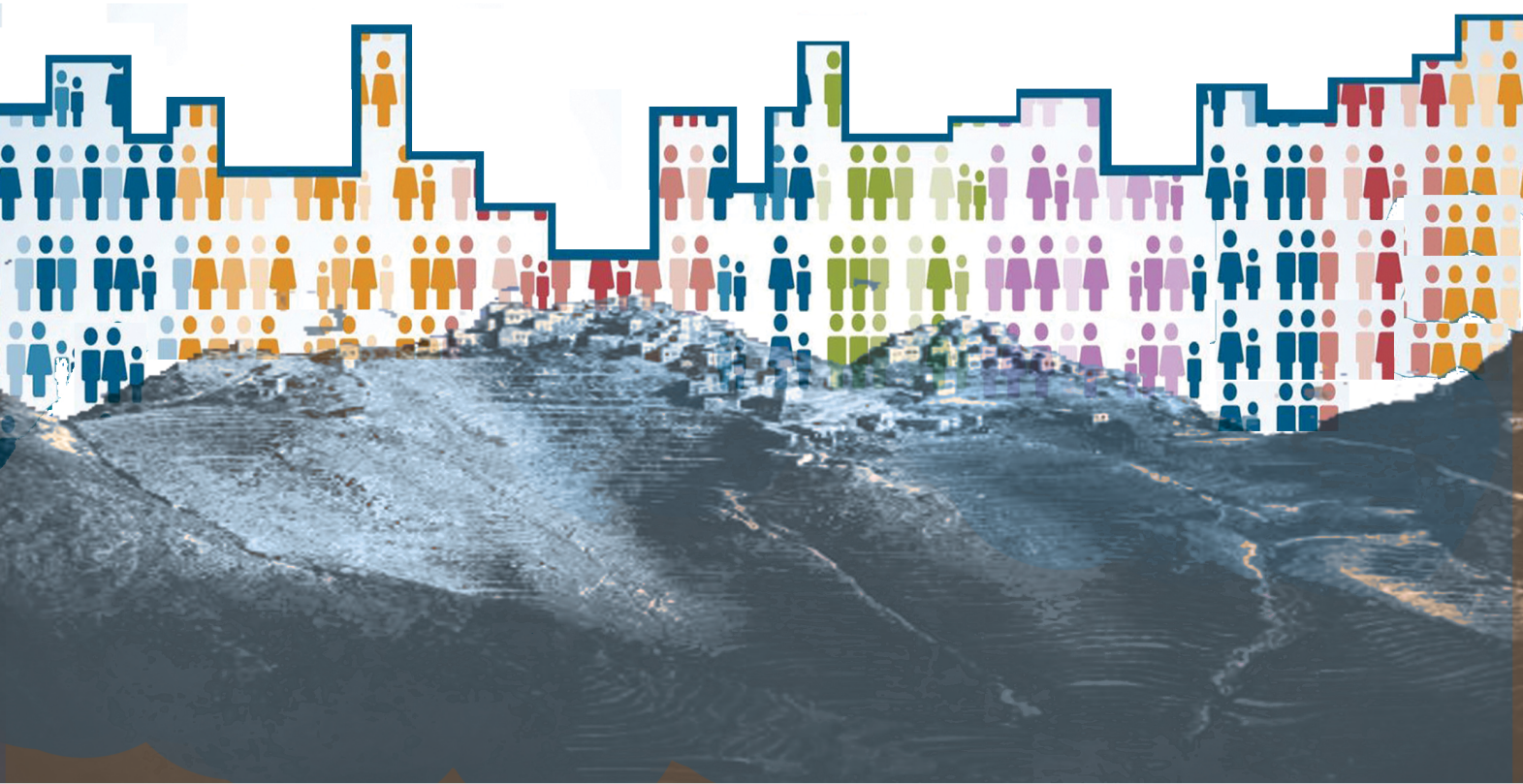


Yemen Shelter/NFI/CCCM Cluster Housing

Rental Market Assessment

September 2018

Marib Governorate



SHELTER CLUSTER
تنسيق المأوى الإنساني



CCCM CLUSTER
دعم مجتمعات النازحين

YEMEN



YHF

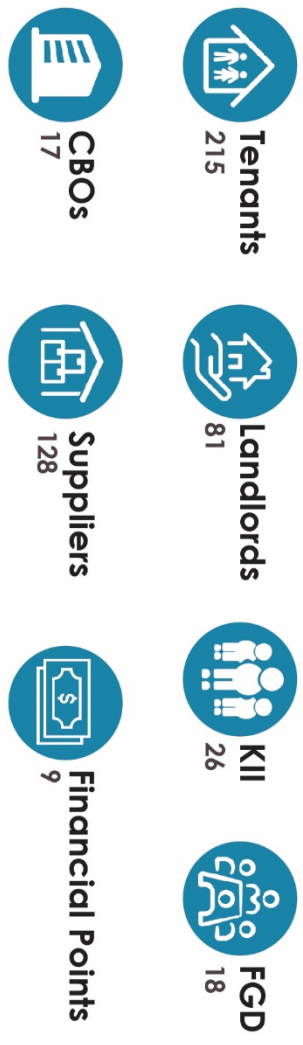
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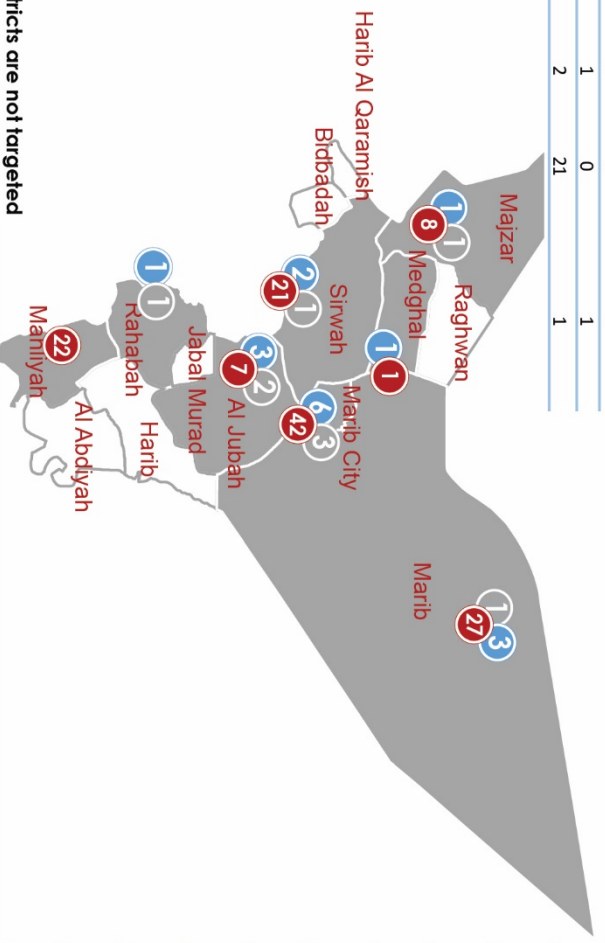


The Samples of The assessment



CBOs, Suppliers, and Financial Points Sample

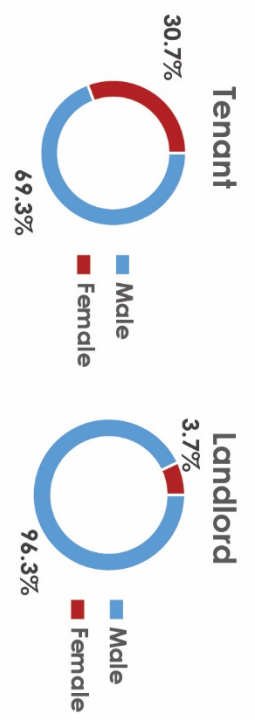
Districts Name	CBOs	Suppliers	Financial Points
Al Jubah	3	7	2
Mahliyah	0	22	0
Majzar	1	8	1
Marib	3	27	1
Marib City	6	42	3
Medghal	1	1	0
Rahabah	1	0	1
Sirwah	2	21	1



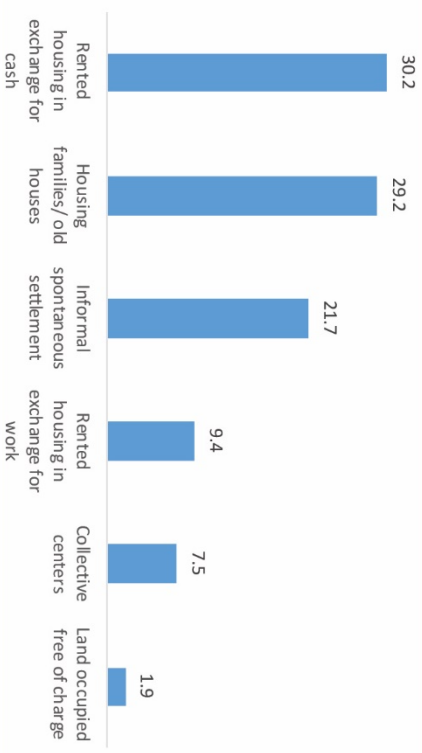
* The other districts are not targeted



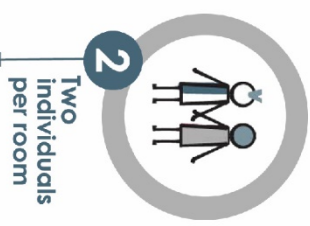
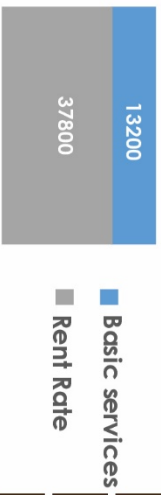
Gender



The Majority of Housing Inhabited by the IDPs



Income and Expenses and The Crowding Index



Introduction

General information about the Governorate:

Marib Governorate covers an area of 7,405 square kilometers (6,720 square miles). Its population, according to the 2004 Yemeni census, is “241,619”. The number of IDPs in the Governorate has reached (27,954) according to TEPM (Task Force on Population Movement Yemen)| 17th Report - August 2018.

What is the Objective of this Assessment?

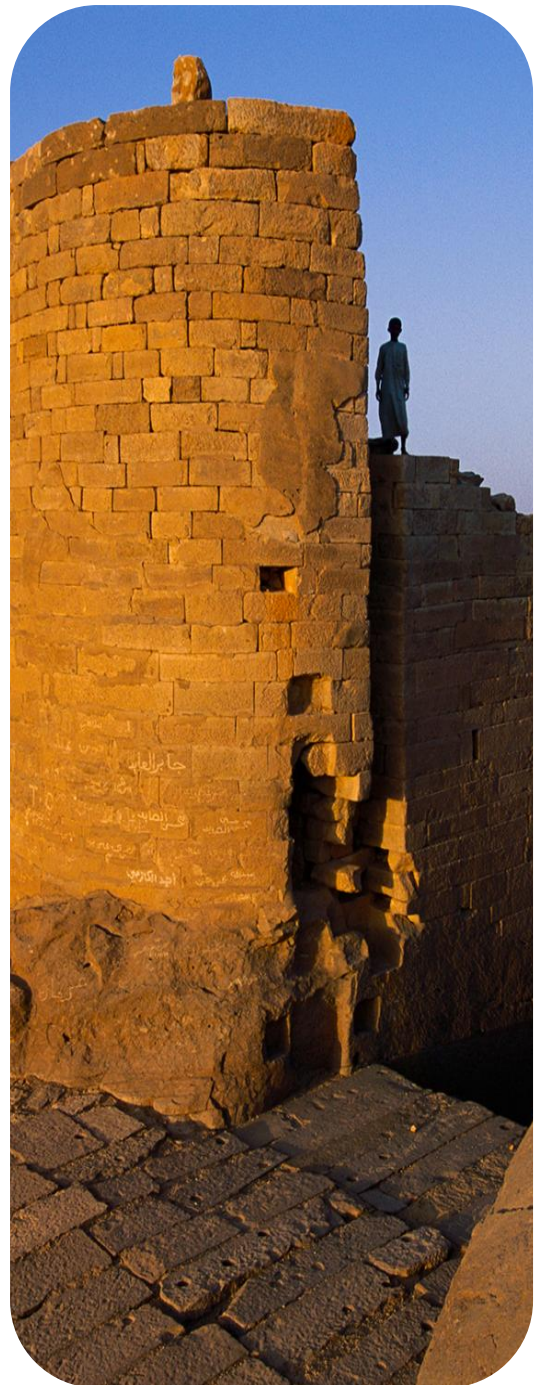
The Preparedness Assessment is guided by a number of objectives. The main objective is to support Clusters’ priority preparedness activities through providing an independent preparedness assessment about “Housing Rental Market Assessment and Host Community Capacity Assessment”.

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 Marib Governorate

The districts of Marib Governorate are: Bidbadah ,Harib Al Qaramish, Marib, Mahliyah, Sirwah, Majzar, Marib city, Rahabah,Medghal, and Al,Jubah. All the districts were covered in the study except for: Bidbadah and Harib Al Qaramish districts because there were restriction accessing these districts.



Section 1: Housing Rental Market Assessment

1. Demographic Detail

1.1 Targeted Districts

The results of the tenants' sample analysis of Marib Governorate show that tenants were distributed to Marib's districts as shown in Figure (1).

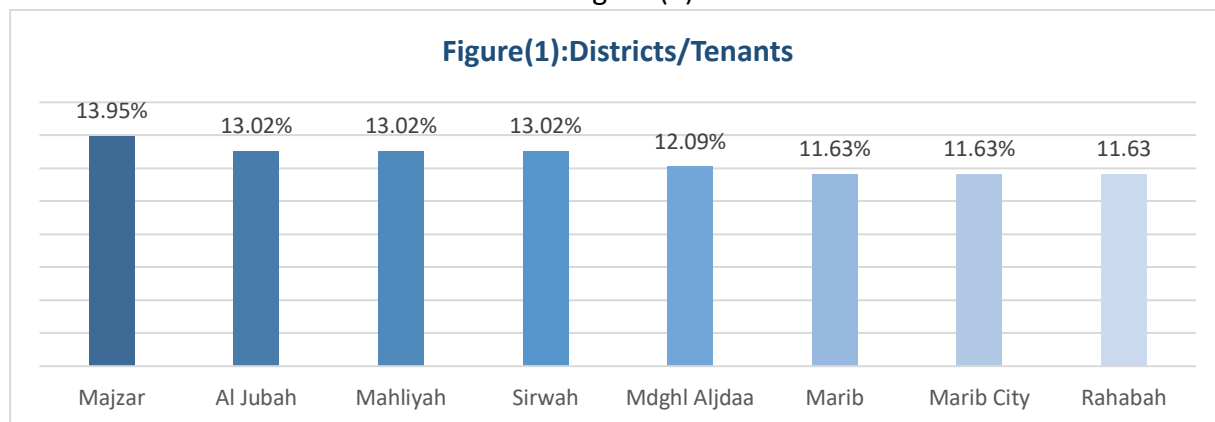
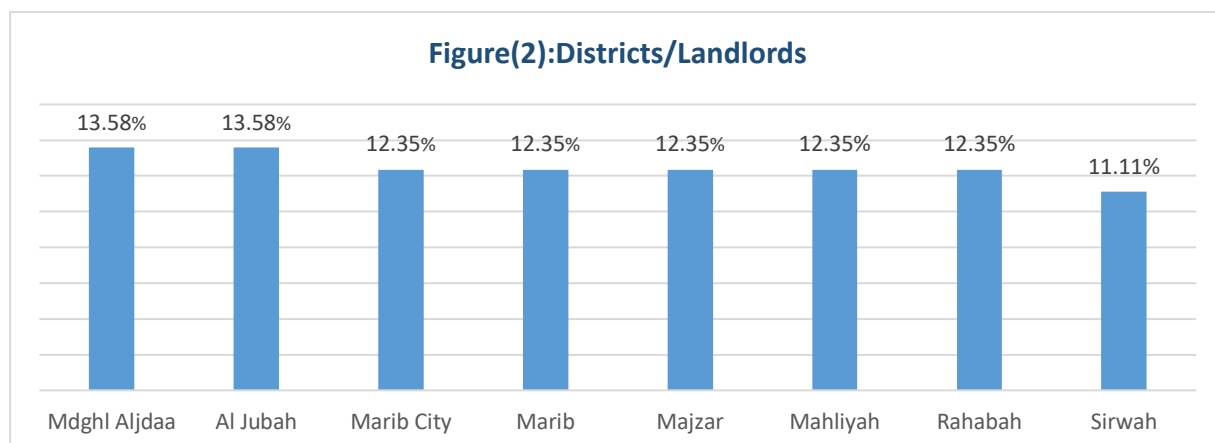


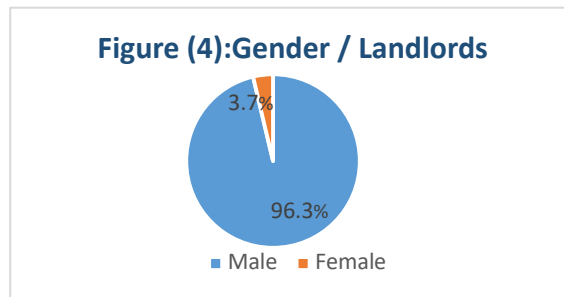
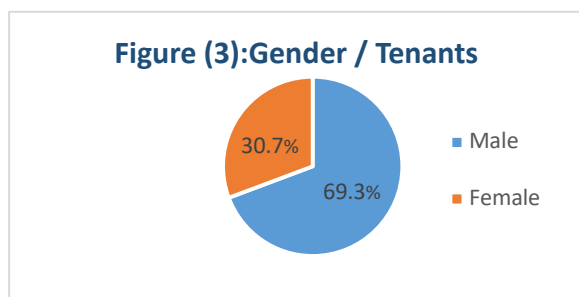
Figure (2) shows the results of the landlords' sample analysis of Marib Governorate, the districts were distributed as shown in the figure below.



The results of the tenants and landlords analysis show that most districts have reached full habitation capacity that is close to 100% , which is a strong indicator of the availability of a good number of housing for rent that are in good conditions in the majority of districts in Marib Governorate.

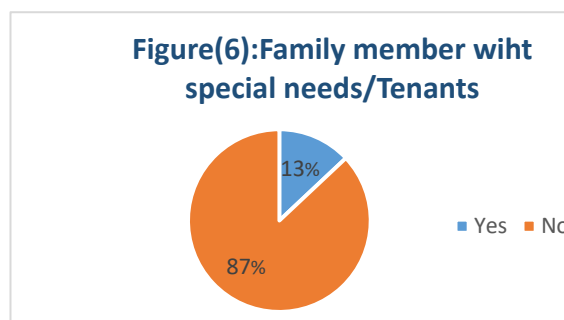
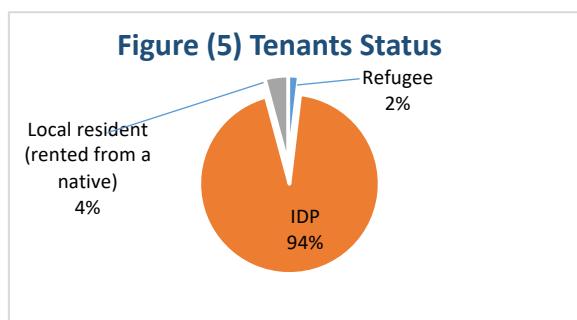
1.2 Gender (Landlords / Tenants)

Figure (3) shows the gender distribution of the tenants' sample, 69.3% male tenants, and 30.7% female tenants. Whereas the landlords gender distribution was 96.3% male landlords, and 3.7% female landlords (Figure. 4). These results reflect male domination in all aspects of society: political, social and economic.



1.3 Tenant Characteristics

The results of the study analysis (Figure. 5) shows that 4% of tenants were local residents of the same area, 2% were refugees, and 94% were IDPs tenants, which reflects the predominant presence of IDPs in this area. The study also shows that 13% of tenants have family members with special needs (Figure. 6).



1.4 Household Age Category

The analysis (Table 1) illustrates the tenants' age category in the target districts. The age categories of tenants are: 45% over 18 years to 55 years, and 27% over 5 years to 18 years, 24% less than 5 years old, and 3% of family members over 55 years. And according to the results of the analysis, the gender of the tenants is 51% males and 49% females. These results reveal the magnitude of suffering endured by the greater part of the household which are women and children, especially for IDPs.

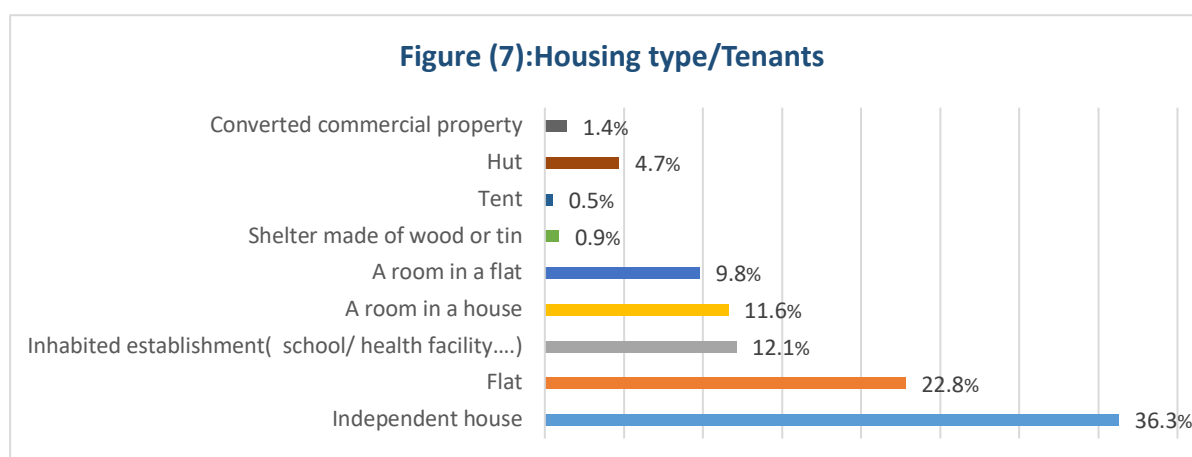
Table (1): Age and Gender of the Tenant Family Members

Gender	under 5 years		From 5 to 18 years		More 18 – 55 years		Older than 55 years		Total of members in the households	
	number	%	number	%	number	%	number	%	number	%
Male	119	55%	126	50%	207	50%	13	45%	468	51%
Female	97	45%	125	50%	209	50%	16	55%	447	49%
Total	216	100	251	100	416	100	29	100	915	100
Within Age%	24%		27%		45%		3%		100%	

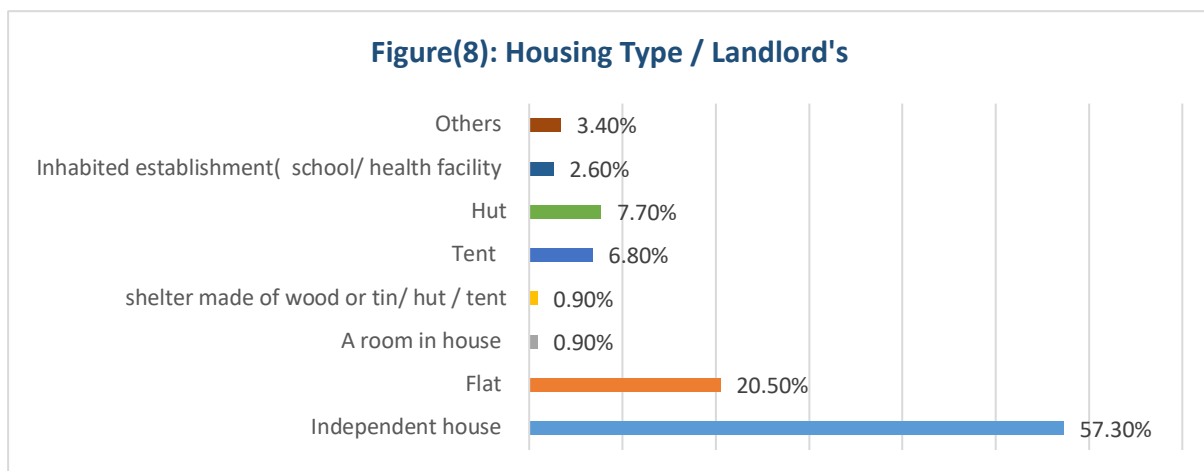
2. Details of the Rented Housing

2.1 Type of Housing (Tenant / Landlords)

The study shows that 36.3% of the tenants' sample rented independent housing, 22.8% rented flats, 12.1% inhabited schools and health facilities, 11.6% rented in an independent room in a shared housing, 9.8% rented a single room in a flat, 4.7% lived in huts, 0.9% lived in a wood/tin shelter, 0.5% lived in tents, and 1.4% inhabited converted commercial properties (Figure 7). These results show that the majority of the tenants' sample rented independent housing and flats.



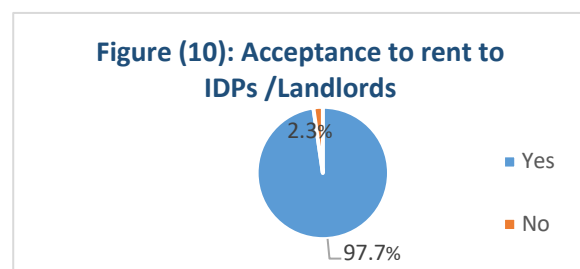
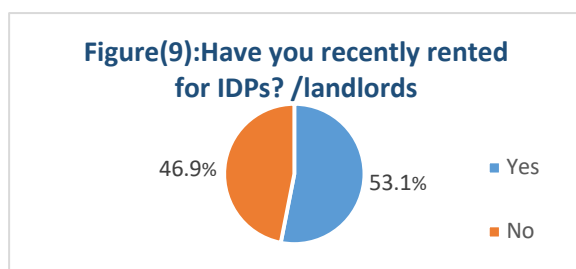
In the same context, the landlords' analysis results show that the nature of the predominant housing available for rent are independent housing 57.3%, flats 20.5%, huts 7.7%, tents 6.8%, converted commercial property 2.6%, an independent room in a shared housing 0.9%, wood/tin shelter 0.9%, and 3.4% other (IDPs Shared places), Figure (8).



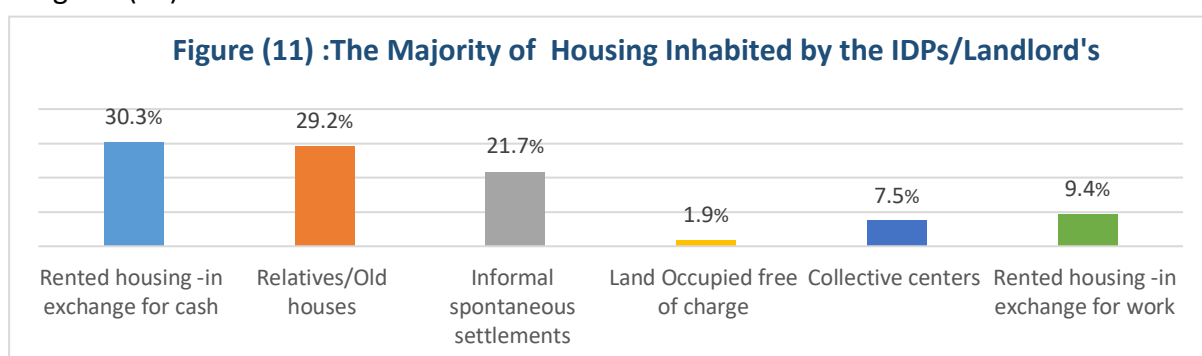
The results of the analysis of group discussions and key informant interviews of both male and female opinions confirmed that the majority of rented housing available in the Governorate of Marib are new/old independent housing and flats.

2.2 Rent for IDPs

The results of the landlords' sample analysis (Figure. 9) show that 53.1% of landlords have already rented housing for IDPs, whereas 46.9% have not. The analysis also shows that 97.7% of landlords do not have a problem renting to IDPs, while 2.3% do not accept to rent to IDPs (Figure.10). The high percentage of landlords who already rented to IDPs or 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.

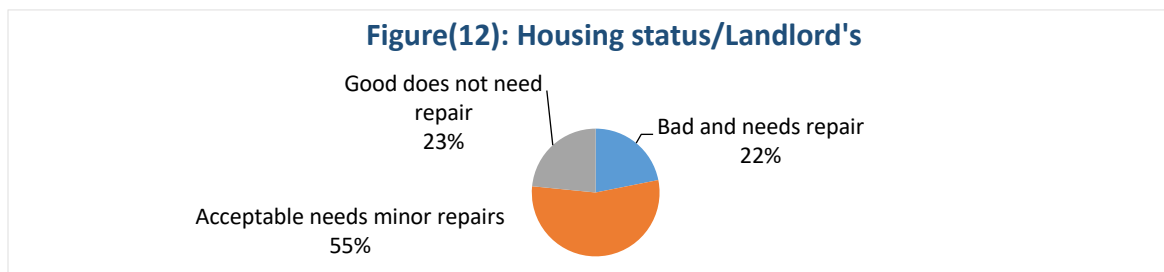


In the same context, according to the landlords' data, around 30.2% of IDPs rented housing in exchange for cash, 29.2% live with relatives or in old housing, 17.9%, inhabit informal spontaneous settlements, 9.4% live in housing in exchange for labor (working for landlord), 7.5% live in collective centers (such as school facilities), and 1.9% live in lands free of charge Figure. (11)



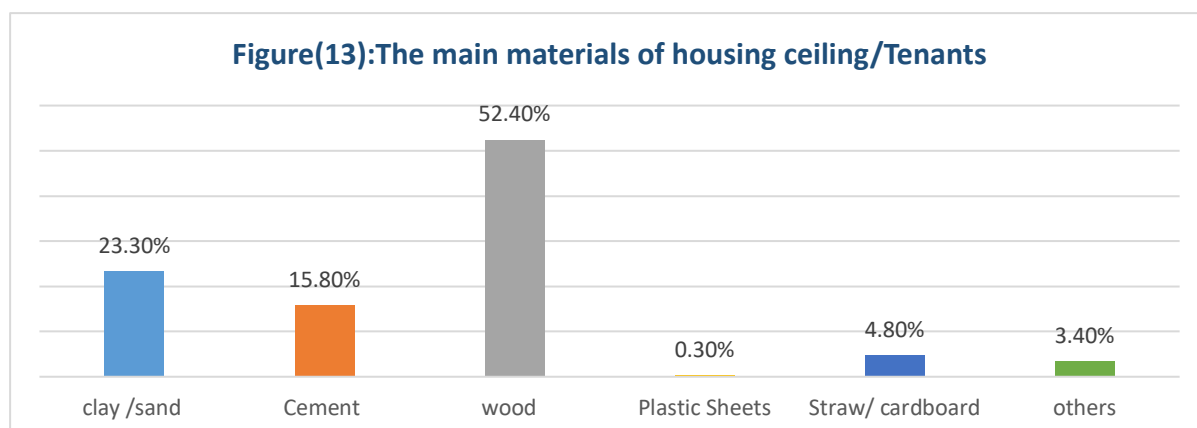
2.3 State of Housing

Results from the data analysis indicate that 55% of housing managed by landlords are in acceptable conditions and only need minor repairs, 23% are in good conditions and do not require any maintenance, and 22% are in bad conditions and need maintenance and repairs (Figure 12).



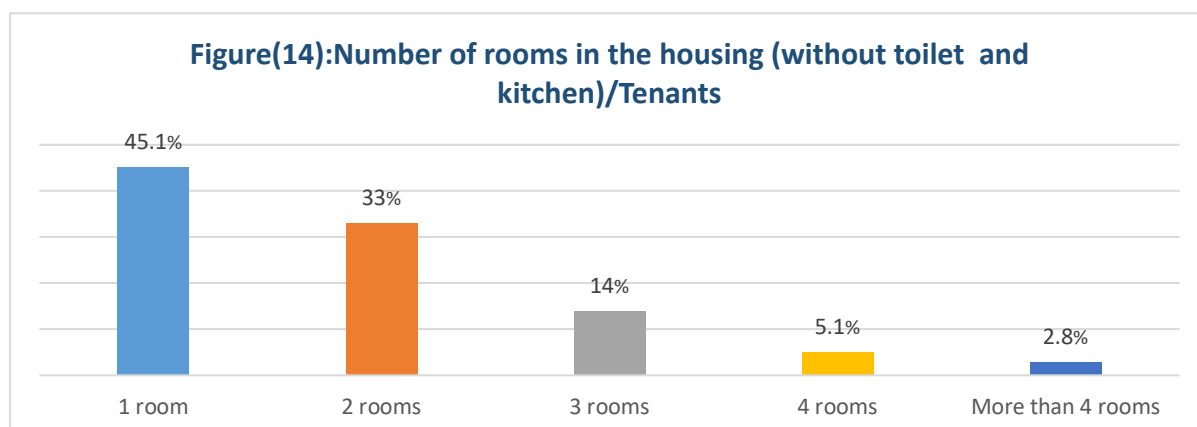
2.4 Materials used for Ceilings of Housing

Figure (13) illustrates the materials used for the ceilings of rented housing as follows: wood 52.40%, clay/sand 23.30%, cement 15.80%, straw/cardboard 4.80%, plastic sheets 0.30%, and 3.40% other.

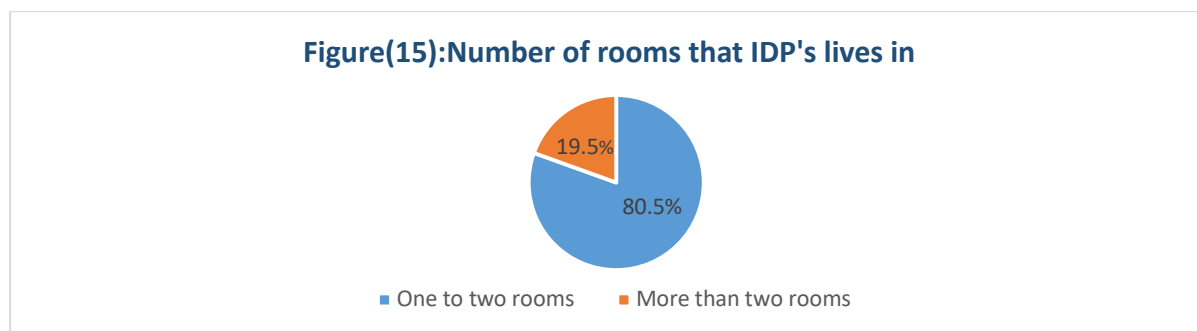


2.5 Number of Housing rooms

The results of the tenants' sample analysis (Figure.14) indicate that 45.1% of tenants live in rented housing that consist of one room, 33% two rooms, 14% three rooms, 5.1% four rooms, and 2.8% more than four rooms. These results indicate that the majority of tenants live in housing that consist of one to two rooms. These results indicate that the majority of tenants live in housing that have one to two rooms. The crowding index in Marib Governorate shows that every two individuals share a room according to the number of household members 915 divided by the total number of rooms 415 excluding kitchen and toilet, Table (1).

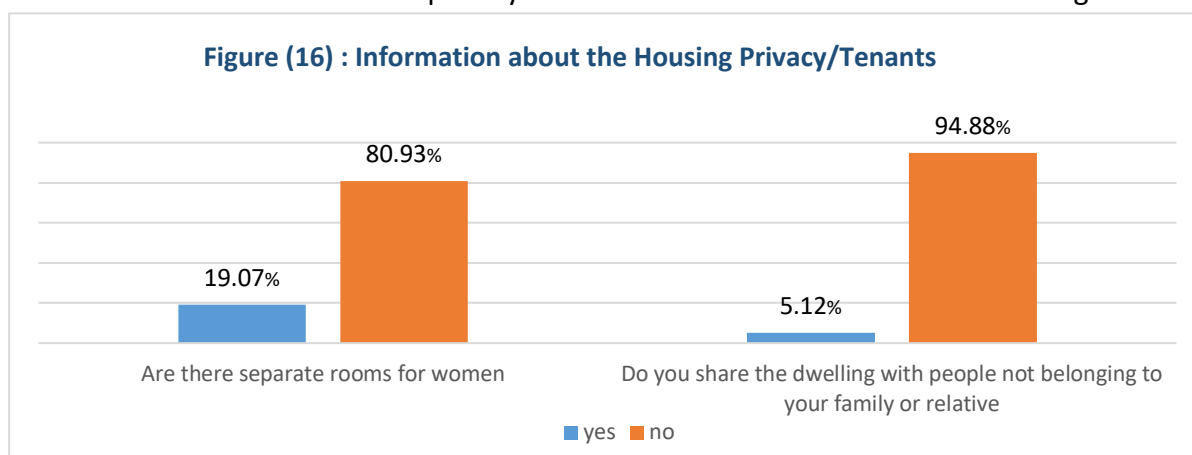


As previously mentioned, 94% of the tenants in Marib Governorate are IDPs (Figure 5), the study shows that 80.5% of them live in one to two rooms.



2.6 Privacy of the Housing

Figure (16) shows that 19.07% of rented housing have separate rooms for women, whereas 80.93% do not have separate rooms for women. The study also revealed that 94.88% of rented housing were not shared by any members from outside the family of the household. These results reflect the lack of privacy for women in some of the tenants' housing.



2.7 Availability of Toilets in the Housing

The results of the study sample analysis show that 84.19% of rented housing have a toilet in the housing, while 15.81% do not have a toilet in the housing. The study also shows that 1.85% of rented housing had a separate toilet for women, whereas 98.15% did not have (Figure. 17). Furthermore, 71% of toilets are located inside the rented housing, whereas 29% have a toilet outside the rented housing.

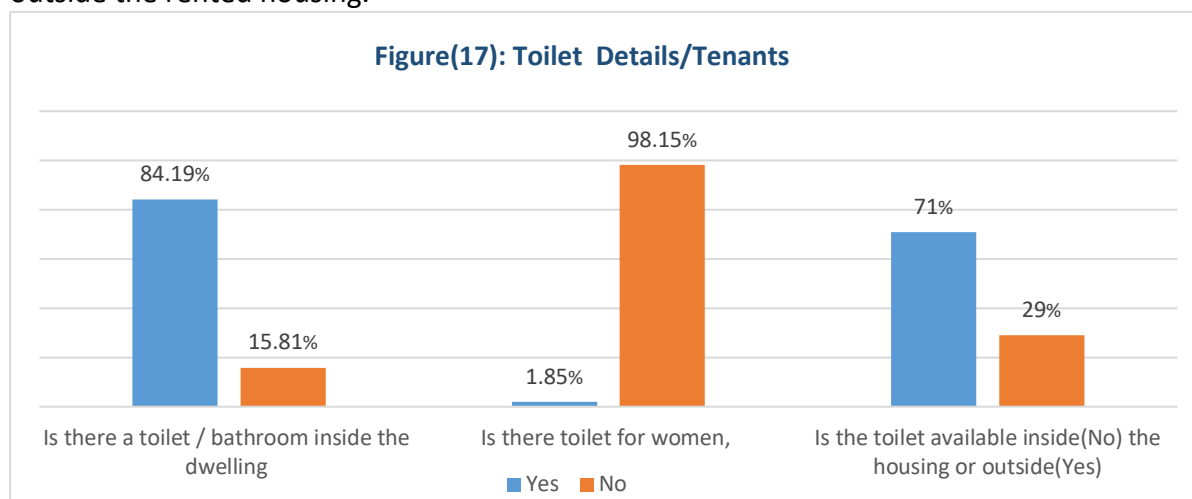


Figure (18) illustrates whether the toilets are shared with other families or not and the number of families that shared a toilet. The tenants' sample analysis shows that 67.96% of tenants did not share the toilet with other families, whereas 32.04% did share the toilet with other families. As for the number of families that shared a toilet, the results show that 40.35% of families share a toilet with two other families, 24.56% with more than three families, 24.56% with more than four families, 15.79% with more than four families, 12.28% with four families, and 7.02% of tenants share the toilet with one other family. These statistics indicate the great lack of privacy that most families endure in this area.

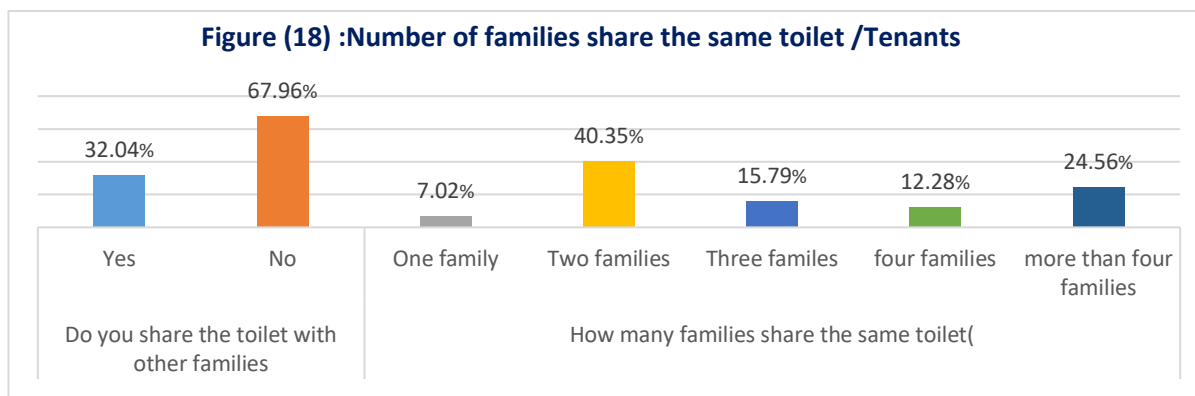
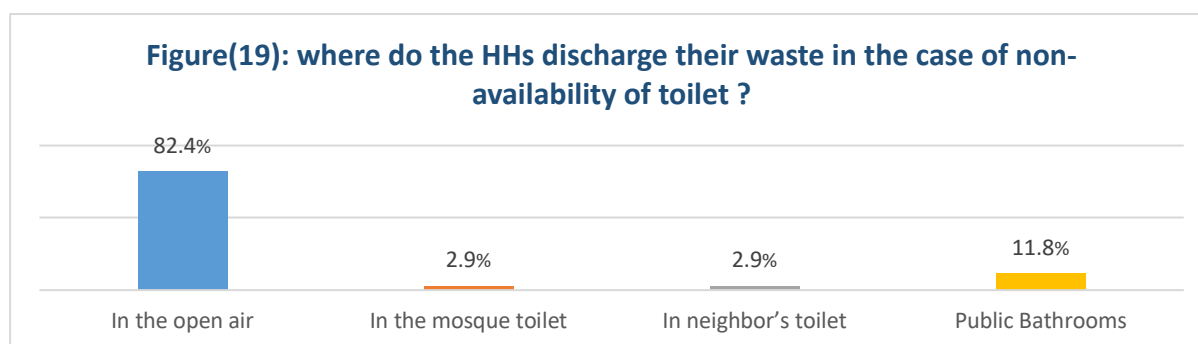
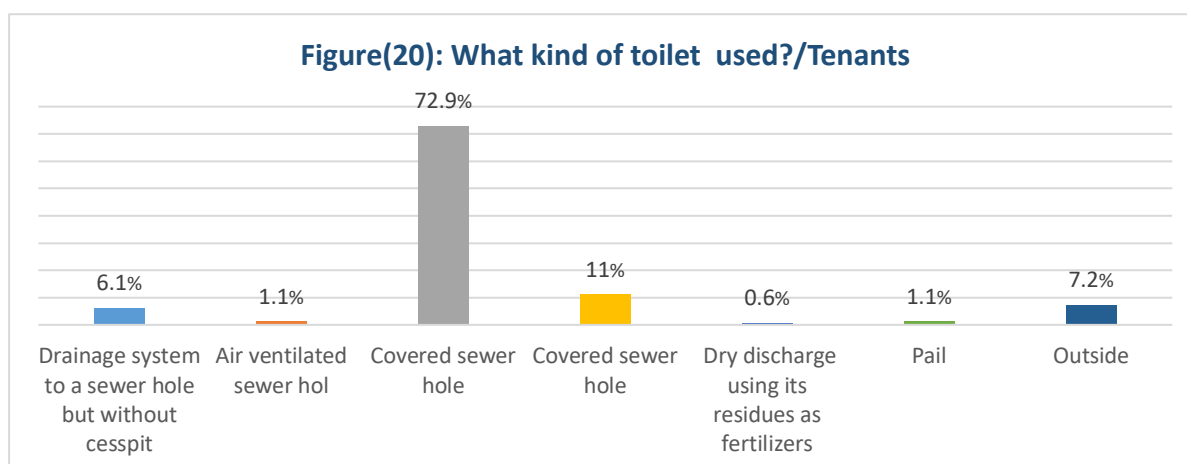


Figure (19) shows the alternatives in case of unavailability of toilets. 82.4% of tenants who do not have access to a toilet use the outdoor area, 11.8% use public toilets, 2.9% use neighbors' toilets, and 2.9% use the mosque's toilets.



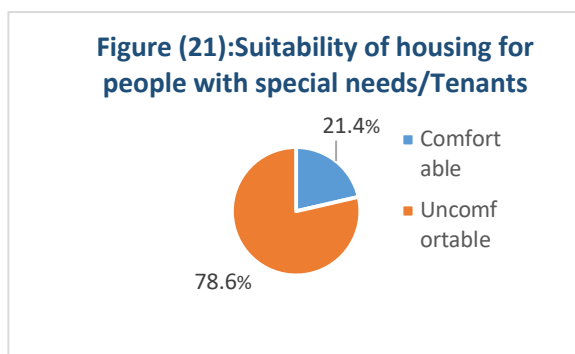
2.8 Type of Sanitation System

The results of the analysis (Figure.20) indicate that 72.9% of the tenants' rented housing use covered cesspits. 11% uncovered cesspits, 7.2% the outdoors, 6.1% the drainage system without a cesspit, 1.1% ventilated cesspits, 1.1% pails, and 0.6% dry discharge (using the waste as fertilizers). These results reveal that some of the types of sanitation systems used in this Governorate are unhygienic for the tenants.



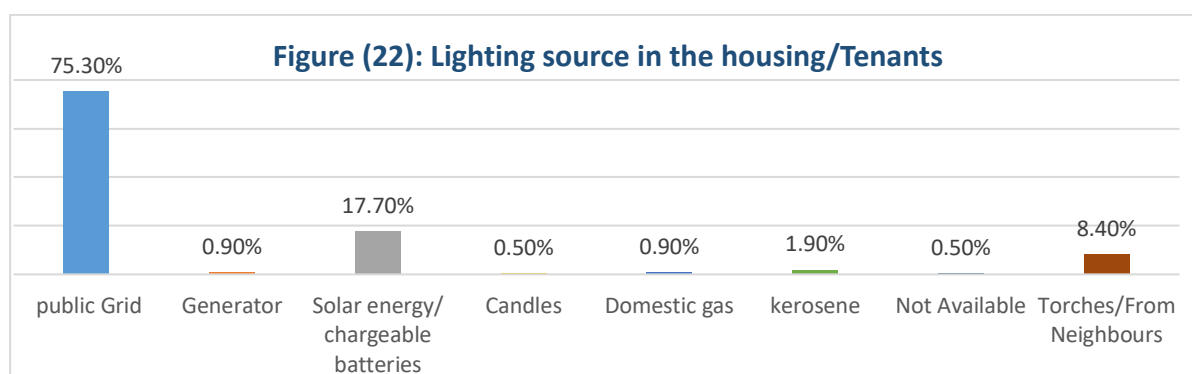
2.9 Suitability of Housing for People with Special Needs

The results of the analysis indicate that 78.6% of rented housing are not suitable or comfortable for family members with special needs, and 21.4% are suitable for family members with special needs (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.



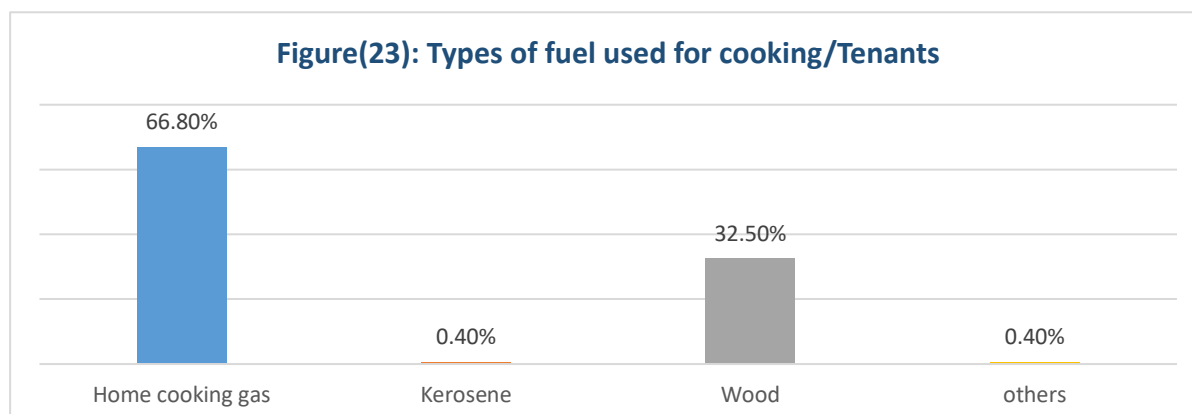
2.10 Source of Lighting

The results of the tenants' sample analysis show that 75.30% of rented housing in the targeted area use the public electric grid, 17.70% solar system and rechargeable batteries, 8.40% torches/connect from neighbors, 1.90% kerosene, 0.90% domestic gas, 0.50% generators, 0.50% candles, and 0.50% of rented housing do not have access to a source of light, Figure (22). These results reveal that the majority of tenants in Marib Governorate use the public electric grid.



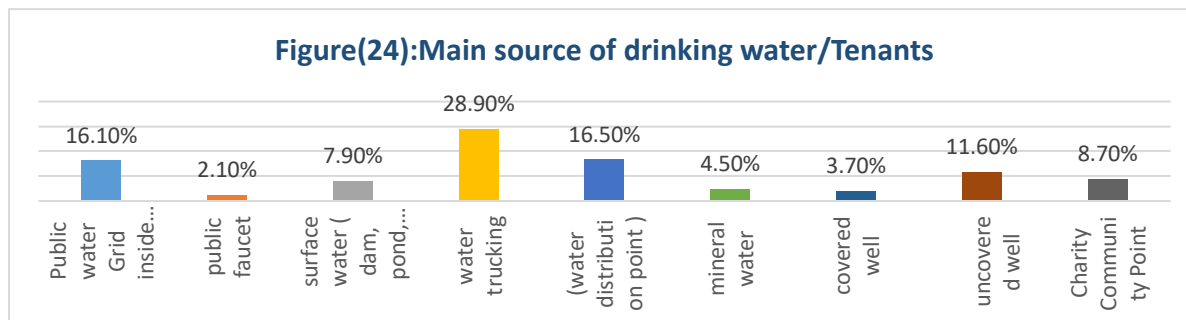
2.11 Type of Fuel used for Cooking

In the context of the geographical sample of Marib Governorate, the analysis of this study shows that the main type of fuel used by the tenants in the rented housing for cooking purposes is home cooking gas 66.80%. Followed by: firewood 32.50%, kerosene 0.40%, and 0.40% other (food is provided to tenants as charity). 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. Which consequently, reflects negatively on the individuals' health and constitutes an additional burden on the family in obtaining alternative fuels for cooking. (Figure 23)



2.12 Source of Drinking Water

(Figure. 24) illustrates the tenants' main sources for drinking water as follows: water trucks 28.90%, water distributions points 16.50%, public water grid inside the housing 16.10%, uncovered wells 11.60%, surface water (dams, ponds and streams) 7.90%, covered wells 3.70%, public faucet 2.10%, mineral water 4.50%, and charity community points 8.70%. These statistics reflect the difficulties many tenants face in obtaining clean drinking water.



3. Accessing Housing

3.1 Transfer from Area of Origin (Geographical Area):

Figure (25) shows that 96.74% of the tenants' sample moved from other Governorates or from within the districts of Marib, whereas 3.26% were local residents of the area.

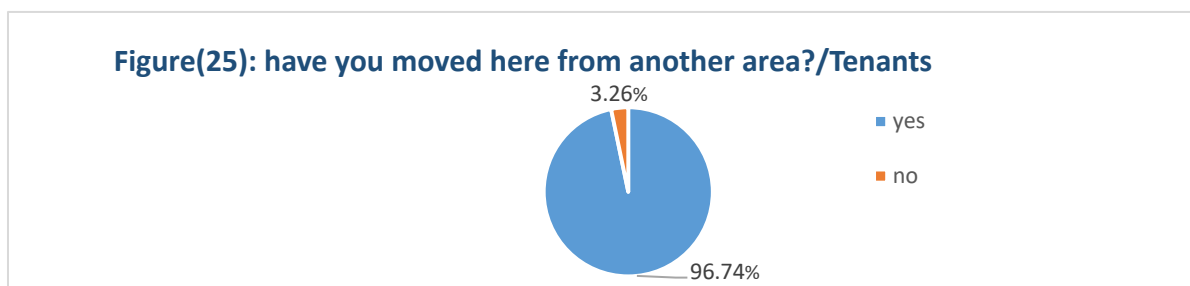
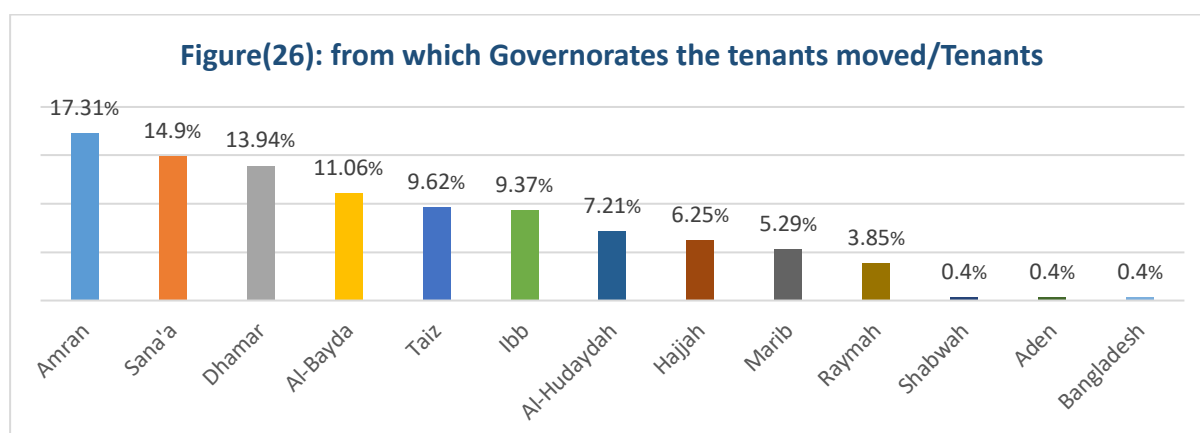


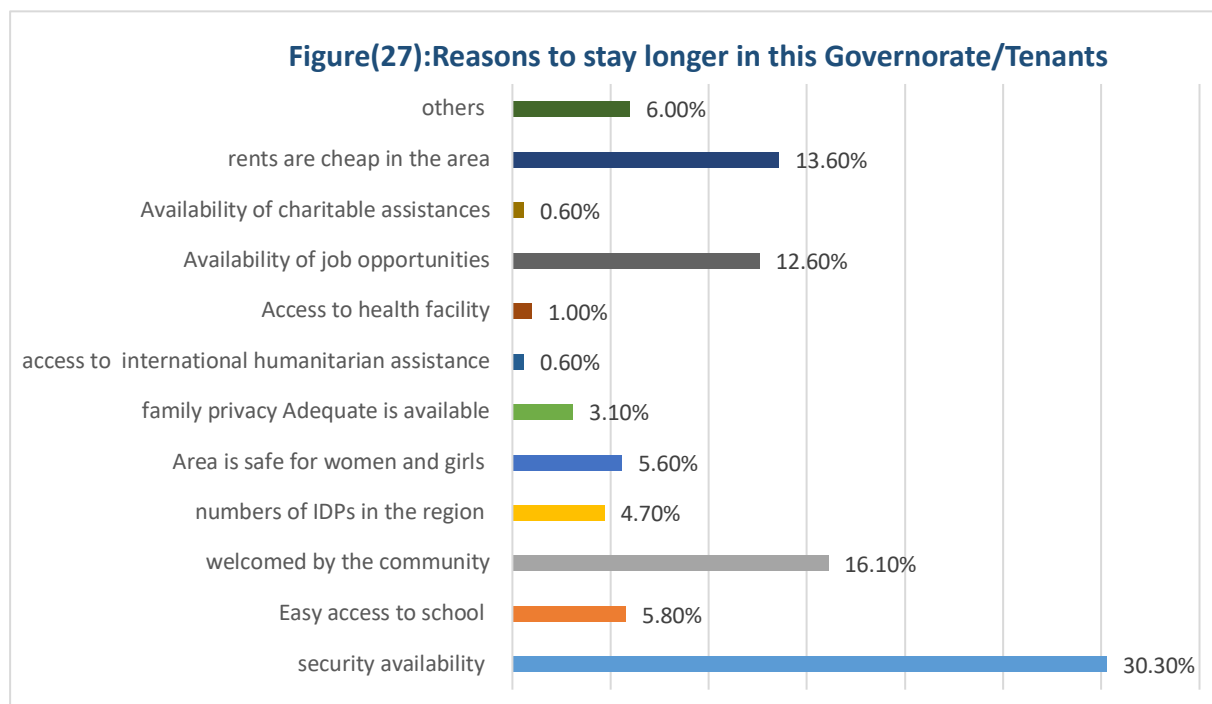
Figure (26) shows that 5.29% of the tenants who moved to Marib Governorate are from within the Governorate itself. Tenants who moved from other Governorates are as follows: Amran 17.31%, Hajja 6.25%, Taiz 9.62%, Dhamar 13.94%, Al-Bayda 11.06%, Raymah 3.85%, Sana'a 14.9%, Lahj 0.5%, and from Ibb 9.37%, Al-Hudaydah 7.21%, Shabwah 0.4%, Aden 0.4%, and Bangladesh 0.4%.



The results of the analysis of the FGDs and KII show that the majority of IDPs who moved to Marib Governorate were from: Taiz, Hajjah, Al-Hudaydah, Sana'a, Dhamar, Amran, Raymah, and Al-Baydha Governorates. And from the districts of Marib: Al-Wahaybah, Ganyah, Hawran and Surwah. The analysis also revealed that Marib Governorate is considered the largest and most significant Governorate in receiving and hosting IDPs.

3.2 Choosing the Governorate for Residence

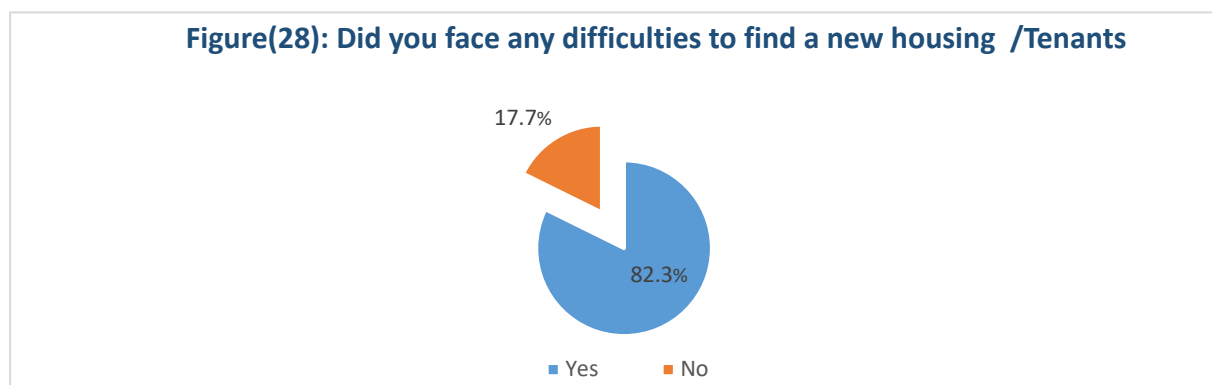
The results of the qualitative analysis of the data (Figure 27) indicate that the reasons for choosing this Governorate for housing, especially by IDPs were: 30.30% security, 16.10% being welcomed by the local community, 13.60% affordable and cheap rent, 12.60% availability of job opportunities, 5.80% ease of access to schools, 5.60% safe area for girls and women, 4.70% the existence of other IDPs in the area, 3.10% family privacy, 1% access to health facilities, 0.60% availability of charity and assistance, 0.60% access to international aids, and 6% other reasons.



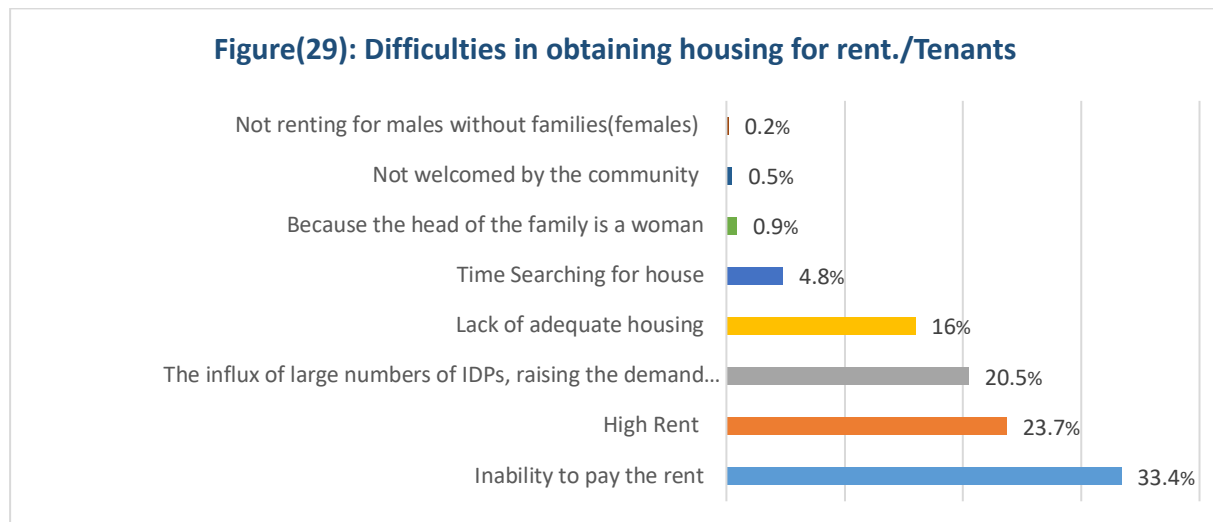
The results of the analysis of the FGDs and KII confirmed that the majority of IDPs moved to Marib Governorate mainly for safety reasons, which was a priority for IDPs tenants. Other reasons were: affordable and cheap rent, ease of access to service, availability of job opportunities, and being welcomed and supported by the local community that provides IDPs with cheap or free housing in the outskirts areas of Marib city.

3.3 Difficulties in Obtaining Housing and Stability

Figure (28) shows that 82.3% of the tenants faced difficulties in finding rented housing, and 17.7% did not face any difficulties.



The results of the tenants' sample analysis illustrate the difficulties faced by tenants in finding a rented housing, which are as follows: inability to pay rent 33.4%, high rent costs 23.7%, the influx of large numbers of IDPs to the area 20.5%, lack of adequate housing 16%, the period of time it takes to find housing 4.8%, because the head of the family is a woman 0.9%, not being welcomed by the local community 0.5%, and landlords not renting to males without families 0.2%, Figure (29).



These results are consistent with the outcomes of the qualitative analysis which confirmed that the Governorate does not have many housing for rent. The analysis also reflects the inability of poor tenants to pay rents due to the lack of income. The financial situation of poor tenants threatens stability in the area especially with no job opportunities available.

The results of the analysis of the FGDs and KII of both genders confirmed that the main difficulties IDPs are facing are: increasing rent costs, lack of rented housing, inability to pay rent, salaries being paid late, and lack of income.

In the same context, the results of the landlords' sample analysis list the following challenges in the rental market: 22.20% unavailability of housing for rent, 22.20% high demand and low supply of rented housing, 19.4% excess supply of unleased property, 8.3% increasing rent costs, and 6.5% unable to repair/maintain rental property. The remaining challenges are shown in Figure (30). These results reflect the urgent need for assistance in both rent support and housing' repairs and maintenance.

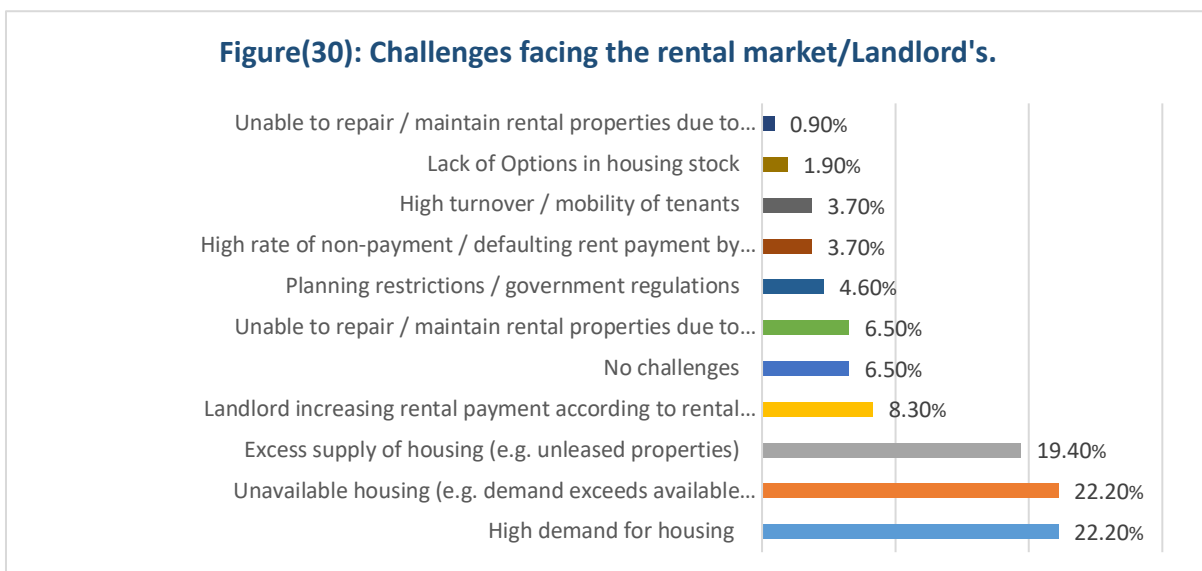


Figure (31) illustrates the average period of time it takes tenants to find housing for rent. It takes the 58.6% of tenants more than three months to find a rented housing, 20% one month, 9.8% from one to two weeks, and less than a week for 11.6% of tenants.

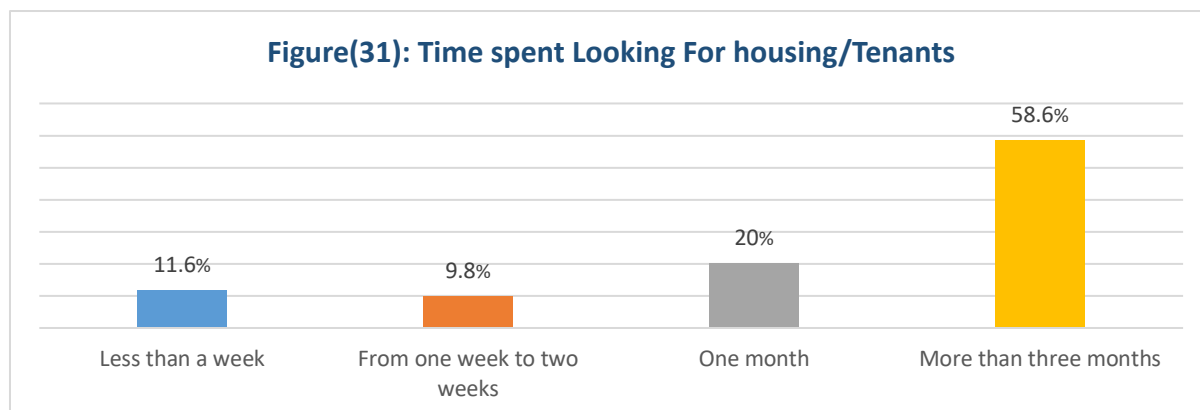
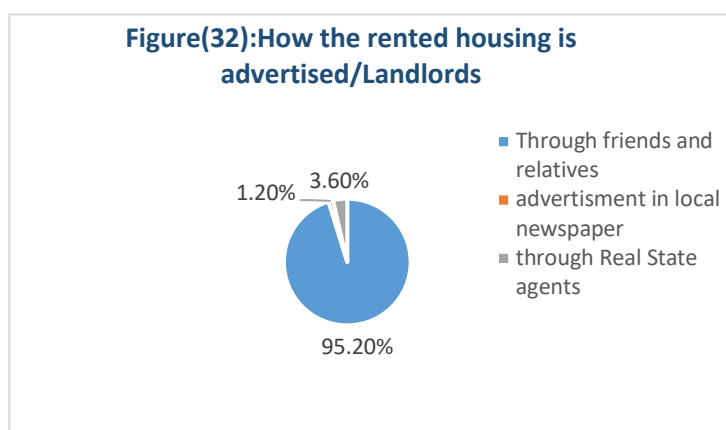
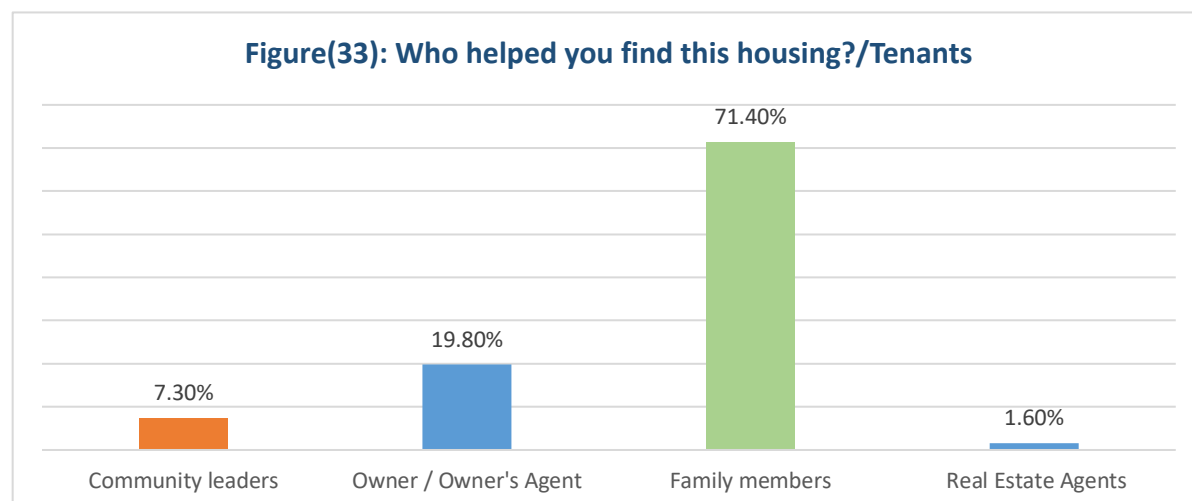


Figure (32) shows the methods of advertising rental housing. 95.20% of vacant housing were advertised through friends or relatives, 3.60% real estate offices or realtors, and 1.20% the local newspaper. These results reflect the weak role of real estate offices in the Governorate of Marib.



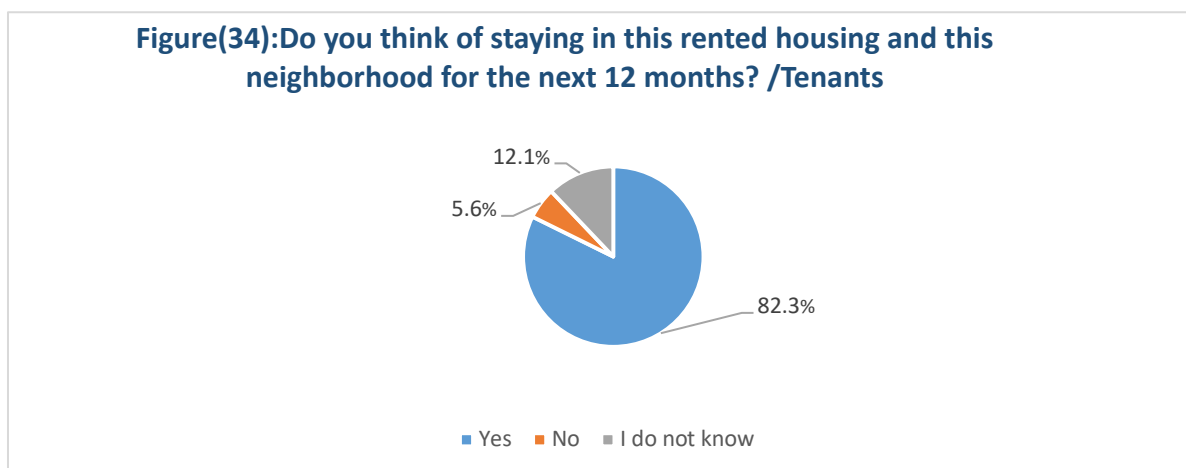
3.4 Key Agents in the Rental Market and Housing Access

The results of the tenants' sample analysis show that 71.40% of tenants found rented housing through family members, 19.80% through landlord's / landlords' agents (Act on behalf of the landlord), 7.30% community leaders, and 1.60% of tenants found rented housing through real estate agents broker/realtors, Figure (33). The results clearly demonstrate that housing advertisements are largely done through word of mouth (family members).



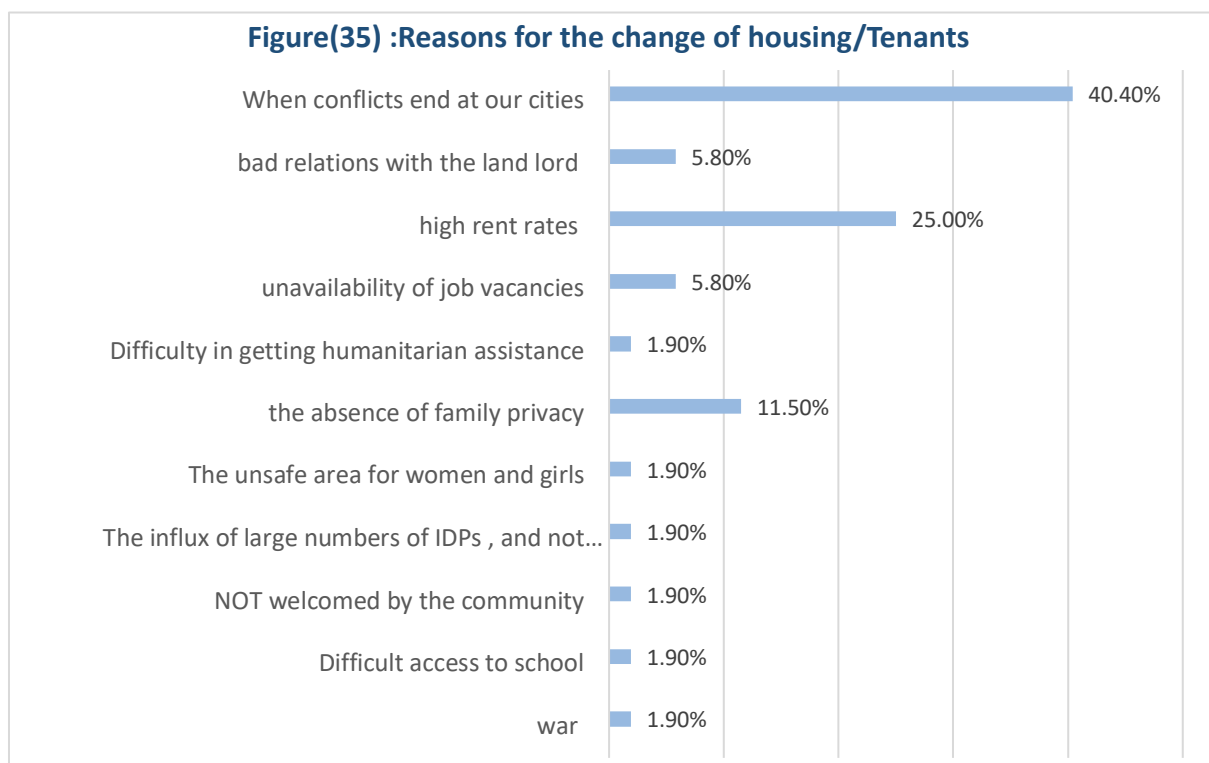
3.5 Stability in the Housing

Figure (34) shows that 82.3% of tenants decided to settle in their current rented housing for the next twelve months, whereas 5.6% will not stay, and 21.1% have not made a decision.



According to the result of the tenants’ sample analysis (Figure 35), the following reasons are why some tenants will not continue to live in their current rented housing: 40.40% are waiting for conflicts in their area of origin to stop so they can go back , 25% high rent rates, 11.50% lack of family privacy, 5.80% bad relationships with landlords, 5.80% lack of job opportunities, 1.90% difficulties accessing humanitarian aids, 1.90% the area is unsafe for girls and women, 1.90% the influx of large numbers of IDPs, 1.90% being unwelcomed by the local community, 1.90% difficulties accessing schools, and 1.90% because of the war.

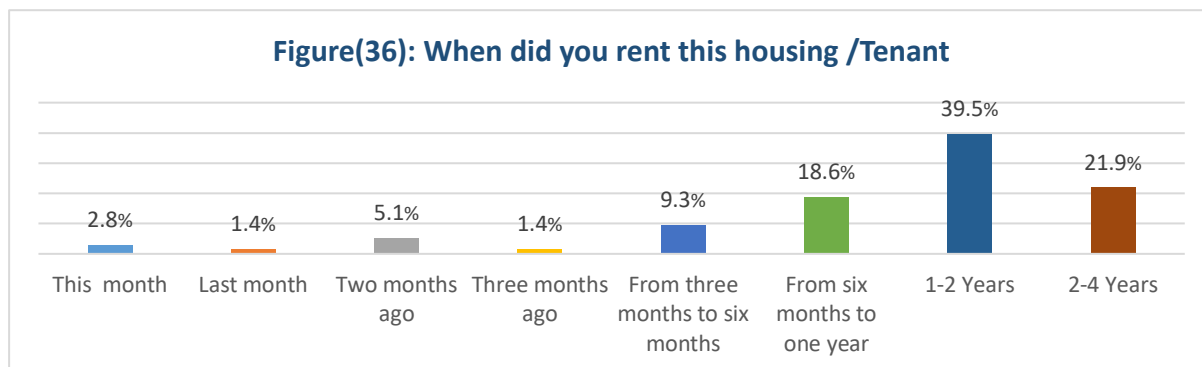
The results of the analysis of the FGDs and KII of both genders agree that the majority of IDPs chose to settle in this area because of safety reasons and job opportunities.



4 Rent and the Main Sectors of the Rental Market

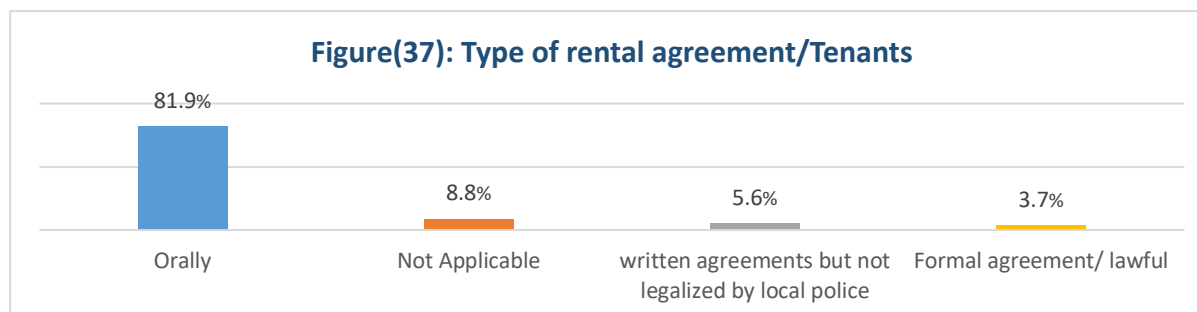
4.1 The Rental Period of the Housing

Figure (36) shows that 61.4% of the tenants' sample have rented these housing for more than one year, and 18.6% for six months to one year ago. These outcomes reflect the fact that IDPs from the conflict areas of Marib started moving to safer areas in the years 2013 and 2014, whereas IDPs from other Governorates moved to Marib Governorate in the years 2014 and 2015 as conflicts escalated.

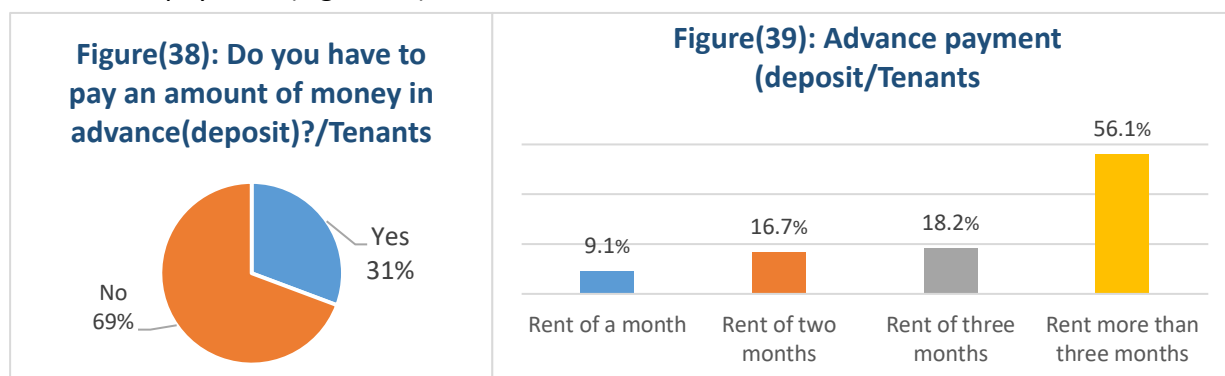


4.2 Renting Agreements

The results of the analysis of the tenants' sample (Figure 37) indicate that 81.9% of the tenants have rental agreements with verbal contracts, 3.7% are legal written agreements, 5.6% are informal written agreements, and 8.8% is other (not applicable). These results reflect that most of the rental agreements in the Governorate of Marib are informal agreements, which shows that the rental market in the Governorate is not governed by formal contracts /agreements.



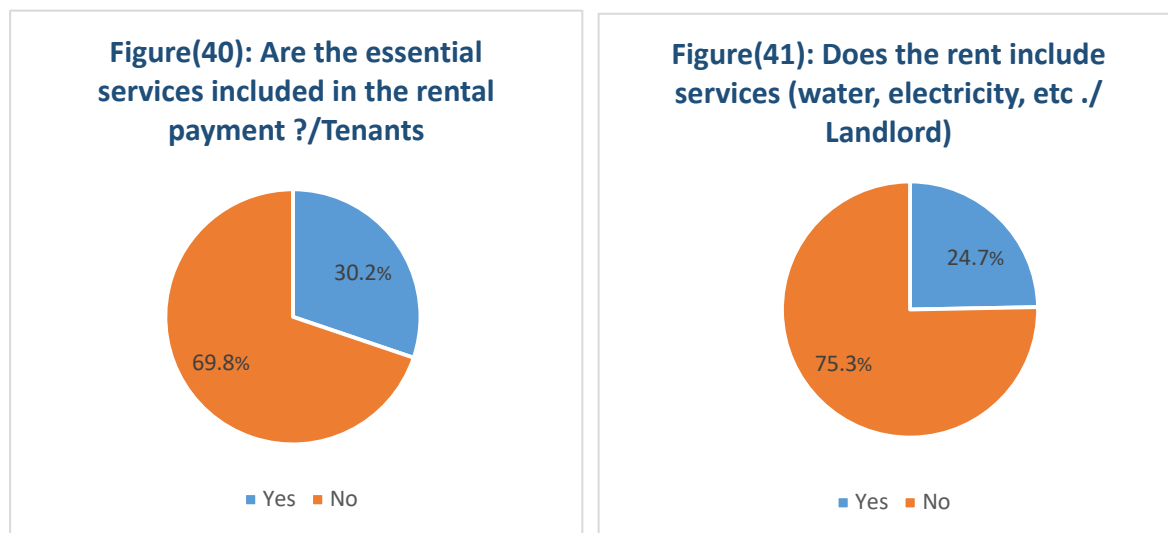
In regards to advanced payments (Figure 38), the results of the analysis show that 69% of tenants are not obligated to make an advanced payment in the rental agreement, whereas 31% have to pay a certain amount of money in advance. The details of the advanced payment are as follows: one month's rent was required by 9.1% of landlords, two months' rent 16.7%, three months' rent 18.2%, and 56.1% of landlords asked for more than three months' rent as an advance payment (Figure 39).



4.3 Services in the Governorate

The results of the study (Figure 40) indicate that 69.8% 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 30.2% of the sample indicated that the rental amount covers the costs of basic services.

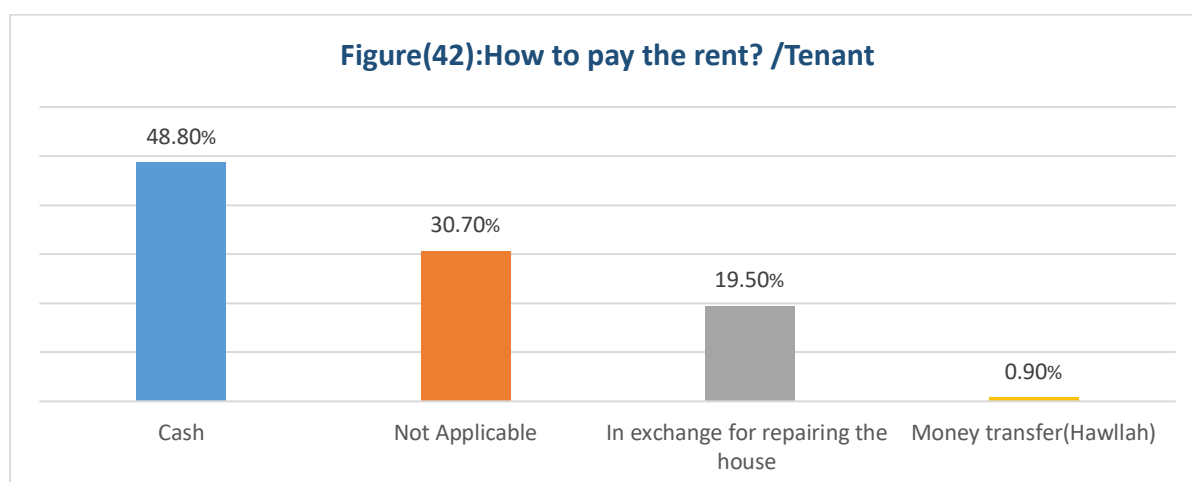
In the same context, the results of the landlords' analysis shows that 75.3% of landlords do not include basic services in the rent, while 24.7% of landlords do include these services, but usually to shared housing only.



The study shows that many landlords have raised rent costs in a very unreasonable manner in Marib. The study also shows that a tenant pays an additional 8,797 YER on average for basic services on a monthly basis, which is quite high, this number is subject to market prices fluctuation, especially water and fuel. This reflects the additional burden endured by tenants, especially IDPs.

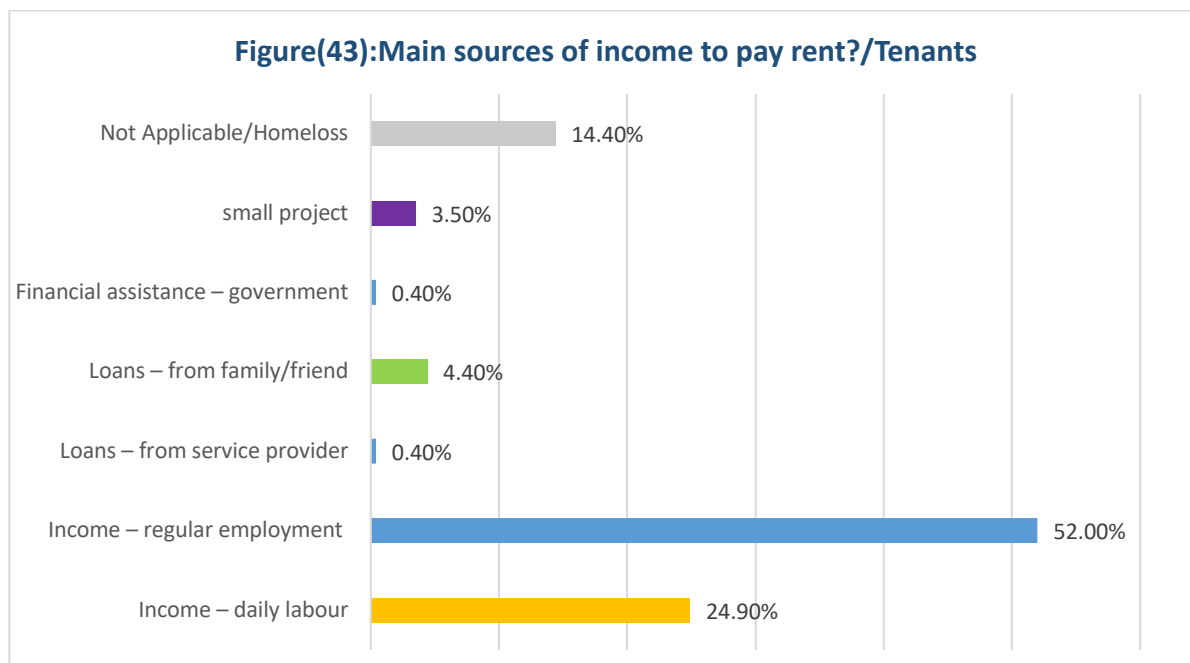
4.4 Rent Payment Methods

The results of the study (Figure 42) reveal that 48.8% of the tenants' sample pay the rent in cash, 0.9% through money transfer (Hawllah), 19.5% repair the housing instead of directly paying the rent, and 30.7% was not applicable.



4.5 Source of Income to Pay the Rent

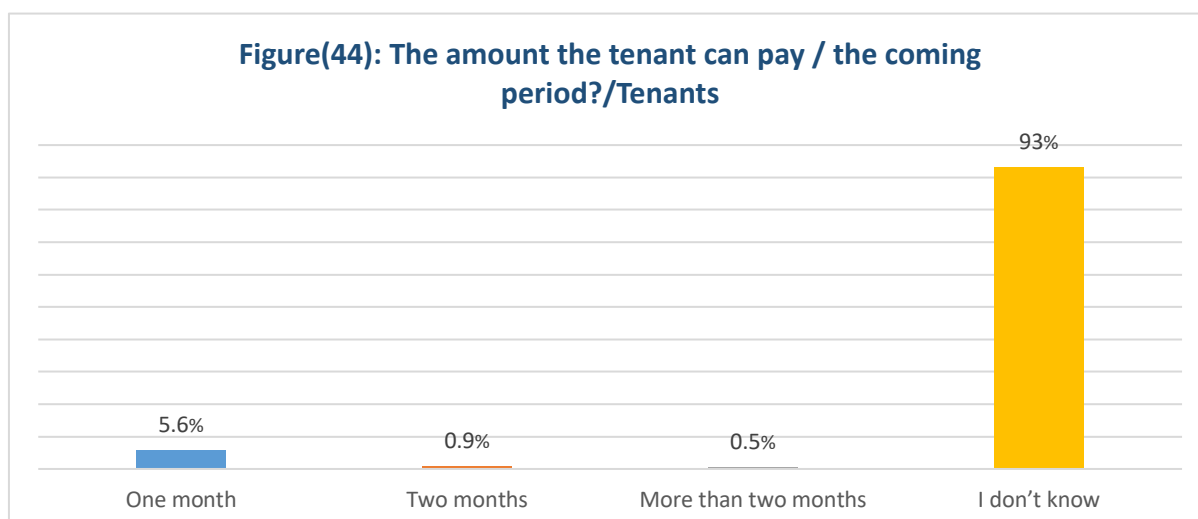
Figure (43) shows that 52% of the tenants' sample pay rent through stable employment, and 24.90% through their daily labor income. The remaining percentages were as follows: 14.40% are homeless/not applicable, 4.40% loans from family and friends, 3.50% paid through their own small projects, 0.40% loans from service providers, and 0.40% paid rent from government financial assistance.



These results indicate that the majority of tenants/IDPs depend on their stable jobs for income due to the availability of governmental jobs in Marib. Other tenants through their daily labor income or their own small projects. Stability of income is a great advantage that is provided to residence/IDPs in Marib Governorate.

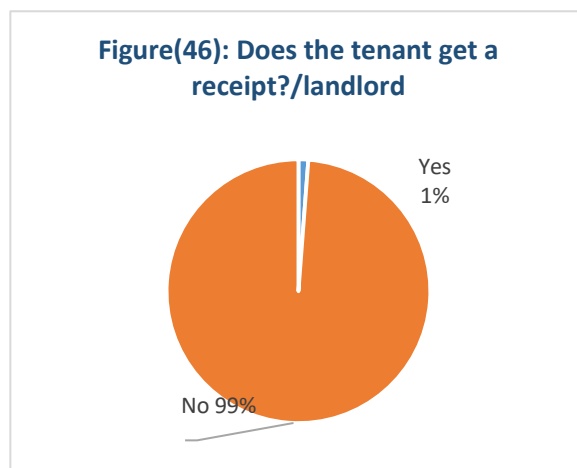
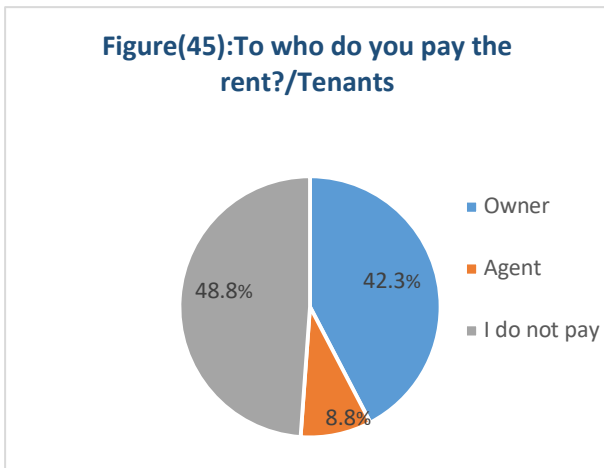
4.6 Paying the Rent

Figure (44) illustrates the amount of rent that tenants are able to commit to paying in the next coming months. 93% did not know for how long they can pay rent, 5.6% will be able to pay for one more month, 0.9% two more months, and 0.5% more than two months.



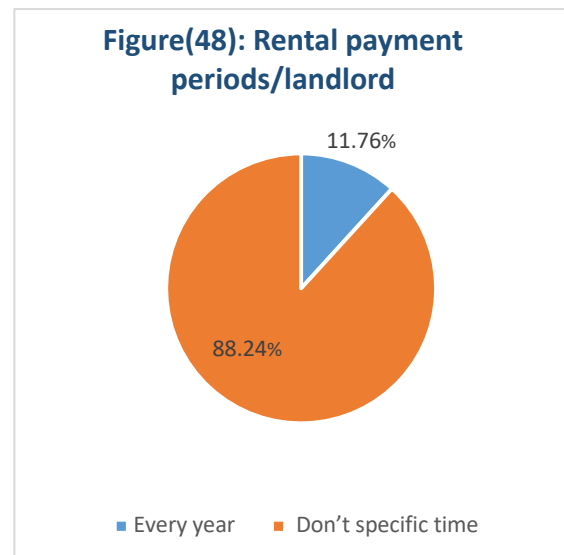
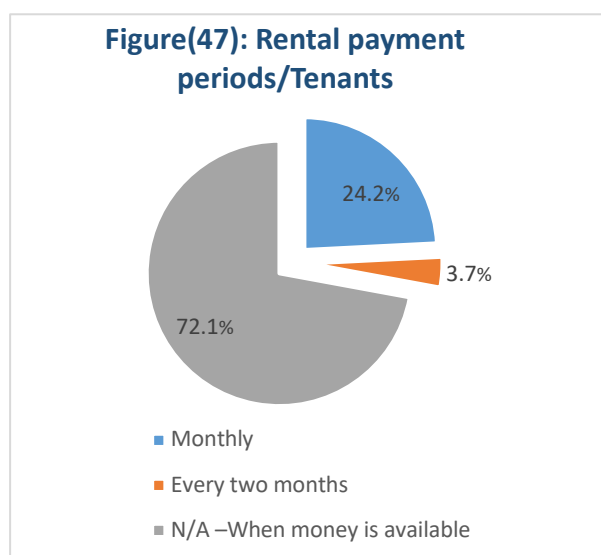
As for the methods of paying rent, 42.3% of tenants pay the rent directly to landlords, 8.8% to landlords' agents, and 48.8% do not pay rent (Figure 45).

The landlords' analysis study shows that 1% of tenants get a receipt for rental payment from landlords, whereas 99% do not get a receipt (Figure 46), which reflect the trust between tenants and landlords, but also reveals the lack of regulations that govern the rental payment process.



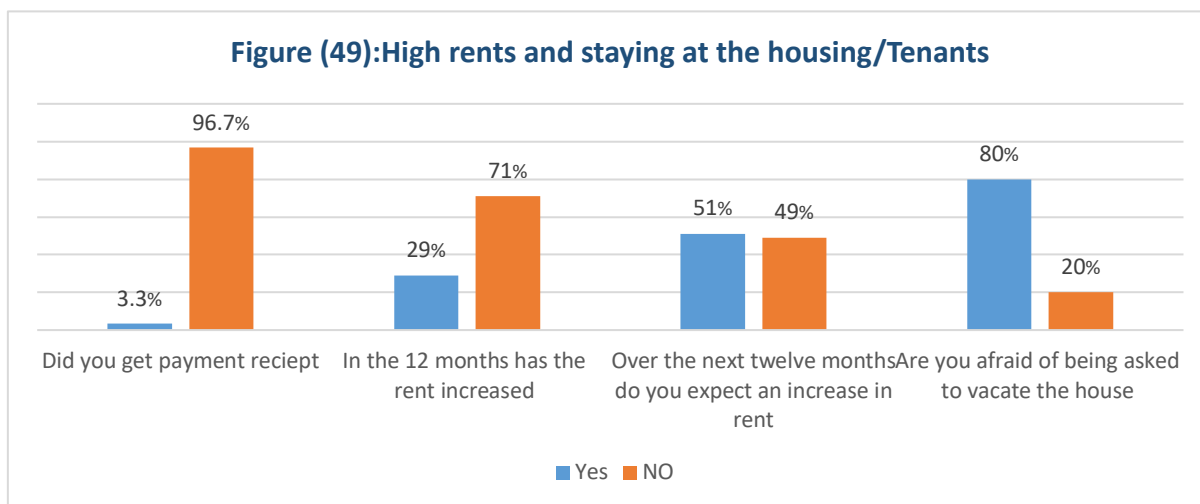
The results of the tenants' analysis (Figure.47) illustrates rent due dates. 72.1% of tenants pay rent when money is available, 24.2% on monthly basis, and 3.7% every two months.

The results of the landlords' sample data analysis show that 88.24% of landlords reported that the rental payment deadline is fixable, and that rent due dates are open according to the ability of tenants to pay, whereas 11.76% of tenants are required to pay rent annually.



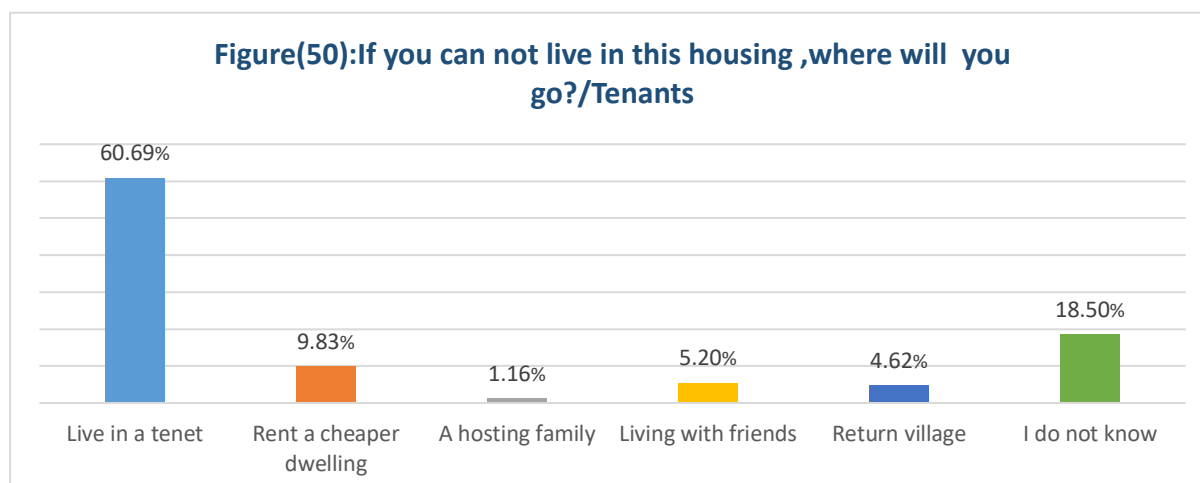
4.7 Rent Increase and Stability

The study (Figure 49) shows the correlation of rent fluctuation and housing stability. 29% of tenants stated that there was an increase in rent payment during the past twelve months, whereas 71% reported that there was no increase in rent payment during in the past year (Figure 49). As for the next twelve months, 51% of tenants expected an increase in rent costs in the coming twelve months, whereas 49% did not anticipate any increase in rent payment over the next twelve months. In regards to eviction, 80% of tenants expressed their worries from the possibility of being evicted from their rented housing, and 20% of tenants did not have those concerns (Figure 49). These results reflect the extent of instability among tenants. The results of the tenants' sample also revealed that of all rent payments, 3.3% of tenants got a receipt, whereas 96.7% did not get a receipt for rent payment.



The results of FGDs and KII reveal that most tenants anticipate an increase of 20% - 100% in rental payment due to the continuous influx of IDPs, the high demand and low supply of rented housing, and due to the instable exchange rate of the dollar. However, the results also indicate that there is an active movement in the real estate area regarding construction which means more supply of new housing and thus a decrease in rent costs.

Figure (50) illustrates the results of the tenants' sample analysis in regards to alternatives tenants are considering in case of unavailability of rented housing, and they are as follows: tents 60.69%, rent cheaper housing 9.83%, live with a friend 5.20%, return to hometown /village 4.62%, live with a hosting family 1.16%, and 18.50% said that they do not know.



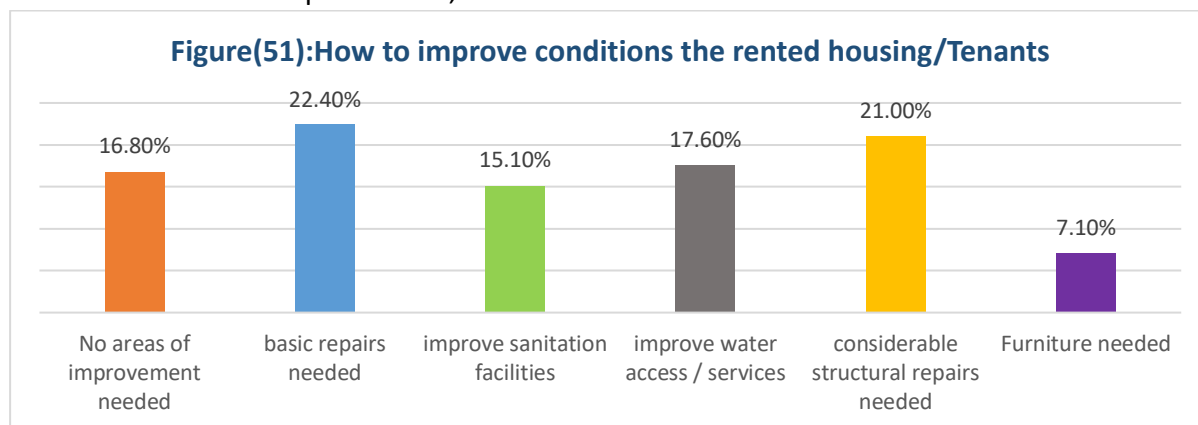
4.8 Total of income of tenants and their families

The results of the tenants’ sample analysis show that the collective income of working members in the household averages at 56,643 YER. As previously mentioned, the average rent is (37,843 YER) in addition to the cost of basic services at (13,201 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 94% of the tenants’ sample (Figure 5).

5 Housing Improvement and Accessing Assistance

5.1 Housing Improvement

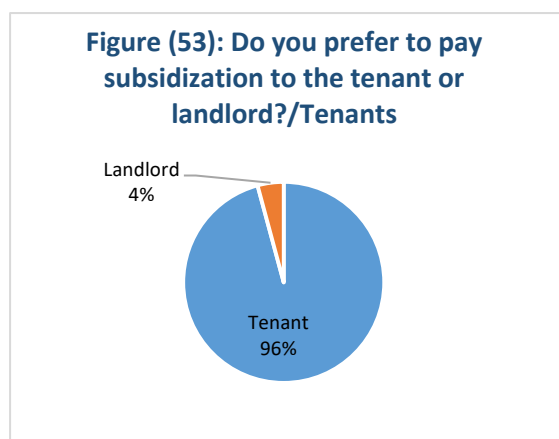
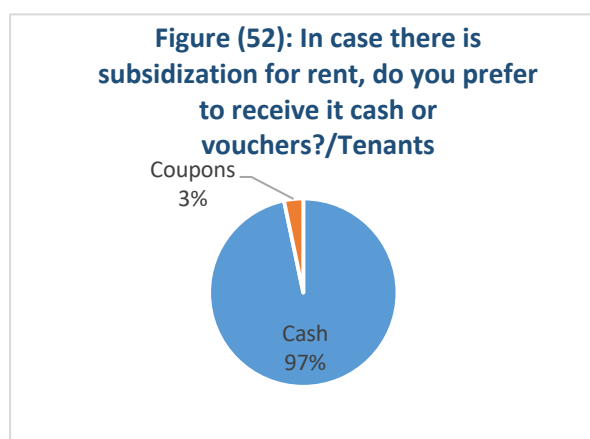
In regards to housing’ improvement, figure (51) shows that 21% of tenants stated that considerable structural repairs are needed, 17.60% improvement of water and other basic services, 15.10% improvement of sanitation facilities, 22.40% the housing need basic repairs, 16.80% no need for improvement, and 7.10% stated that furniture is needed.



These results reveal that there are various improvements that need to be made in order for these housing to be inhabitable, because most of these housing, in their current conditions, pose a health and safety hazard for tenants/IDPs living in them.

5.2 Accessing Assistance

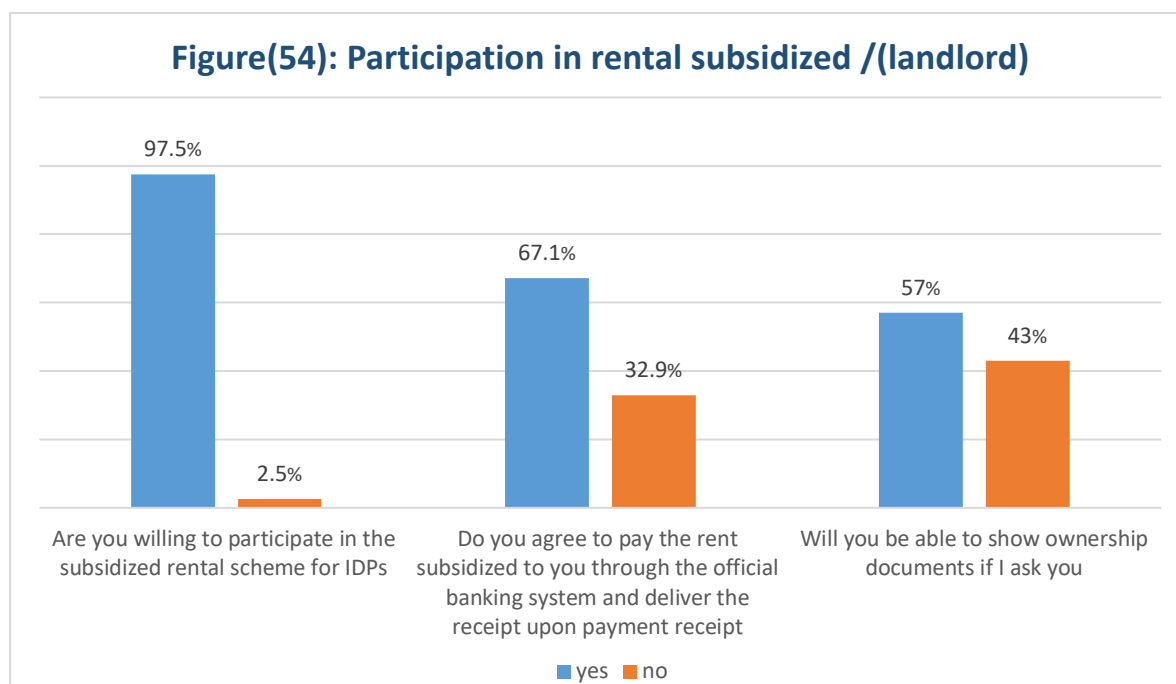
In regards to rental assistance, the results of the tenants’ sample analysis (Figure. 52) shows that 97% of tenants prefer to receive rental assistance if available in cash, and 3% of them through vouchers. Figure (53) shows that 4% of the tenants preferred the rents be paid directly to landlords, whereas 96% preferred it to be paid to the tenants.



6 Taking Advantage and Participating in Support Programs:

6.1 Show Property Documents:

Figure (54) shows that 57% of landlords are willing to show housing' ownership documents, whereas 43% are not willing to show housing' documents.



6.1 Method of Receiving Rental Funds

In regards to the method of receiving rental funds, 67.1% of landlords are willing to receive the rent through the banking system and provide a delivery receipt, whereas 32.9% are not willing to do so (Figure 54).

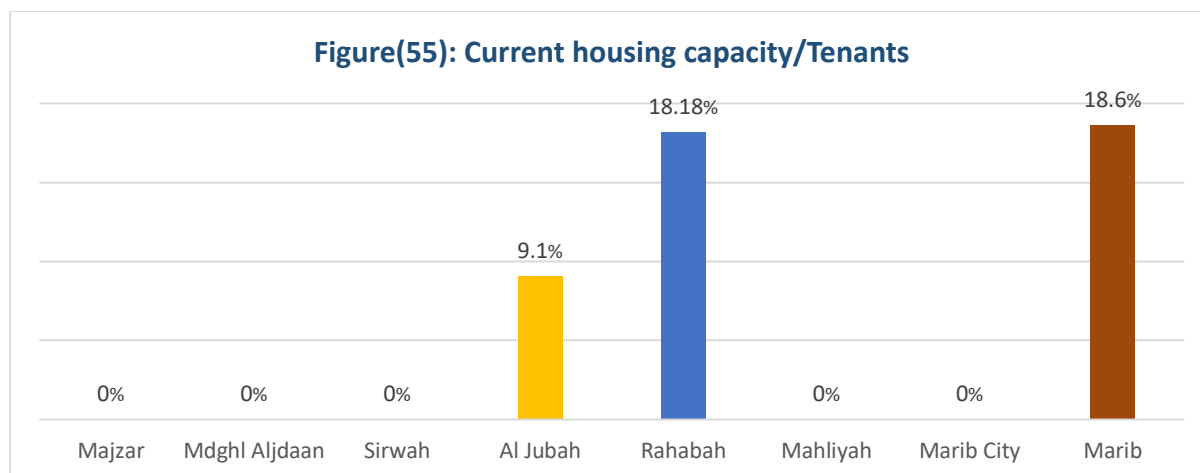
6.2 Preparing for Participation

As for participating in rental support programs, results show that 97.5% of landlords stated that they are willing to participate in any future rental support programs for IDPs, whereas 2.5% 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 Marib is quite limited. 91% of housing are occupied, while only 9% were vacant. Figure (55) shows that the current rental housing capacity in the districts of Marib Governorate is as follows: Al Jubah 9.1%, Rahabah 18.18%, and Marib 18.6%, while other districts of Marib Governorate have no capacity at all. These results seem, to a large extent, consistent with the data from the interviews administrated by the key informants who have highlighted the difficulties in finding rental housing within their districts. For further details, check Housing Capacity Map - Annex (6).



The analysis of the tenants' sample data shows that the housing' rent in the Governorate of Marib is 37,843 YER per month on average, which is considered high. However, in Marib City it is considered a reasonable amount when compared to the quality and size of the rented housing and the 300% increase in prices of commodities. This amount decreases as we move away from the center of Marib city.

2. Community Hosting IDPs

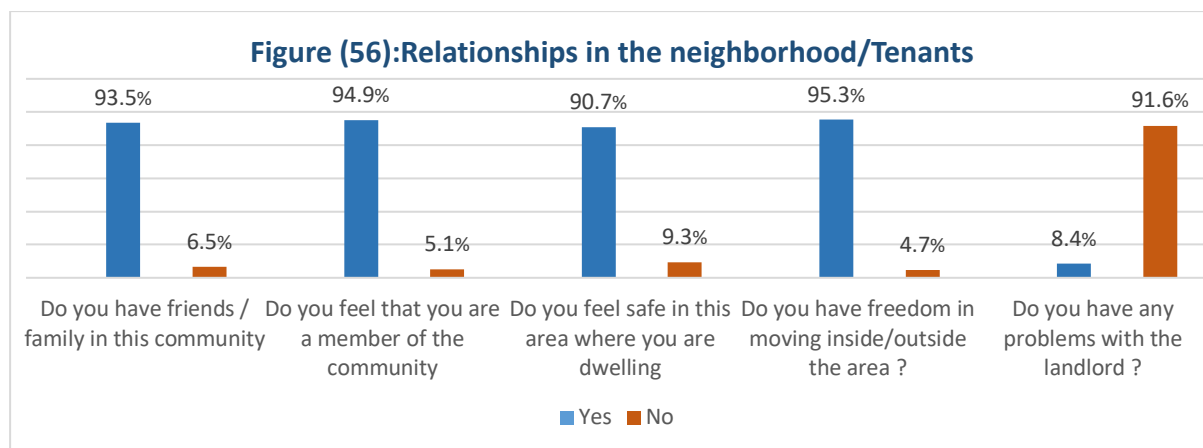
The analysis shows that the community of Marib Governorate accepts and supports IDPs and that there is no discrimination against them. However, the analysis of the KII and the FGDs state that the presence of large numbers of IDPs has caused an increase of prices and a decrease in the number of housing available for rent. Currently, rental housing are available in the rural areas of Marib Governorate more than the urban areas. This issue has been discussed by many participants in the focus groups. One participant said: "We accept IDPs but the government should be responsible for solving their problems", another participant said "There are no available housing for rent, people are starting to reserve flats in building for rent while they are still under construction".

Furthermore, since many IDPs came to this Governorate, the assessment reveals an increase in the number of buildings that are being constructed, taking advantage of the knowledge and experience of some IDPs that have expertise in this area and who try to contribute to the hosting community. However, the increasing number of IDPs created a lot of pressure on basic services such as education and health that cannot accommodate this large number of IDPs. The pressure on services resulted in the spreading of some diseases and large number of students not attending schools.

The assessment reveals that some IDPs are living in lands and government facilities like schools rent free. The negative side to IDPs presence, according to FGDs, is the increase of robbery in the community and witnessing large numbers of homeless children and women in the streets of Marib Governorate. The study also revealed that there are fears of child labor.

3. The Relationships between IDP's and the Hosting Community

The tenant's sample analysis study (Figure 56) shows that 93.5% of tenants have friends and families inhabiting the area where they lived, and 6.5% did not have friends or relatives in the same neighborhood. The results of the study also revealed that 94.9% of tenants feel like a member of the community, whereas 5.1% did not feel that way.



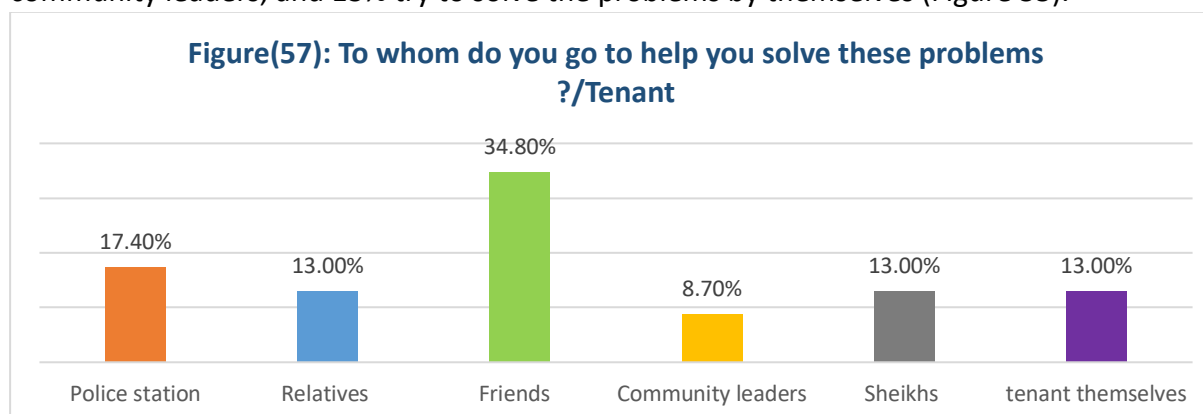
The results of group discussions and key informant interviews of both genders confirm that the majority of IDPs are welcomed and supported by the local community (by both the community leaders of that area and local residents as well).

3.1 Feeling Safe and Freedom of Movement in the Neighborhood

Figure (56) shows that 95.3% of tenants said that they have freedom of movement in the neighborhood, whereas 4.7% of tenants stated that they do not feel free to move around their neighborhoods. The results also show that 90.7% of tenant felt safe in the areas where they lived, while 9.3% did not feel safe.

3.2 Tenants / IDPs Relationship with Landlords.

In regards to the tenants/IDPs relationship with landlords, 91.6% of the tenants did not have any problems with their landlords, while 8.4% reported that they do have issues with their landlords (Figure 56). In order to settle problems with landlords: 34.80% of tenants go to their friends, 17.40% to the police station, 13% to relatives, 13% to Sheikhs, 8.70% to community leaders, and 13% try to solve the problems by themselves (Figure 55).



3 Community Based Organizations.

CBOs working in Marib 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. 17 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 Marib Governorate shows the availability of (9) 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 Marib. 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 8 districts of Marib 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 Marib, which can be summarized as follows:

- The community of Marib Governorate is a tribal society that accepts the presence of IDPs and treats them with respect and has good relations with them. The local community provides IDPs with support despite the difficult living circumstances of the locals. However, the increase numbers of IDPs has resulted in an increase of prices, overcrowding the streets, and other burdens endured by the local community for the sake of helping IDPs.
- Since the outbreak of the war, Marib Governorate has witnessed an exodus from many Governorates: Taiz, Hajjah, Al-Hudaydah, Sana'a, Dhamar, Amran, Raymah and Al-Baydha, and from districts from within Marib Governorate: Al-Wahaybah, Ghanyah, Hawran, and Surwah. Marib Governorate has become a target center for many IDPs due to its geographical proximity to most Governorates affected by the war, safety provided by this area, and being welcomed by the local community.
- According to the study results, the tenants' age category in the target districts. The age categories of tenants are: 45% over 18 years to 55 years, and 27% over 5 years to 18 years, 24% less than 5 years old, and 3% of family members over 55 years. And according to the results of the analysis, the gender of the tenants is 51% males and 49% females (Table 1). 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 analysis of the tenants' sample (Figure 37) indicate that 81.9% of the tenants have rental agreements with verbal contracts, 3.7% are legal written agreements, 5.6% are informal written agreements, and 8.8% is other (not applicable). These results reflect that most of the rental agreements in the Governorate of Marib are informal agreements, which shows that the rental market in the Governorate is not governed by formal contracts /agreements.
- The results of the tenants' sample analysis show that the collective income of working members in the household averages at 56,643 YER. As previously mentioned, the average rent is (37,843 YER) in addition to the cost of basic services at (13,201 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 94% of the tenants' sample (Figure 5).
- The average rent (37,843 YER) is relatively reasonable when compared to the size and quality of some of the rented housing, and also when compared to the 300% increase in prices of commodities and fuel. The results also showed that 51% of tenants expected an increase in rent costs over the coming twelve months.

- IDPs feel safe in the targeted Governorate due to the good security measures in Marib. However, IDPs are very concerned and worry about being evicted for inability to pay rent due to delayed salaries. They are also concerned about the increased prices of commodities.
- The main problems faced by the hosting community are overcrowded streets, pressure on schools and health services, and a big increase in rental costs and prices of commodities.
- Results of the study show that 20.70% of rented housing need considerable structural repairs in order to be suitable for inhabitation, 17.30% need improvement of water and other basic services, 14.90% need improvement of sanitation facilities, 22.10% need basic repairs to become suitable for living, 16.60% did not need improvement, and 8.40% was other. These results reveal the various improvements that need to be made in order for housing to be inhabitable, because in their current conditions, most of these housing pose a health and safety hazard for IDPs living in them.
- The study also revealed that the local residents are willing to receive more IDPs despite the challenge of having only a few housing available for rent.
- Results indicate that housing that are currently available for rent might be occupied in the near future due to the continuous influx of IDPs and also because of the delayed building process of new housing in the area. The study also suggested that IDPs should distribute themselves around different districts of the Governorate which will increase their chances of finding available housing to rent (for example in old/abandoned housing) instead of gathering in one area.
- The most urgent form of humanitarian support that IDPs need is rental assistance especially when the head of the IDPs family is a woman. Another crucial problem which IDPs need assistance in is housing' repairs and maintenance, support for women and children, and assistance in basic services.
- The results of the study analysis show that there are major investments in the field of constructing new buildings and housing for rent, which will facilitate IDPs' search for housing and lower rents, especially in Marib City and the center areas of Marib's districts.
- The results show that the role of the local authority is limited. It organizes the process of receiving IDPs, checking their documents, and directing them to available housing. The local authority also takes on general roles in city planning.
- As for participating in rental support programs, results show that 97.5% of landlords stated that they are willing to participate in any future rental support programs for IDPs, 67.1% of landlords are willing to receive the rent through the banking system and provide a delivery receipt, and 57% of landlords are willing to show housing' ownership documents.

Summary of the Assessment:

District	Number of presence CBOs	Suppliers				Financial points	Average Rent rate/YER
		Household items	Furniture	Cloths	Shelter Materials		
Al Jubah	3	1	1	3	2	2	31296
Mahliyah	0	5	7	5	5	0	11326
Majzar	1	2	0	1	5	1	7614
Marib	3	6	6	7	8	1	53737
Marib City	6	8	8	7	19	3	13333
Mdghl Aljdaan	1	0	0	0	1	0	13400
Rahabah	1	0	0	0	0	1	23640
Sirwah	2	4	6	5	6	1	17320

Annexes:

Annex (1): Assessment Maps

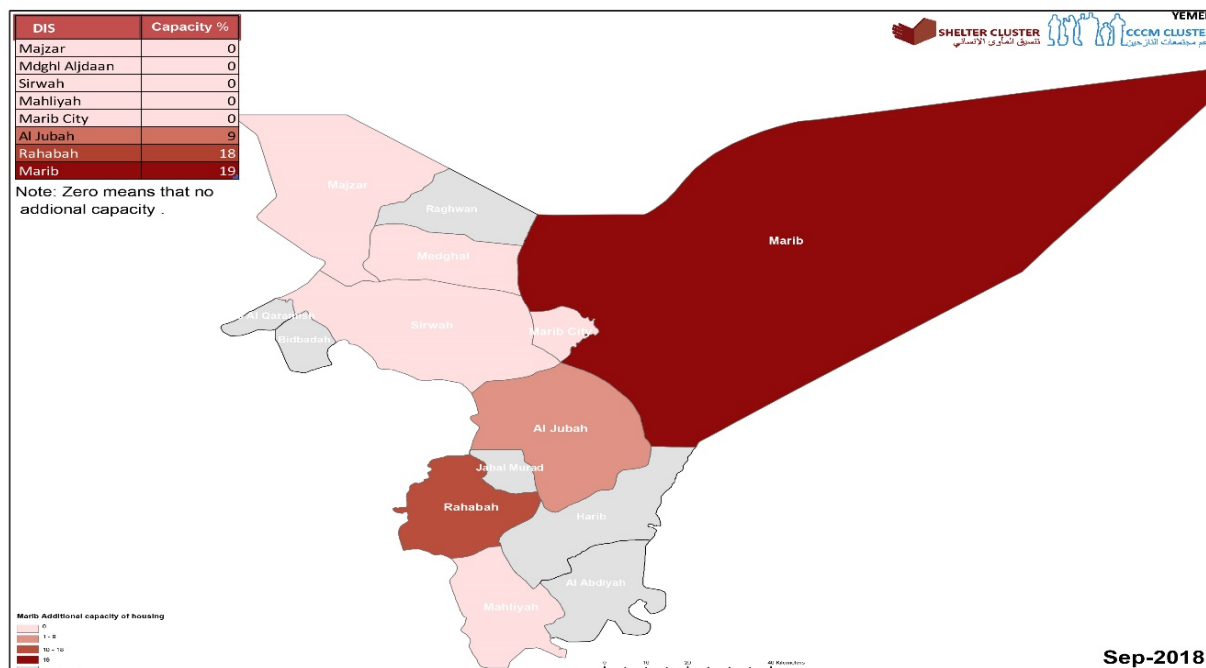
Annex (2): Community Based Organizations

Annex (3): 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:

Development- Relief, 334, 337, 341, 343, 347
Development, 335, 338, 340, 342, 345, 349
Development-charity, 339
Heath-Development-, 348
Relief, 333, 336, 344, 346

Validity of license

Not valid, 349
Valid, 333-348

Bank Accounts

Available: 334-343, 345-348
Not Available: 333, 344, 349

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, 2483,2484,2492-2494,2497,2499,2506-2509,2528,2532,2538-
2541,2540,2541,
2544,2549,2552,2553,2558,2566,2567,2569,2573,2577,2578

Furniture, 2489-

2491,2494,2498,2503,2504,2511,2532,2533,2535,2536,2544,2549,2550,
2551,2553,2557,2559-2563,2568,2574,2577-2579

Shelter materials, 2482,2485-2488,2495,2496,2500,2501,2505,2512-2520,
2522-2527,2529-2531,2534,2537,2543-2547,2550,2553-
2556,2565,2570,2572,2575,2576,
2580

Household items,

2489,2499,2502,2504,2510,2511,2521,2532,2533,2540,2544,2549-2551,2553,
2559-2561,2564,2568,2569,2571,2577-2579

Previous experience in voucher program:

Available:

2499,2501,2507,2509,2511,2514,2522,2532,2538,2558,2559,2562,2563,2573

Not Available: 2482-2498,2500,2502-2506,2508,2510,2512,2513,2515-2521,2526-
2531,

2533-2537,2539-2557,2560,2561,2564-2572,2574-2580

Willingness to respond in emergency:

Willing: 2482-2542,2545-2580

Not willing: 2543