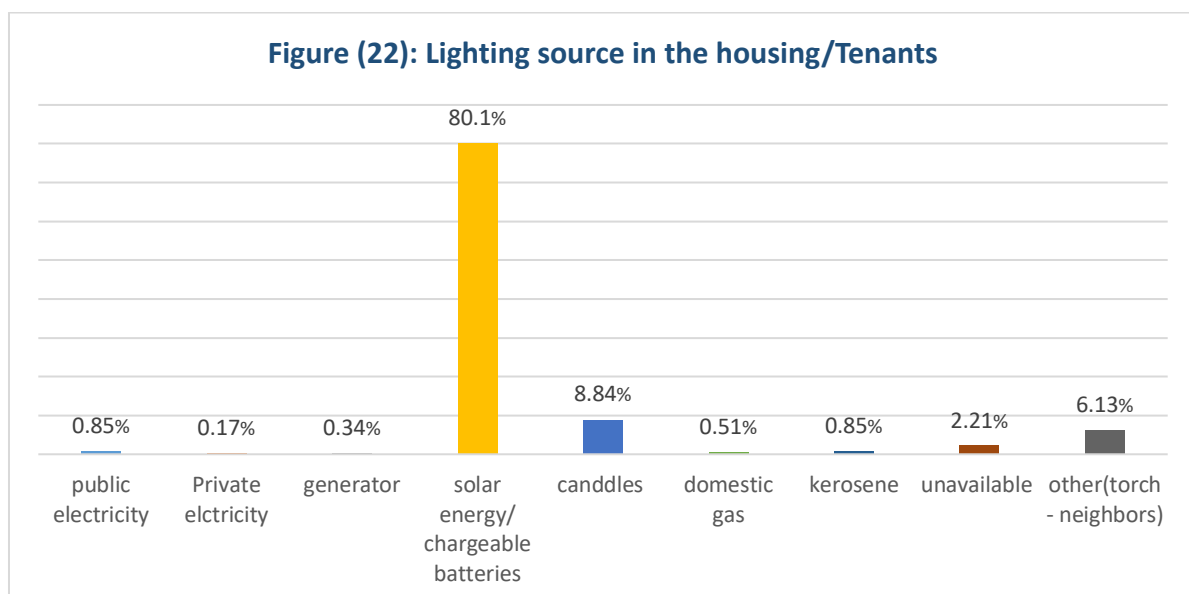
2.9 Suitability of Housing for People with Special Needs

The results of the tenants' analysis indicate that 86% of housing are not suitable for family members with special needs, and 14% are adequate and suitable Figure (21). However, it is common not only in this area but all over the country that there is a lack of proper accommodations and a general disregard towards the basic requirements and special facilities necessary for individuals with special needs.



2.10 Source of Lighting

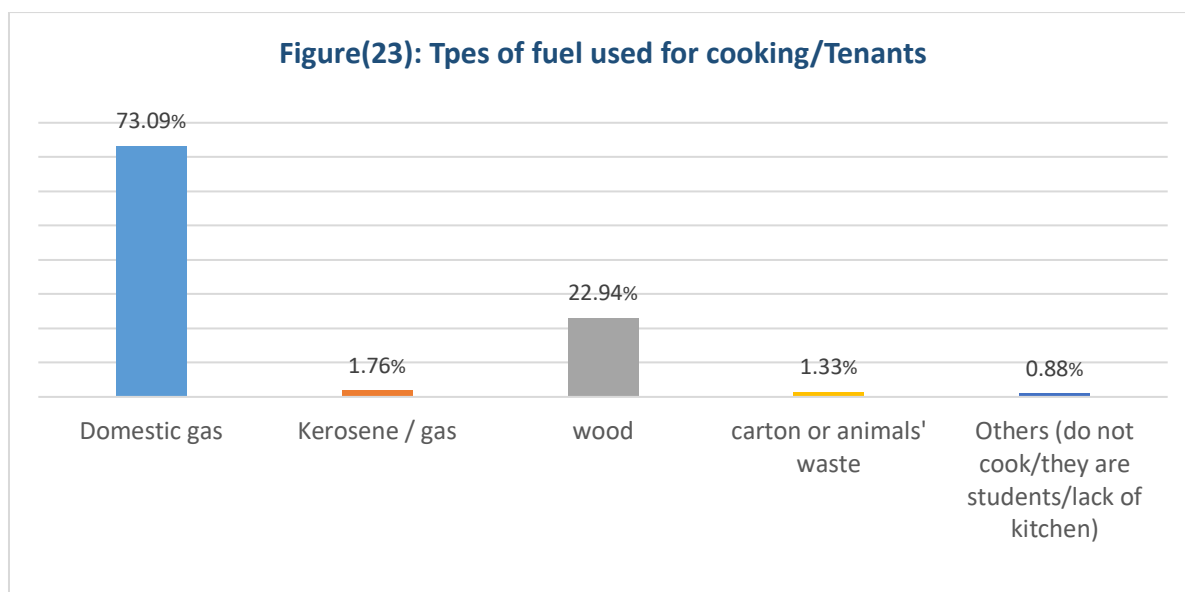
Figure (22) illustrates the results of the tenants' analysis which shows that the sources of lighting in the rented housing are as follows: 80.1% solar energy and rechargeable batteries, 8.84% candles, 0.85% public electricity, 0.17% private sector electricity, 0.34% generators, 0.51% domestic gas, 0.85% kerosene, 2.21% unavailability source of lighting, and 6.13% was categorized as other (torch / from neighbors). These results show that solar energy and rechargeable batteries (80.1%) are the primary source of lighting in this Governorate.



2.11 Type of Fuel used for Cooking

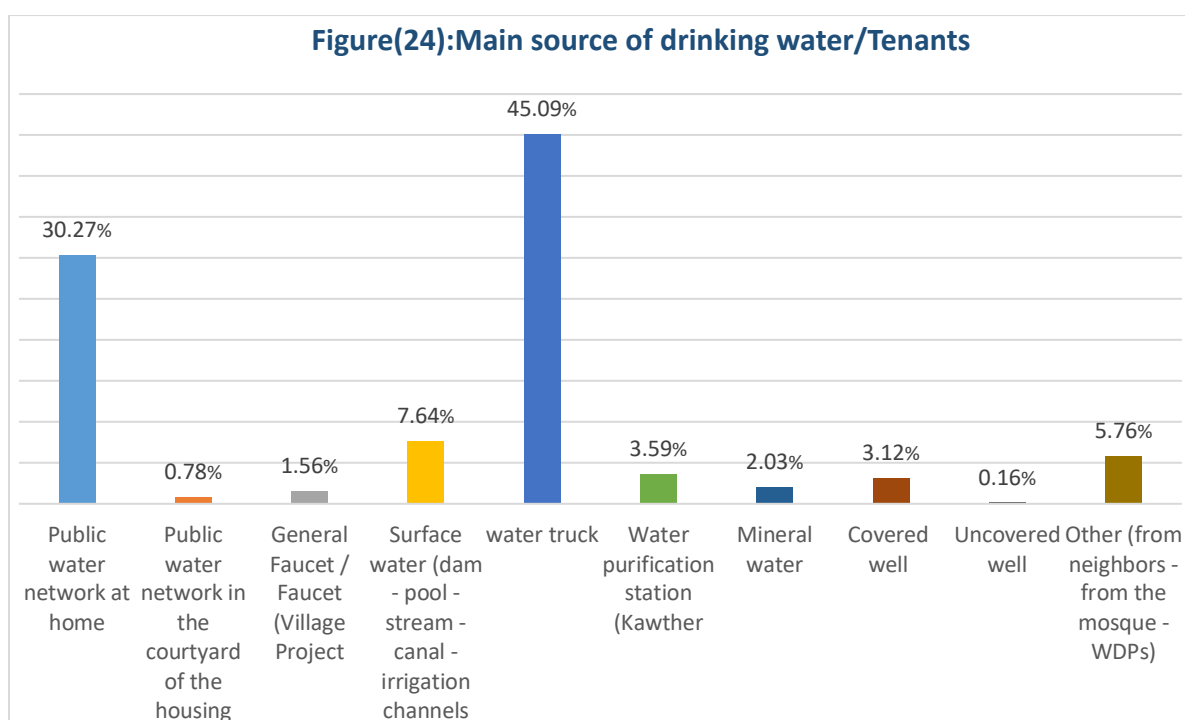
In the context of the geographical sample of Ibb Governorate, the analysis of this study showed that the types of fuel used by the tenants' households for cooking purposes are: 73.09% domestic cooking gas, 22.94% wood, 1.33% cartons and animal waste, 1.76%

kerosene, and 0.88% other (unavailability of a kitchen in the residence / students that do not cook). These results reflect the difficult circumstances faced by some of the tenants, especially IDPs who cannot afford the price of cooking gas and are forced to use firewood and other harmful sources of fuel. These alternative fuel reflect negatively on the tenants' health and constitute an additional burden on the family in obtaining it (Figure 23).



2.12 Source of Drinking Water

Figure (24) shows tenants' main sources of drinking water, which are as follows: 45.09% water trucks, 30.27% the public water system, 7.64% surface water (dams, ponds and streams), 3.59% water purification stations, 2.03% mineral water, 3.12% covered wells, 0.16% uncovered wells, 1.56% public faucet project, and 5.76% was categorized as other. These statistics reflect the difficulty which many tenants face in obtaining clean drinking water.



3 Accessing Housing

3.1 Transfer from Area of Origin (Geographical Area):

Figure (25) shows that 56% of tenants in this study have moved either within the Governorate of Ibb itself, or were displaced from other Governorates. 44% of the tenants' sample are local residence of the area.

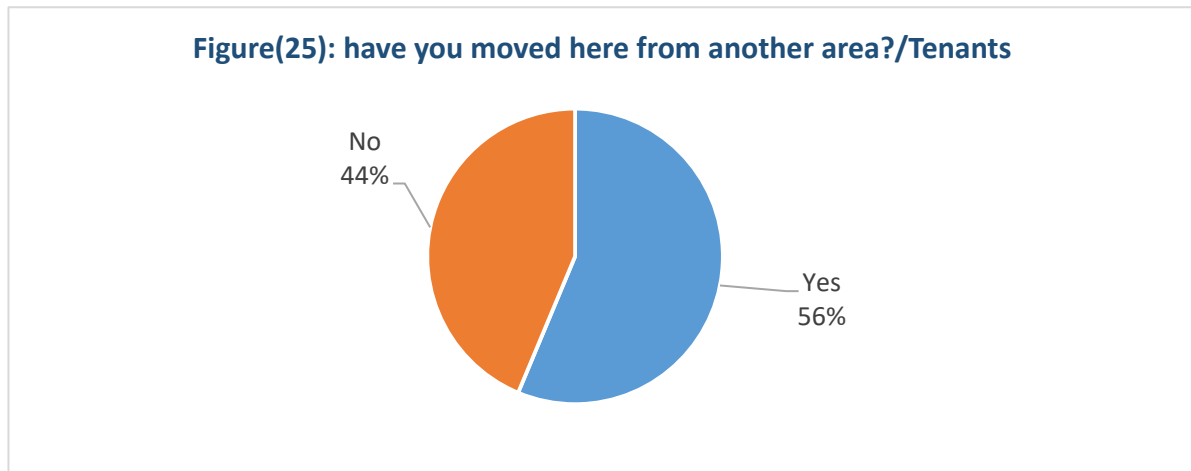
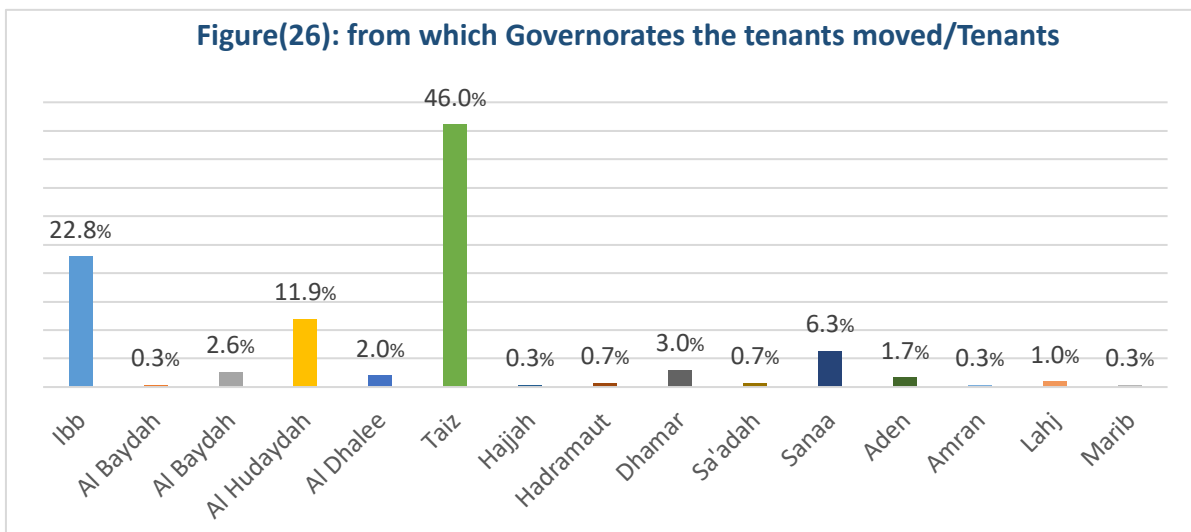


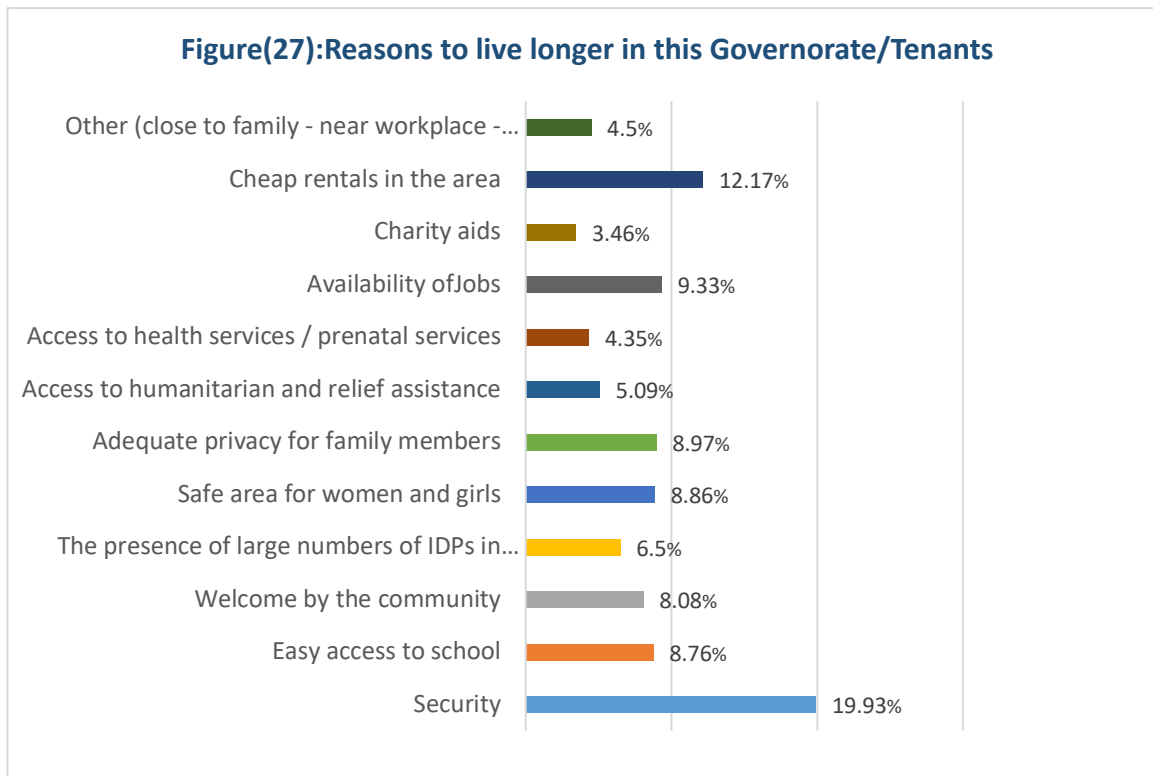
Figure (26) shows that the majority of tenants who moved to Ibb Governorate are from: 46.0% Taiz Governorate, 22.8% districts of Ibb, 11.9% Al-Hudaydah, 6.3% Sana'a, 3% Dhamar, 1.7% Aden, 2.6% Al-Bayda, 2% Al-Dhalee, 1% Lahj, 0.3% Hajjah, 0.7% Hadhrmut, 0.7% Sa'adah, 0.3% Amran, and 0.3% Marib.



The results of the analysis of the FGDs and KII confirm that the arrival of IDPs to this area has increased after the recent conflicts in the Governorate of Al-Hudaydah. The analysis shows that 56% of tenants transferred from other areas, whereas 44% were original residents of the area. The results show that the war/loss of jobs is what led IDPs to move to this Governorate.

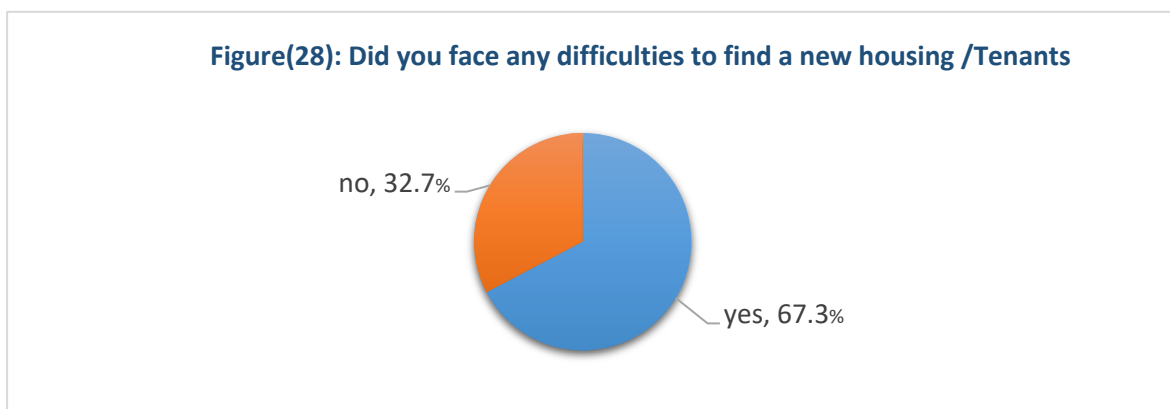
3.2 Choosing the Governorate for Residence

The results of the tenants' qualitative analysis of the data (Figure 27) indicate that there are a number of reasons for choosing this Governorate for housing, especially by the IDPs. The reasons were: 19.93% security, 12.17% cheap and affordable rented housing, 8.76% ease of access to schools, 8.08% being welcomed by the local community, and the remaining percentage is shown in Figure (27). These results reflect that cheap rents and safety were a priority for the tenants.



3.3 Difficulties in Obtaining Housing and Stability

Figure (28) shows that 67.3% of the tenants' sample faced difficulties in finding rented housing and 32.7% did not face any difficulties.



The difficulties faced by the tenants in finding rented housing are as follows: high rent rate 26.84%, inability to pay rent 15.4%, the influx of large numbers of IDPs which increased the demand for rented housing 31.27%, lack of adequate housing 10.92%, the poor financial status of the tenants 30.34%, landlords not renting for males without families 2.6%, because

the head of the family is a child 1.77%, because the head of the family is a woman 0.88%, and not being welcomed by the local community 0.59%, Figure (29). These results reflect that the difficulties and challenges facing the stability in the area are mainly the lack of rental housing, high rent rates, and inability of poor tenants to pay rent.

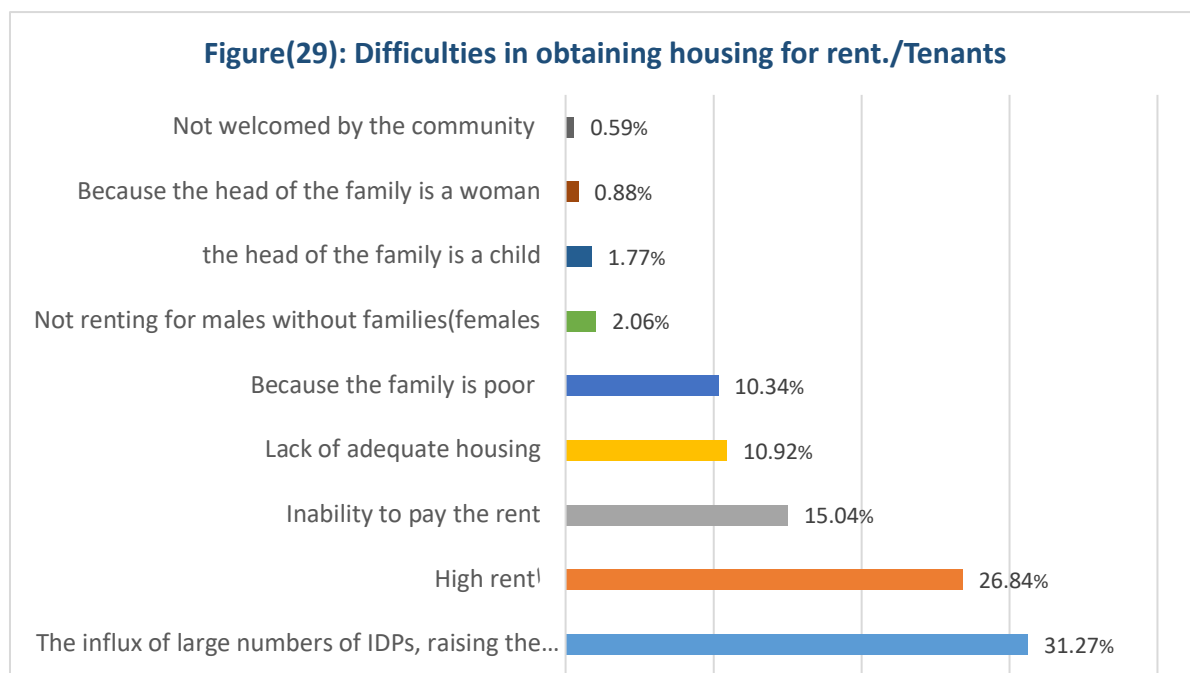


Figure (30) illustrates landlords' main challenges in the rental market. These difficulties are as follows: 16.61% high rate of nonpayment, 12.58% excess supply of housing (unleased property), 23.55% high demand for housing, 10.01% tenants overcrowding the property, 09.65% the demand of housing exceeds the availability of housing for rent (demand vs supply of rented housing), 5.49% inability to repair housing due to insufficient financial resources, the remaining challenges are shown in figure (30).

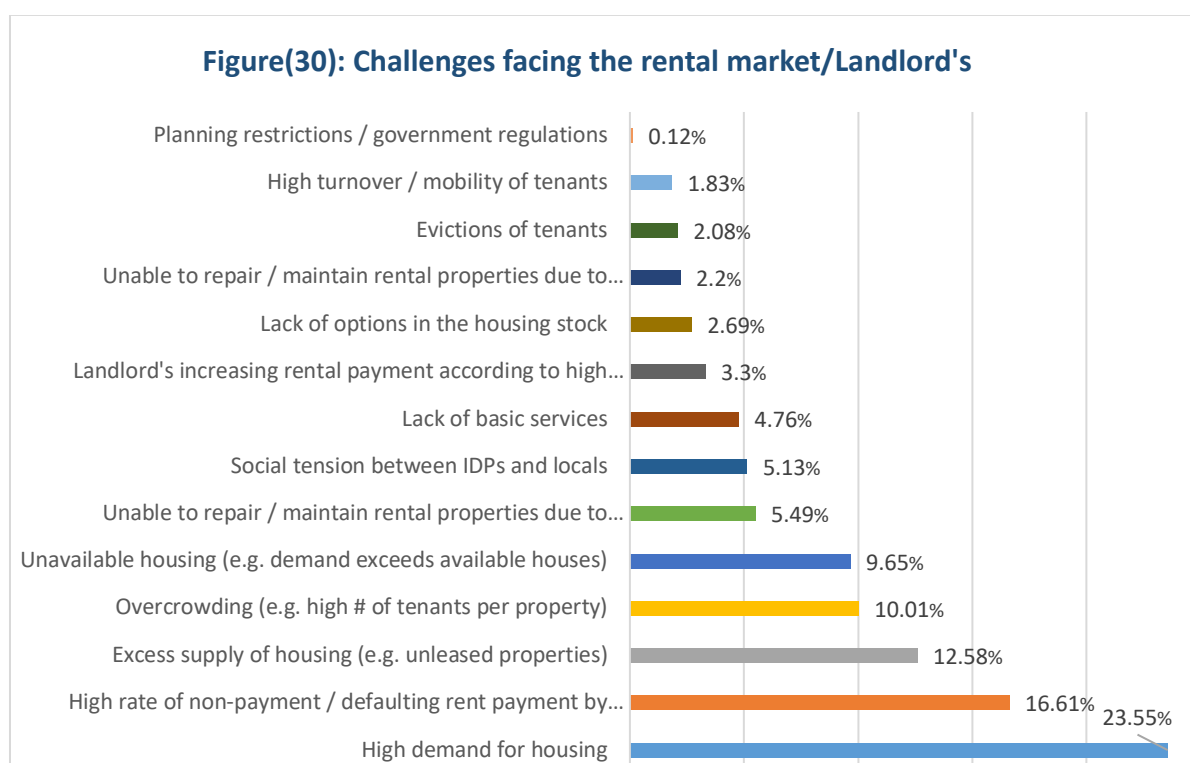


Figure (31) illustrates the average period of time it takes tenants to find a rented housing. 37.8% was one month, 24.4% was from one week to two weeks, 19.7% was less than a week, and 18.1% was more than a month.

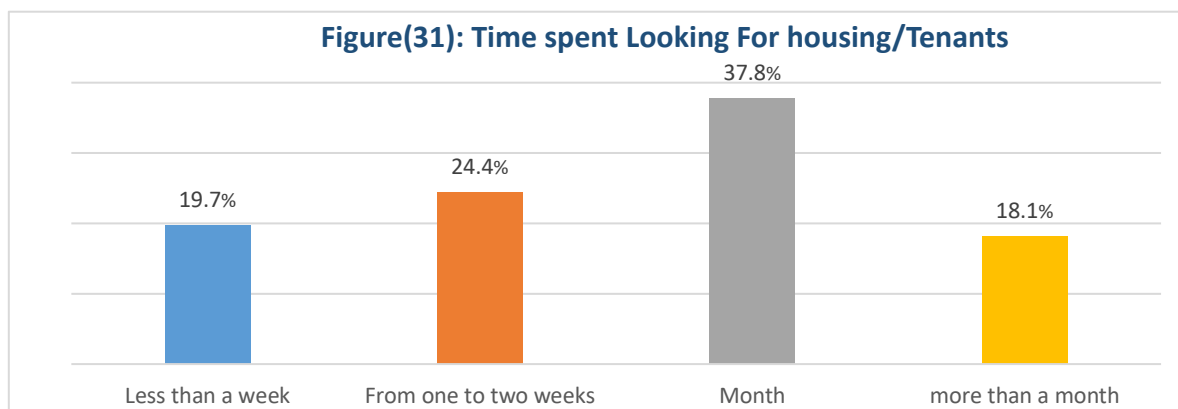
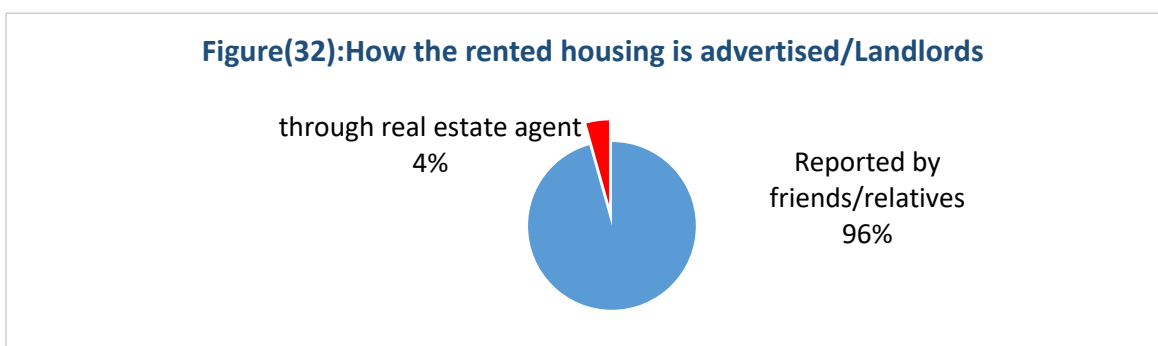
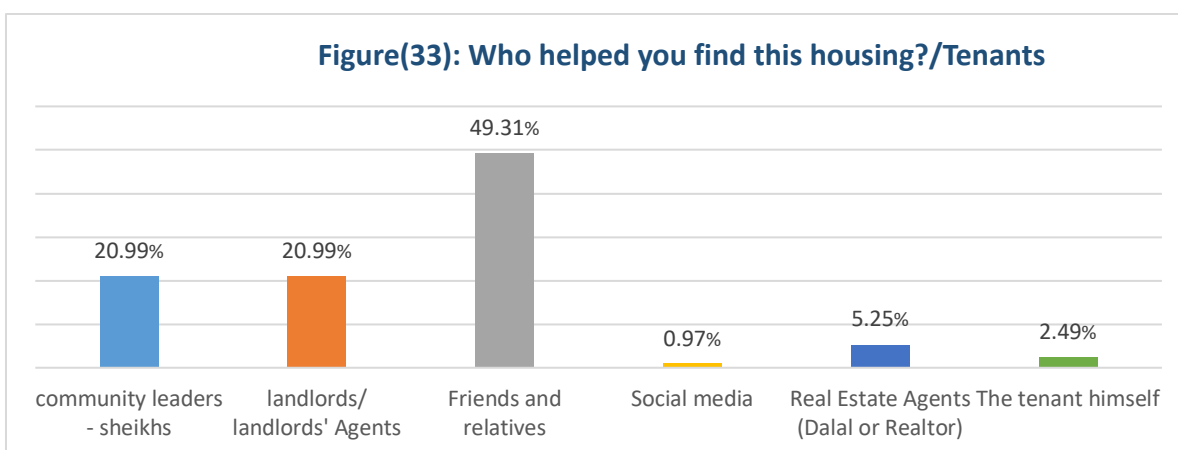


Figure (32) shows how rented housing are being advertised. According to the landlords' sample analysis, 96% of vacant housing were advertised through friends or relatives, and 4% were advertised through real estate offices or realtors. These results reflect the weak role of real estate offices in the Governorate.



3.4 Key Actors in the Renting Market and Housing Access

In the same context, figure (33) shows how tenants found rented housings. 49.31% through friends and relatives, 20.99% through community leaders/Sheikhs, 20.99% through landlord's/landlords' agents, 5.25% through real estate agents/brokers/realtors, 0.97% through social media, and 2.49% of tenants found the housing themselves. These result show the minor role played by real estate offices and how tenants rely mostly on friends and family in order to find adequate housing.



3.5 Stability in the Housing

Figure (34) shows that 70% of tenants decided to settle in their current rented housing for the next 12 months, 24% hesitated to answer because of their inability to make any decision (due to the unpredictable economic situation and the possibility of returning to their home towns) ,6% were unwilling to continue to live in the area because of difficulties in accessing basic services, lack of safety in the area, lack of jobs, and high costs of rents.

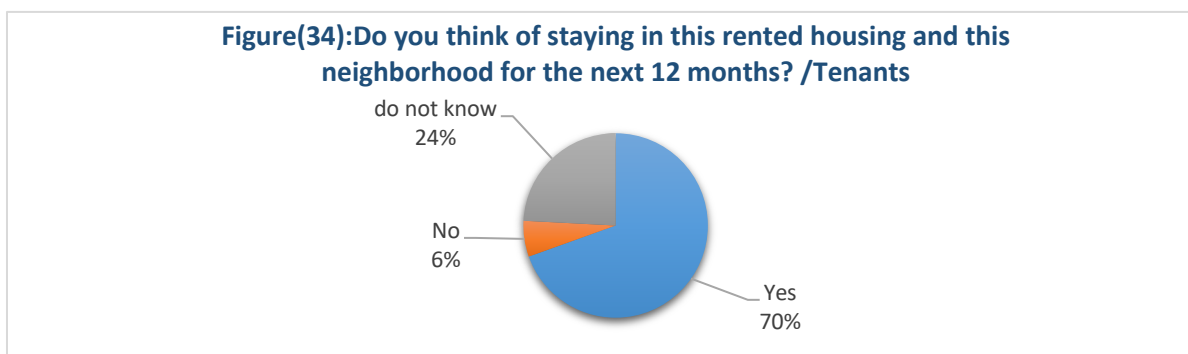
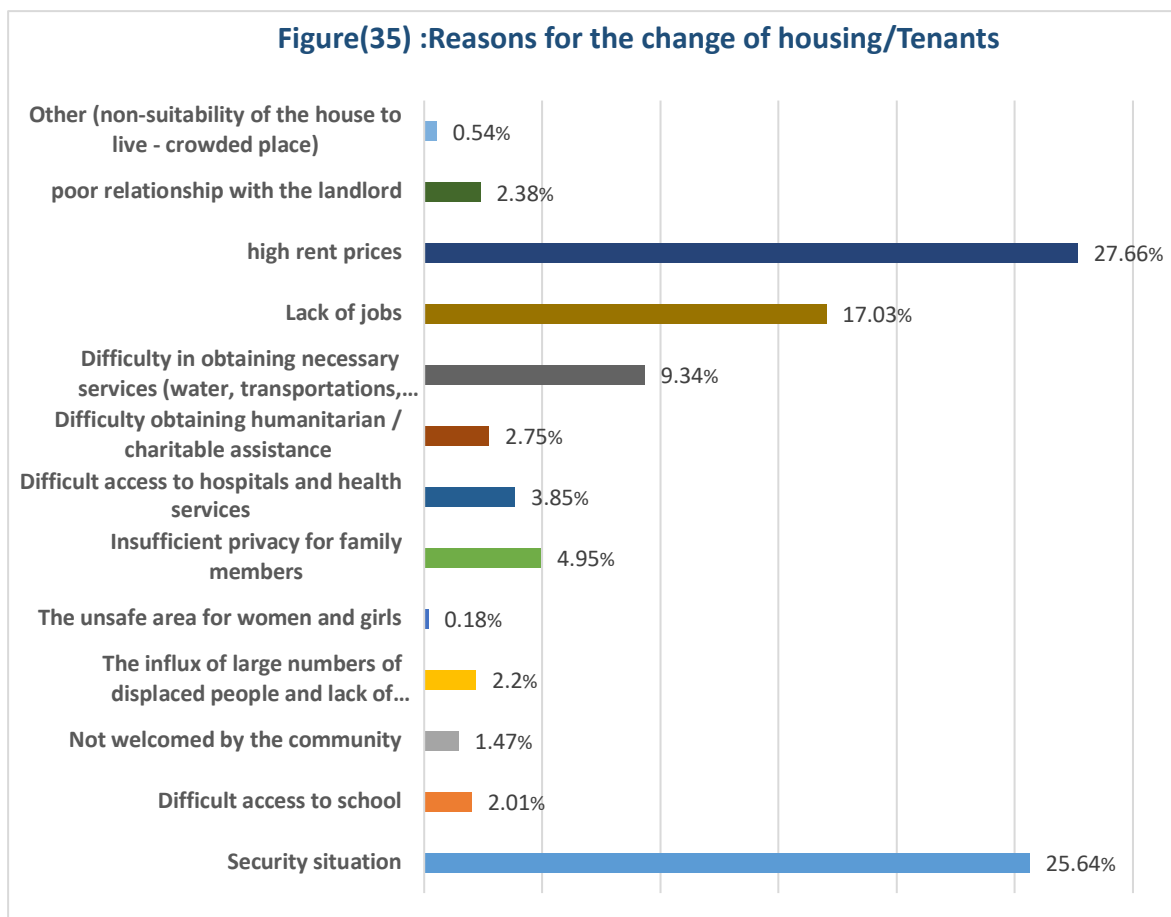


Figure (35) illustrates an additional number of reasons and difficulties such as lack of privacy for their families, obstacles in accessing schools and health facilities, poor relationships with landlords, and the large influx of IDPs.

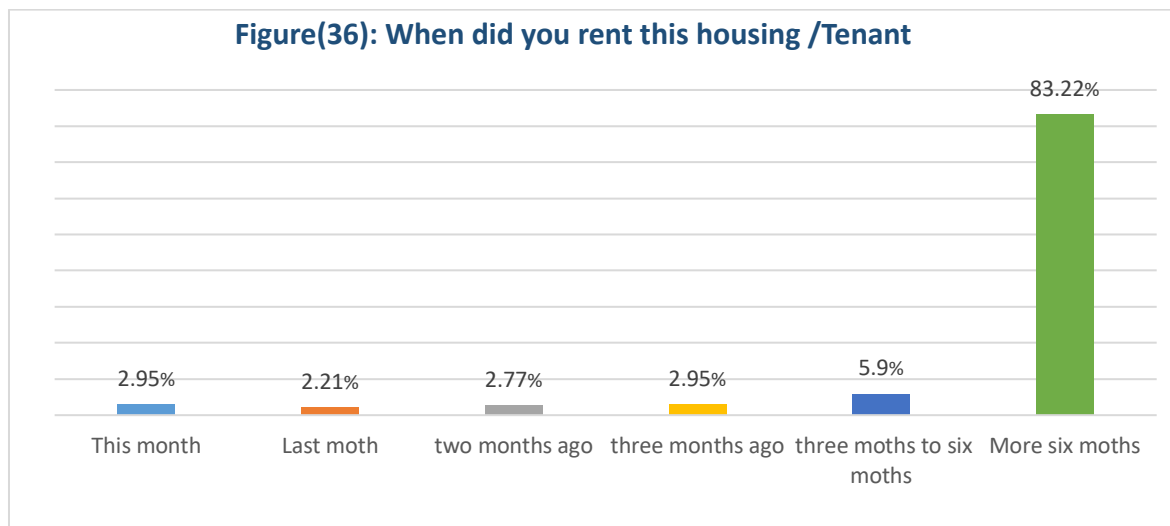
The results of the analysis of group discussions and key informant interviews of both genders confirm that the majority of IDPs have moved to this area due to safety, access to health facilities and schools, and ease of access to international aids and charity.



4 Rent and the Main Sectors of the Rental Market

4.1 The Rental Period of the Housing

Figure (36) shows that 83.22% of the tenants' sample have rented housing for more than six months ago, 5.9% three months to six months ago, 2.95% three months ago, 2.77% two months ago, 2.95% this month, and 2.21% rented housing last month. These percentages reflect the fact that the majority of tenants are former stable residents of the area.



The results of the analysis of the group discussions and key informant interviews of both genders confirm the data of the tenants' sample that most of the tenants started arriving to this area since 2013. The influx of IDPs continues due to the increase and spread of areas of conflict. Other IDPs came from the Governorate of Al Hudaydah during the year 2018. Their displacement was due to recent conflicts that reached Al-Hudaydah causing a humanitarian crisis.

4.2 Renting Agreements

The results of the analysis of the tenants' sample (Figure 37) indicate that 89.1% of the tenants have rental agreements with verbal contracts, 8.9% are legal written agreements, 1.1% are informal written agreements, and 0.9% other (rent free housing). These results reflect that most of the rental agreements in the Governorate of Ibb are verbal agreements, which shows that the rental market in the Governorate is not governed by formal contracts/agreements.

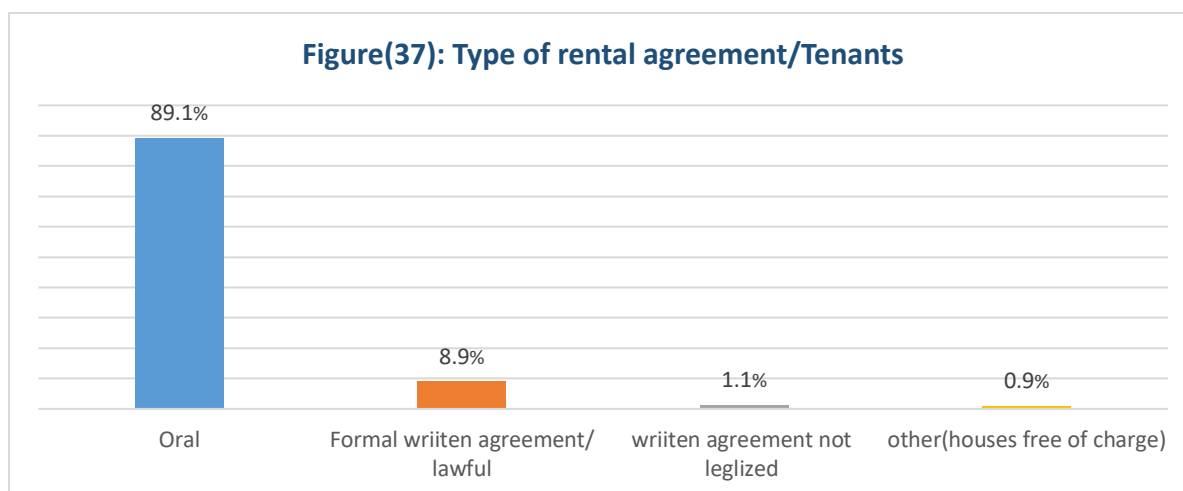
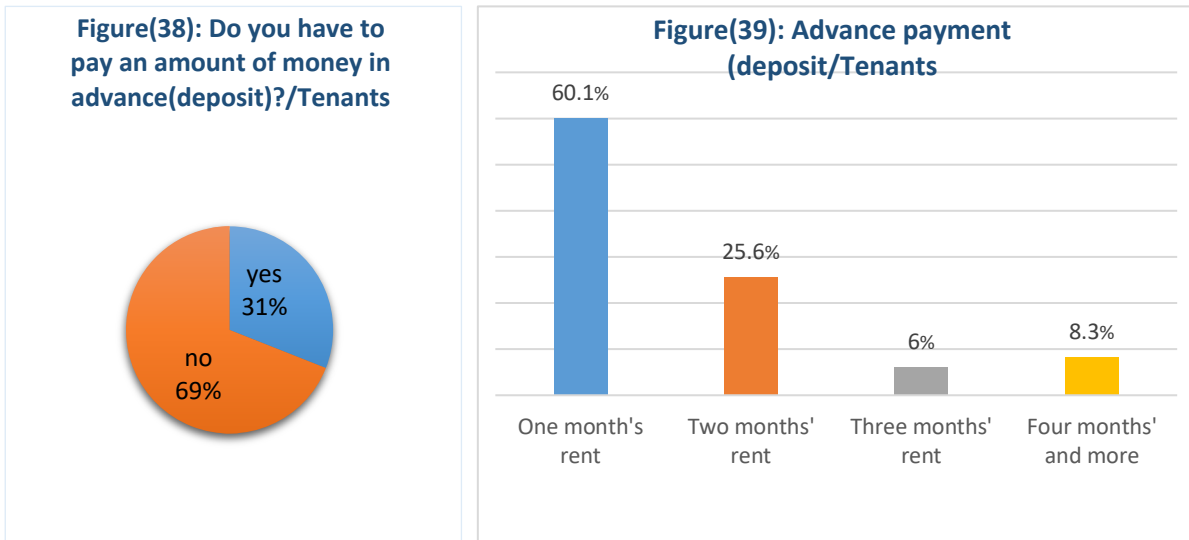


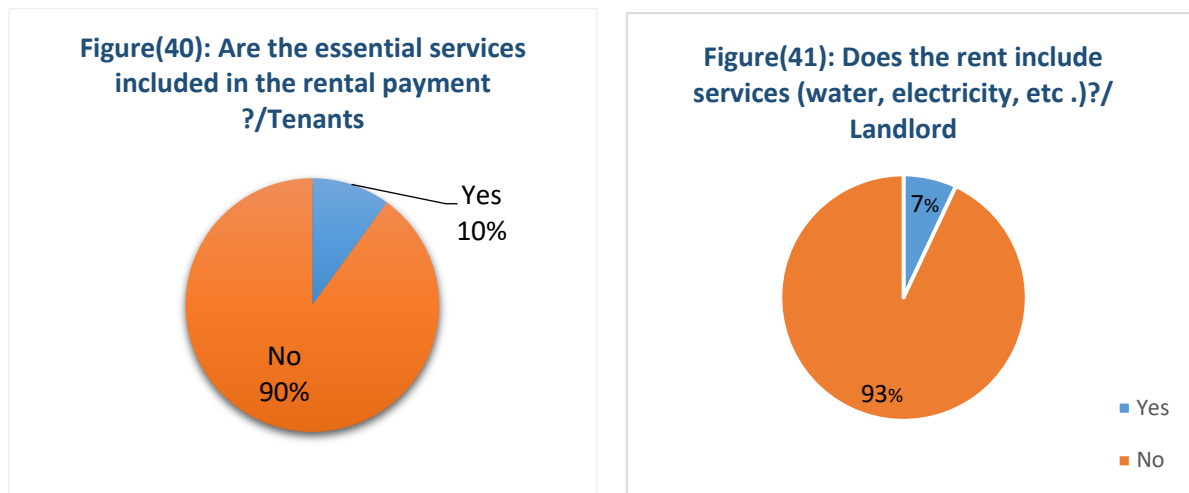
Figure (38) shows that 69% of tenants are not obligated to make an advance payment in the rental agreement, whereas 31% have to pay a certain amount of money in advance. The details of the advanced payment are as follows: 60.1% one month's rent, 25.6% two months' rent, 6% three months' rent, and 8.4% of landlords asked for four months and more as an advance payment (Figure. 39).



4.3 Services in the Governorate and value of the Rent

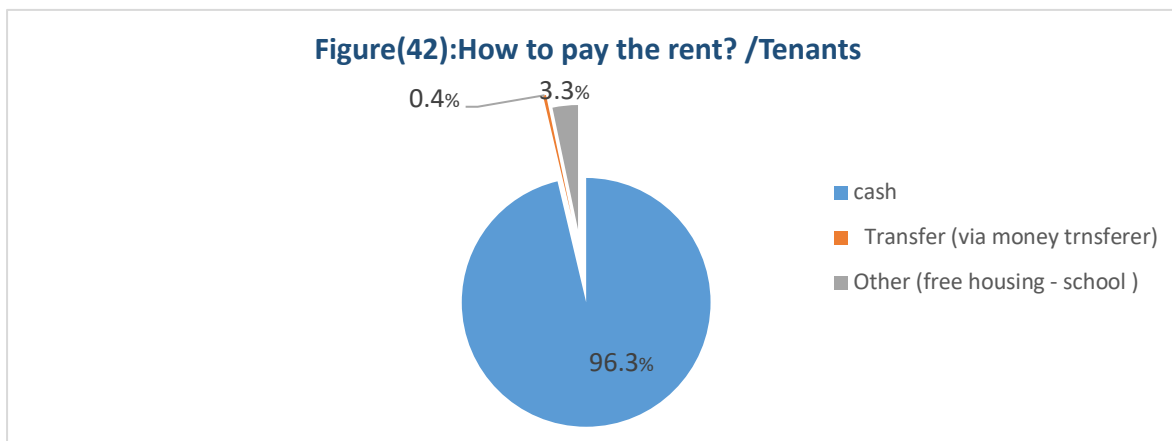
The results of the study (Figure. 40) also indicate that 90% of the tenants' sample said that the rental payment does not include any of the basic services such as water or electricity and that these services are considered separate services and have a separate cost, while 10% of the sample indicated that the rental amount covers the costs of basic services.

The results of the landlords' analysis show that 93% of landlords do not include any essential services such as water and electricity when renting housing to tenants, and 7% do include these services, but only to shared rented housing (Figure.41).



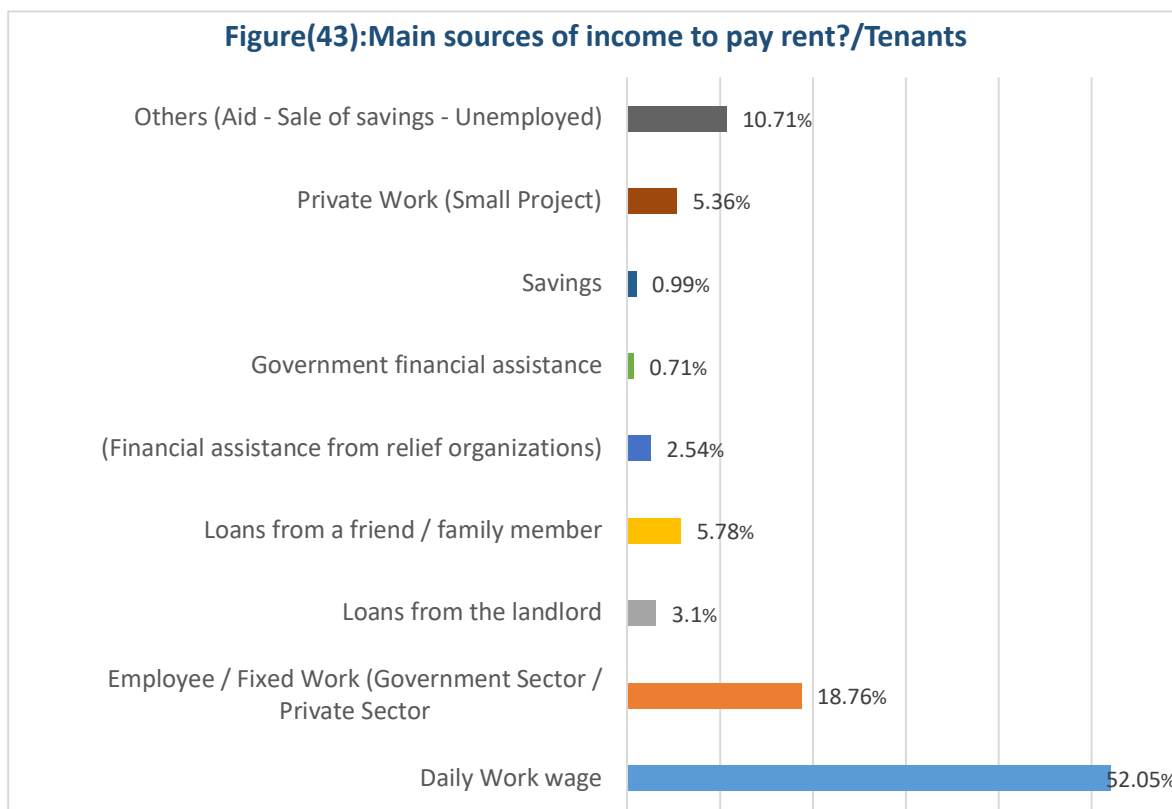
4.4 Rent Payment Methods

The results of the study (Figure 42) reveal that 96.3% of the tenants' sample pay rent in cash, 0.4% pay through money transfers, and 3.3% other (do not pay rent because they live in school facilities or free housing). The results of the landlord's sample study show that the main method of paying rent in Ibb Governorate is cash payment.



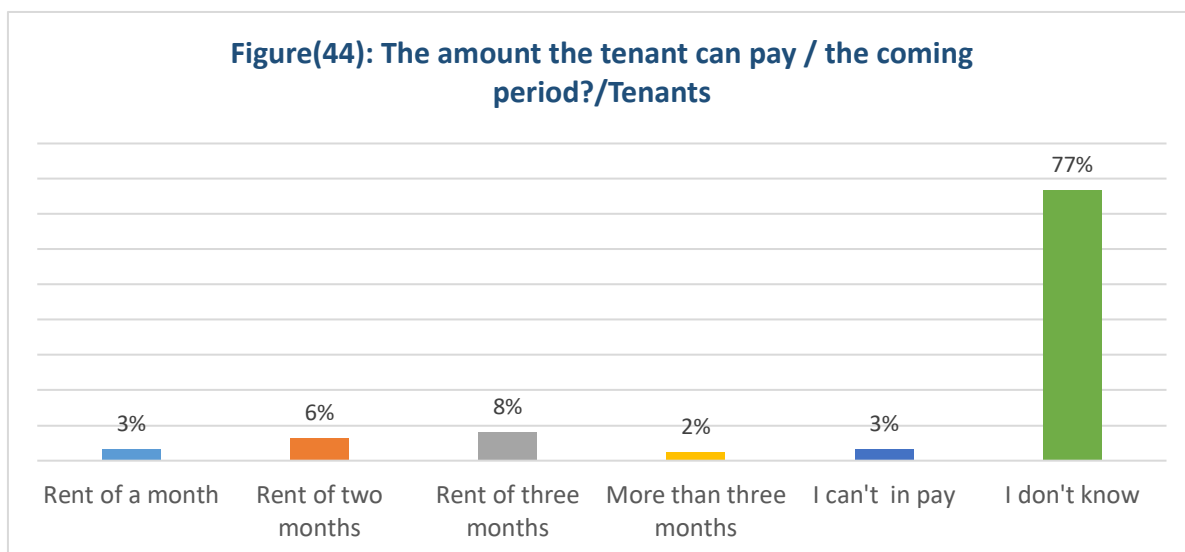
4.5 Source of Income to Pay the Rent

The study (Figure.43) shows that 52.05% of the tenants' sample depend on their daily working labor to pay rent, 18.76% have steady income (government employees or have fix employment), 10.71% depend on charity/aids or sell their own belongings, 5.78% loans from friends and relatives, 5.36% paid rent from the income of their own small projects, and the remaining sources of income are shown in Figure (43).



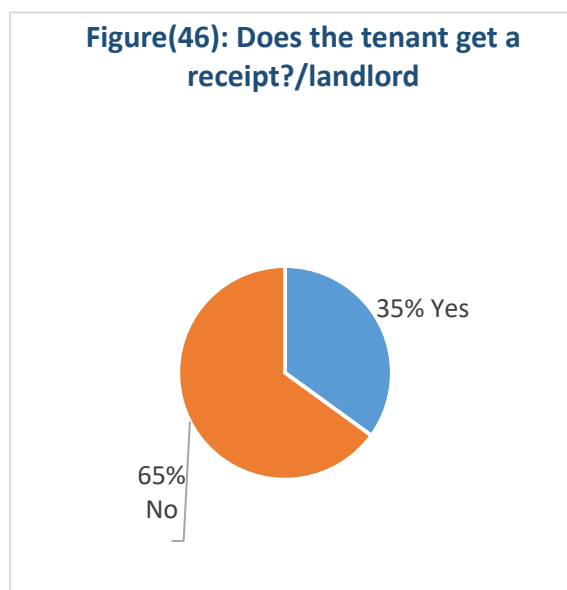
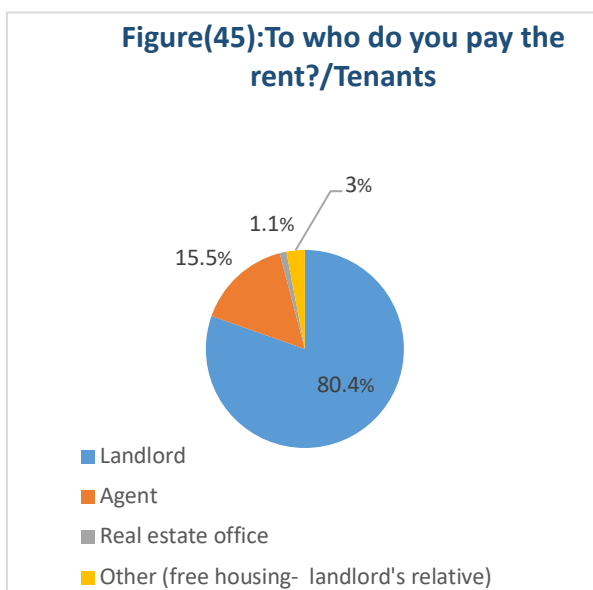
4.6 Paying the Rent

Figure (44) illustrates the amount of rent that the tenants are able to commit to paying in the coming months. 77% of the tenants' sample said they did not know, 8% can pay for three more months, 6% two more months, 3% one month, 2% more than three months, and 3% cannot pay rent.

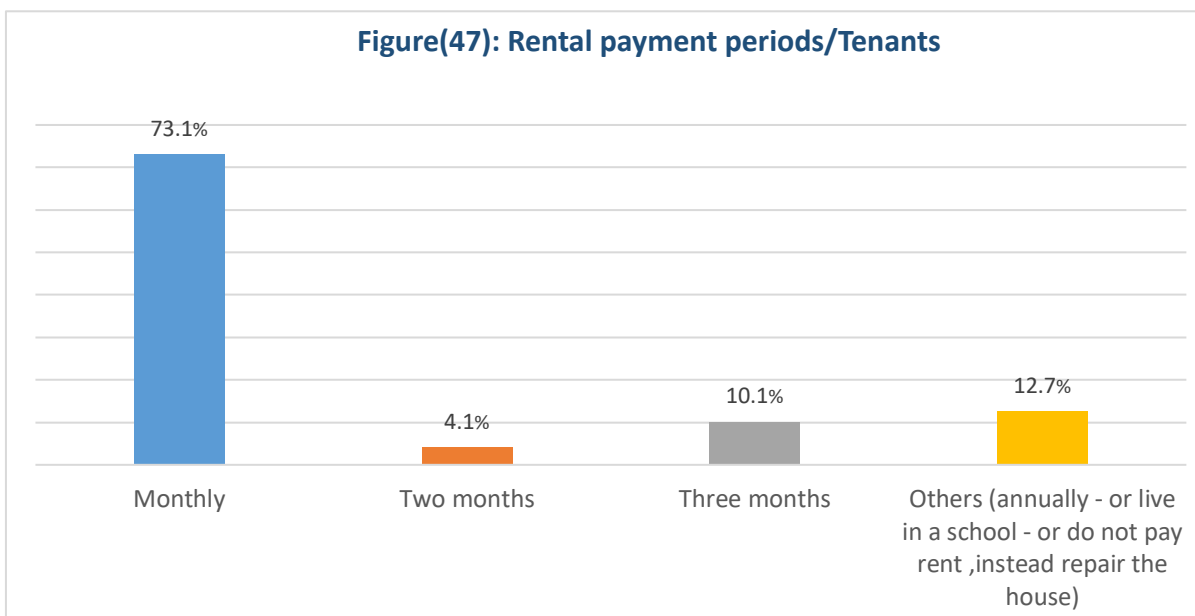


As for the methods of paying the rent, 80.4% of tenants hand the rent money directly to the landlords, 15.5% give the rent payment to the landlords' agents, 1.1% pay rent to real estate offices, and 3% of tenants do not pay rent (because they are either living with relatives or in free housing) Figure (45).

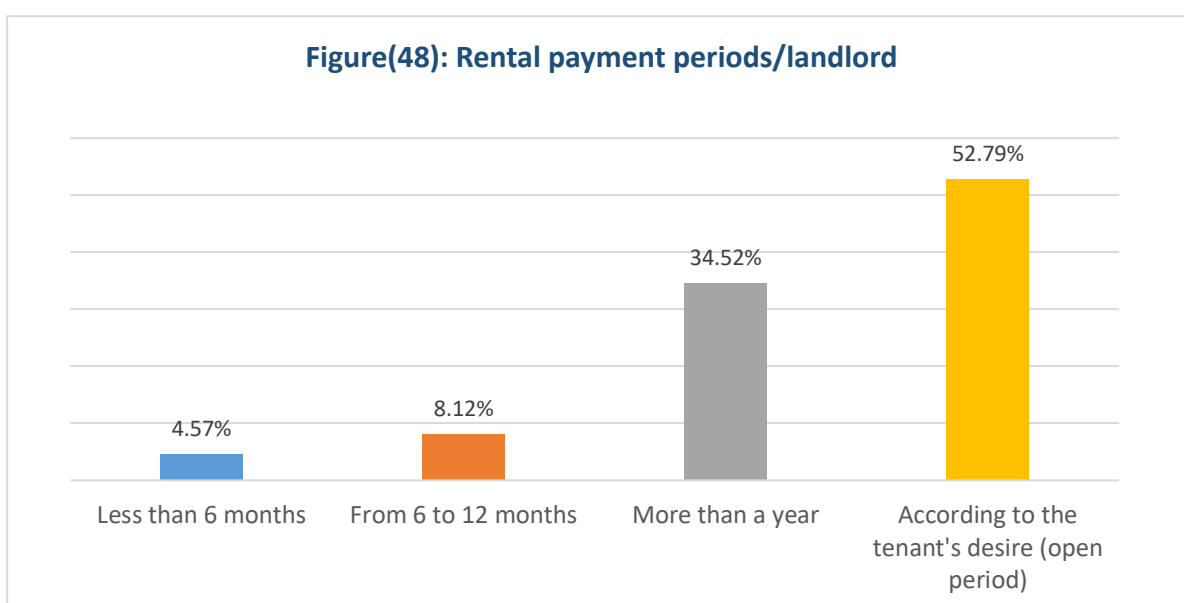
In regards to getting a receipt for rental payment from the landlords Figure (46), study shows that 35% of tenants get a receipt, whereas 65% of tenants do not get a receipt.



The results of the study also show that rental payment due dates vary, 73.1% pay on monthly basis, 10.1% pay every three months, 4.1% every two months, and 12.7% other (tenants who paid the rent annually, lived in schools rent free, or repaired the housing instead of paying cash for rent) Figure (47).

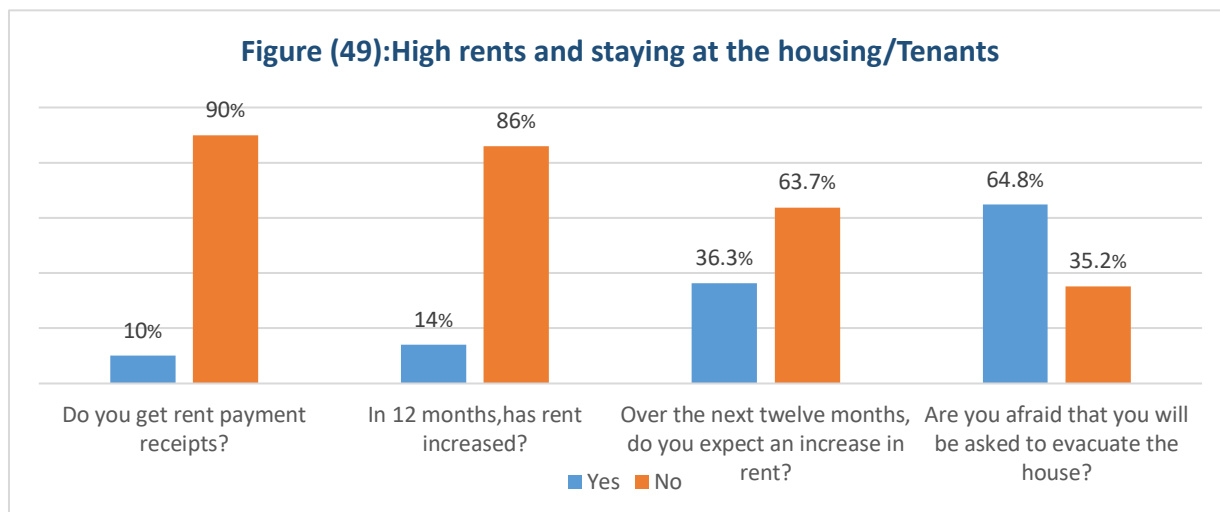


The results of the landlords' sample data analysis show that landlords reported that the rental payment deadline is fixable. The study shows that landlords keep rent due dates open according to the ability of tenants to pay. These periods are: 4.57% less than six months, 8.12% six to twelve months, and 34.52% more than a year. However, 52.79% of landlords stated that rent payment time is an open period and there was no specific deadline for when tenants are forced to pay, instead it is according to tenants' financial ability (Figure.48).



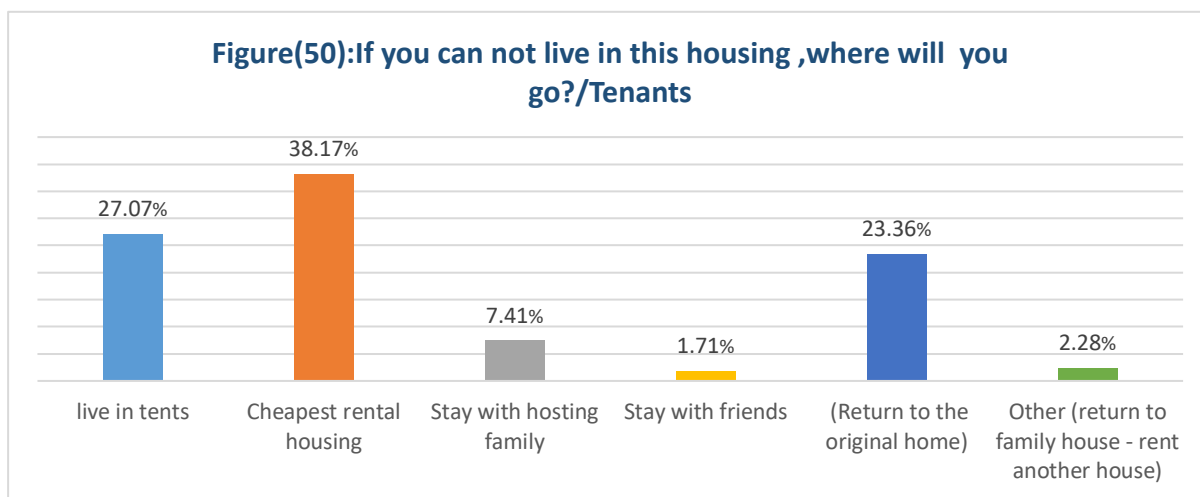
4.7 Rent Increase and Stability

Figure (49) illustrates the study’s results in regards to the correlation of rent fluctuation and housing stability. 86% of tenants stated that there was no increase of rent in the past twelve months, whereas 14% reported an increase in rent payment during in the past year. 63.7% of tenants expected an increase in rent payment in the next twelve months, and 36.3% did not anticipate any raise in the rent payment. 64.8% of tenants expressed their worries from the possibility of being evicted from the rented housing, while 35.2% did not have those fears. The study also showed that of all rent payments, 10% of tenants got a receipt, whereas 90% of tenants did not get a receipt for rent payment.



The results of group discussions and key informant interviews show that most tenants anticipate an increase of 100% in rental payment due to the continuous influx of IDPs especially from the Governorate of Al Hudaydah, and also because of the high demand for rental housing and low supply in the housing market.

Figure (50) illustrates the results of the tenants’ sample analysis in regards to alternatives that tenants are considering in case of unavailability of rented housing. 38.17% of tenants will try to find cheaper and more affordable housing, 27.07% live in tents, 23.36% likely return to their hometowns / villages, 7.41% stay with hosting families, 1.71% stay with friends, and 2.28% was categorized as other (return to family housing or rent another housing).



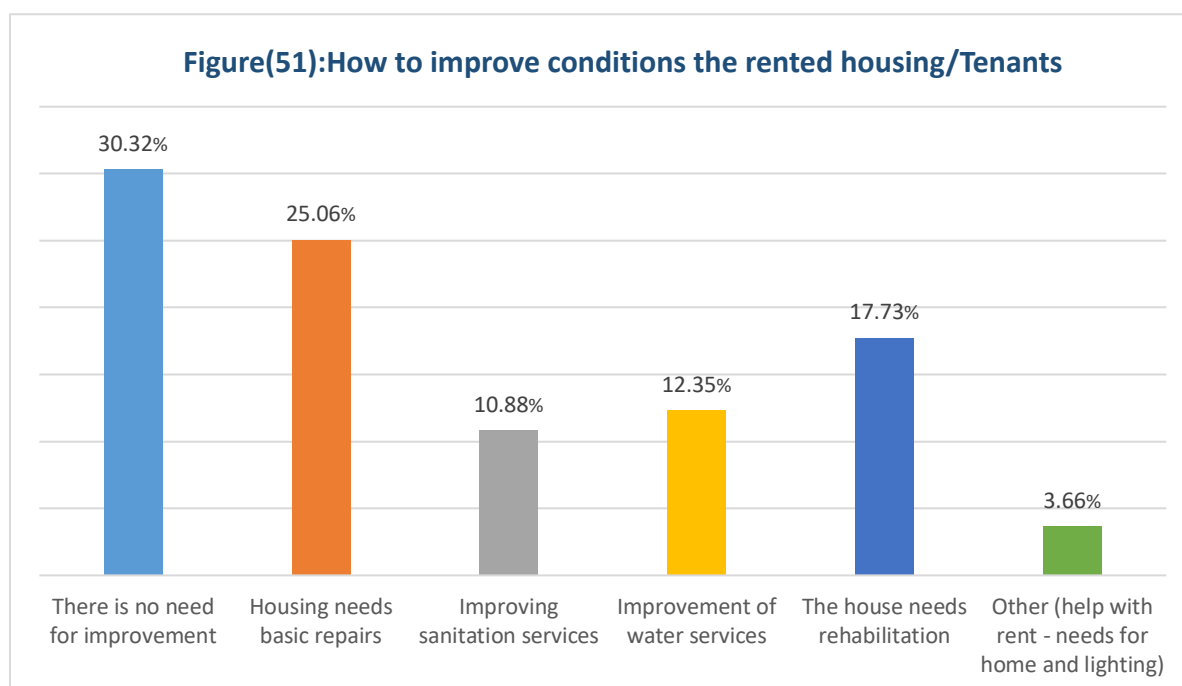
4.8 Total of Income of Tenants and their Families

The results of the tenants' sample analysis show that the collective income of partners of a housing averages at 41,804 YER. As previously mentioned, the average rent is (18,935 YER) in addition to the cost of basic services at (5,504 YER) which means more than half of the income goes to rent and basic services, the rest of the income is very low to sustain a good living. This low income reflects the extent of the humanitarian and economic crisis that tenants are enduring, especially IDPs that are 55% of the tenants' sample (Figure 5).

5 Housing Improvement and Accessing Assistance

5.1 Housing Improvement

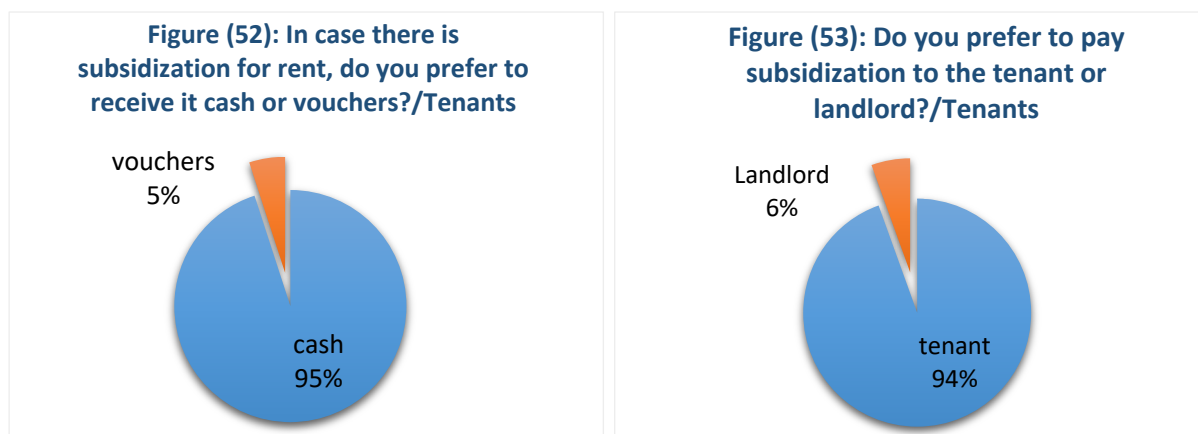
Figure (51) shows that 25.06% of tenants said that the rented housing need basic repairs to become suitable for living, 12.35% of tenants stated that improvement of water services is a priority, 30.32% said that the housing are in good conditions and there is no need for improvement, 17.73% said that the housing need fundamental repairs and renovations, 10.88% of tenants required improvement in sanitation services, and 3.66% was categorized as other (flexibility with the rent costs / light in the housing).



5.2 Accessing Assistance

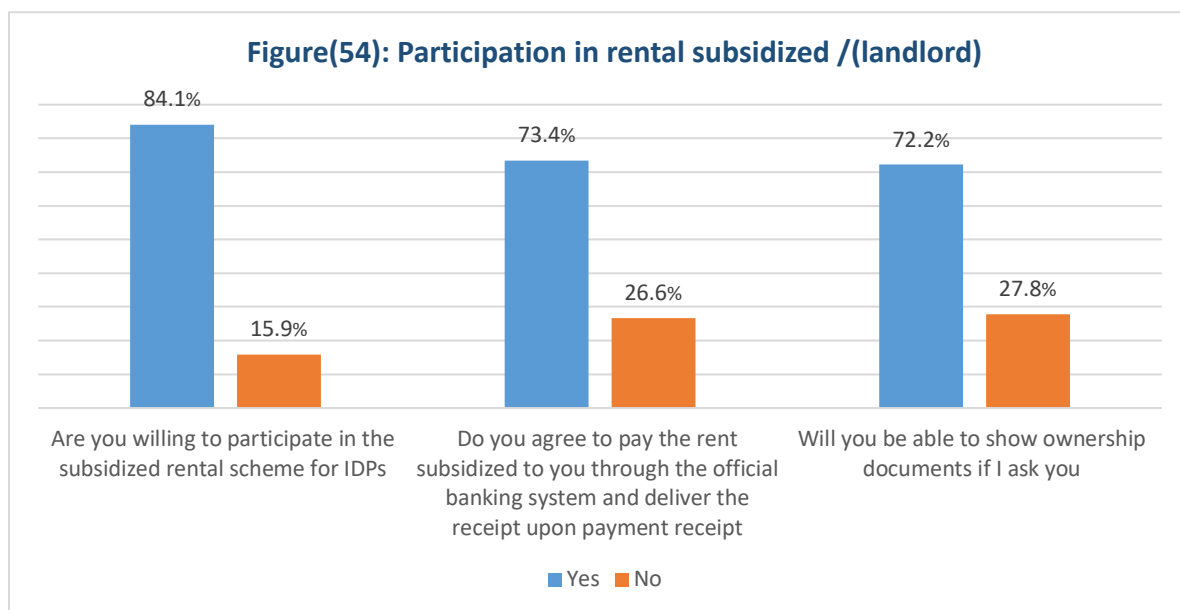
Figure (52) shows that 95% of the tenants' sample prefer to receive rental assistance if available in cash, and 5% through vouchers. Figure (53) shows that 6% of the tenants prefer that rents be paid directly to the landlord, whereas 94% preferred it to be paid to the tenant.

6 Taking Advantage and Participating in Support Programs:



6.1 Show Property Documents:

Figure (54) shows that 72.2% of landlords are willing to show housing ownership documents, whereas 27.2% are not willing to do so.



6.2 Method of Receiving Rental Funds

In regards to methods of receiving rental funds, 72.2% of landlords are willing to receive rent through the banking system and provide a delivery receipt, whereas 27.8% are not willing to do so (Figure.54).

6.3 Preparing for Participation

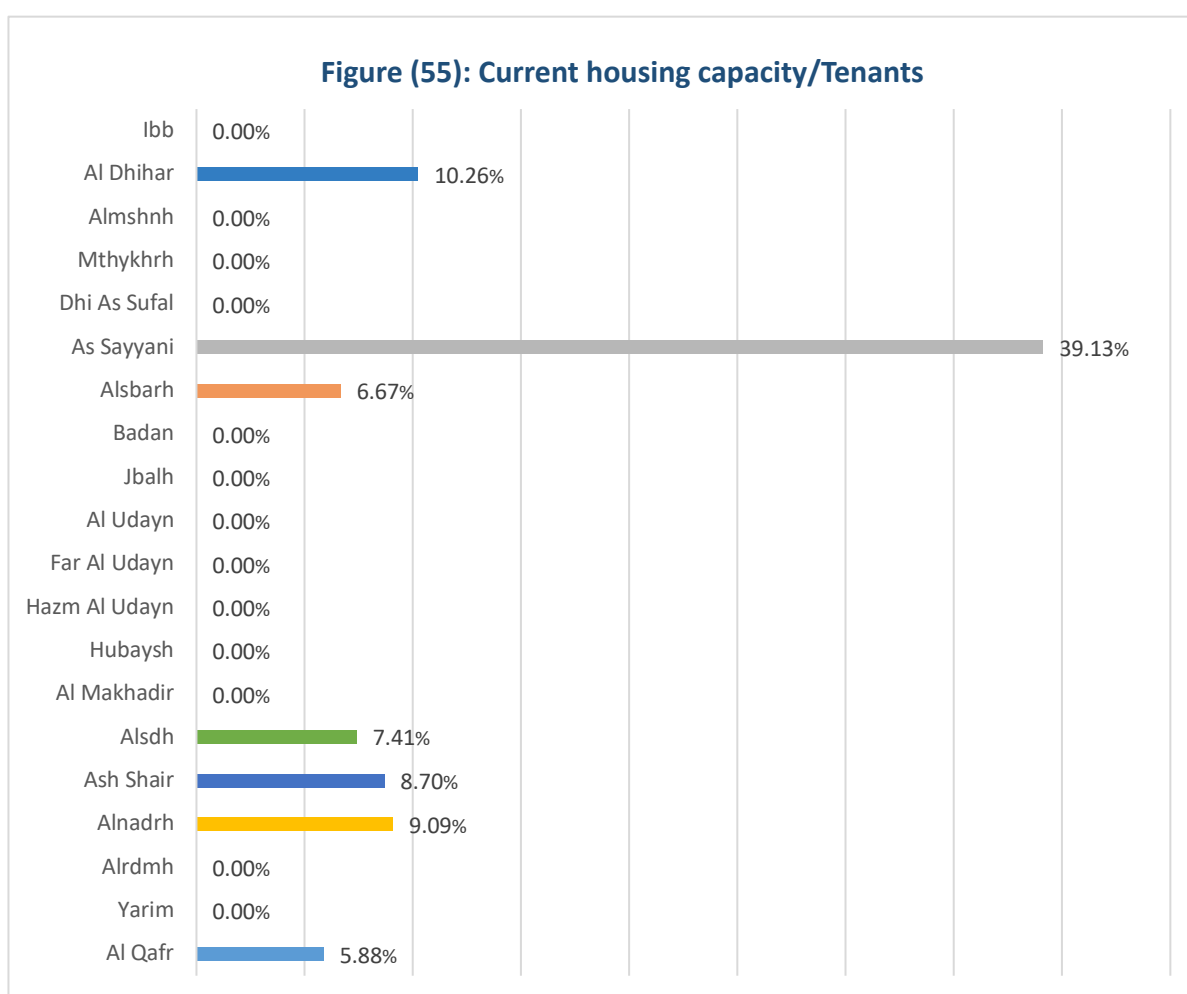
As for participating in a rental assistance program, results show that 84.1% of landlords are willing to participate in any future rental support program for IDPs, and 15.9% are not willing to participate (Figure.54)

Section 2: Host Community Capacity Assessment

1. Rental Housing Capacity and Rent Value

The analysis reveals that the housing capacity in the Governorate of Ibb is quite limited. 95.1% of the rented housing are occupied, while the remaining 4.9% was available for rent. The assessment shows that the housing capacity in the urban districts and the districts that are near to the Governorates of Taiz and Al-Hudaydah is non-existent. Figure (55) shows that the current rental housing capacity in the districts is As- Sayyani 39.13%, Al-Nadrh 9.09%, Ash Shair 8.7%, Al-Dhihar 10.26%, Al-Sadah 7.41%, Al Sbarh 6.67% and ,Al Qafr 5.88%, while the other districts have no capacity at all.

These results are consistent with the data extracted from the key informants interviews who have highlighted the difficulty in finding rental housing in their districts. For more details check the housing capacity - Annex (6).



The analysis of the data shows that the housing rent average in the Governorate of Ibb is 18,935 YER per month, which is a reasonable amount when compared to the quality and size of the housing, since almost half of the tenants' sample live in two rooms as shown in figure (14). The study also shows that a tenant pays an additional 5,504 YER on average for basic services, this number is subject to market prices fluctuation, especially water and fuel.

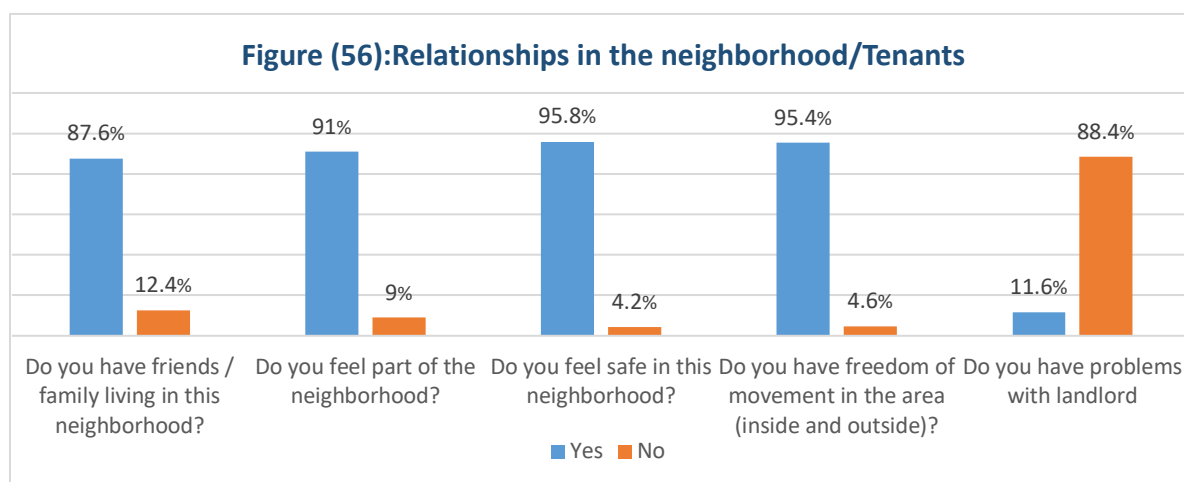
2. Community Hosting IDPs

The results of the analysis of the focus group discussions and key informant interviews among both males and females confirm that:

- The community of Ibb Governorate accepts the presence of IDPs and treats them with respect and provides IDPs with support. The results of the study also showed that there is no discrimination against IDPs. However, the analysis of the KII and the FGDs reveal that the community is willing to host IDPs who have family relations/connection. Furthermore, the ability of the local community to host IDPs is subject to the size of the IDPs household members because the housing in the local area are generally small to medium in size. This issue has been highlighted by many participants in the focus groups. One participant said “If IDPs are family members, they will be hosted given that the household members are few, but it is very difficult if they are many”. Another participant said: “It is very difficult to host IDPs in our homes unless they are part of our family”. These results reflect that the hosting community is willing to host IDPs in their neighborhoods, but only family members can be hosted in a local resident’s own housing.
- The fact that the housing capacity in the Governorate is quite limited was another issue that was highlighted by the participants of the FGDs. One participant said: “ Housing are already overcrowded, there are housing where three or four families share a single housing, so how would IDPs be able to find vacant housing, the area cannot receive more IDP families”. Another participant in the focus group said: “ Currently, there are no available housing for rent, where will new arriving IDPs go?”. So far, the housing market does not seem to be responding quickly to the high demand for rental housing.

3. The Relationships between IDPs and the Hosting Community

The tenants’ sample analysis study (Figure. 56) shows that 87.6% of tenants have friends and families in the area where they live, and 12.4% do not have friends or relatives in the same neighborhood. As for being part of the neighborhood, 91% of tenants stated that they feel as a member of the neighborhood, whereas 9% reported that they did not feel that way. The results of the study analysis confirmed that overall, IDPs have good relationships with the local community, nevertheless, this relationship suffers some tension whenever international humanitarian aids arrive to the area and go exclusively to IDPs.

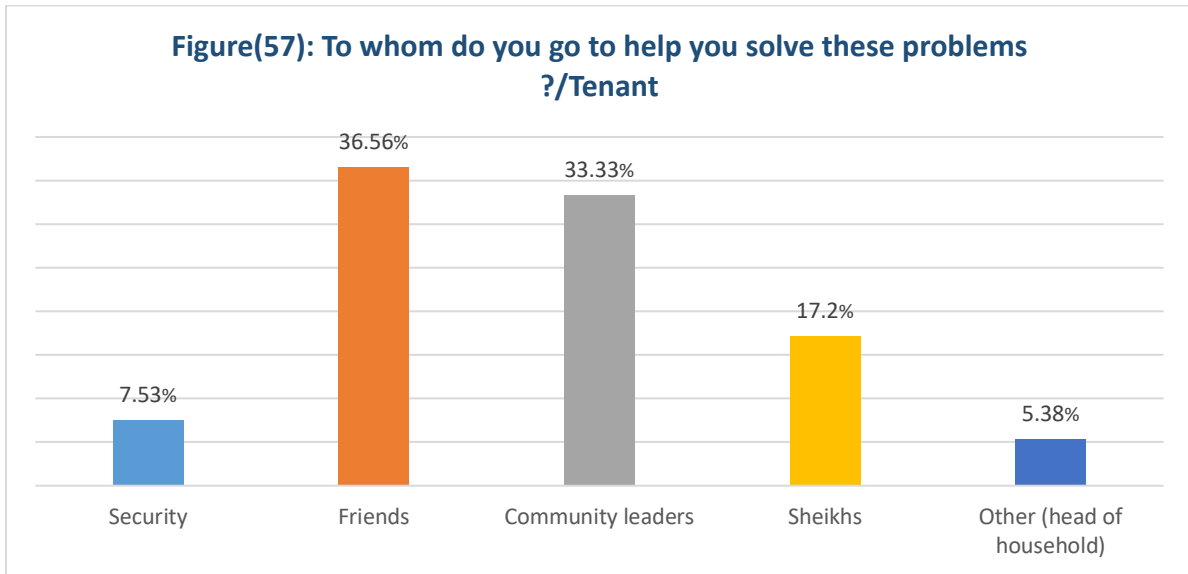


3.1 Feeling Safe and Freedom of Movement in the Neighborhood

The study shows that 95.8% of tenants said that they felt safe in the neighborhood where they live, while 4.2% of the tenants did not feel safe. As for freedom of movement inside and outside the area, 95.4% stated that they had no problems, whereas 04.06% said that they did not have freedom of movement (Figure.51).

3.2 Tenants / IDPs Relationship with Landlords.

In regards to the tenants/IDPs relationship with landlords, 88.4% did not have any problems with their landlords, while 11.6% reported that they do have issues with their landlords (Figure 57). As for settling problems with landlords, Figure (52) shows that tenants go to: their friends 36.56%, community leaders 33.33%, Sheikhs 17.2%, police stations 7.53%, and 5.38% other (the head of the household settles the problem with the landlord).



3. Community Based Organizations.

CBOs working in Ibb Governorate generally falls into the category of human services and development, medical relief, special needs, charity activities, education, and agricultural. For the purpose of this study, the target sample was set to collect data from five active CBOs, in each district, working on humanitarian and development fronts for the last three years. 46 community-based organizations matched the required criteria. The number of CBOs in each district is shown in the summary of assessment table below (full data is presented in -Annex (2)).

4. Financial Points (Exchangers and Remittance Agents).

Data on remittance agent's/ cash points has been collected internally through main money exchangers/remittance agencies. The data gathered on remittance agents in Ibb Governorate shows the availability of (98) remittance agents/cash point scattered in all districts of the Governorate. The summary of the assessment table shows the number of remittance agents in each district. The full data is attached in - Annex (3).

5. Voucher Based Suppliers

The data collected shows positive indicators on the availability of suppliers for NFI/shelter materials in the Governorate of Ibb. The study's consultant was able to gather full data on NFI/shelter suppliers (full data is attached in - Annex 4). Few districts lack sufficient number of suppliers, therefore, information on substitute suppliers from nearby districts was given.

6. Local Authorities

Data on local authority has been collected internally through KII interviews with main local leaders in each district. The full data about the main local authorities in all 20 districts of Ibb Governorate is attached in - Annex (5)

7. Conclusions

The study revealed a number of aspects related to the housing rental market in the Governorate of Ibb, which can be summarized as follows:

- The Governorate of Ibb has witnessed an exodus from several Governorates as well as districts from within Ibb since the outbreak of the war. The main areas which IDPs came from are Taiz and Al Hudaydah Governorates. However, the most recent IDPs came from Al-Hudaydah, which was in the crossfire during the outbreak of conflicts.
- The Governorate of Ibb is considered one of the most important Governorates which IDPs are seeking to settle in due to safety in the area and its geographical proximity to most of the major areas of conflict (that IDPs are coming from). However, choosing to move to Ibb Governorate seems to be associated with family relations as well.
- The tenants' family members of the targeted districts fall between the following two age groups: 39% more than 18 years to 55 years, and 42% more than 5 years to 18 years. Followed by the category of children under five years 17%, and more than 55 years 2%.

- The results show that the household members are 50.83% females, and 49.17% males. These statistics reveal the magnitude of the suffering endured by the greater part of the tenants' households which are children and women, especially for IDPs families Table (1). Therefore, the needs of women and children should be taken into consideration.
- The assessment shows that the housing capacity in the Governorate of Ibb is quite limited. Based on the sample of this assessment, 95.1% of housing were occupied, while only 4.9% were vacant. The assessment shows that the housing capacity in the urban districts and the districts that are near the Governorates of Taiz and Al-Hudaydah is non-existent.
- The analysis reveals that the community willingness to receive more IDPs is subject to social relations between the hosting families and IDPs. Meanwhile, accommodating more IDPs in the Governorate of Ibb seems to be limited to districts where housing capacity still exists.
- The assessment reveals that the majority of tenants live in small to medium housings where minimum standards may not exist. This needs to be considered if cash for rent scheme is going to be introduced.
- The analysis of the data shows that the housing rent average in the Governorate of Ibb is 18,935 YER per month, which is a reasonable amount when compared to the quality and size of the housing, since almost half of the tenants' sample live in two rooms as shown in figure (14). However, this rent average represents housing rent in rural areas and not urban areas, where rent rates are higher.
- The study also shows that a tenant pays an additional 5,504 YER on average for basic services, this number is subject to market prices fluctuation, especially water and fuel.
- The analysis also shows that the common method of paying rent is in cash. The average rent cost might increase significantly in the coming months as the majority of tenants expect the average increase rate to go up by 36.3% over the next 12 months. This is confirmed by the results of the qualitative analysis. Moreover, most tenants anticipate a higher increase rate that may reach 100%.
- The study shows that a large number of IDPs, due to the prolonged duration of the war, fear of being unable to pay rent and consequently being evicted. Furthermore, the results of the study show that the average income of the household partners is approximately 41,804 YER per month. This is a very low income which makes it hard for tenants, especially IDPs, to sustain a decent life.
- Targeting IDPs exclusively by international aids is causing a rift in relationships between IDPs and the local community. This needs to be taken into consideration especially that many local residents in Ibb suffer from poverty.

- The results of the study also showed the important role of international organizations that provide urgent assistance for IDPs and to the children of the local community, due to the deterioration of the humanitarian conditions in this area.
- The results also indicate that the major fears faced by women and children of IDPs families are sexual abuse and exploitation. This is a very sensitive issue that needs special consideration.
- The results show that the role of the local authority is limited. It is clear that the local authority plays a role in organizing the process of receiving IDPs, finding assistance from organizations, disbursing aids and solving problems. However, the authority should also focus more on urban planning and tax reforms.
- The common form of contracts in the area is based on verbal agreements rather than legal written contracts, which shows that Ibb Governorate is not governed by legal contracts. This may result in tenants being forced by landlords to leave rented housing.
- 95.8% of tenants said that they felt safe in the neighborhood where they live, 87.6% have friends and families in the area where they live, and 91% of tenants stated that they feel as a member of the neighborhood.
- The results of the analysis also show that Ibb's community has good relations with IDPs, however, the existence of large numbers of IDPs has contributed an additional burden on the area's basic services, which were not enough for the residents themselves even before the arrival of IDPs. More consideration for multi-sector intervention is needed in order to facilitate the living conditions of the hosting community and the IDPs without disturbing the life conditions of the local community.
- The study shows that 39.9% of housing managed by landlords were in acceptable conditions and only needed minor repairs, 44% were in good conditions and did not require any maintenance, and 16.1% were in bad conditions and need repairs and maintenance, (Figure 12).
- The results of the analysis showed an approval of 84.1% among landlords to participate in any future programs to support rents for IDPs. 72.2% of landlords are willing to show housing' ownership documents, and 73.4% of landlords are willing to receive the rent through the banking system and provide a delivery receipt.

Summary of Assessment:

District	Number of presence CBOs	Supplier				Financial Points	Average Rent Rate
		household items	Furniture	Clothes	Shelter materials		
Al Qafr	2	5	5	5	5	12	15203
Yarim	4	5	5	5	5	4	17909
Alrdmh	1	4	4	9	5	2	24040
Alnadrh	2	1	3	3	3	1	19869
Ash Shair	0	3	3	0	2	1	21000
Alsdh	0	3	4	5	4	2	19500
Al Makhadir	2	5	5	5	5	6	16260
Hubaysh	0	5	5	7	5	2	12461
Hazm Al Udayn	0	5	5	6	5	6	19400
Far Al Udayn	3	6	4	5	6	5	9230
Al Udayn	6	5	6	5	7	5	13580
Jbalh	3	5	5	6	5	12	11807
Badan	0	5	5	5	5	2	22040
Alsbarh	1	5	5	4	6	3	14120
As Sayyani	1	5	5	4	5	3	11148
Dhi As Sufal	6	5	4	5	6	6	14027
Mthykhrh	2	5	5	7	5	6	15740
Almshnh	5	5	5	6	5	9	13333
Al Dhihar	6	5	5	5	6	6	11942.
Ibb	2	6	6	4	5	5	20357
Total	46	93	94	101	100	98	

Annexes:

Annex (1): Targeted Districts Map

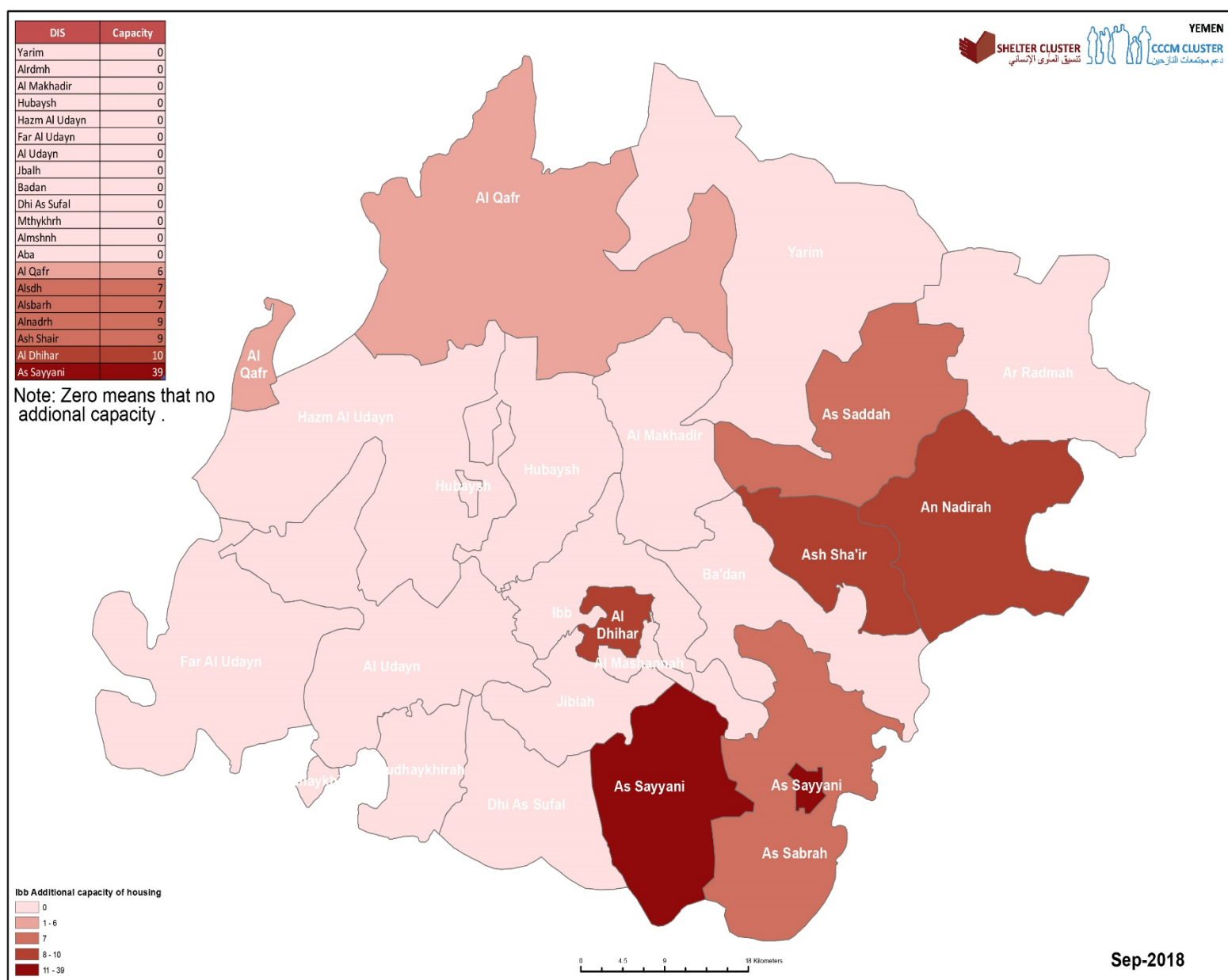
Annex (2): Community Based Organizations

Annex (3): Financial points(Exchangers and remittance agents).

Annex (4): Voucher Based suppliers.

Annex (5): Local Authorities

Annex(6):Housing capacity Map



Sep-2018

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Section 1: CBOs

Activities provided by CBOs:

Relief, 6,22,24,26,29,30-1,35,42,45
Development ,1,4,9,10,13,27
Charity, 34
Agriculture,37
Education,2
Health- development ,28,44
Development- Relief,5,7,11,23,428
Education-development,3,14,18,32
Development-charity,3,12,15,16,20,40-1,43
Special need ,36
Special Needs-Development,25
Special need –Education,33
Health –Development-charity,17
Heath-Development-education,8,21
Agricuture-Development-Charity,39

Validity of license

Not valid, 4-5,11,13-5,19-20,24,32,39,428
Valid, 1-3,6-10,12,16-7,21,23,25-31,33,35-8,40-5

Bank Accounts

Available:1,12,14-17,20-2,24,27-33,35,37-9,42-4,428
Not Available: 13,18-9,23,25-6,36-7,40-1,45

Section 2: Financial points(Exchangers and remittance agents).

Al-Amal Bank 1-4

Al-Kuraimi Exchanger 5-16

Section 3:Vouched based suppliers.

Type of Goods are provided by Vendors:

Cloths, 4-5,15-6,22,26-7,33-4,36-8,40,42-4,57,61-3,66,68,70-3,76,78,82,84-5,87-9,101,107-8,111,115,128-30,134,140,144-6,154,160,163,169,172-4,176,183-4,194-5,197-9,206,214,221-3,227-30,232-33,252,259,260-62,273,277,288,289,290-291,297,310,319,320-2,336,338-42,346-7,352,354,357
Furniture:4-8,15,20,24-6,36,49-2,55,58,68,71,81,83-4,86,95-7,99,105-6,110,123-7,132-3,142,147,149,158-9,166-8,175,186,188,189-90,201,204-5,212,215,217-8,220,226,236-8,243,247,250,256,258,269,272,275,278,281,286-7,294,298-9,306,309-12,317,326-8,330,332,342,347,352,355,359-60
Shelter materials , 2-3,9,12-3,18,28-32,35,39,45,53-4,56,67,74-5,80,84,90-1,94,98,100,102-104,112-3,116,118,120,131,138,141,148,150-2,157,161-2,170,178-180-2,193,200,209-10,213,216,225,234.
Housing hold items, 1,10-1,14-7,19,21-3,26,39,41,46-8,59-0,64-5,69,74,77,84,92-3,967,99,19,114,117,119,121-2,135-7,139,143,153,155-6,164-5,171,177,185,187,191-

2,196,202-3,207-8,211,219,224,231,239,241,245-6,248,254,265-
7,270,276,280,283,285,295-6,302,308,313-5,318,327,329,331,333,343,356,358,361-3

Previous experience in voucher program:

Available: 6,10-2,22,26,35,50,53-4,56,58-60,217,226,228,296,300,320,327,337,342,362

Not Available:1-5,7-9,12,13-34,36-49,47-49,51-52,55,57,61-216,218-225,227,229-295,297-
299,301-319,321-326,328-336,338-341,343-361,363

Willingness to respond in emergency:

Willing:1-7,9-26,28,30-32,35-44,46-53,55-60,64-86,88,90-108,110-115,117-160,162-
173,175-189,191-9,201-4,206-10,212-218,220-2,224,226-32,234-56,261-264,266,269,271-
3,275-363

Not willing:8,27,29,33-4,45,54,61-

3,87,89,109,116,161,174,190,200,205,211,219,223,225,233,257-60,265,267-8,270,274,