

**Yemen Shelter/NFI/CCCM Cluster Housing**

**Rental Market Assessment**

*September 2018*

**Lahj Governorate**



**SHELTER CLUSTER**  
تنسيق المأوى الإنساني



**YEMEN**  
**CCCM CLUSTER**  
دعم مجتمعات النازحين



**YHF**

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### The Samples of The assessment



Tenants  
289



Landlords  
114



KII  
16



FGD  
16



CBOs  
23



Suppliers  
154

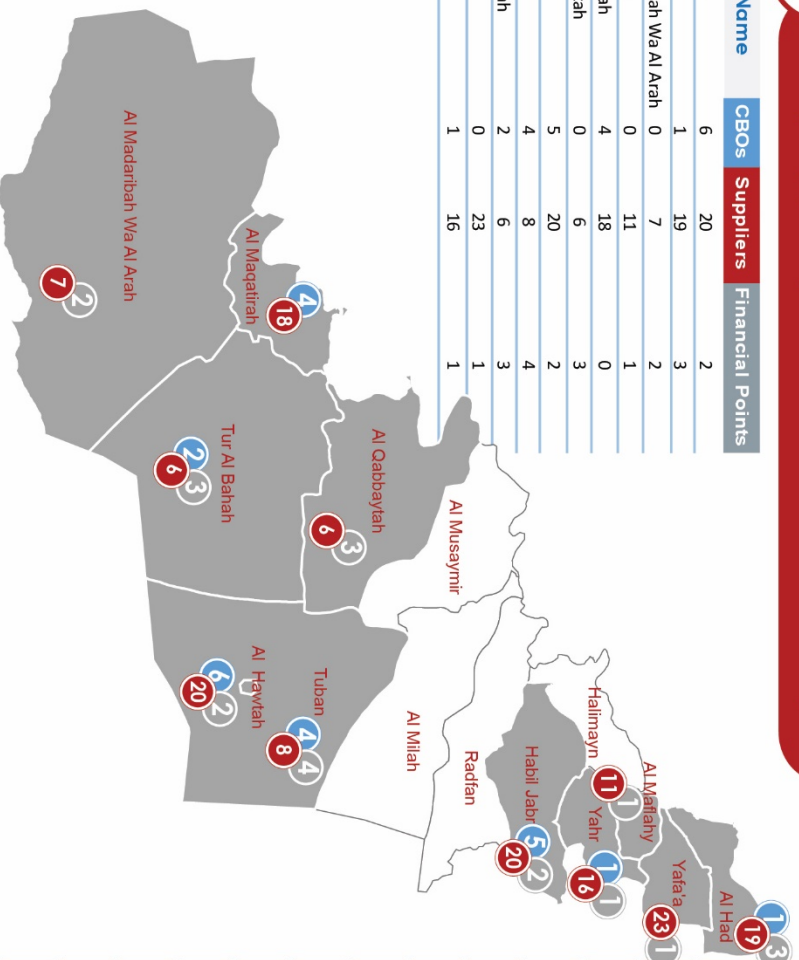


Financial Points  
22

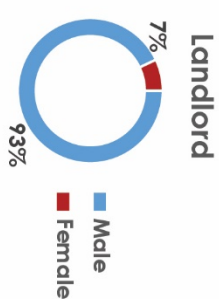
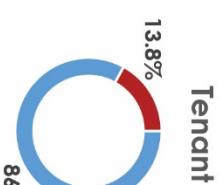
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### CBOs, Suppliers, and Financial Points Sample

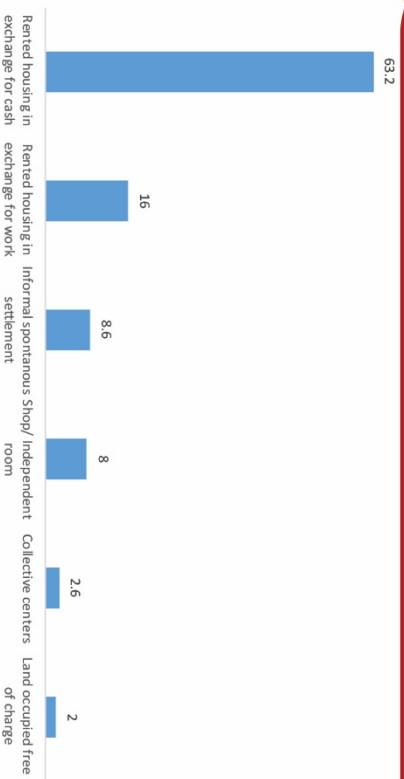
Districts Name	CBOs	Suppliers	Financial Points
Al Hawtah	6	20	2
Al Had	1	19	3
Al Madaribah Wa Al Arah	0	7	2
Al Maflahy	0	11	1
Al Maqatirah	4	18	0
Al Qabbaytah	0	6	3
Habil Jabr	5	20	2
Tuban	4	8	4
Tur Al Bahah	2	6	3
Yafa'a	0	23	1
Yahr	1	16	1



### Gender



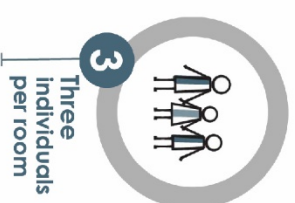
### The Majority of Housing Inhabited by the IDPs



### Income and Expenses and The Crowding Index



Basic services  
Rent Rate





# Introduction

## General information about the Governorate:

Lahj Governorate covers an area of 15,210 km<sup>2</sup> (5,870 sq. mi). Its population, according to the 2004 Yemeni census, is “722,694”. The number of IDPs in the Governorate has reached (74,712) 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 Lahj Governorate

The districts distributed among the targeted sample of Lahj Governorate are 11: Tur Al Bahah, Al Had, Al Maflahy, Habil Jabr, Yafa'a, Yahr, Al Maqatirah, Al Hawtah, Al Qabbaytah, Tuban, and Al Madaribah Wa Al Arah.

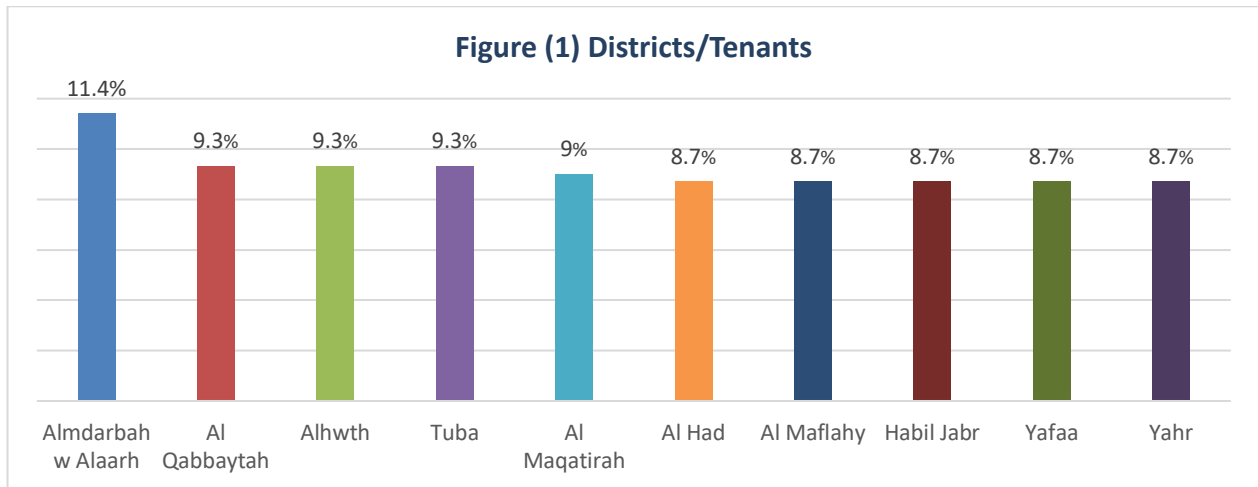


# Section 1: Housing Rental Market Assessment

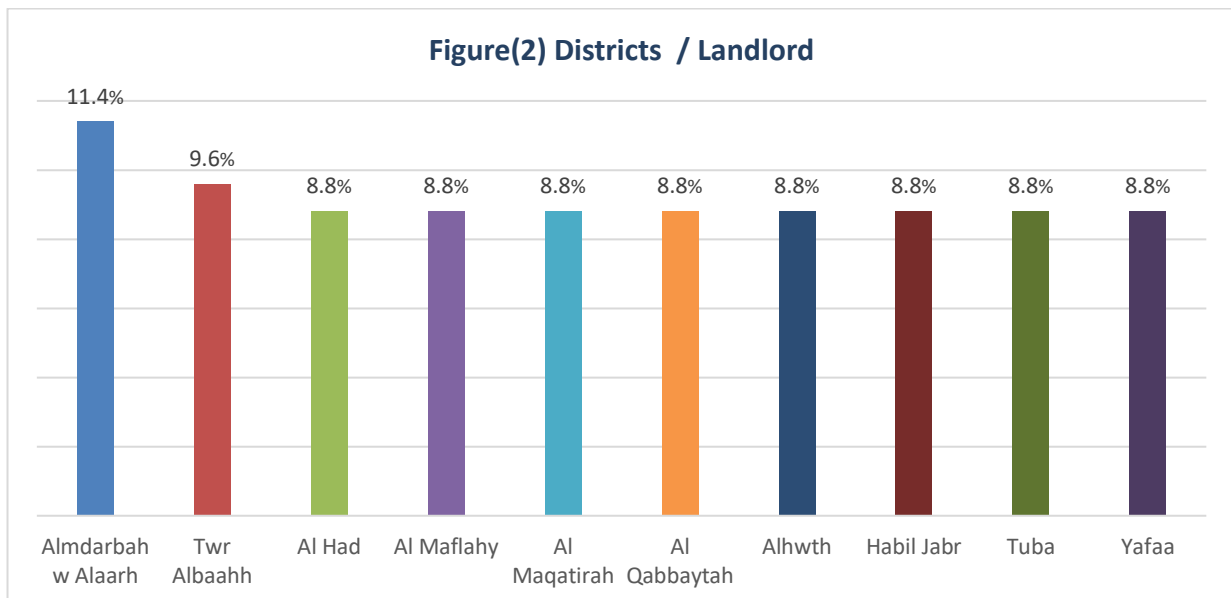
## 1. Demographic Details

### 1.1 Targeted Districts

The tenants are distributed in 11 districts in Lahj Governorate as follows: Al Had 8.7%, Al Maflahy 8.7%, Al Maqatirah 9%, Al Qabbaytah 9.3%, Alhwth 9.3%, Habil Jabr 8.7%, Tuba 9.3%, Yafaa 8.7%, Yahr 8.7%, Twr Albaahh, and Almdarbah w Alaarh 11.4% (Figure. 1).



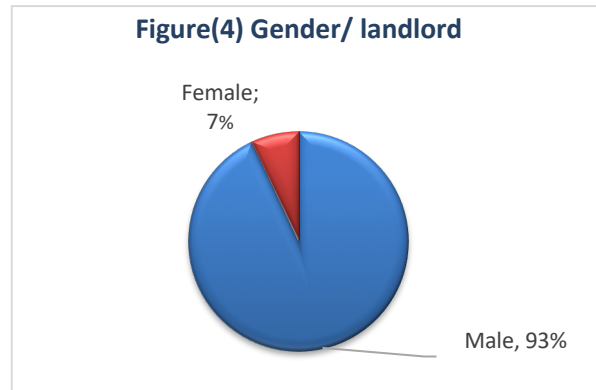
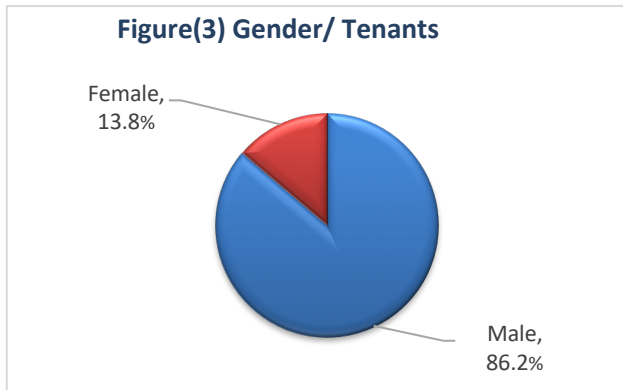
The landlords are distributed in 11 districts in Lahj Governorate as follows: Al Had 8.8%, Al Maflahy 8.8%, Al Maqatirah 8.8%, Al Qabbaytah 8.8%, Alhwth 8.8%, Habil Jabr 8.8%, Tuba 8.8%, Yafaa, Yahr 8.8%, Twr Albaahh 9.6%, and Almdarbah w Alaarh 11.4% Figure (2).



### 1.2 Gender (Tenants /Landlords)

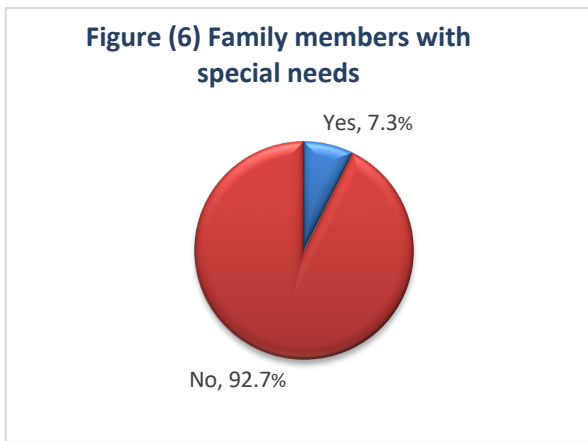
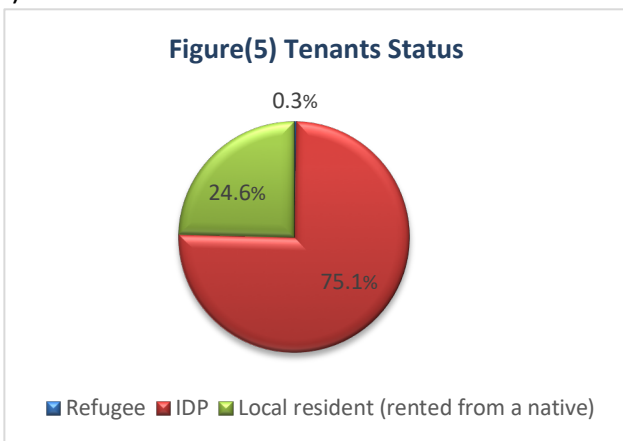
The results of the tenants' sample analysis, as shown in figure (3) reveal that the gender distribution of tenants is 86.2% males and 13.8% females. This percentage indicates that there are a number of women running the tenants' households and struggling to support and sustain their families as well as paying rent.

Figure (4) show the gender distribution of landlords, which is 93% male landlords and 7% female landlords. This reflects the prevailing general situation in the country in terms of male domination of all aspects of society; political, social and economic.



### 1.3 Tenant Characteristics:

The results of the tenants' sample analysis (Figure.5) show that 75.1% of tenants covered in this assessment are IDPs, 24.6% are residents of the same area, while 0.3% of tenants are refugees. The large percent of IDPs (75.1%) among the tenants' sample of Lahj Governorate reflects the displacement of large numbers of people from within the same Governorate and from other nearby Governorates. The study also shows that 7.3% of tenants have family members with special needs and 92.7% of the tenants did not have family members with special needs (Figure. 6).



## 1.4 Household Age Category (Tenants)

The analysis (Table 1) illustrates the tenants' age category in the target districts. The age categories of tenants are: over 18 years to 55 years 41.56%, and over 5 years to 18 years 32.87%. Followed by 19.55% of tenant members that are less than 5 years old, and 6.02% of family members over 55 years. And according to the results of the analysis, the gender of the tenants is 52.58% male and 47.42% female. These results reveal the magnitude of suffering endured by the greater part of the household which are women and children, especially for IDPs.

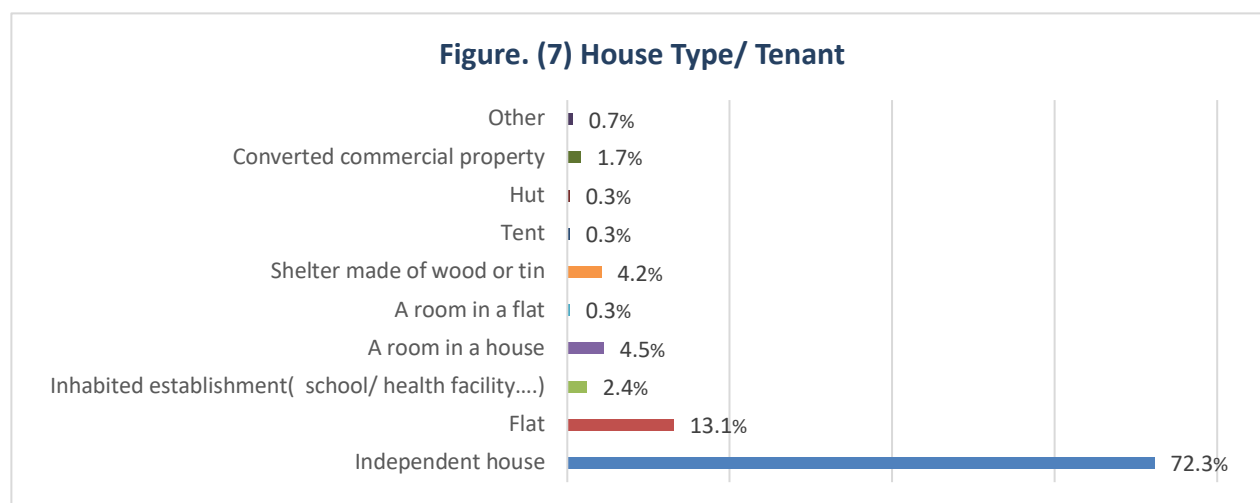
Table (1): Age and Gender of the Tenant Family Members

Gender	under 5 years		From 5-18 years		More 18-55 years		Older than 55 years		Total numbers of individuals	
	Number	%	Number	%	Number	%	Number	%	Number	%
Male	184	50.55	356	58.17	387	50	52	46.43	979	52.58
Female	180	49.45	256	41.83	387	50	60	53.57	883	47.42
Total	364	100	612	100	774	100	112	100	1862	100
% within Age	19.55%		32.87%		41.56%		6.02%		100%	

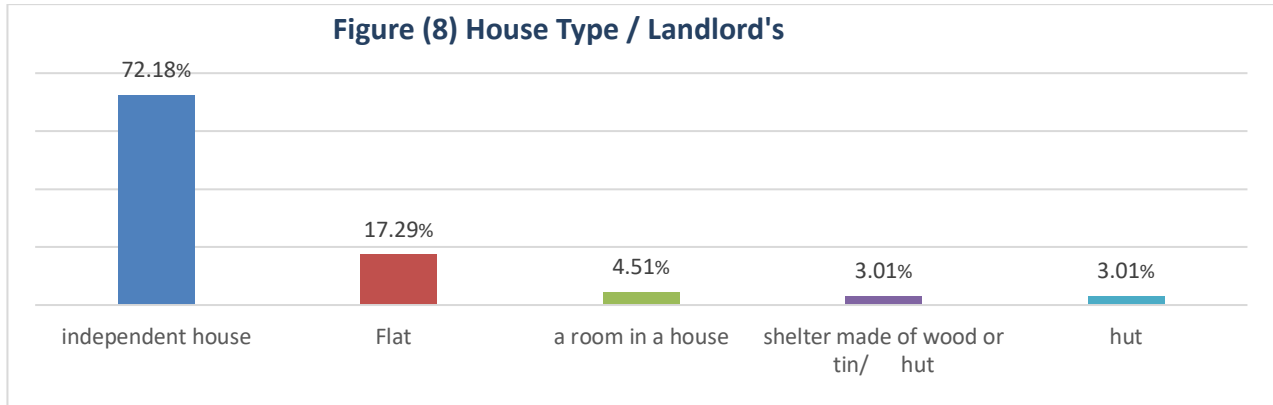
## 2. Details of the Rented Housing

### 2.1 Type of Housing (Tenants / Landlords)

The results of the tenants' sample in the targeted districts of Lahj Governorate (Figure.7) show that the type of housing rented by the tenants are independent housing 72.3% , flats 13.1%, a room in a housing 4.5% , tents 0.3%, commercial properties converted to housing 1.7%, shelter made of tin or wood 4.2%, inhabited public establishments 2.4%, huts 0.3%, a room in a flat 0.3%, and other 0.7%.



In the same context, the landlords' sample analysis in Figure (8) shows the nature of the predominant housing available for rent in the Governorate, which are: independent housing 72.18%, flats 17.29%, a room in a housing 4.51%, shelter made of wood/tin 3.01%, and huts 3.01%. These results indicate that independent housing and flats are the main types of housing.

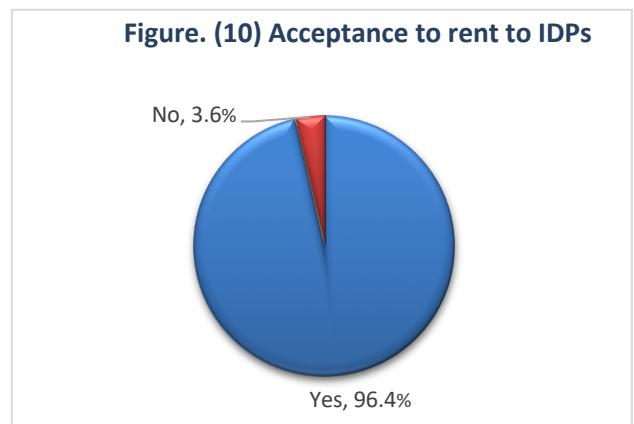
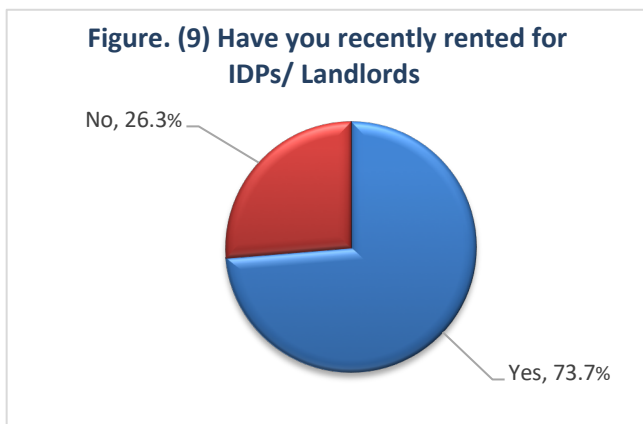


Participants in FGDs and KIIs indicated that the majority of rented housing in Lahj Governorate are old housing, which are uncomfortable and need a lot of repair. Also, some people rented flats in the outskirts of Al-Hawta district, where housing for rent is available.

### 2.2 Rent for IDPs

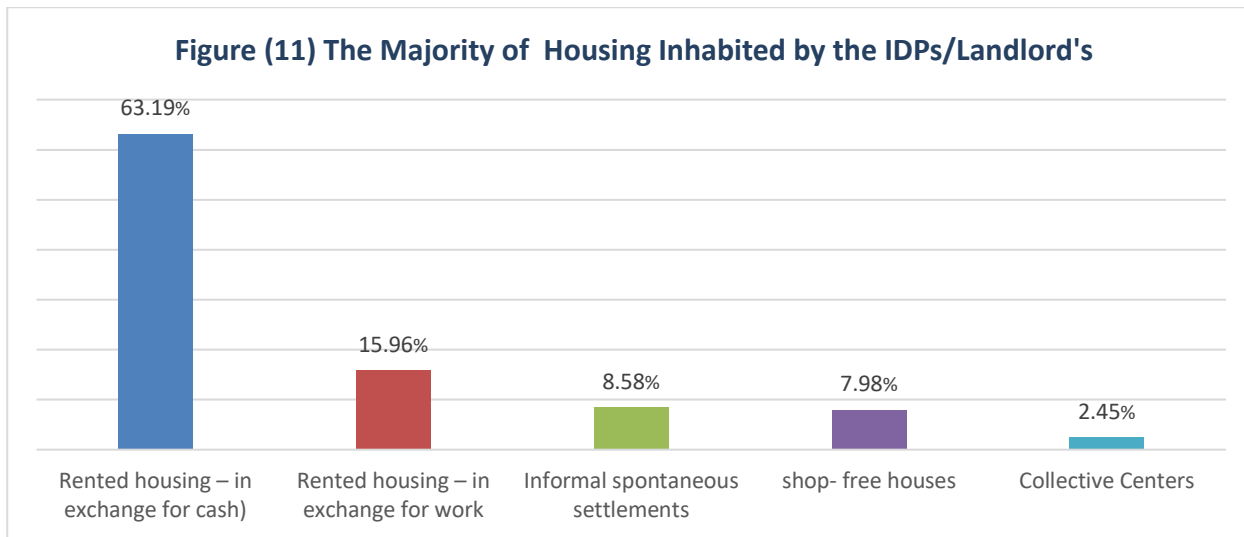
Figure (9) shows that 73.7% of the landlords' sample have already rented housing to the IDPs, whereas 26.3% of landlords have not yet rented to IDPs. This is a positive indicator showing that this area has no problem in leasing to IDPs.

The analysis of the landlords' data shows that 96.4% of landlords are willing to rent to IDPs, while 3.6% of landlords are not willing 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 is no discrimination against IDPs in this Governorate. However, the unwillingness of some landlords to rent to IDPs might be a result of IDPs' inability to pay rent regularly.



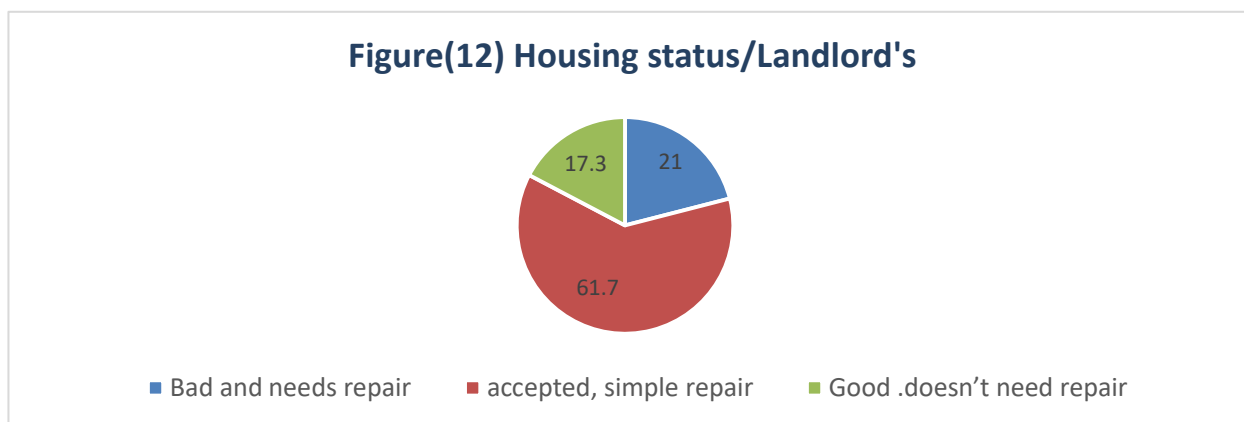
Participants in focus group discussion and key informant interview indicated that in many cases the host community allowed IDPs to settle down in private lands rent free, which confirms the premise that the local community supports IDPs.

According to the landlords' sample analysis, around 63.19% of IDPs live in housing in exchange for cash, 15.96% of IDPs live in in housing in exchange for work (working for landlords instead of rental payment), 8.58% live in informal spontaneous settlements, 7.98% live in free housing or schools, and 2.45% live in collective centers, Figure (11).



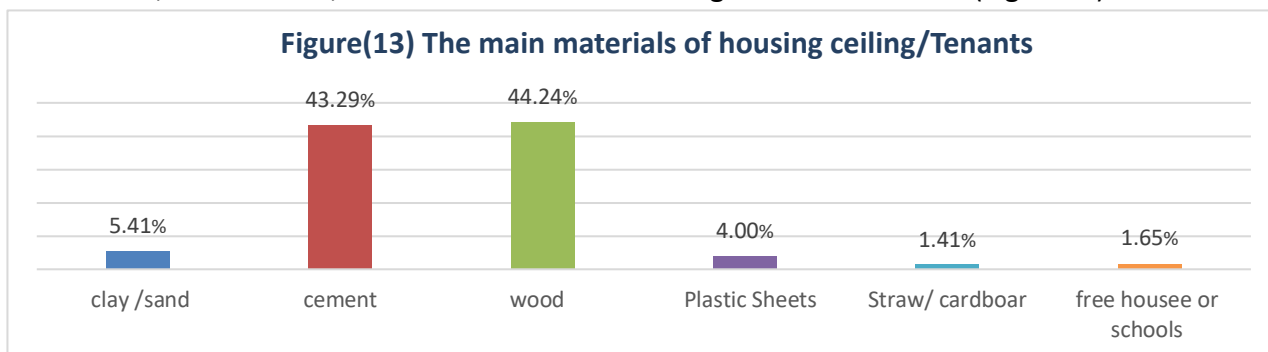
### 2.3 State of Housing

The results of the landlord's sample analysis (Figure.12) reveals that 61.7% of the housing managed by the landlords are in an acceptable conditions and need minor repairs, 17.3% of housing are in good conditions and do not require any maintenance, while 21% of the housing are in bad conditions and need maintenance and repairs.



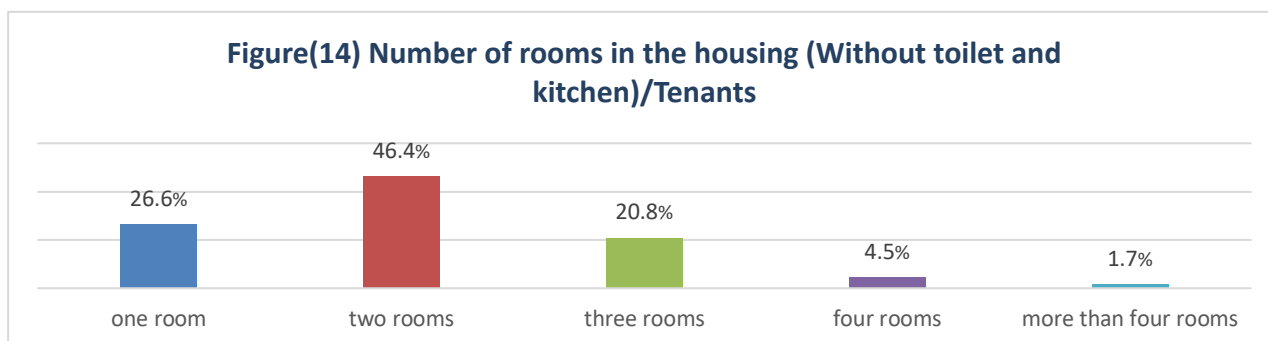
## 2.4 Materials used for Ceilings of Housing

Based on the results of the tenants' sample analysis, the main materials used in the ceilings of rented housing in the Governorate are cement 43.29%, wood 44.24%, clay/sand 5.41%, plastic sheets 4%, straw 1.41%, and 1.65% were free housing or school facilities (Figure13).

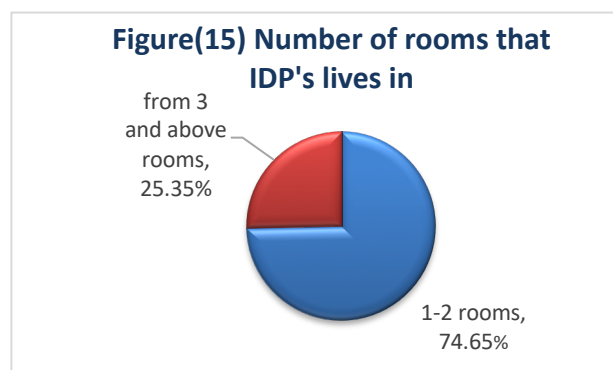


## 2.5 Number of Housing Rooms

Figure (14) shows the results of the tenants' sample analysis regarding the number of rooms in a rented housing. 46.4% live in housing that have two rooms, 26.6% had one room, 20.8% have three rooms, 4.5% had four rooms, and 1.7% of the rented housing had more than four rooms.



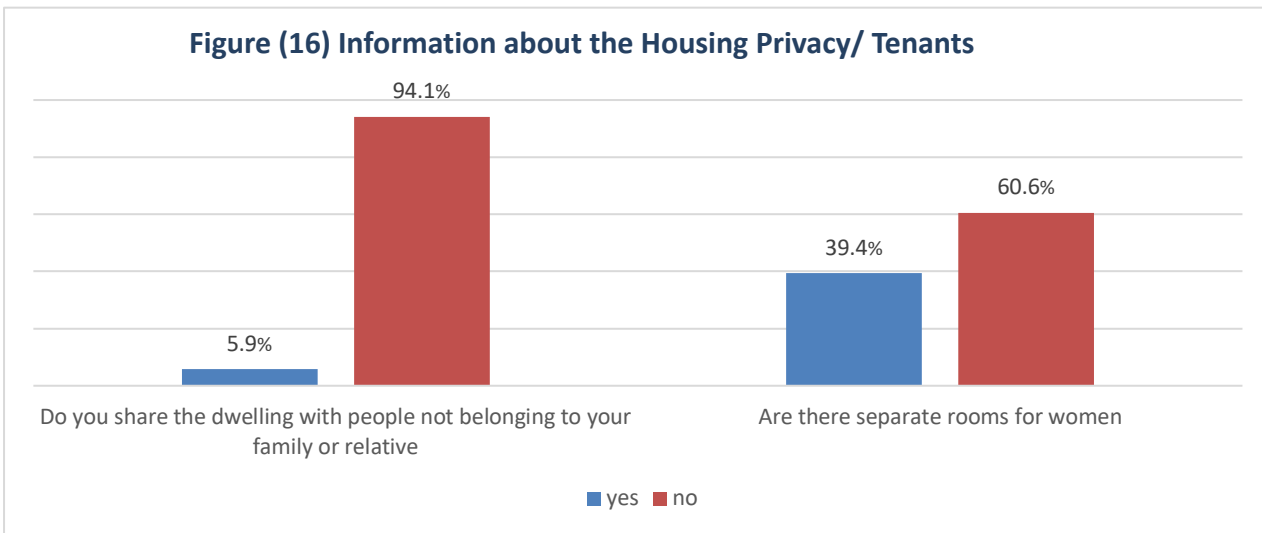
The data shows that 73.65% of tenants live in housing that have one to two rooms which is confirmed by the crowding index in Lahj Governorate; there are three members per room, according to the number of household members (1862), as shown in table (1), divided by the total number of rooms (602) excluding kitchen and toilet, Figure (15).



As previously mentioned that 75.1% of the tenants in Lahj Governorate are IDP's Figure (5), in which the study shows 74.65% of them live in one to two rooms.

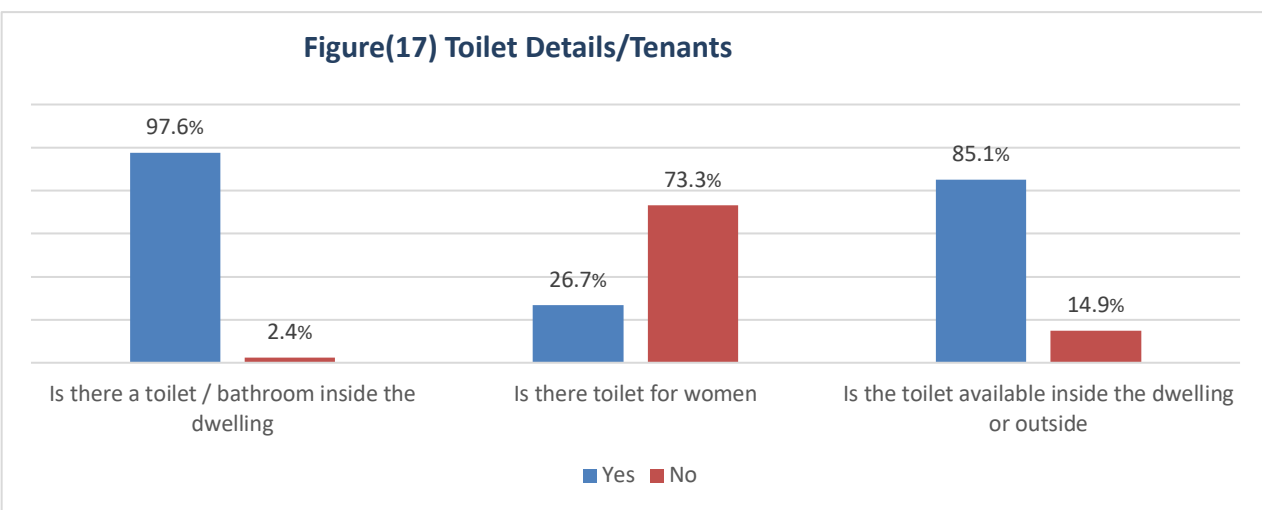
## 2.6 Privacy of the Housing

The tenants' sample results show that 60.6% of rented housing did not have separate rooms for women, and 39.4% did have separate rooms for women. Also, 94.1% of tenants do not share their rented housing with people from outside the family, and 5.9% share their housing with nonfamily members. These results reflect the lack of privacy for women in shared housing Figure (16).

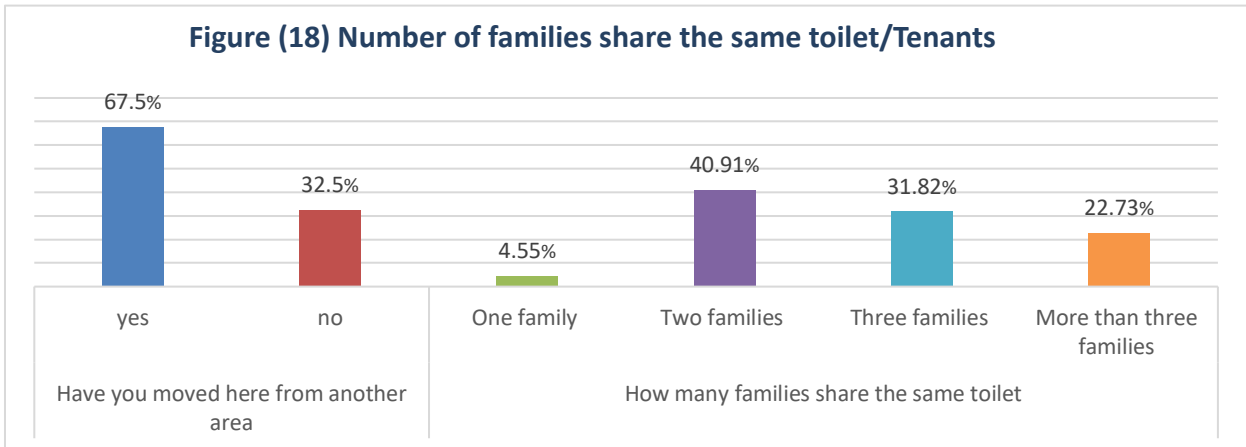


## 2.7 Availability of Toilets in the Housing

The results of the tenants' analysis also show that 97.6% of the tenants' sample have a private toilet located in their own housing, while 2.4% do not have a toilet in the rented housing. In addition, 73.3% of housing did not have separate toilets for women, while 26.7% had a separate toilet for women. This reflects the lack of sensitivity towards this traditional custom in many rented housing, which creates a predicament if there is more than one family sharing a housing. The study also showed that 85.1% of housing had toilets inside the housing, and 14.9% had toilets outside of the housing (Figure.17).

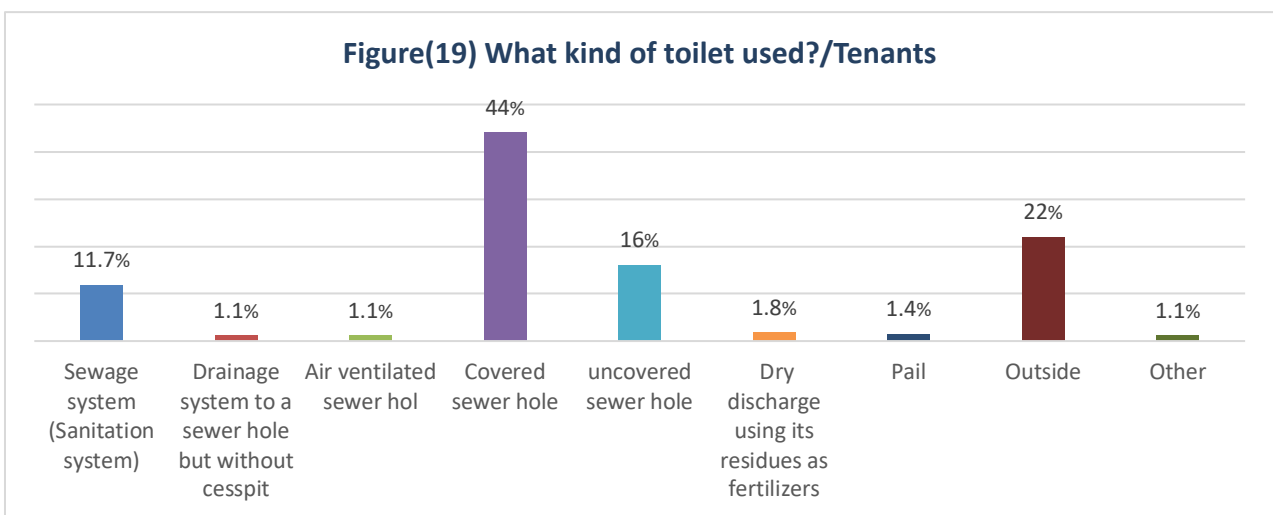


In regards to the number of families sharing a toilet, figure (18) shows that 67.5% of tenants did not share the toilet with other families, whereas 32.5% shared the toilet with other families. Also, the figure shows the number of families that shared a toilet. 40.91% of families shared a toilet with two other families, 31.82% with three other families, 22.73% with more than three families, and 4.55% with one other family. These results indicate the great lack of privacy that most families endure in this area.



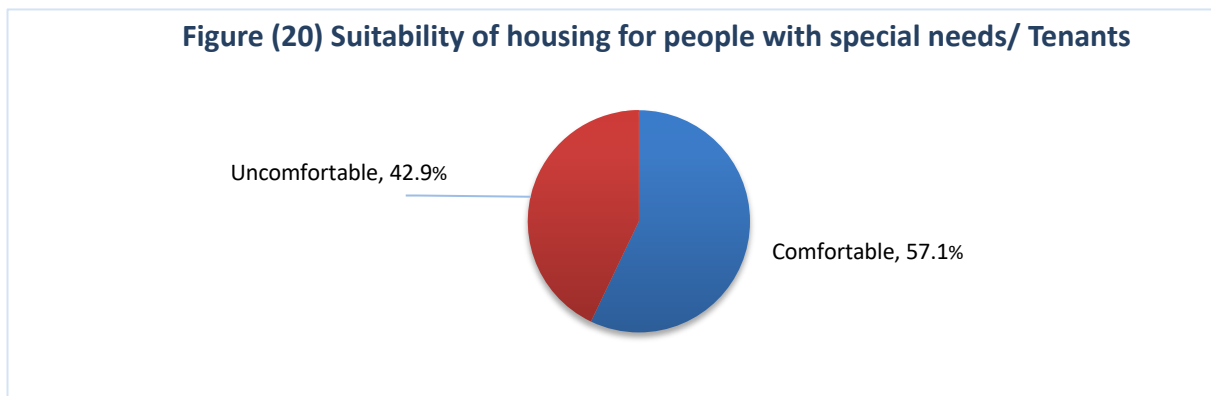
### 2.8 Type of Sanitation System

The results of the tenants' sample analysis show that 44% of rented housing used covered sewer hole, 22% used the outside area, 16% used uncovered sewer hole, 11.7% used the proper sanitation system, 1.8% used a dry discharge using human waste as fertilizers, and 1.1% used others (drainage system to a sewer hole without cesspit). These results indicate that at least 38% of rented housing do not have proper sanitation system, which reflects negatively on the health and wellbeing of the tenants and the environment surrounding them(Figure. 19).



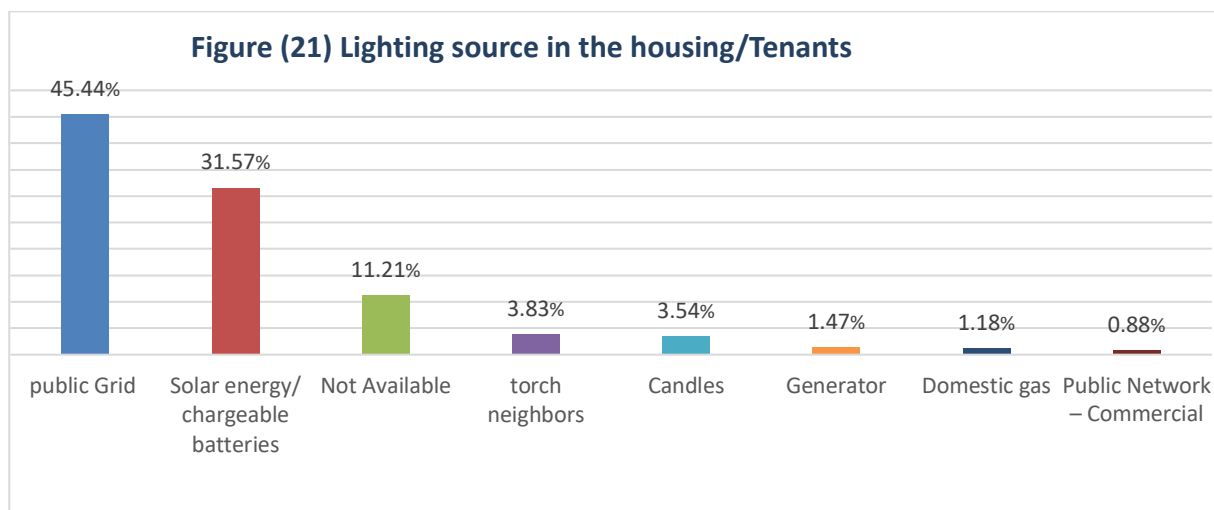
## 2.9 Suitability of Housing for People with Special Needs

As mentioned earlier, 7.3% of the tenants' sample have family members with special needs, 42.9% of them said that the area is not comfortable for people with special needs, whereas 57.1% said the it is comfortable. 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.



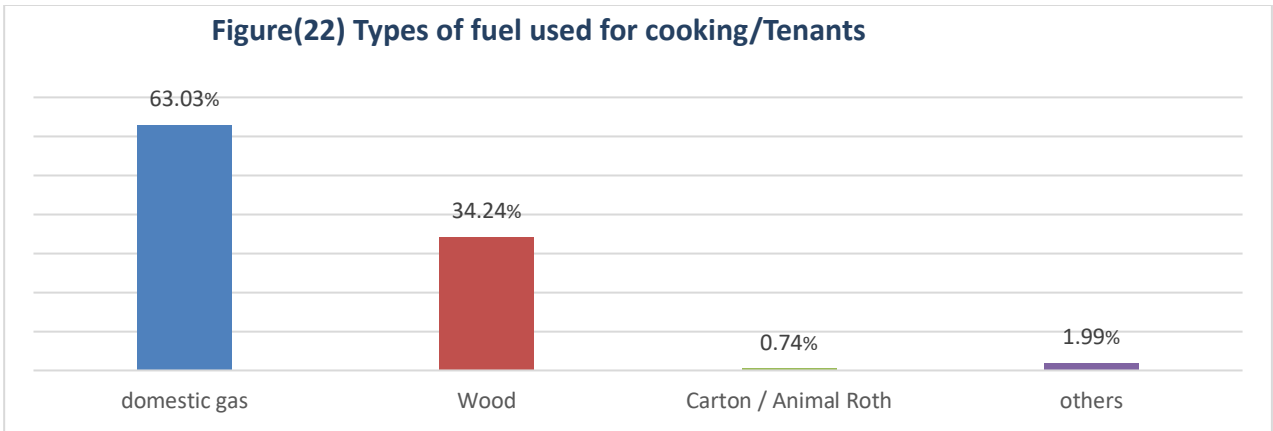
## 2.10 Source of Lighting

The sources of lighting in the rented housing of the target area in Lahj (Figure.21) is as follows: the public electricity grid 45.44%, used solar energy and rechargeable batteries 31.57%, candles 3.54%, kerosene 0.88%, with no source of lighting 11.21%, and 3.83% was categorized as other (torch, or light from neighbors). These results indicate that a sizable number of tenants use the public electricity grid and solar energy which is considered as an economic source for lighting.



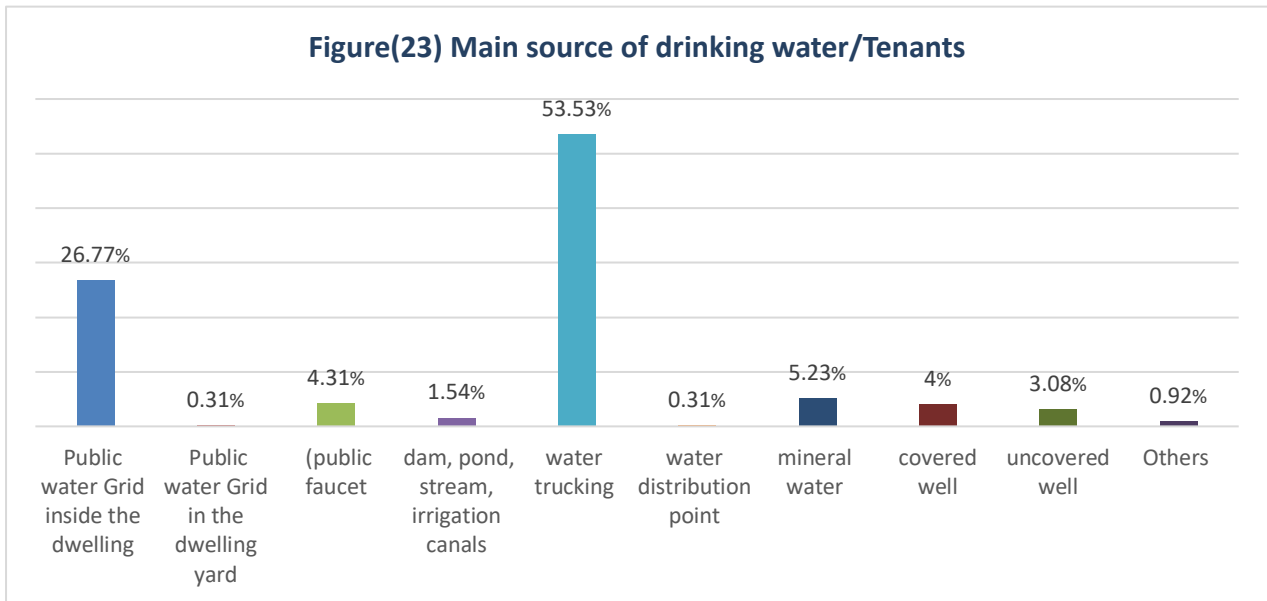
### 2.11 Type of Fuel Used for Cooking

The analysis of this study shows that the types of fuel used by the tenants' households for cooking purposes are: domestic cooking gas 63.03%, firewood 34.24%, cartons and Roth (animal waste) 0.74% and others (don not cook) 1.99%. These results show the difficult circumstances encountered by the tenants, especially the IDPs, who cannot afford to buy cooking gas. The alternatives for domestic gas are harmful to the tenants and the environment and add additional burden and hardship on the families in obtaining them (Figure.22).



### 2.12 Source of Drinking Water

Figure (23) shows the main sources of drinking water for tenants, which is as follows: water trucks 53.53%, public water tanks 26.77%, other sources are distributed like dams, ponds, streams, irrigation canals 0.92% , public faucet in the village 4.31%, covered wells 4%, and mineral water (water purification stations) 5.23%. These results reflect the tenants' struggling conditions in obtaining clean and sanitary drinking water.



### 3. Access to Housing

#### 3.1 Transfer from Former Residence (Geographical Area)

According to the results of the analysis, figure (24) shows that 67.5% of the tenants sample have moved from other the Governorates or from within Lahj itself, whereas 32.5% of the tenants are local residents of the same area. This reflects displacement on a large scale.

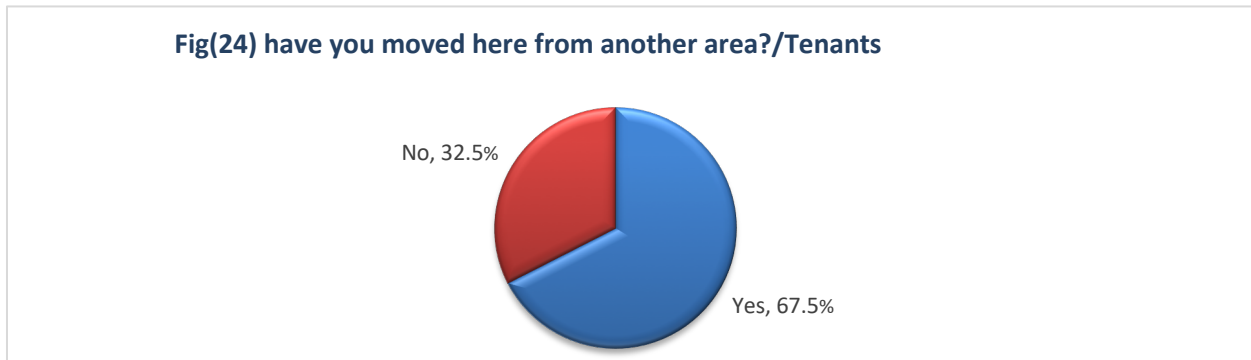
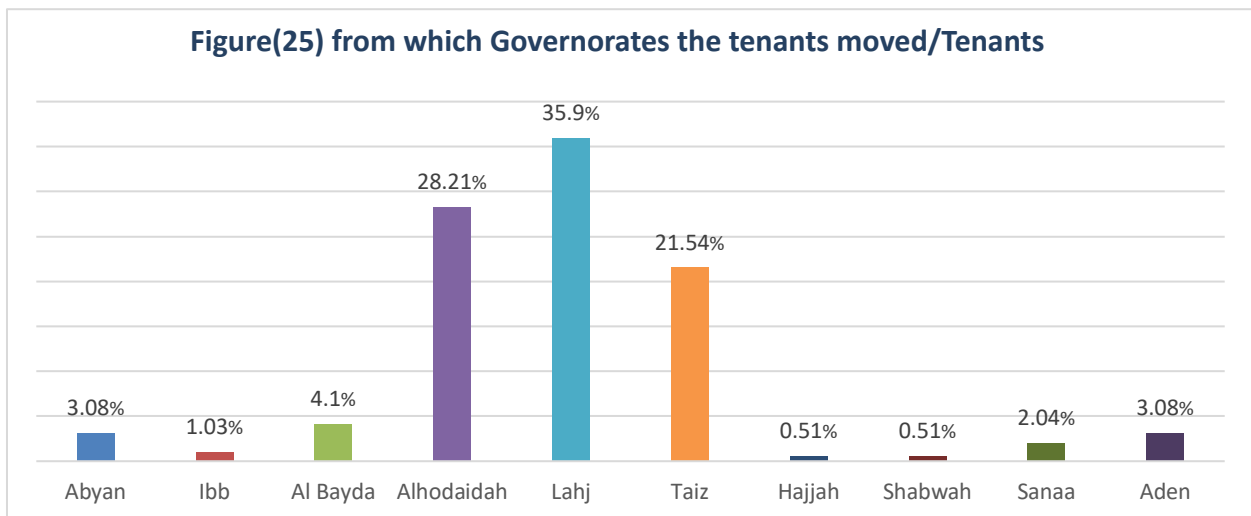


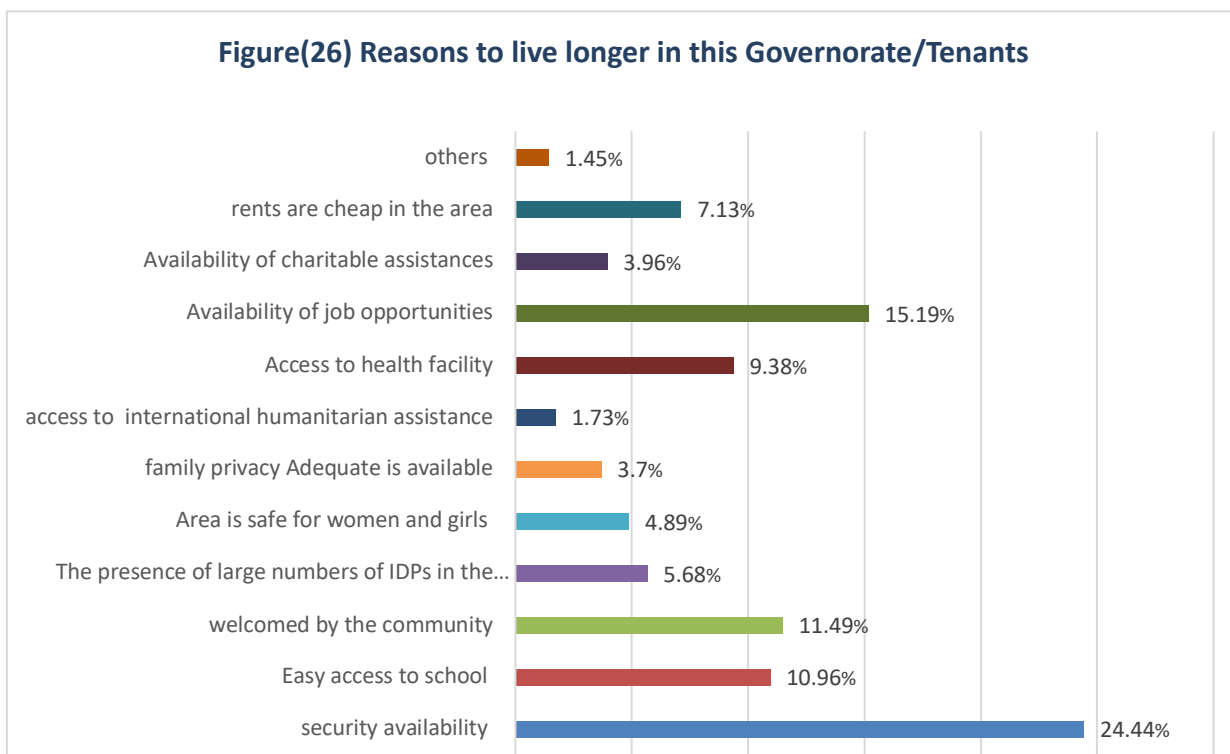
Figure (25) shows that 35.9% of tenants moved from within Lahj itself, and tenants who moved from different Governorates are mostly coming from Al-Hudaydah 28.21%, Taiz 21.54%, Al-Bayda 4.1%, Aden 3.08%, and Abyan 3.08%.

These results were confirmed by the focus group discussions (FGDs) analysis and key informant interviews of both male and female genders that stated that the majority of IDPs moved after 2015 from Karesh, Al Mousaimeer, Al-Whazeha (Taiz) , and Al-Hudaydah. The majority of IDPs have been from the Governorate of Al-Hudaydah, especially due to the ongoing conflicts spreading into the districts of Al-Hudaydah which affected negatively on the life of people. Participants also indicated that Al-Hudaydah welcomed IDPs from Ibb in 2011.



### 3.2 Choosing the Governorate for Residence

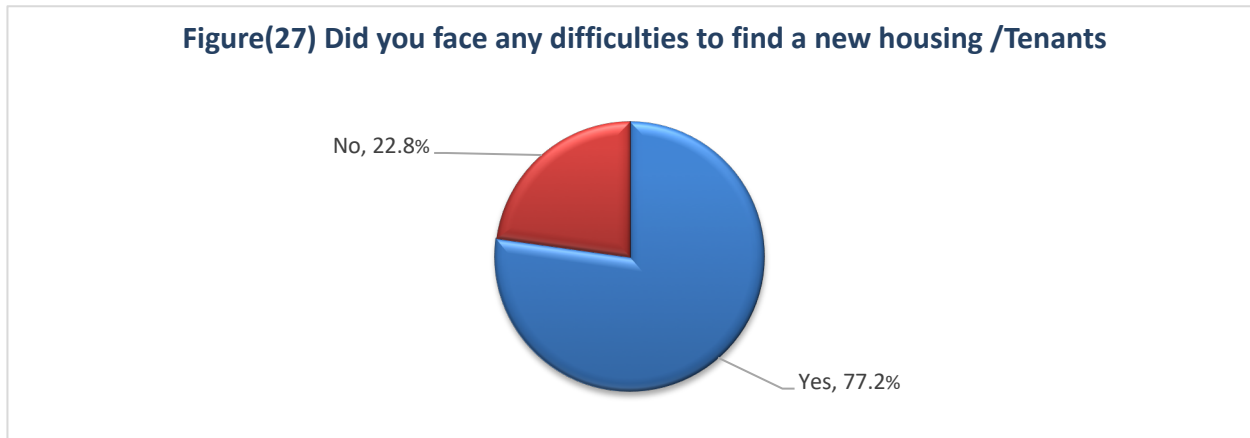
The results of the tenants' sample analysis illustrate the number of factors that were taken into consideration when choosing a rented housing. 24.44% chose areas with security conditions, 15.19% rented in areas with availability of job opportunities, 11.49% decided to live in the areas where they were welcomed by the community, 10.96% rented in areas with ease of access to schools, 9.38% decided to live in areas with access to health facilities, 7.13% chose areas with cheap rent cost, and 1.45% was categorized as other reasons (close to family). The rest of the reasons are illustrated in Figure (26). These results reflect that the availability of security in these areas along with access to facilities and community acceptance is what IDPs tenants are looking for, all of which is available in this Governorate.



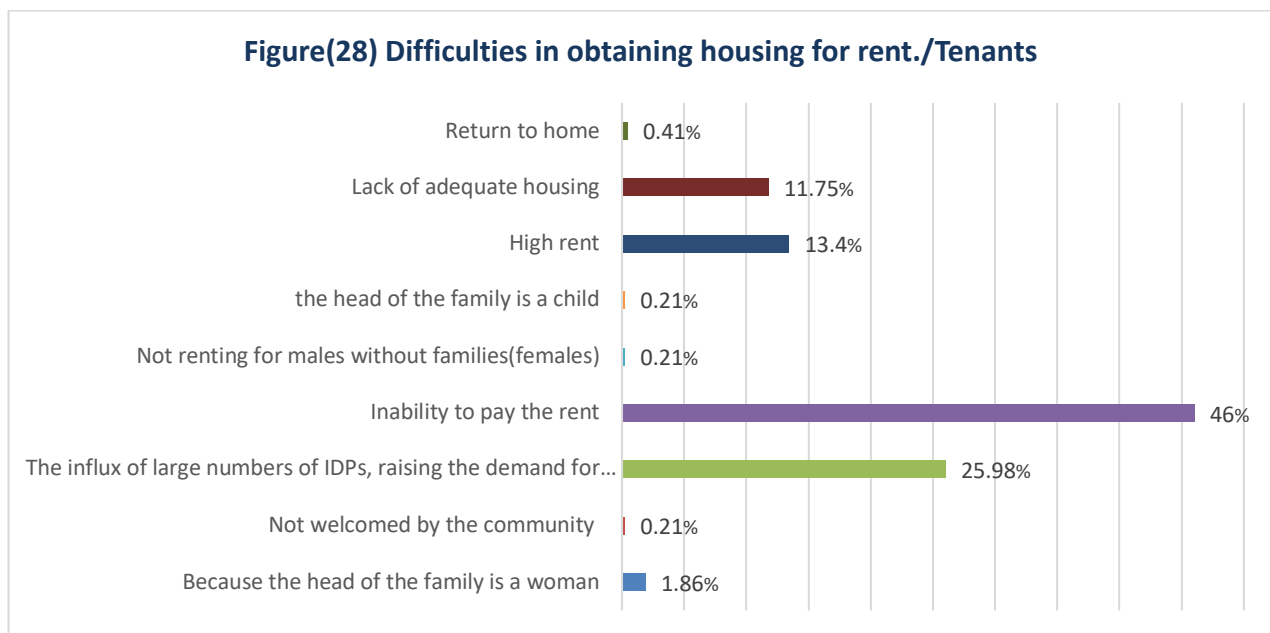
The qualitative analysis (FGDs and KII) indicates that IDPs have chosen some districts in Lahj to settle down in for: the proximity of Lahj to their original areas where they came from, safety, and similarity of traditions and culture between the local community and IDPs. In addition, participants added: the availability of job opportunities (especially in farms), security for women and children, the availability of schools and humanitarian organizations working in the Governorate.

### 3.3 Difficulties in Obtaining Housing and Stability

The results of the tenants' sample analysis (Figure. 27) showed that 77.2% of the tenants reported that they found difficulties in finding a housing for rent, whereas 22.8% of tenants did not experience any difficulties.



The difficulties are as follows: inability to pay rent 46%, increased demand for rental housing due to the large influx of IDPs.98%, high rent costs 13.04%, lack of adequate housing for rent 11.75%, because the head of the family is a woman 1.86%, because the head of the family is a child 0.21%, not welcomed by the community 0.21%, because landlords do not rent to males without a family 0.21%, and 0.41% of tenants will return to their home towns Figure (28). These results reflect the problem of high rent in the Governorate and the tenants' inability (due to poverty) to afford it.



These results largely confirm the outcomes of the qualitative analysis which show that the Governorate does not have many housing for rent. The analysis reflects the inability of poor tenants to pay rents due to the lack of income which causes instability in the area especially with no job opportunities available.

The results of the analysis of the group discussions and key informant interviews of both male and female confirmed that the main difficulties IDPs are facing are: lack of adequate housing, the shortage of rented housing, and tenants' inability to pay rent.

Figure (29) shows that landlords stated the following challenges facing the rental market: 22.53% unavailability of housings for rent, 20.88 % high demand for housing, 12.09% lack of diversity in the housing stock, 10.44% high cost of rent, 8.24% excess supply of unleased property, 7.69% high rate of non payment, 4.40% unable to repair housing, 4.95% overcrowding rented housing, 2.75% eviction of tenants, and 1.10% market monopoly. These results reflect the struggles and challenges IDPs face in finding housing to rent.

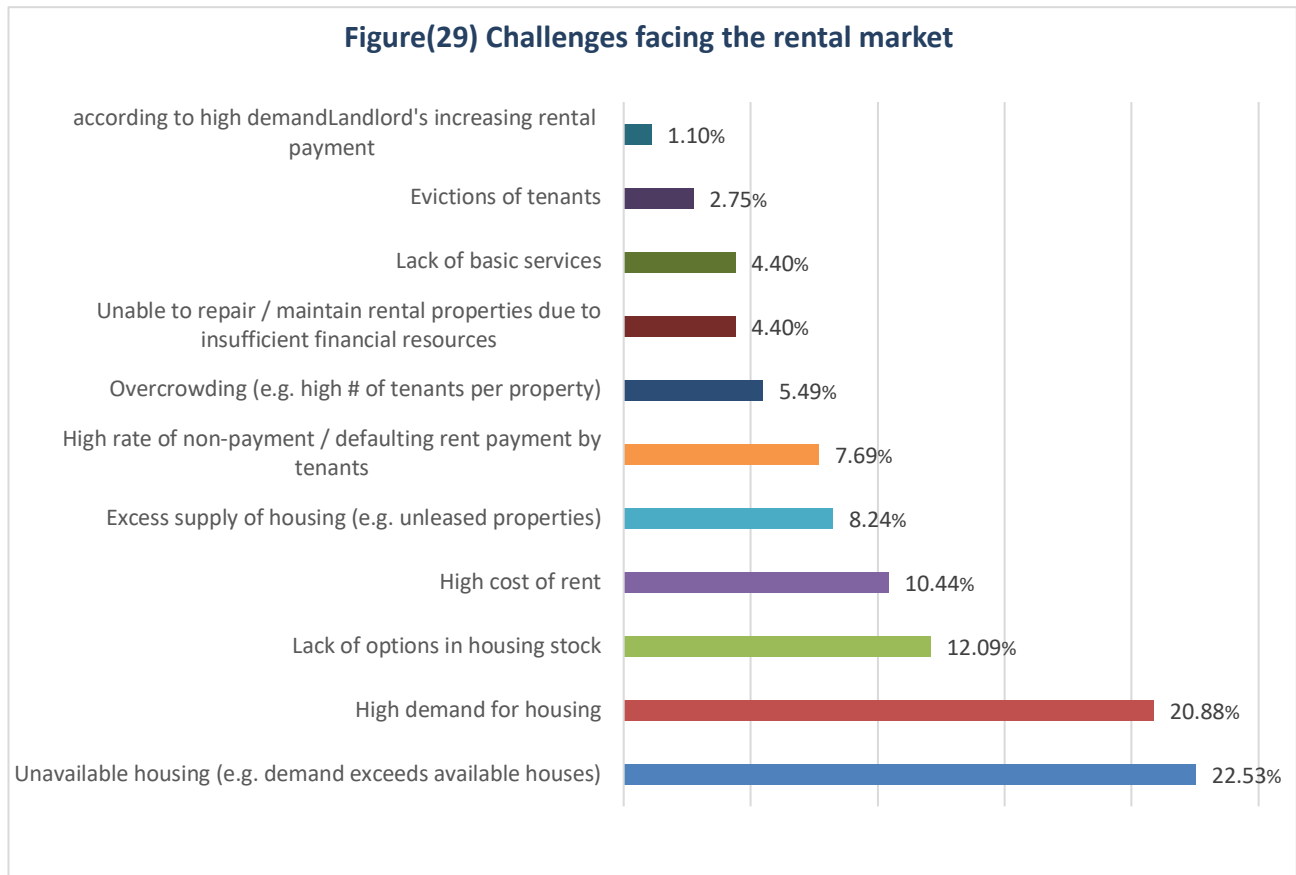
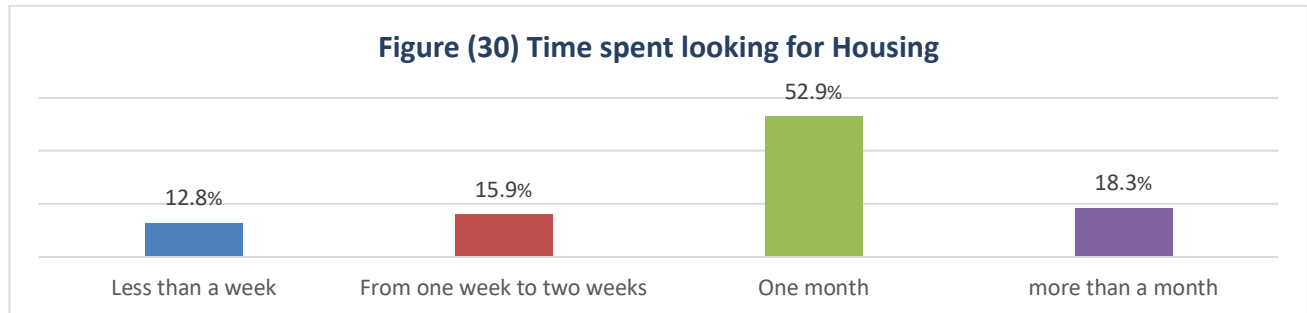
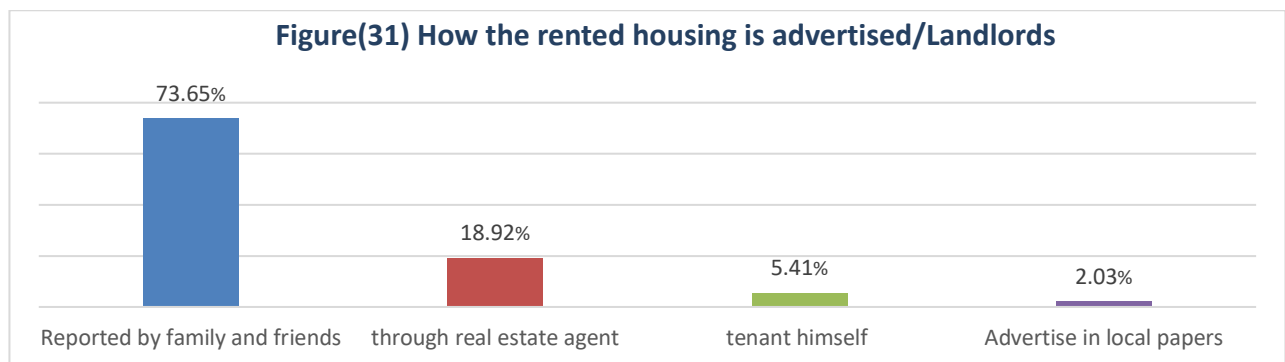


Figure (30) shows the period of time it takes tenants to find a housing to rent. It took 52.9% of tenants one month, 15.9% from one week to two weeks, 12.8% less than a week, and 18.3% more than a month. This shows that there is a gap between the tenants and the advertisements of the housing market mainly due to the low supply of housing and lack of real estate offices.



The results of analysis of FGDs and KII confirmed that the three main reasons IDPs find it challenging to find housing for rent are: high rents, lack of income to pay rent, and inavailability of rental housing.

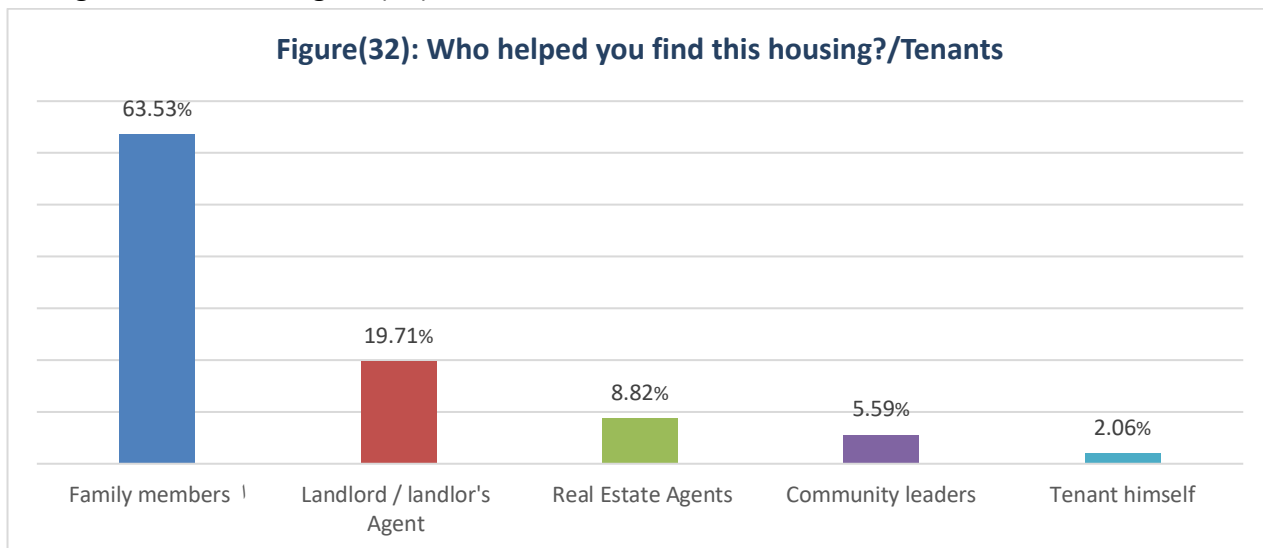
The landlords' sample analysis shows how the tenants found rented housing. 73.65% of vacant housing were rented through friends and relatives, 18.92% through real estate offices or realtors, 5.41% of housing were found by the tenant himself, and 2.03% was through official newspaper advertisements. These results reflect the minor role of real estate offices and how tenants rely mostly on friends and family in order to find adequate housing Figure (31).



These results were confirmed by the outcomes of the analysis of focused group discussions and key informant interviews of both male and female that the majority of IDPs are financially incapable of affording high costs of rent which make them unable to pay the rent. The remaining challenges were unavailability of suitable housing to rent (no electricity and water services), and some landlords demanding an advance rental payment.

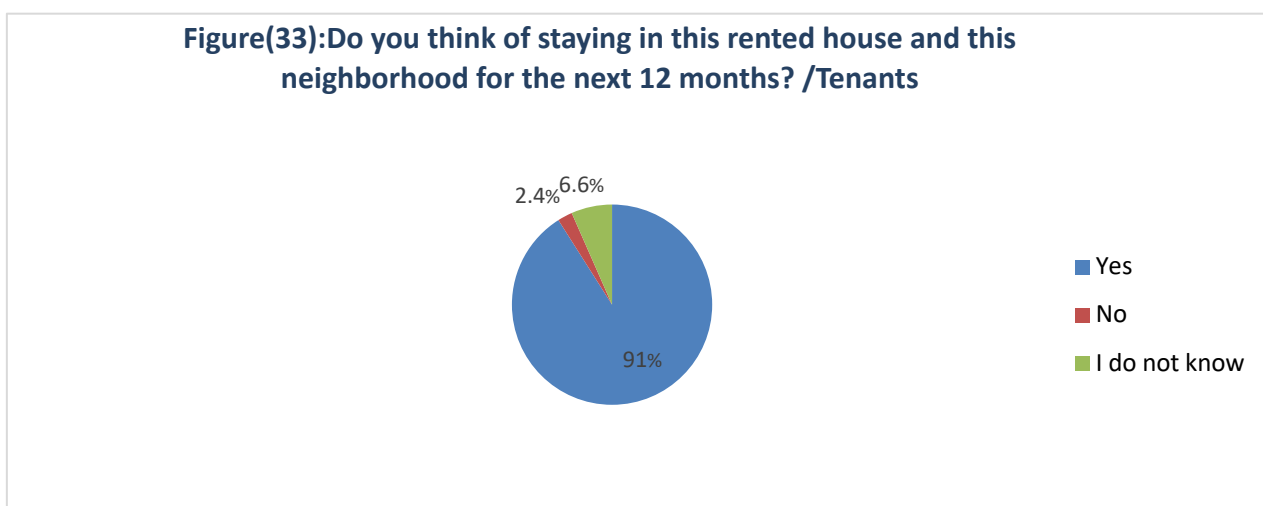
### 3.4 Key Actors in the Rental market and Housing Access

The analysis of the tenants' sample data shows that 63.53% of the tenants found the rented housing through relatives and friends, 19.71% through landlord/landlord's agent, through real estate agents 8.82%, through community leaders 5.59% and 2.06% through the tenant himself. The results indicate that the majority of tenants rent housing through friends and relatives, reflecting that the majority of landlords advertise their property through traditional methods and do not advertise through social media, Figure (32).

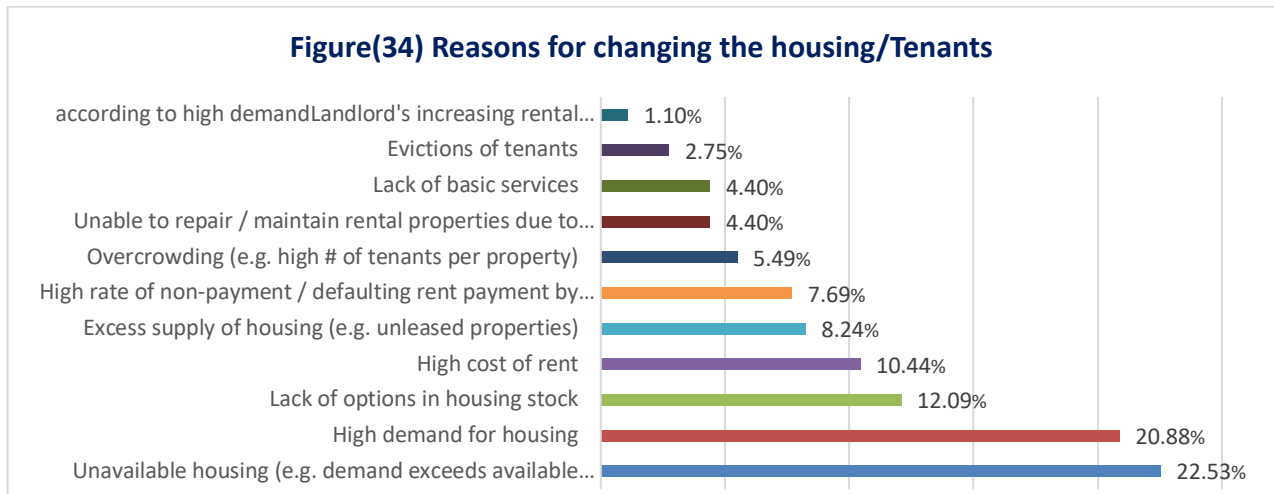


### 3.5 Stability in the Housing

Figure (33) shows that 91% of the tenants decided to settle in their current rented housing for the next 12 months, while 2.4% were unwilling to stay, and 6.6% were hesitant to answer due to their inability to make any decision.



According to the results of the tenants' sample analysis, tenants will move from their current housing for the following reasons: unavailability of rented housing (demand vs supply) 22.53%, high demand for rented housing 20.88%, lack of options in the housing stock 12.09%, high cost of rent 10.44%, unleased property 8.24%, high rate of nonpayment 7.69%, overcrowding the rented housing 5.49%, inability to repair rental properties 4.40%, lack of basic services 4.40%, eviction of tenants 2.75%, and 1.10% was landlords increasing rent costs because of high demand on rental housing (Figure. 34).

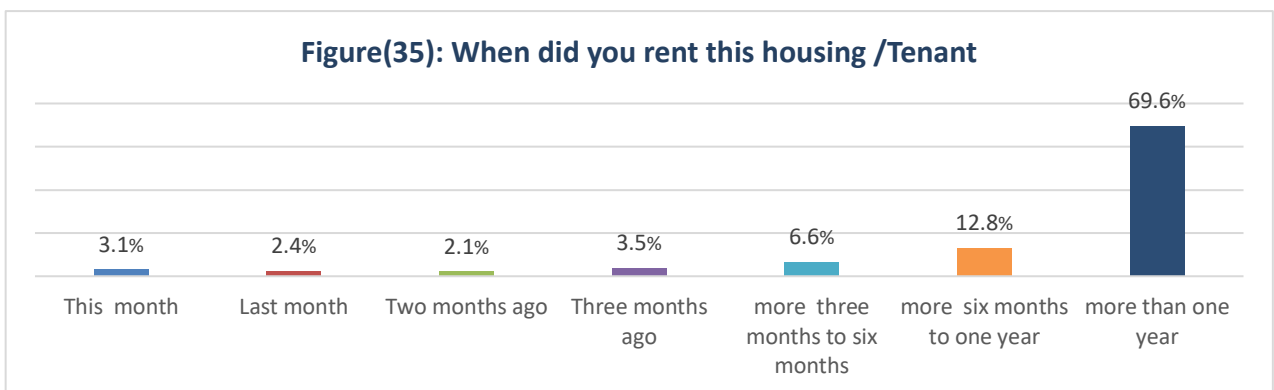


The results of the analysis of the focus group discussions and key informant interviews of both males and females confirm that IDPs preferred stability in this area due to security, availability of job opportunities and humanitarian aids.

#### 4. Rent and the Main Sectors of the Rental Market

##### 4.1 The Rental Period of the Housing

Figure (35) shows that 69.6% of the tenants' sample rented housing for more than one year, 12.8% from six months to one year, 6.6% from three to six months, 2.1% two months ago, 3.1% last month. These percentages reflect that the majority of tenants have been stable residents of the same area for some time.



#### 4.2 Rental Agreement

The results of the tenants' sample analysis (Figure 36) in Lahj Governorate indicate that 87.9% of rental agreements are verbal, 6.9% are written agreements but not legal, 4.5% are legal written agreements, and 0.7% other (with no agreement). The high percentage of verbal agreements reflects that the leasing market in the Governorate is not governed by written formal agreements. In same context, participants in the KIIs and FGDs highlighted that rental agreements are mainly verbal and only a few are formal agreements.

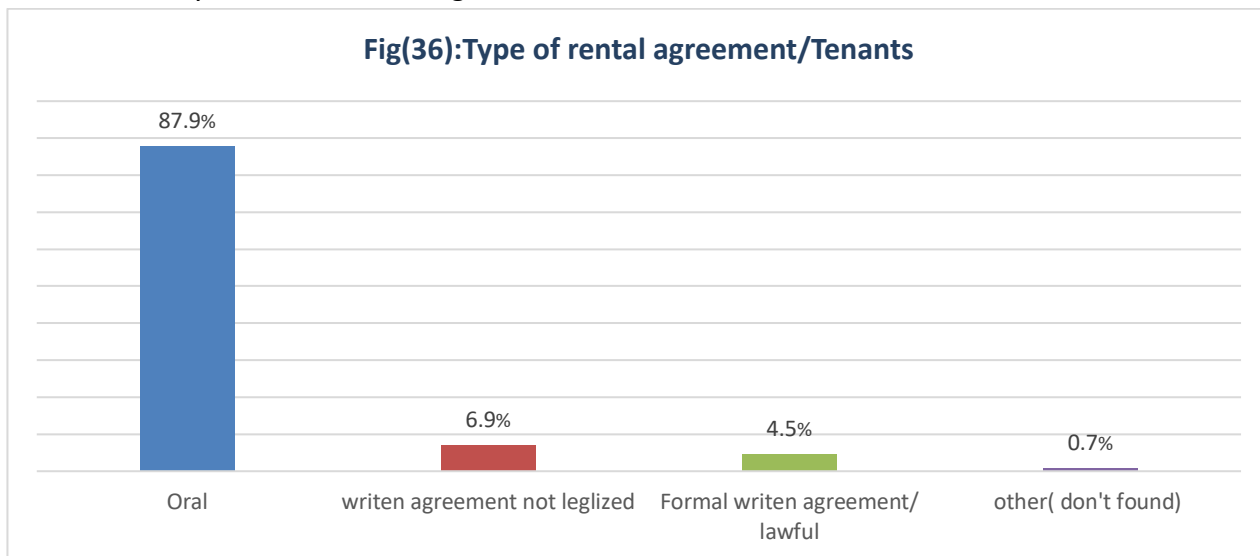


Figure (37) shows that 77.5% of the tenants' sample do not pay any advance payment when signing the rental agreement, while 22.5% pay an advance payment. Such payments, which usually cover basic repairs upon departure, are an additional financial burden on tenants especially IDPs.

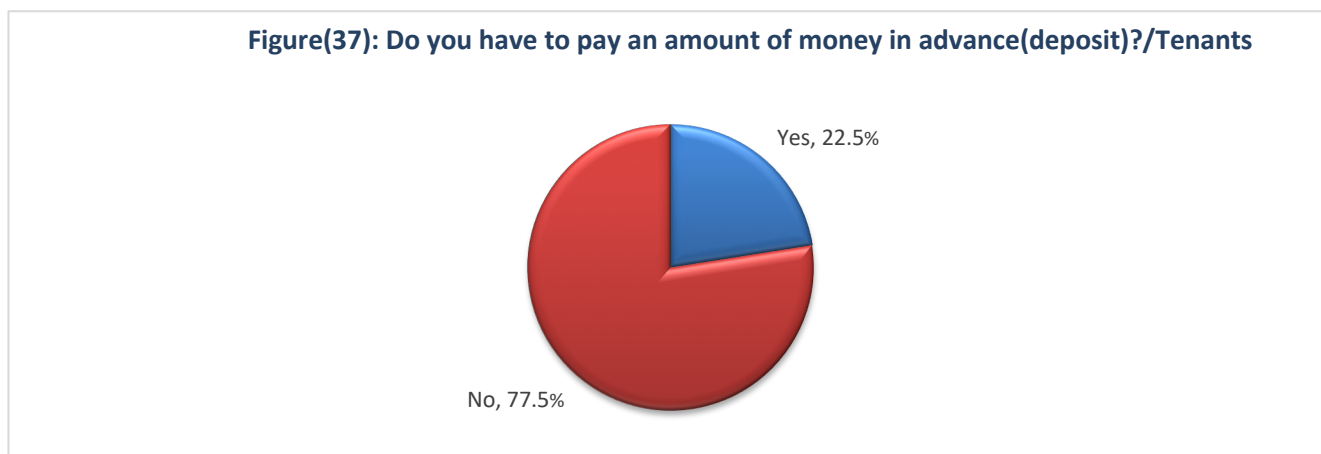
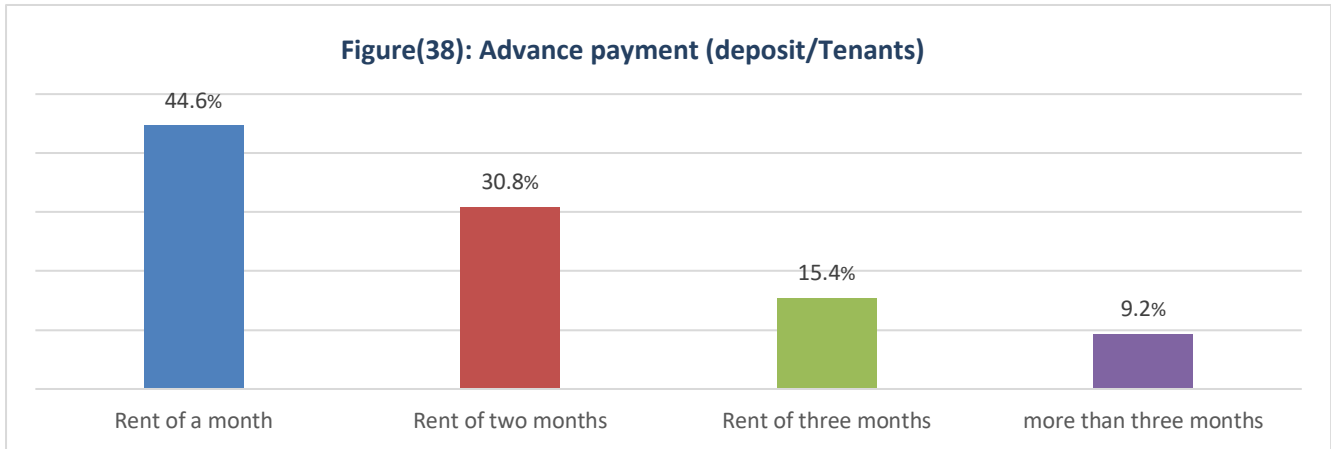


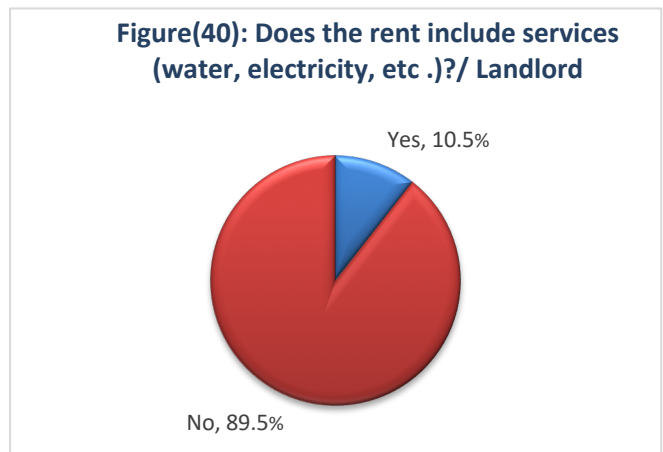
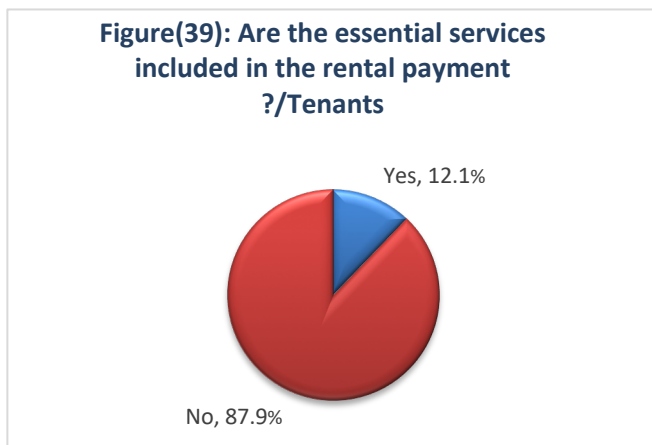
Figure (38) shows that the advance payment ranges from a month's rent 44.6%, two months 30.8%, three months 15.4%, more than three months 15.4%, and 9.2% more than three months.



As shown by the results of the tenants' sample analysis (Figure.40) 87.9% of rent payment does not include basic services such as water or electricity, and only 12.1% include basic services, however, some landlords include basic services to shared housing only.

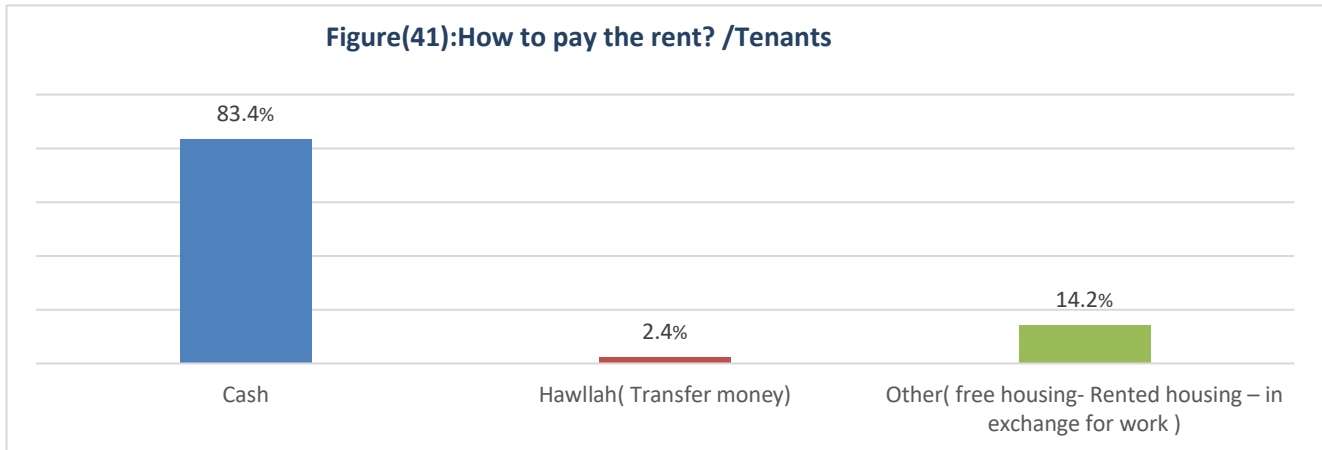
#### 4.3 Services in the Governorate

The results of the study (Figure 39) indicate that 87.9% of the tenants' sample did not have basic services such as water or electricity included in the rent payment, and that these services are considered separate services and have a separate cost. However, 12.1% of the sample indicated that the rental amount covers the costs of basic services. The result of the landlords' sample analysis (Figure.40) indicate that 89.5% of landlords do not include basic services (water and electricity), while 10.5% of landlords do include basic services.



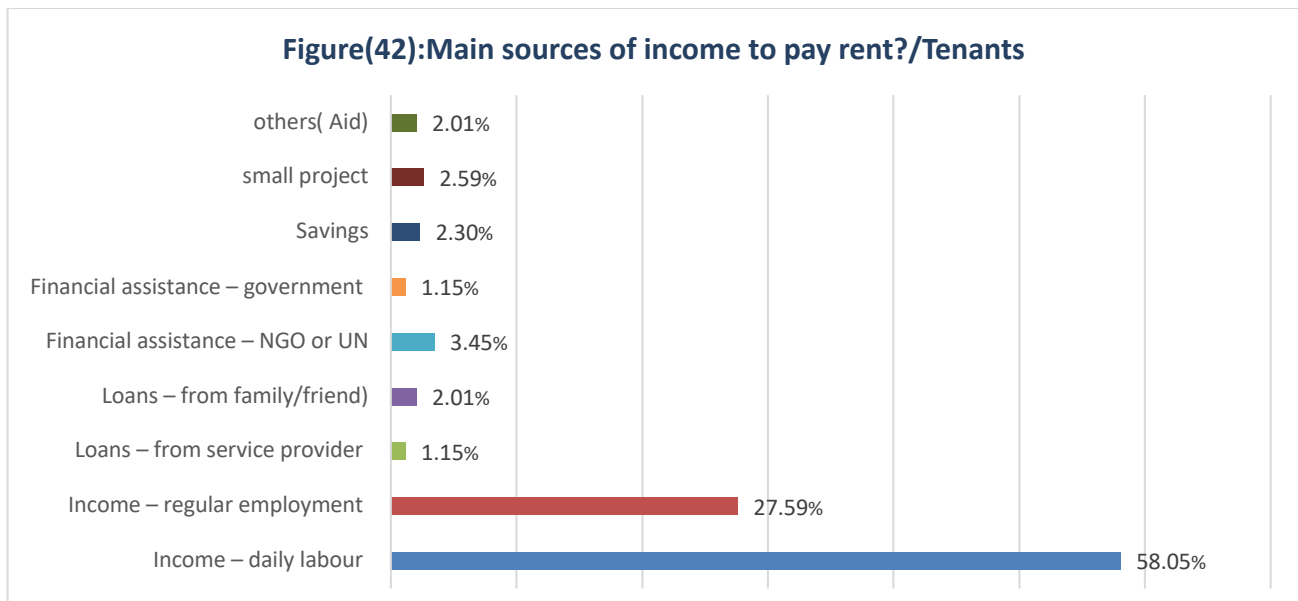
#### 4.4 Rent Payment Methods

Figure (41) shows rent payment details, 83.4% of the tenants pay the rent in cash, 2.4% through money transfer, and 14.2% other (rent free housing or working for landlords in exchange for rent).



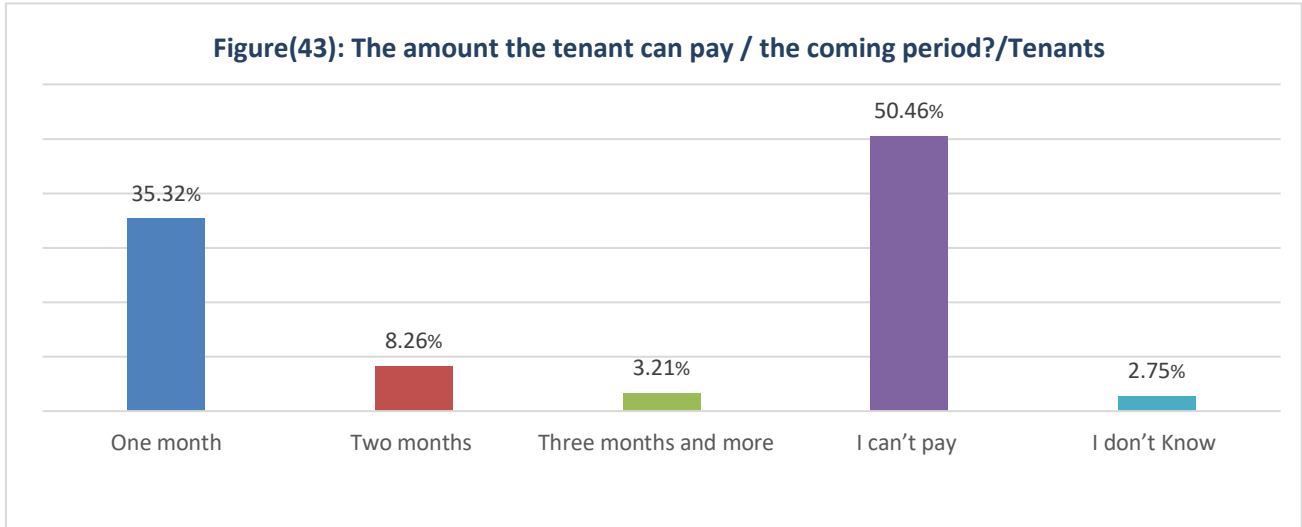
#### 4.5 Sources of Income to Pay Rent

The study shows (Figure. 42) that 58.05% of the tenants paid rent from their daily income, 27.59% from a steady employment, 3.45% from financial assistance (NGO or UN), 2.30% by using their savings, 2.59% from their small projects, 1.15% from government assistance, 2.01% loans from friends/relatives, 1.15% loans from service providers, and 2.01% other (aids).



#### 4.6 Paying the Rent

The results of the tenants' sample analysis show the number of months that tenants can pay rent for the coming months. 50.46% of tenants said that they cannot pay rent (because of the war circumstances), 35.32% can pay for one month, 8.26% can pay for two months, and 2.75% of tenants said that they did not know (Figure 43).



As shown by the results of the tenants' sample analysis, 73.7% of tenants pay the rent directly to the landlord, 21.8% pay the rent to the landlord's agent, 1% pay it through real estate offices, and 3.5% are rent free housing (Figure.44). In regards to getting a receipt for rental payment from the landlords, study shows that 0.9% of tenants get a receipt, whereas 99.1% of tenants do not get a receipt (Figure.45).

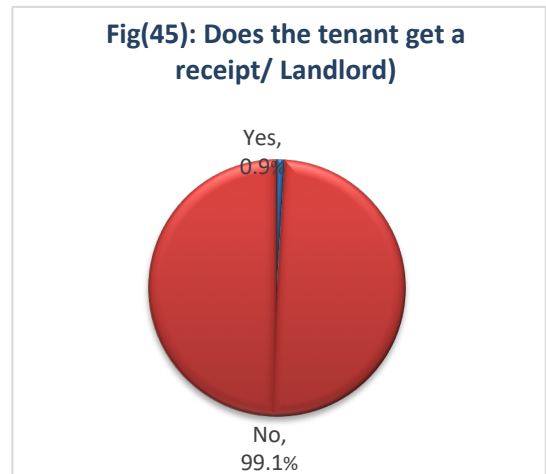
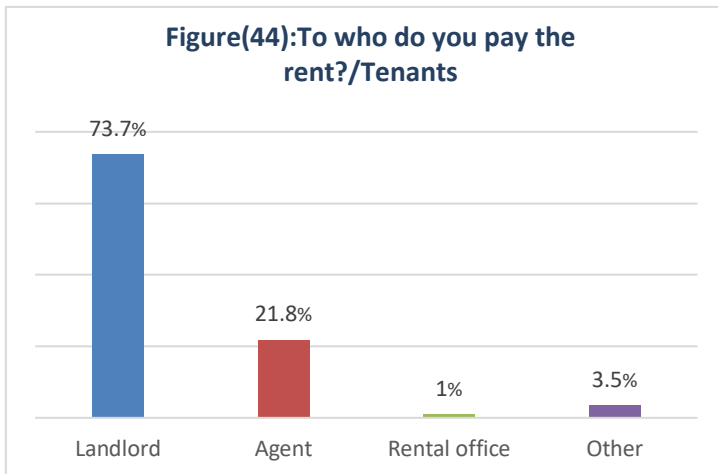
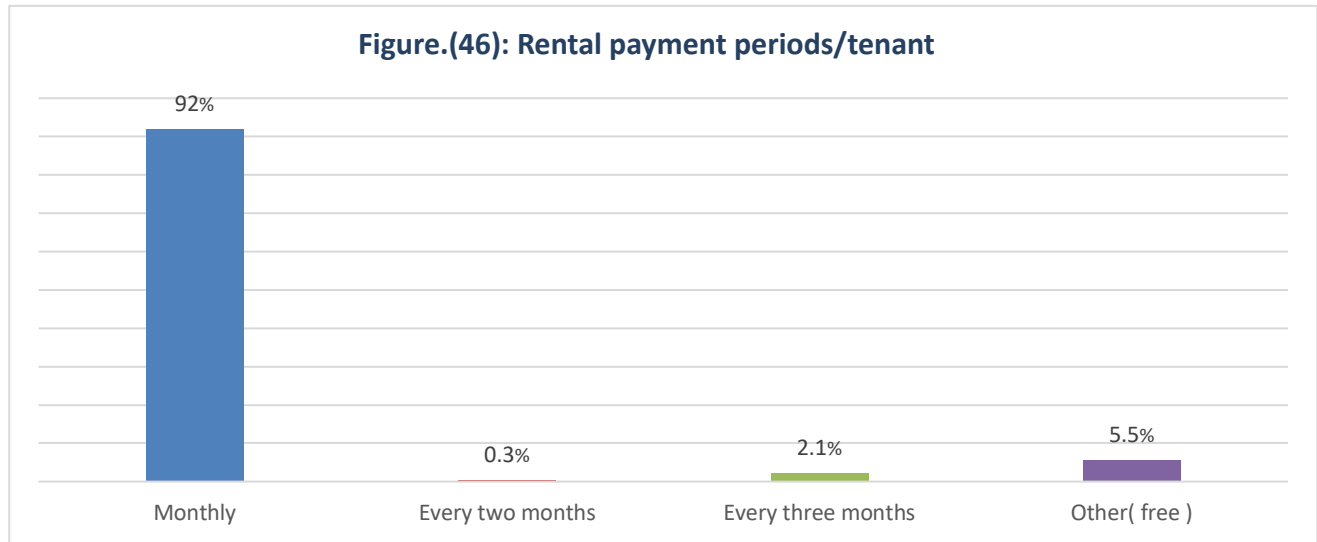
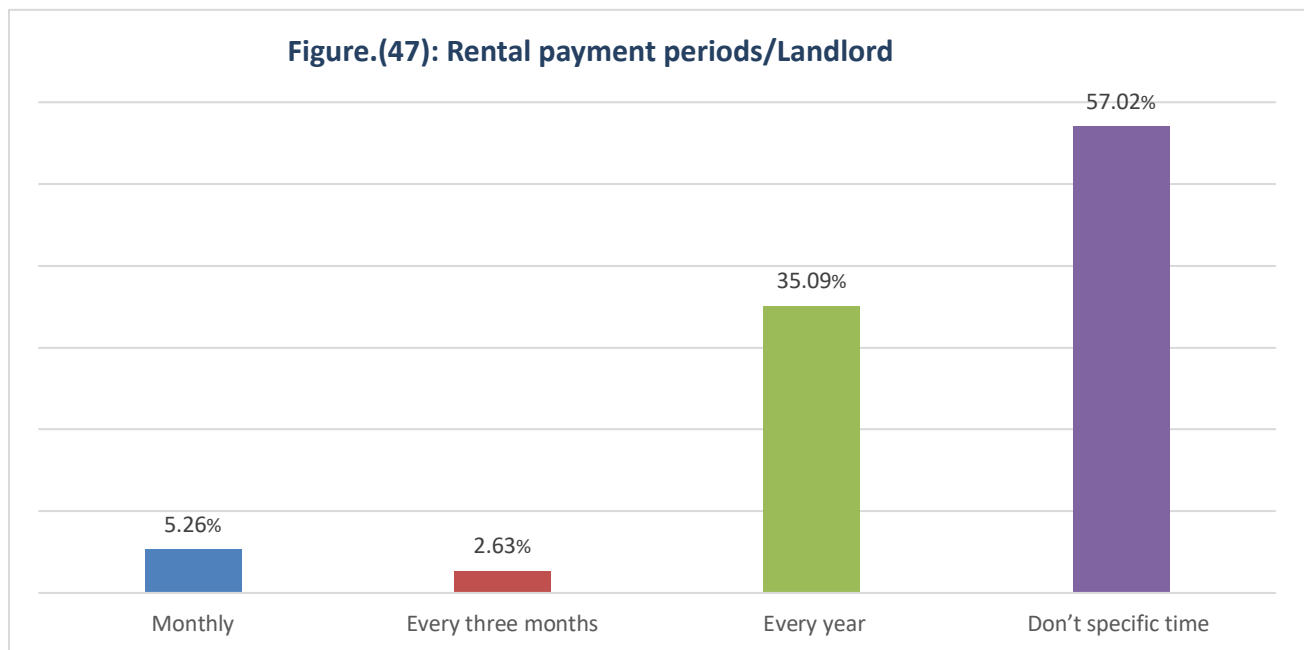


Figure (46) shows that 92% of tenants pay rent on monthly basis, 0.3% pay every two months , 2.1% pay every three months, 5.5% do not pay rent.



The results of the landlords’ sample analysis show that landlords keep rent due dates open according to the tenant’s financial ability. The study shows that 57.02% of landlords do not specify a deadline for rental payment, 35.09% annually, and 5.26% on monthly basis, and 2.63% every three months. Generally, tenants in Lahj Governorate are not obligated to pay rent on a specific deadline , rather it is flexible due to the war circumstances, displacement and loss of jobs (Figure. 47).



#### 4.7 Rent Increase and Stability

The result of the tenants' data analysis (Figure 48) shows that 85.1% of tenants reported no increase in rent over the past 12 months, and 14.9% reported an increase in rent. The rate of increase in rent varied, the average increase in rent is estimated at 29.72%. The high percentage of tenants who have not had an increase in rent reflects that the hosting community is taking into consideration the financial conditions of IDPs. On the other hand, the analysis (figure 48) shows that 53.6% of the tenants do not expect an increase in rent in the coming 12 months, whereas, the 46.4% expect an increase in rent rate.

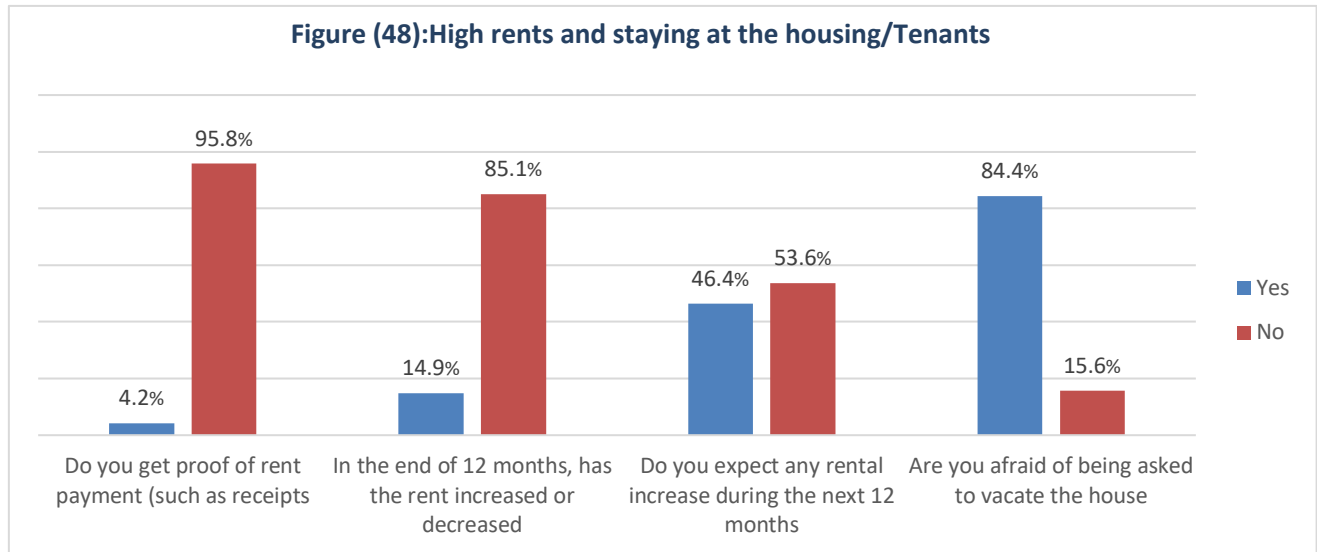
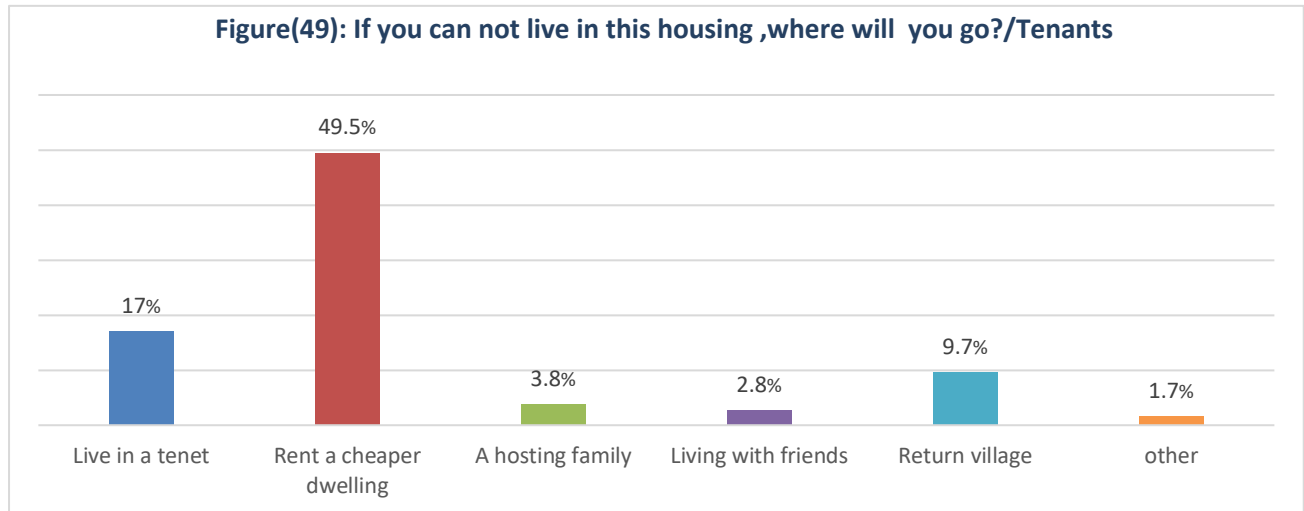


Figure (48) also shows that 15.6% of the tenants' sample do not expect landlords to ask them to vacate the rented housing, whereas 84.4% of tenants expect to be evicted by landlords, usually due to their inability to pay rent on regular basis, which threatens the stability of most tenants, especially IDPs. The study also showed that of all rent payments, 10% of tenants got a receipt for rental payment, whereas 90% of tenants did not get a receipt.

The results of the analysis of the FGDs and the KII confirmed that there is a large increase in rents by 30-100%, a low supply of new rental housing, and rising of prices due to the continuous influx of IDPs, especially from Al-Hudaydah and Taiz.

Figure (49) illustrates the alternatives tenants are considering if they can no longer stay in their current rented housing. 49.5% of the tenants' sample will rent a cheaper housing, 17% will live in tenets, 9.7% will likely return to their hometown, 3.8% will stay with a hosting family, 2.8% will live with friends, and 1.7% was categorized as other.



The results of the analysis of the focus group discussions and the key informant interviews confirmed that the hosting community largely sympathizes with IDPs in the Governorate. The majority of opinions indicated that IDPs would return to their homes in conflict areas as a result of their inability to pay rent or find alternative housing, go to IDPs Sites, or live in school facilities as a last resort.

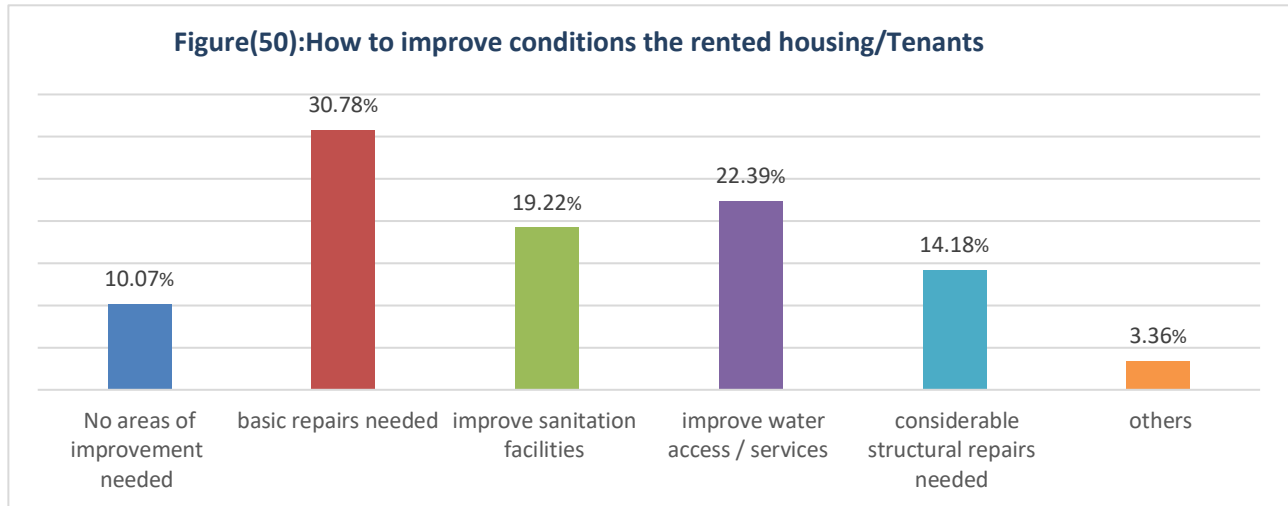
#### 4.8 Total income of tenants and their families

The results of the tenants' sample analysis showed that most of the tenants (working members in the house) had an average income of 47,781 YER. As previously mentioned, the average rent in Lahj Governorate is 14,996 YER in addition to the basic services at 7,136 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, therefore this reflects the extent of the humanitarian and economic crisis that tenants are enduring, especially that 55% of them are IDPs as shown in Figure (5).

## 5. Housing Improving Housing and Accessing Assistance

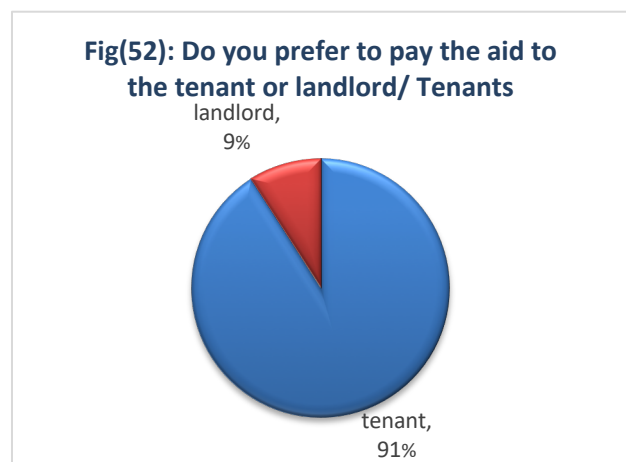
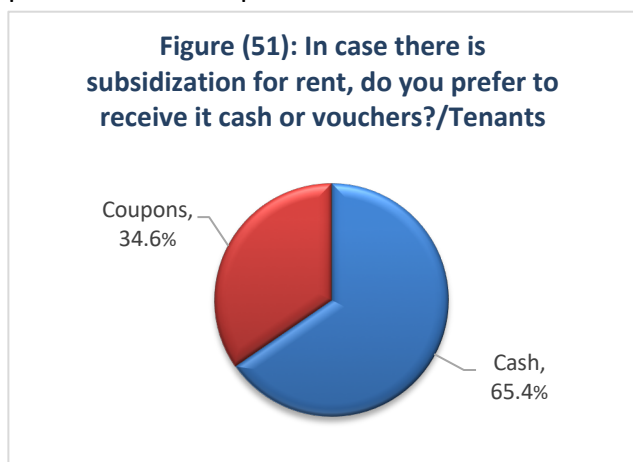
### 5.1 Improving of Housing

Figure (50) shows that 30.78% of the tenants said that improvement of basic services is their priority, 22.39% said the housing needs water services, 19.22% required improvement in sanitation services, 14.18% said that the housing needs repairs and renovation, and 3.36% was other (asked for flexibility with the rent costs).



### 5.2 Accessing Assistance

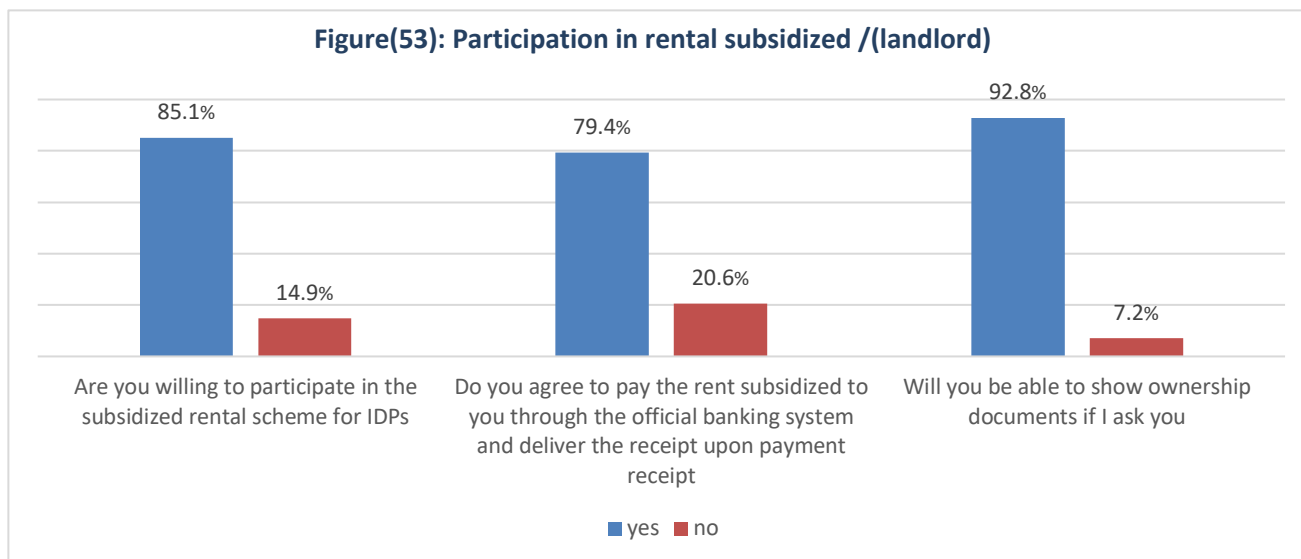
Figure (51) shows that 65.4% of tenants prefer to receive rental assistance if available in cash, and 34.6% of them said through vouchers. The results of the analysis of the tenants' sample (Figure.52) indicate that 9% of the tenants prefer that the rents be paid directly to the landlords, and 91% preferred it to be paid to the tenants.



## 6. Taking Advantage and Participating in Support Program:

### 6.1 Show Property Documents

The results of the landlord's sample analysis shows that 92.8% of landlords are willing to show home ownership documents, while 7.2% are not willing to so, Figure (53).



### 6.2 Method of Receiving Rental Funds

The results show that 79.4% of landlords are willing to receive the rent through the banking system and provide a delivery receipt, whereas 20.6% are not willing to so (Figure.53).

### 6.3 Preparing for Participation

Results also show that 85.1% of landlords are willing to participate in any future rental support programs for IDPs, whereas 14.9% are not willing to participate (Figure.53).

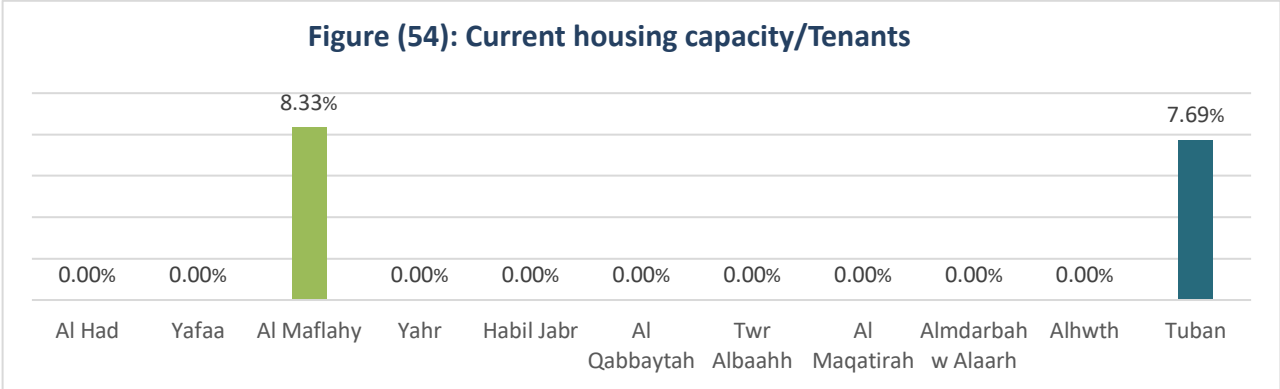
# Section 2: Host Community Capacity Assessment

## 1. Rental Housing capacity and rent value

The analysis reveals that the housing capacity in the Governorate of Lahj is quite limited. 98.17% of the rented housing are occupied, while the remaining 1.83% was available for rent. The assessment shows that the housing capacity in the urban districts and the districts near the Governorates of Taiz and Al-Hudaydah, is nonexistent. The assessment also reveals that the housing capacity in the Governorate of Lahj is limited and the majority of tenants live in small rented housing where minimum standards and basic services such as electricity and water usually do not exist.

Figure (54) shows that the current rental housing capacity is limited to the districts of Al Maflahy 8.33%, and Tuban 7.69%, 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 due to escalation of conflicts.



The results of focus group discussions and key informant interviews confirm that most tenants of moved to this Governorate because of the following reasons: safety, availability of job opportunities, access to international aids, and the welcoming nature of the local community.

The analysis of the data shows that the housing rent average in the Governorate of Lahj is 14,996 YER per month, which is considered a reasonable amount when compared to the small size and poor conditions of the housing. The study also shows that a tenant pays an additional 7,136YER on average for basic services, this number is subject to market prices fluctuation, especially water and fuel. The analysis of the data shows that rent costs are expected to increase 29.72%.

## 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 Lahj Governorate accepts the presence of IDPs and treats them with respect and provides IDPs with support. The results of the study also showed that the most prevalent fears that IDPs are facing are: being evicted from the rented housing due to their inability to pay rent, the prolongation of the war, not receiving humanitarian aids, unavailability of food provision, lack of rented housing and IDPs Hosting Sites. These issues have been highlighted by many participants in the focus groups that confirmed that IDPs cannot be hosted in the local residents' homes. One participant said "IDPs can be hosted in schools during the summer vacation". Another participant said: "It is difficult to receive the IDPs because of the lack of rental housing, especially in Al-Hamra village". And another participant said: "Famine is coming because of IDPs inability to pay rent".

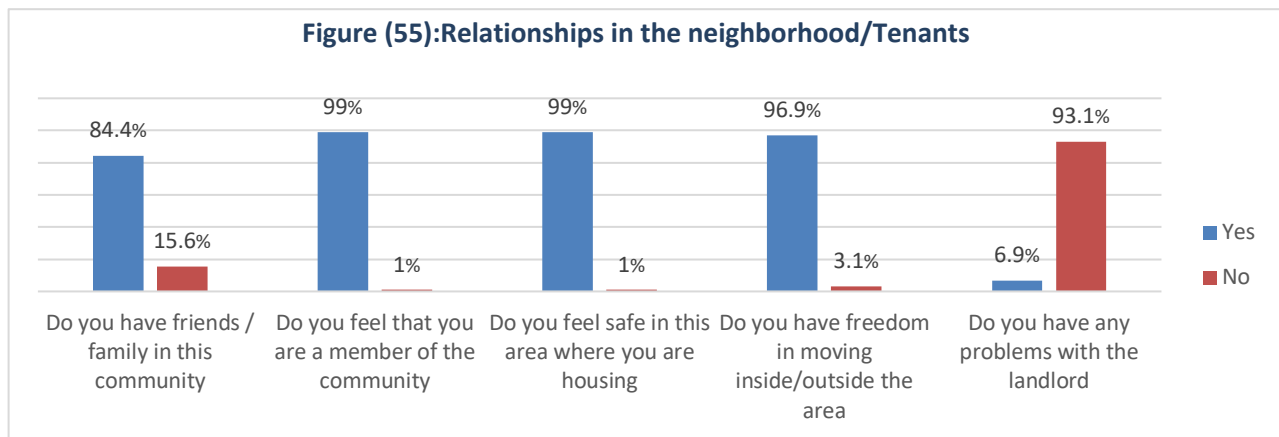
Another issue that seemed to dominate the FGDs is the distribution of humanitarian aids exclusively among IDPs without considering the hosting community (which most of its people suffer from the same level of poverty).

The economic factor was another key issue that was discussed in the FGDs. The financial status of the hosting family plays an important role in deciding whether the household will be able to host an IDPs family or not. Most hosting families in Lahj Governorate are not financially able to host IDPs, one of the FGDs' participants said: "The living costs is a strong reason for not being able to host IDPs".

The ability of the community in Lahj to receive more IDPs is subject to a number of factors including encouraging people to invest in building housing, creating more job opportunities, wider distribution of humanitarian aid to include poor members of the hosting community, creating public awareness about the IDPs' humanitarian situation and the importance to support them, and increasing IDPs' awareness about the issues that may affect peaceful cohabitation within the hosting community.

## 3. The Relationships among IDPs and hosting community

Figure (55) shows that 99% of the tenants' sample feel that they are members of the community where they live in, while 1% do not feel that way. The results also showed that 84.4% of the tenants have friends and relatives in the local community, while 15.6% do not.



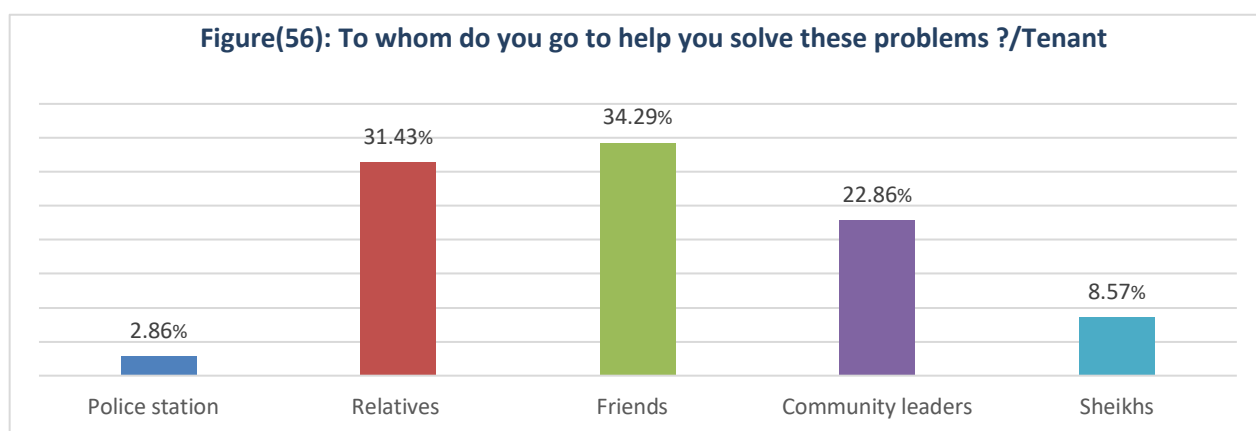
### 3.1 Feeling Safe and Freedom of Movement in the Neighborhood

The study shows that 99% of tenants said that they felt safe in the neighborhood where they live, while 1% of the tenants did not feel safe. As for freedom of movement inside and outside the area, 96.9% stated that they had no problems, whereas 3.1% said that they did not have freedom of movement. (Figure 55)

The results of the analysis of the focus group discussions and key informant interviews stated that a large number of IDPs have good relations with the local residents of the area although they have no family relations. The FGDs also stated that IDPs moved to this Governorate for the following reasons: the geographic proximity to their hometowns, being welcomed by the local community, and safety.

### 3.2 Tenants / IDPs Relationship with Landlords

In regards to the tenants / IDPs relationship with the landlords, 93.1% did not have any problems with their landlords, while 6.9% reported that they do have issues with the landlords. As for settling problems with landlords, figure (56) shows that tenants go to: community leaders 22.86%, their friends 34.29%, their relatives 31.43%, the police 2.86%, and Sheikhs 8.57%.



## **Community Based Organizations.**

CBOs working in Lahj 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. 23 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).

### **3. 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 Lahj Governorate shows the availability of (22) 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).

### **4. Voucher based suppliers.**

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

## **5. 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 11 districts of Lahj Governorate is attached in - Annex (5)

## 6. Conclusions.

- The results of the analysis showed that the community of Lahj is a tribal and urban society that respects, supports and accepts the presence of IDPs. The results of the analysis also show that the local 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 such as water, crowded streets, and make increased prices of commodities and housing' rent costs. Also, the presence of IDPs has decreased job opportunities for local residences due to IDPs' cheap labor.
- The results of the qualitative study showed that the majority of tenants/IDPs fear of being evicted by landlords due to their inability to pay the rent which threatens the stability of most tenants, especially the IDPs.
- The results of the qualitative analysis also showed that most fears that women and children have are: spread of diseases, dropping out of schools (especially for girls), fear from harassment, and malnutrition among children and pregnant women.

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

- The analysis (Table 1) illustrates the tenants' age category in the target districts. The age categories of tenants are: over 18 years to 55 years 41.56%, and over 5 years to 18 years 32.87%. Followed by 19.55% of tenant members that are less than 5 years old, and 6.02% of family members over 55 years. And according to the results of the analysis, the gender of the tenants is 52.58% male and 47.42% female. These results reveal the magnitude of suffering endured by the greater part of the household which are women and children, especially for IDPs.
- The results of the tenants' sample analysis (Figure 36) in Lahj Governorate indicate that 87.9% of rental agreements are verbal, 6.9% are written agreements but not legal, 4.5% are legal written agreements, and 0.7% other (with no agreement). The high percentage of verbal agreements reflects that the leasing market in the Governorate is not governed by written formal agreements. In same context, participants in the KIIs and FGDs highlighted that rental agreements are mainly verbal and only a few are formal agreements.

- The results of the tenants' sample analysis showed that most of the tenants (working members in the house) had an average income of 47,781 YER. As previously mentioned, the average rent in Lahj Governorate is 14,996 YER in addition to the basic services at 7,136 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, therefore this reflects the extent of the humanitarian and economic crisis that tenants are enduring, especially that 55% of them are IDPs as shown in Figure (5).
- The results of the analysis of the FGDs and the KII confirmed that there is a large increase in rents by 30-100%, a low supply of new rental housing, and rising of prices due to the continuous influx of IDPs, especially from Al-Hudaydah and Taiz.
- The study shows that 99% of tenants' sample said that they felt safe in the neighborhood where they live. As for freedom of movement inside and outside the area, 96.9% stated that they had no problems. The study also showed that 99% of the tenants' sample feel that they are members of the community where they live in Figure (55).
- The analysis showed that Lahj's community has good relations with IDPs and the IDPs consider themselves part of the hosting community, and do not have any security concerns.
- The analysis reveals that the main obstacle facing tenants is the lack of housing available for rent due to the large number of IDPs, and the inability to pay the rent.
- The assessment reveals that the housing capacity in the Governorate of Lahj is too limited and the majority of tenants live in small housings where minimum standards may not even exist. This point needs to be taken into consideration if rental assistance programs are going to be introduced.
- The assessment shows most of the problems and challenges facing the hosting community is currently: pressure on health facilities, overcrowding classrooms, unavailability of rental housing, increase in commodities' prices, and humanitarian aids going exclusively to IDPs.
- The results of the study show that 85.1% of the landlords' sample are willing to participate in any future rental support programs for IDPs, 92.8% of landlords are willing to show home ownership documents, and 79.4% of landlords are willing to receive the rent through the banking system and provide a delivery receipt.

## Summary of the Assessment

District	Number of presence CBOs	Suppliers				Financial Points	Average Rent rate
		household items	Furniture	Clothes	Shelter materials		
Al Had	1	5	4	5	5	3	106400
Al Maflahy	0	3	1	4	3	1	17629
Al Maqatirah	4	5	4	5	4	0	11459
Al Qabbaytah	0	1	1	1	3	3	30625
Alhwth	6	5	5	5	5	2	154800
Almdarbah w Alaarh	0	1	2	3	1	2	21852
Habil Jabr	5	5	4	6	5	2	45909
Tuban	4	2	0	1	5	4	35208
Twr Albaahh	2	1	1	1	3	3	44671
Yafaa	0	6	6	5	6	1	17333
Yahr	1	5	4	5	2	1	50000
	23					22	

## **Annexes:**

**Annex (1): Assessment Maps**

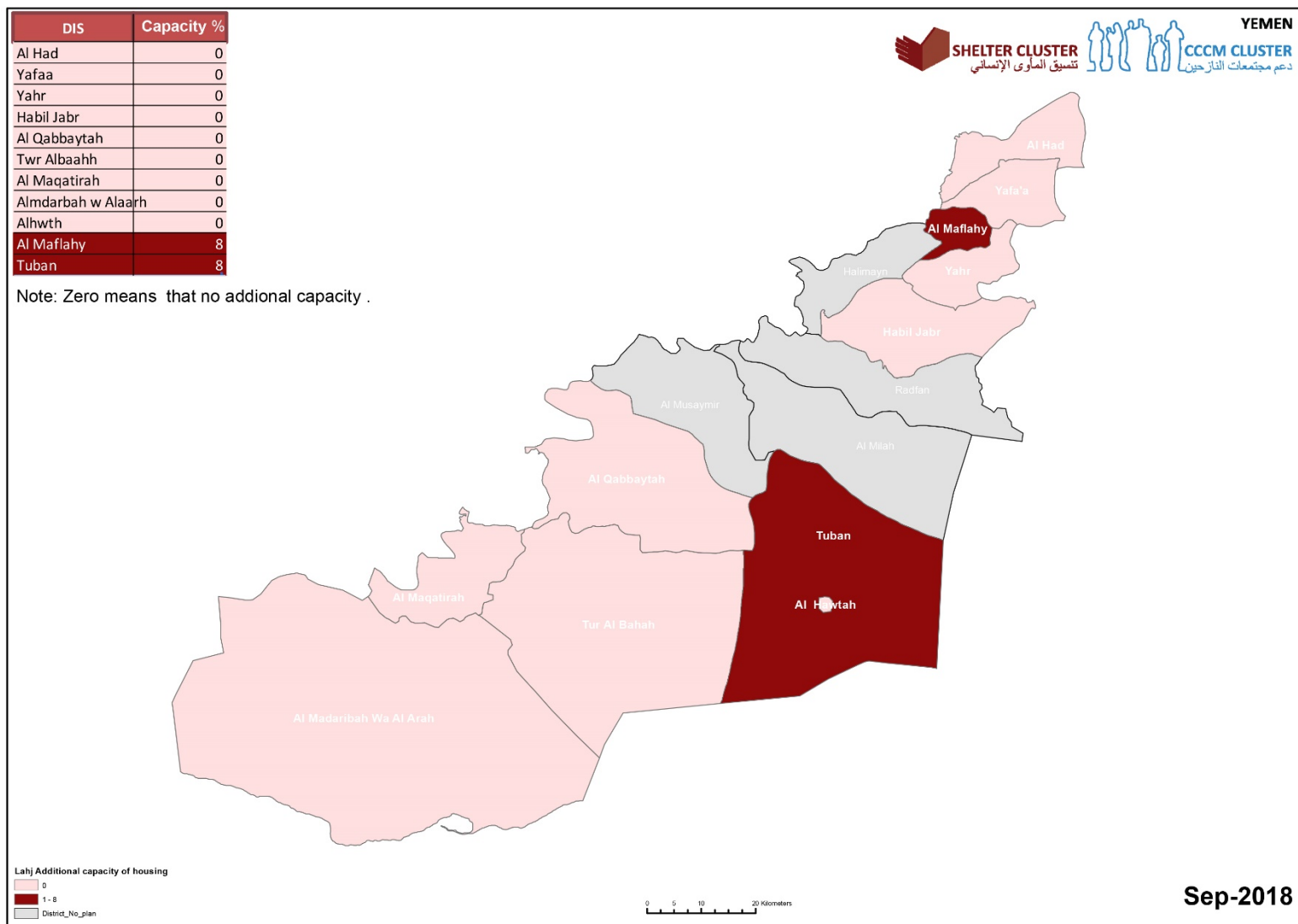
**Annex (2): Community Based Organizations**

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

**Annex (4): Voucher Based suppliers.**

**Annex (5): Local Authorities**

## Annex (6): Housing capacity Map



## Index

### Section 1: CBOs

#### Activities provided by CBOs:

- Relief, 319, 330
- Development, 311, 313, 317, 320-324
- Charity, 310, 325-329, 332
- Development- Relief, 315-316, 318
- Development- Relief- charity, 314
- Development- Relief, charity, education, 312, 331

### **Validity of license**

Not valid, 313, 317-320, 322, 326, 329

Valid, 311-312, 314-316, 321, 323-325, 327-328, 330-332

### **Bank Accounts**

Available: 311-317, 319, 322-325, 328-331

Not Available: 310, 320-321, 326-327, 332

### **Section 2: Financial points- Exchangers and remittance agents.**

**Al-Amal Bank**

**Al-Kuraimi Exchanger**

### **Section 3: Voucher based suppliers.**

#### **Type of Goods are provided by Vendors:**

**Cloths**, 2354-2357,2367,2368,2373-2375,2379,2387,2388,2392-2394,2397,2402,2403, 2409,2411,2418-2420,2429-2433,2441,2442,2446,2454-2456,2458,2459,2467,2469, 2476-2478

**Furniture**, 2358,2359,2361,2364,2368,2376,2377,2381,2382,2386,2389,2399,2403,2406, 2415,2416,2418,2421,2424,2425,2427,2435-2437,2440,2454,2457,2467,2470,2476,2480,2481

**Shelter material**, 2353,2360,2369,2371,2372,2383,2384,2390,2395,2398-2401, 2404-2406,2410,2412-2413,2414,2418,2423,2428,2438,2444-2446,2448,2449,2451,2452, 2461,2462,2464-2466,2468,2472,2473,2475,2476,2479

**Household item** , 2362,2363,2365,2366,2368,2370,2378,2380,2385,2391,2396,2397,2399, 2403,2406-2408,2417,2418,2422,2426,2427,2434-2437,2439,2443,2447,2450,2453,2457, 2458,2460,2463,2470,2471,2474,2479

#### **Previous experience in voucher program:**

Available: 2358,2360-2365,2384,2395,2396,2398,2399,2404-2406,2445,2449,2451,2452, 2462,2472

Not Available: 2353-2357,2359,2366-2383,2385-2394,2397,2400-2403,2407-2444, 2446-2448,2450,2453-2461,2463-2471,2473-2481

#### **Willingness to respond in emergency:**

Willing: 2353-2481

Not willing:

