

Yemen Shelter/NFI/CCCM Cluster Housing

Rental Market Assessment

September 2018

Taizz Governorate



SHELTER CLUSTER
تنسيق المأوى الإنساني



CCCM CLUSTER
دعم مجتمعات النازحين

YEMEN



YHF

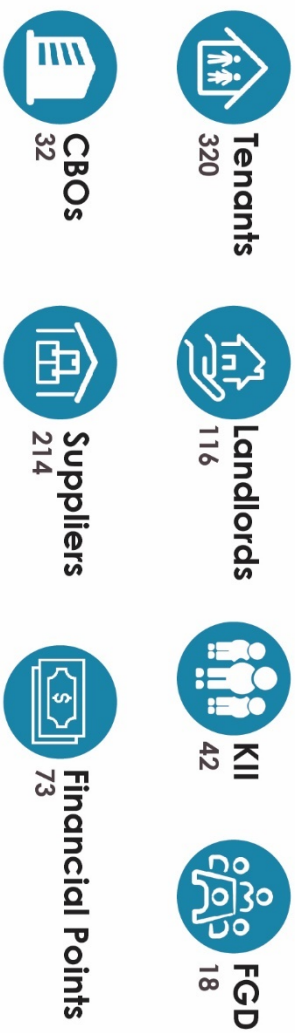
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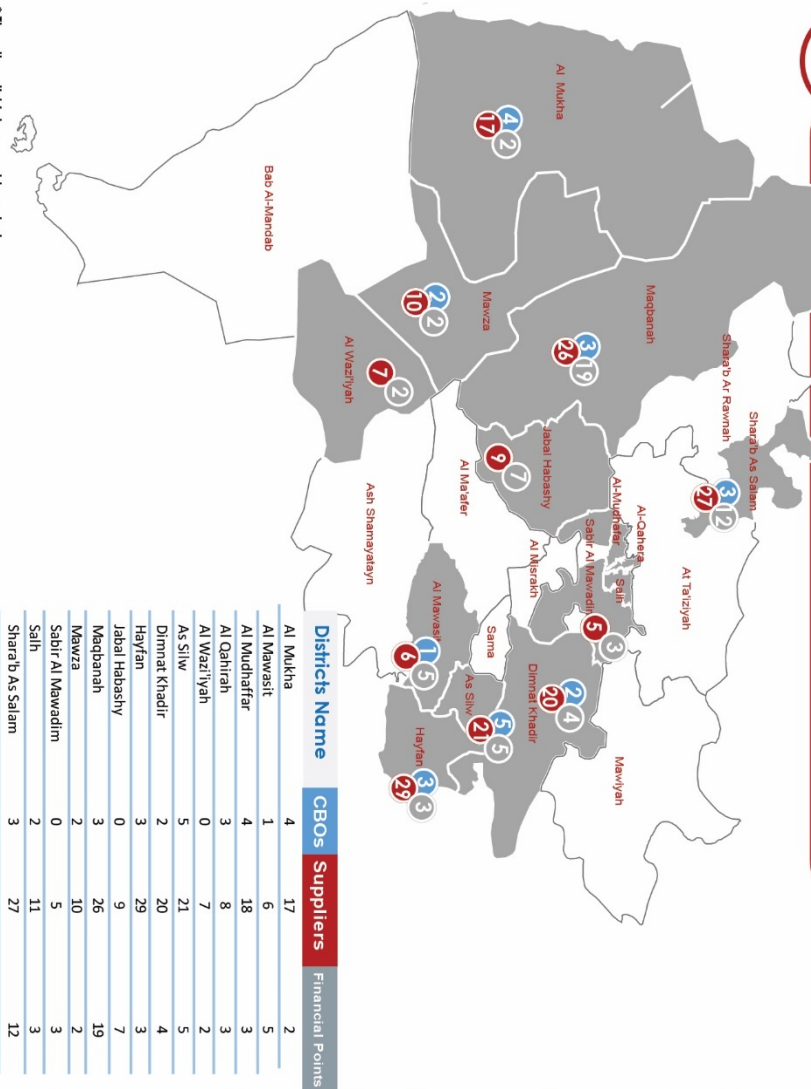
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The Samples of The assessment



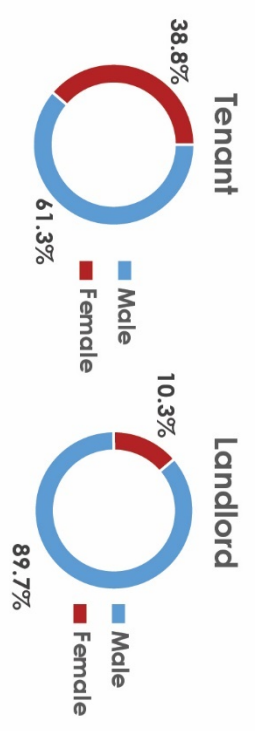
CBOs, Suppliers, and Financial Points Sample



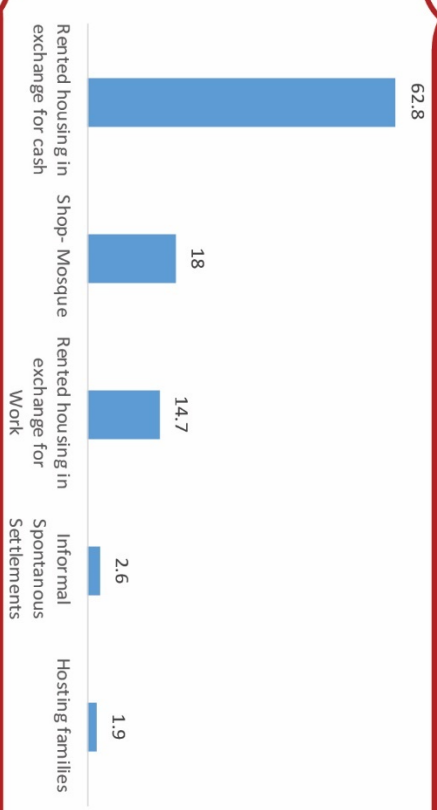
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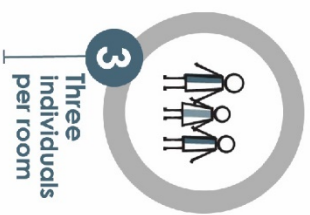
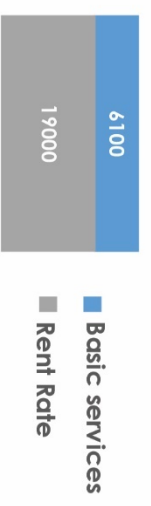
Gender



The Majority of Housing Inhabited by the IDPs



Income and Expenses and The Crowding Index



Introduction

General information about the Governorate:

Taiz Governorate covers an area of 12,605 km² (4,867 sq. mi). Its population, according to the 2004 Yemeni census, is “2,393,425”. The number of IDPs in the Governorate has reached (387,426) according to TEPM(Task Force on Population Movement Yemen)| 17th Report - August 2018.

What is the Objective of this Assessment?

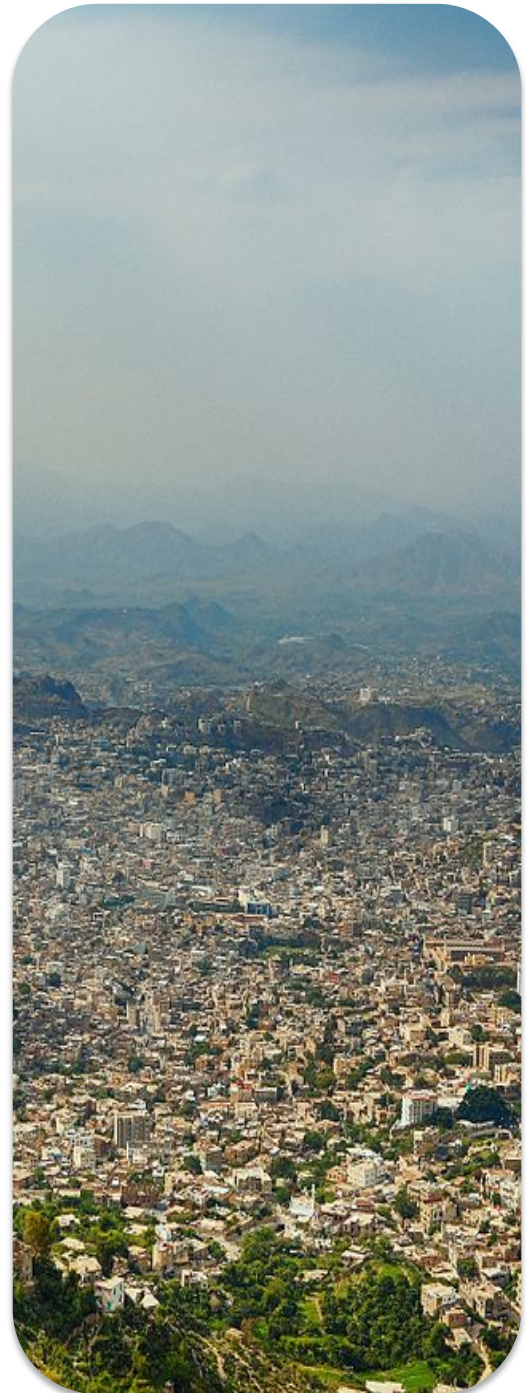
The Preparedness Assessment is guided by a number of objectives. The main objective is to support Clusters’ priority preparedness activities through providing an independent preparedness assessment about “Housing Rental Market Assessment and Host Community Capacity Assessment”.

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 Taiz Governorate

The districts distributed among the targeted sample of Taiz Governorate are 14: Al Wazi'iyah, Mawza, Al Mawasit, Al Mukha, Al Mudhaffar, Dimnat Khadir, Al Qahirah, As Silw, Hayfan, Maqbanah, Shara'b As Salam, Sabir Al Mawadim, Jabal Habashy, and Salh. The data was collected from all the districts of Taiz except Al-Waz’iyah where no tenants or landlords were found, and Mawze district that had tenants but no landlords (because they have left their property).

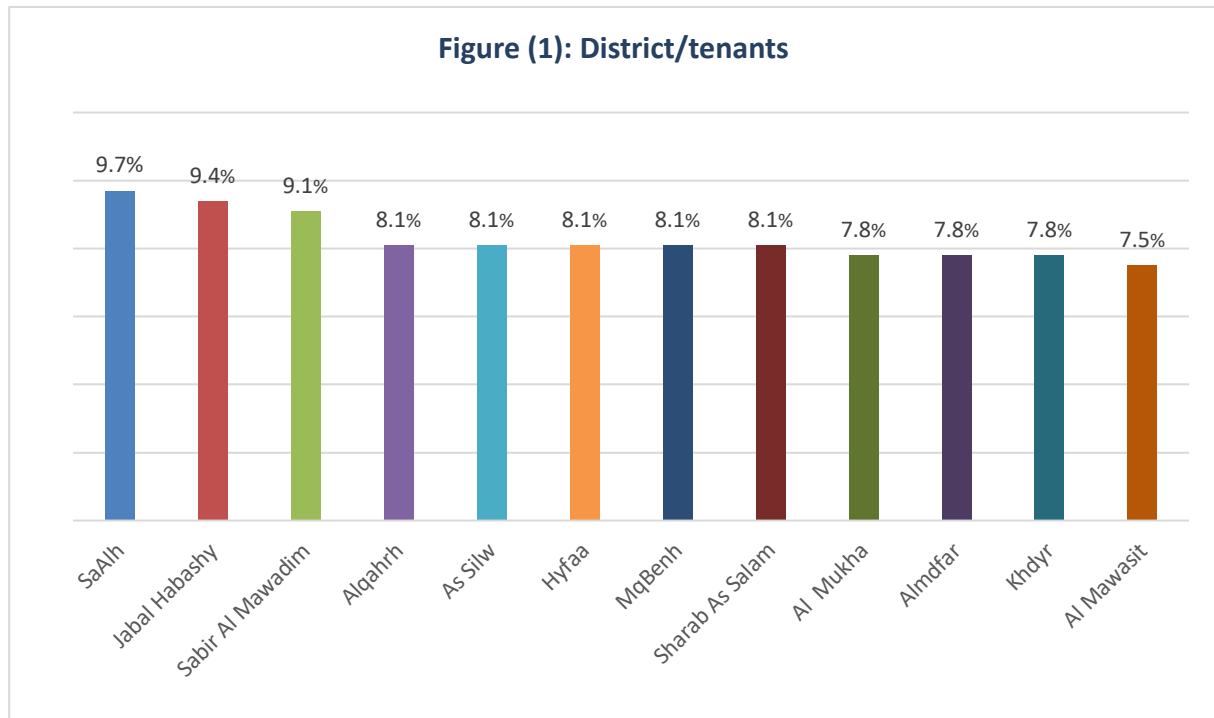


.Section 1: Housing Rental Market Assessment

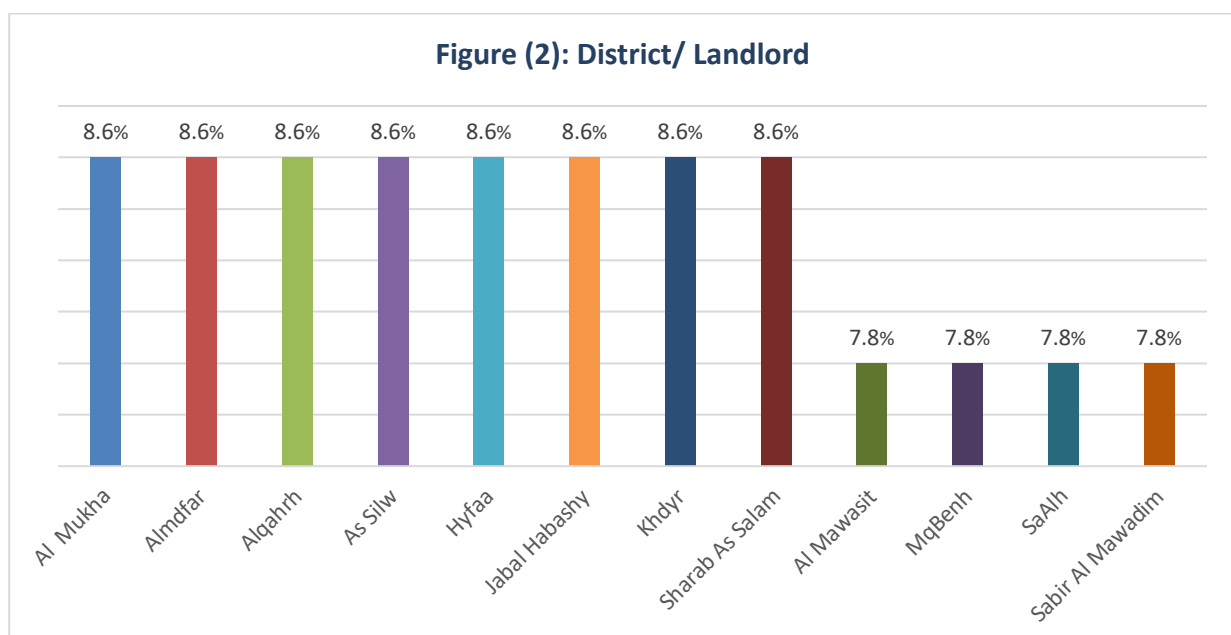
1. Demographic Details

1.1 Targeted Districts

The tenants' sample study targeted the following twelve districts within the Governorate of Taiz: SaAlh, Jabal Habashy, Sabir Al Mawadim, Alqahrh, As Silw, Hyfaa, MqBenh, Sharab As Salam, Al Mukha, Almdfar, Khdyr, and Al Mawasit (Figure.1).

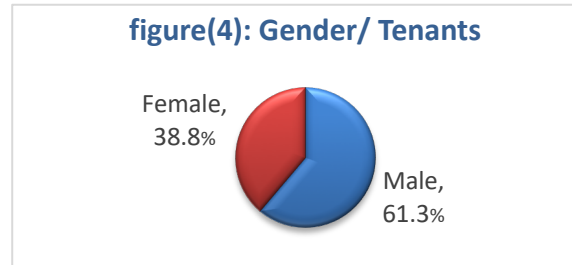
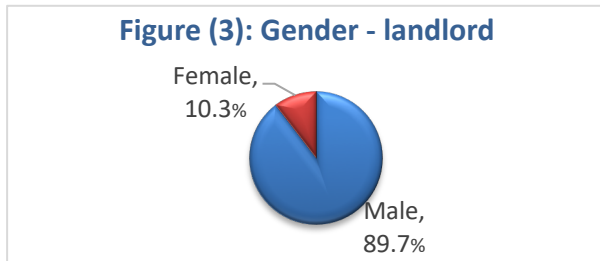


The landlords' sample covered 116 landlords distributed in the twelve districts of Taiz Governorate as shown in figure (2).



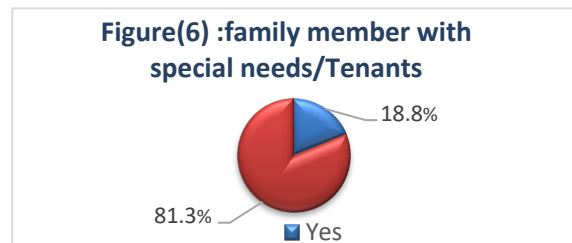
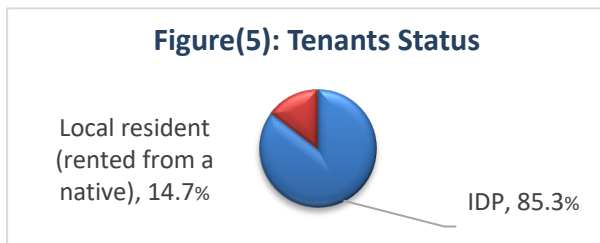
1.2 Gender (Landlords / Tenants)

Figure (3) shows the gender distribution of landlords, 89.7% are male landlords and 10.34% are female landlords. Figure (4) shows that the gender distribution of tenants which is 61.3% male tenants, and 38.8% female tenants.



1.3 Tenant Characteristics

The study shows that 85.31% of tenants covered in this assessment are IDPs, while 14.7% are local residents of the same area (Figure. 5). The large percentage of IDPs (85.31%) among the tenants' sample in Taiz reflects displacement on a large scale of people from within the same area and from other nearby Governorates. The study also shows that 18.8% of tenants have family members with special needs, whereas 81.3% do not 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: over 18 years to 55 years 41.95%, and over 5 years to 18 years 37.24%. Followed by 17.05% of tenant members that are less than 5 years old, and 3.74% of family members over 55 years. And according to the results of the analysis, the gender of the tenants is 50.70% male and 49.30% female. These results reveal the magnitude of suffering endured by the greater part of the household which are women and children, especially for IDPs.

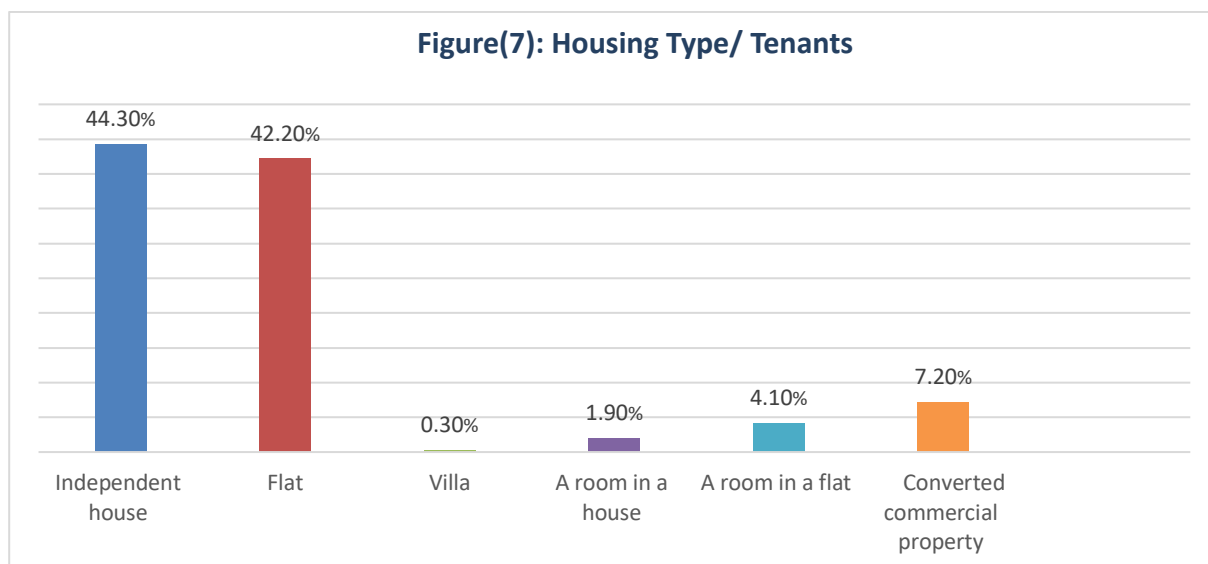
Table (1): Age and Gender of the Tenant Family Members

Gender	Under 5 years		From 5-18 years		More than 18-55 years		Older 55 years		Total of members in the households	
	Number	%	Number	%	Number	%	Number	%	Number	%
Male	185	52.11	422	54.45	413	47.31	35	44.87	1055	50.70
Female	170	47.89	353	45.55	460	52.69	43	55.13	1026	49.30
Total	355	100	775	100	873	100	78	100	2081	100.00
% within Age	17.05%		37.245		41.95%		3.74%		100%	

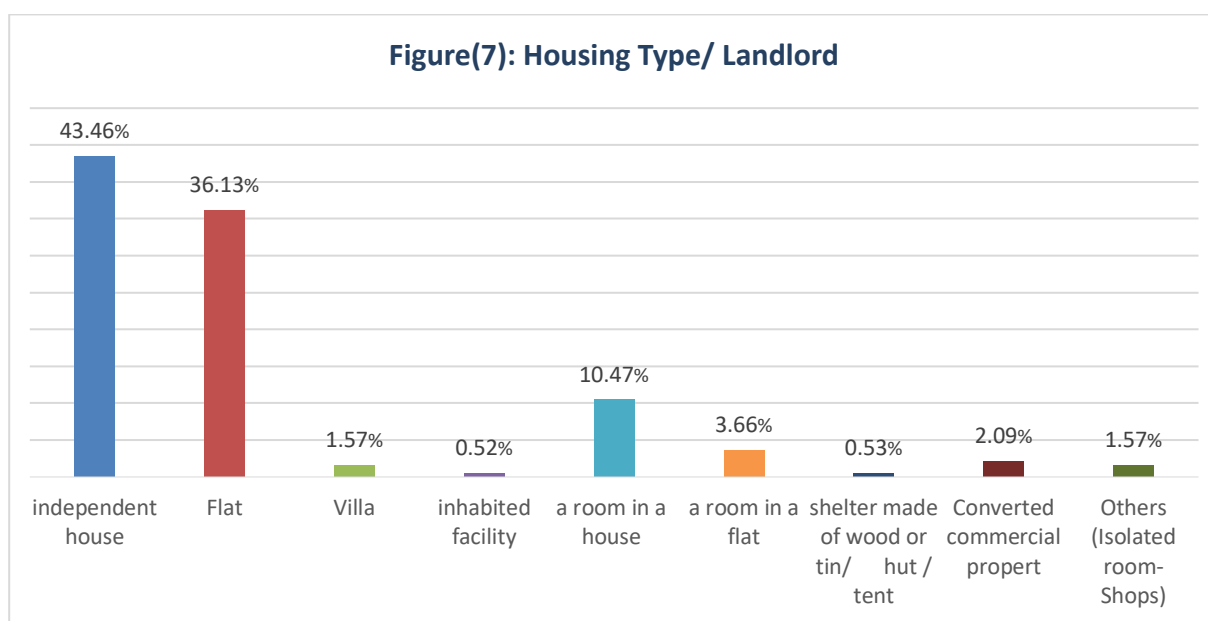
2. Details of the Rented Housing

2.1 Type of Housing (Tenant / Landlord's)

The study shows that the type of housing rented by the tenants' sample are: independent housing 44.30%, flats 42.20%, converted commercial property used as housing 7.20%, a single room in a flat 4.10%, a room in a housing 1.90%, and a villa 0.30% (Figure. 7).



In the same context, the landlords' sample analysis showed that the following are the main types of housing available for rent: independent housing 43.46%, flats 36.13%, a room in a housing 10.47%, a room in a flat 3.66%, converted commercial property 2.09%, a villa 1.57%, huts/tents or shelter made of wood or tin 0.53%, living in public facility 0.52%, and other (isolated room / shops) 1.57% (Figure. 8).

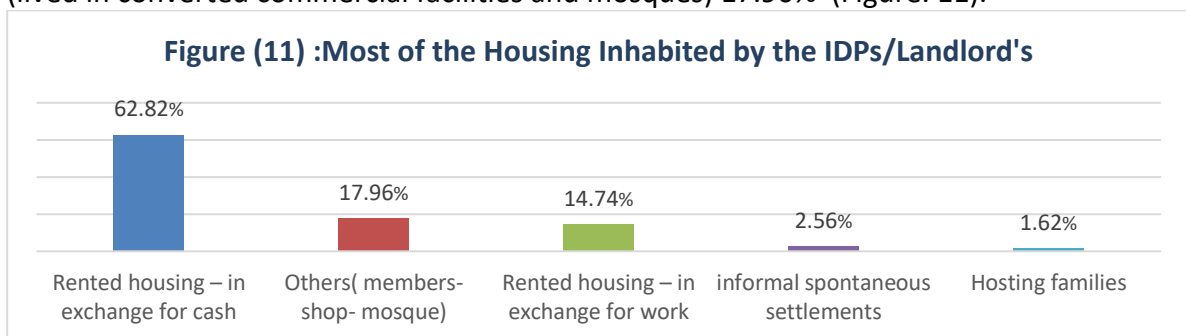


2.2 Rent for IDPs

The landlords' sample shows that 79.31% of landlords have already rented to IDPs, while 20.69% have not yet rented to IDPs (Figure 9). The study also showed that 77.2% of the landlords' sample are willing to rent to IDPs, whereas, 22.8% are not willing to rent to IDPs (Figure 10). The high percentage of landlords who agree to rent to IDPs is a positive indicator of the community's willingness to receive IDPs. On the other hand, the financial situation of IDPs is most likely why some landlords are not willing to rent to IDPs (fear of not being paid the rent regularly).

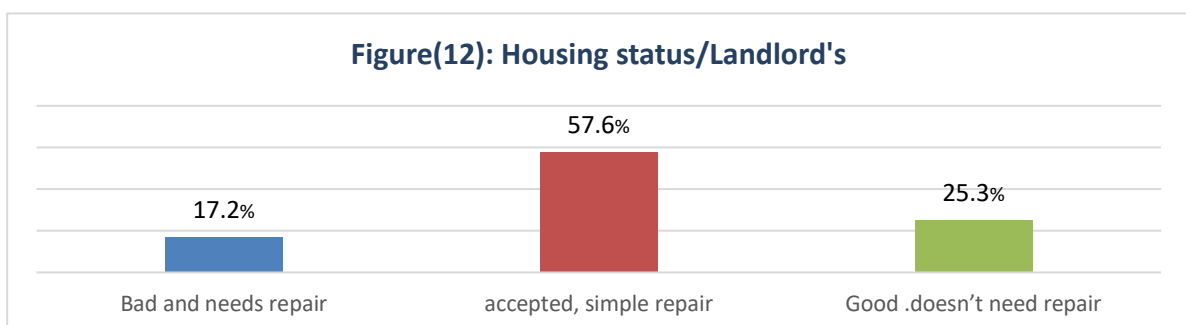


According to the landlords' analysis, the main type of housing that are inhabited by IDPs are: housing/flats 62.82%, worked for landlords in exchange for renting the housing 14.74%, IDPs Hosting Sites 2.56%, lived with a hosting family 1.92%, and other (lived in converted commercial facilities and mosques) 17.96% (Figure. 11).



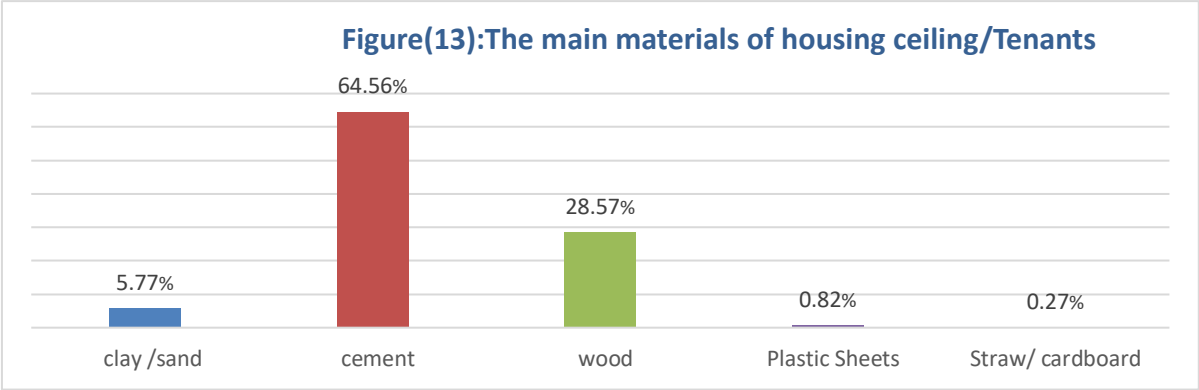
2.3 State of Housing

The analysis of the tenants' sample indicates that 57.6% of the housing managed by landlords are in acceptable conditions and only need minor repairs, 25.3% are in good conditions and do not require any repairs, 17.2% are in bad conditions and need repairs and maintenance (Figure 12). These percentages reveal that a large number of tenants in the Governorate of Taiz live in housing in acceptable conditions.



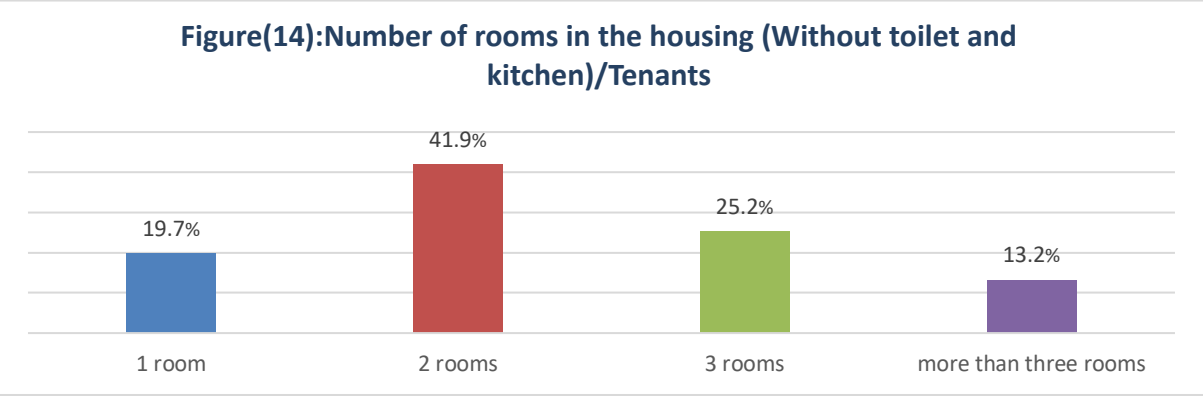
2.4 Materials used for Ceilings of Housing

Figure (13) shows that the materials used in ceilings of rented housing are 64.56% cement, 28.57% wood, 5.77% clay/sand, 0.82% plastic sheets, and 0.27% straw.

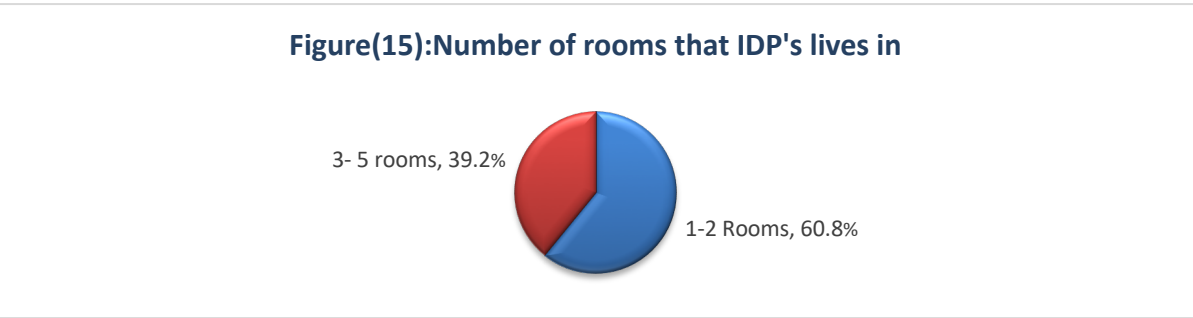


2.5 Number of Housing Rooms

The results of the analysis (Figure 14) indicate that 41.9% of tenants live in rented housing that consist of two rooms, 25.2% consist of three rooms, 19.7% consist of one room, and 13.2% consist of more than three rooms. These results indicate that the majority of tenants live in housing that have one to two rooms. The crowding index in Taiz Governorate shows that every three individuals share a room according to the number of household members 2081 divided by the total number of rooms 750 room excluding kitchen and toilet, Table (1).

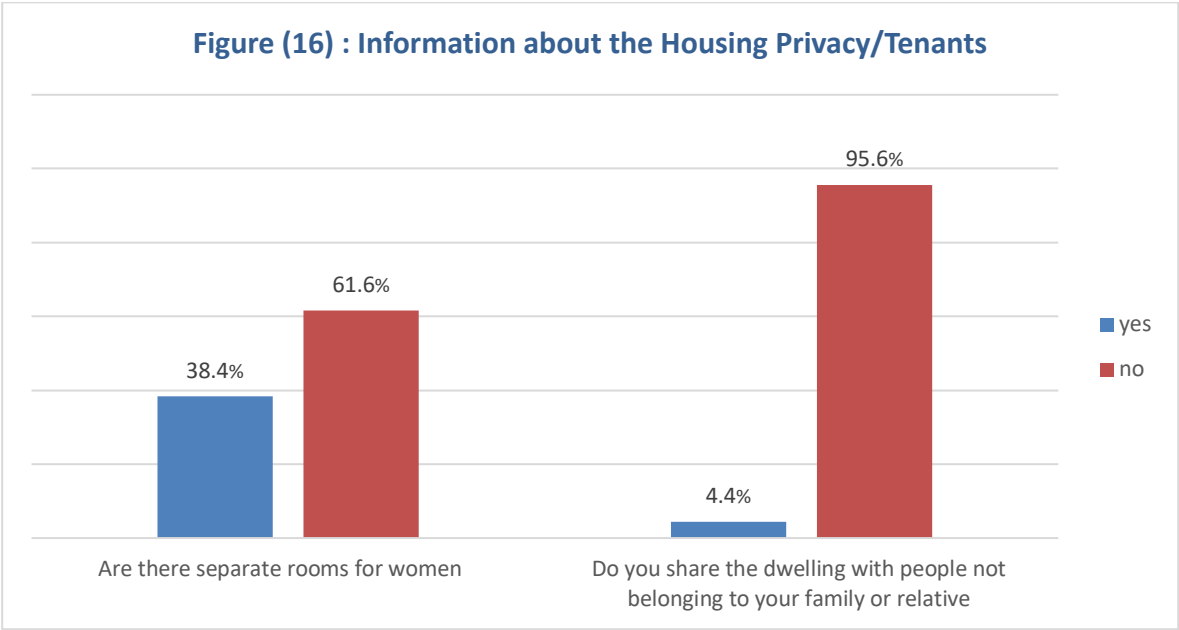


As previously mentioned, 85.3% of tenants in Taiz Governorate are IDPs Figure (5), the study shows that 60.8% of them live in one to two rooms (Figure 15).



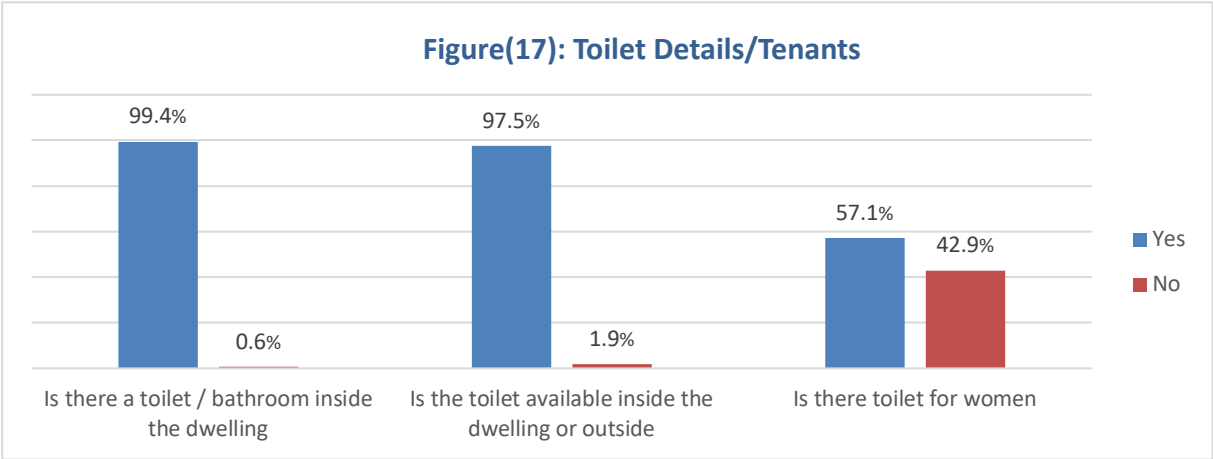
2.6 Privacy of the Housing

The analysis of the tenants’ sample reveals that 61.6% of tenants do not have separate rooms for women in the rented housing, while 38.4% have separate rooms for women (Figure 16). This situation seems to be acceptable since 95.6% of tenants do not share their housing with non-family members, and only 4.4% share their housing with other people who are not family members.



2.7 Availability of Toilet in the Housing

The results of the tenants’ sample show that 99.4% of the tenants have a toilet inside their housing, while 0.6% do not have a toilet inside the housing. The results of the study also showed that 57.1% of housing have separate toilets for women, while 42.9% do not have separate toilets for women. Also, 97.5% of housing had a toilet inside the housing, and 1.9% had a toilet outside of the housing. The study reveals that 93.7% of the tenants’ households do not share the toilet with other families, which guarantees privacy for women and children in using toilet (Figure. 17).



The study shows that 5.5% of tenants shared the toilet with other families. As for the number of families that share a toilet, results show that two families that shared a toilet are 45.45%, three families that shared a toilet are 18.18%, four families that shared a toilet are 9.09%, and 27.27% shared a toilet with one other family Figure (18). These statistics reflect the lack of privacy that some families endure in this area.

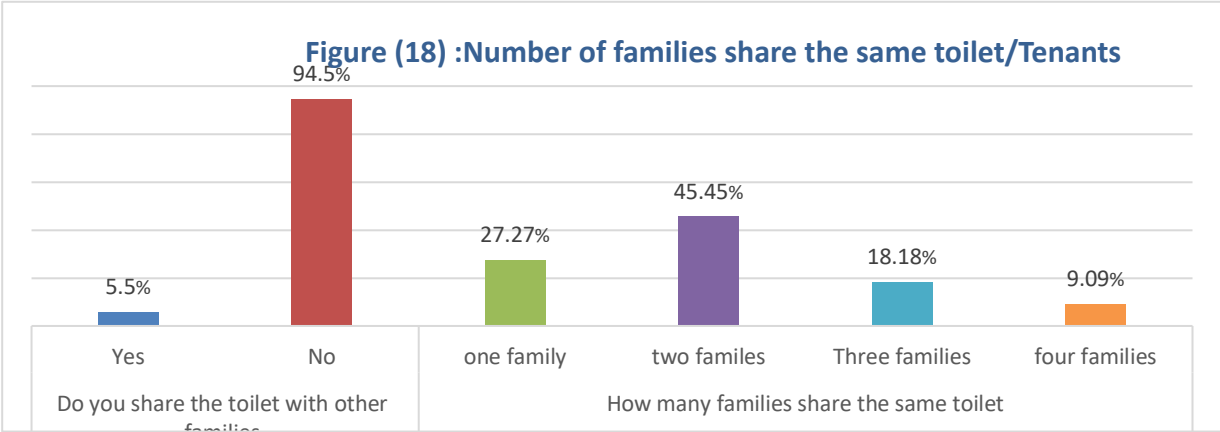
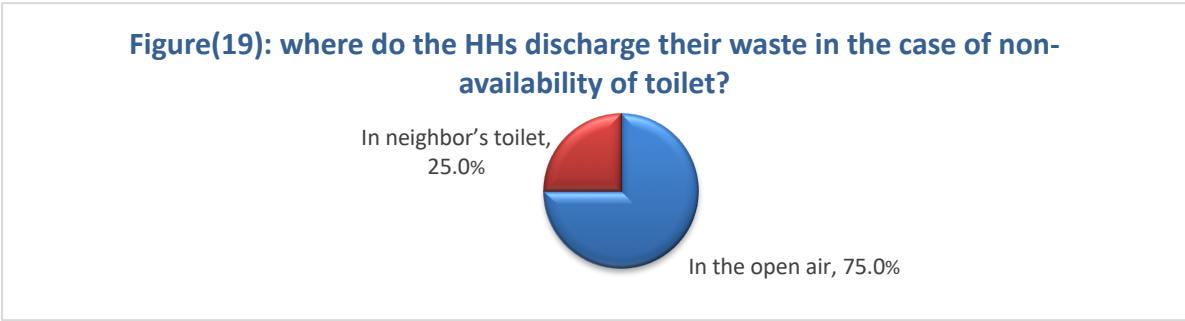
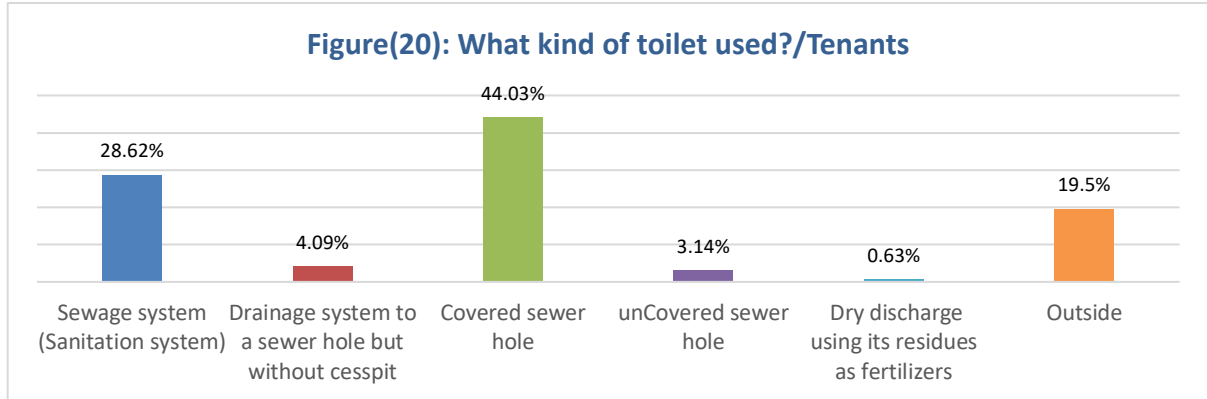


Figure (19) shows the alternatives in case of unavailability of a toilet. 75% of tenants use the outdoor area, and 25% use the neighbors' toilet.



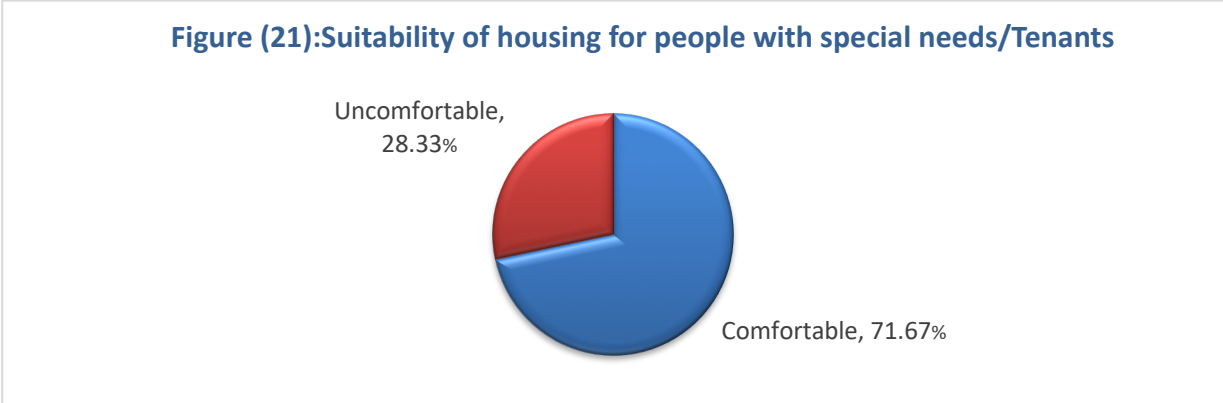
2.8 Type of Sanitation System

The results of the tenants' analysis (Figure. 20) show that 44.03% of rented housing use covered sewer holes, 28.62% use the proper sewage system, 19.50% use the outdoor area, 3.14% use uncovered sewer holes, 4.09% use a drainage system connected to a sewer hole but without cesspit, and 0.63% have dry discharges using its residues as fertilizers. These percentages indicate that at least 27.36% of households do not have a proper sanitation system which is unhealthy for tenants and bad for the environment.



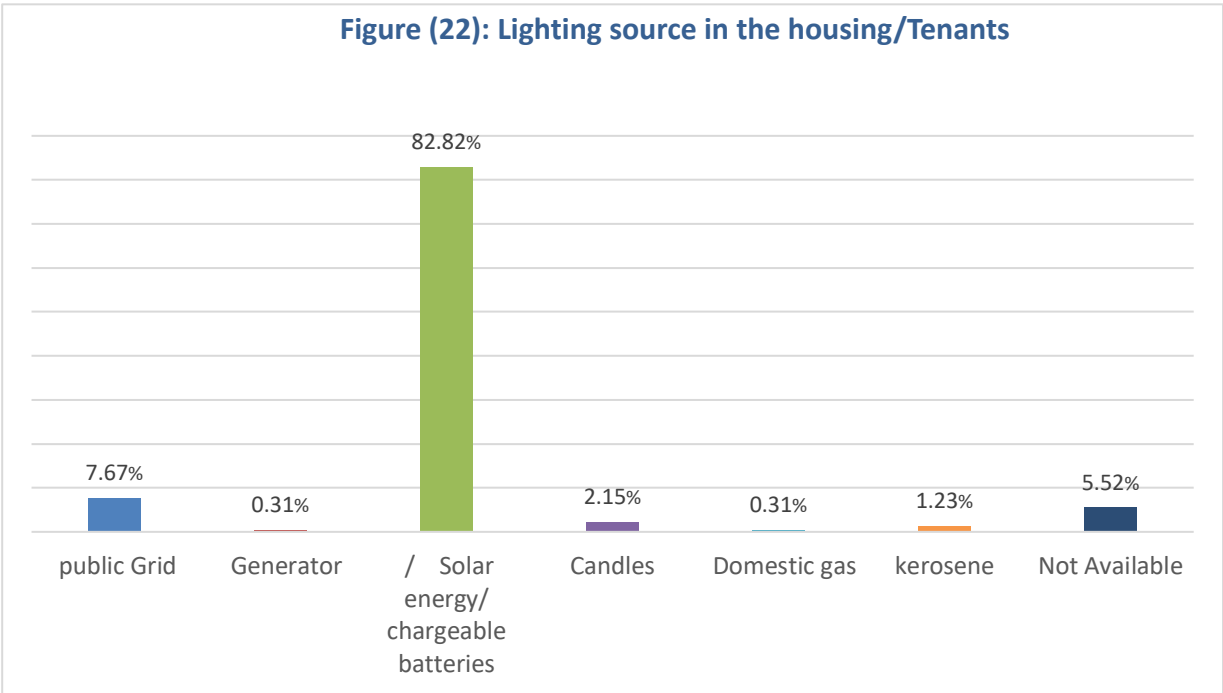
2.9 Suitability of Housing for People with Special Needs

The results of the tenants’ analysis shows that 71.67% of tenants that have members with special needs said that the rented housing is suitable for individuals with special needs, while 28.33% said that the housing is not suitable (Figure. 21). However, it is common not only in this area but all over the country that there is a lack of proper accommodations and a general disregard towards the basic requirements and special facilities necessary for individuals with special needs.



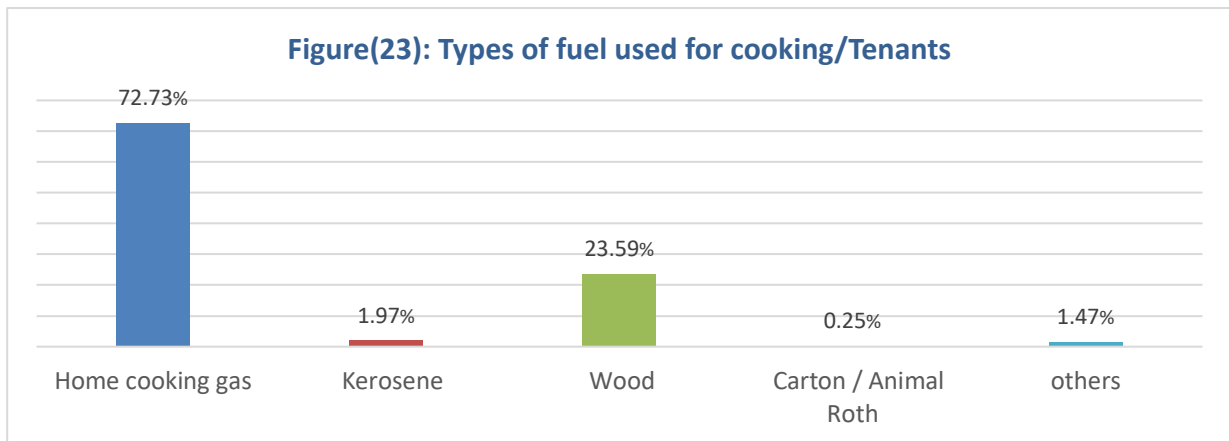
2.10 Source of Lighting

The tenants’ analysis (Figure. 22) shows that 82.82% of tenants use the solar system, 7.67% use the public grid, 5.52% have no source of lighting, 2.15% use candles, 1.23% use kerosene, 0.31% use domestic gas and 0.30% use generators. These results show that 90.49% of tenants’ households have access to electricity either through their own solar system or through the public grid.



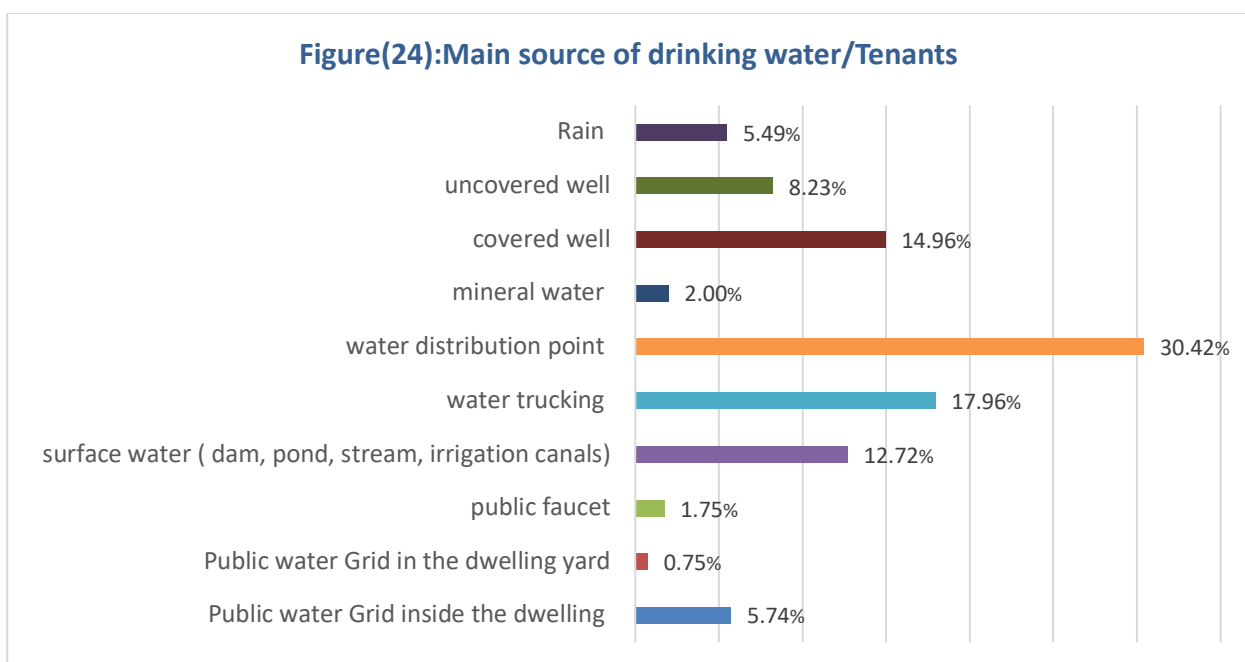
2.11 Type of Fuel used for Cooking

The analysis of the tenants' data shows that the main types of fuel used for cooking purposes in tenants' households are: 72.73% domestic cooking gas, 23.59% wood, 1.97% kerosene, 0.25% carton/animal Roth (animal waste), and 1.47% use other sources. These results illustrate the difficult circumstances faced by tenants, especially the IDPs, who cannot afford to buy cooking gas and are forced to use harmful alternatives that negatively affect the tenants and the surrounding environment and constitute an additional burden on the family to obtain (Figure.23)



2.12 Source of Drinking Water

The tenants' sample analysis shows that 30.42% of tenants get drinking water through water distribution points, 17.96% through water truck vendors, 14.96% get water from covered wells, 8.23% from uncovered wells, 5.74% through the public water grid inside the housing, 5.49% from rain, 2.00% use mineral water, 1.75% from public faucets, and 0.70% from the public water network connected to the housing yard (Figure. 24). The assessment reveals that a large percentage of the sample depend on sources of water that may not be safe for drinking, and may lead to spread of diseases among tenants. Buying water through truck vendors is another financial burden on tenants especially IDPs.



3. Accessing Housing

3.1 Transfer from Former Residence (Geographical Area):

Figure (25) shows that 92% of the tenants have moved from another area, while 8% are local residents of the same area. The large percentage of tenants who moved to this area have either moved from within the districts of Taiz or from other Governorates. This scale of displacement reflects the humanitarian crisis and the suffering of many people.

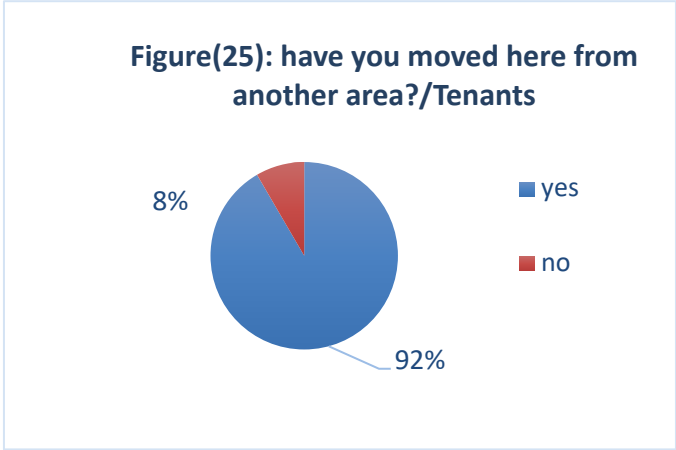
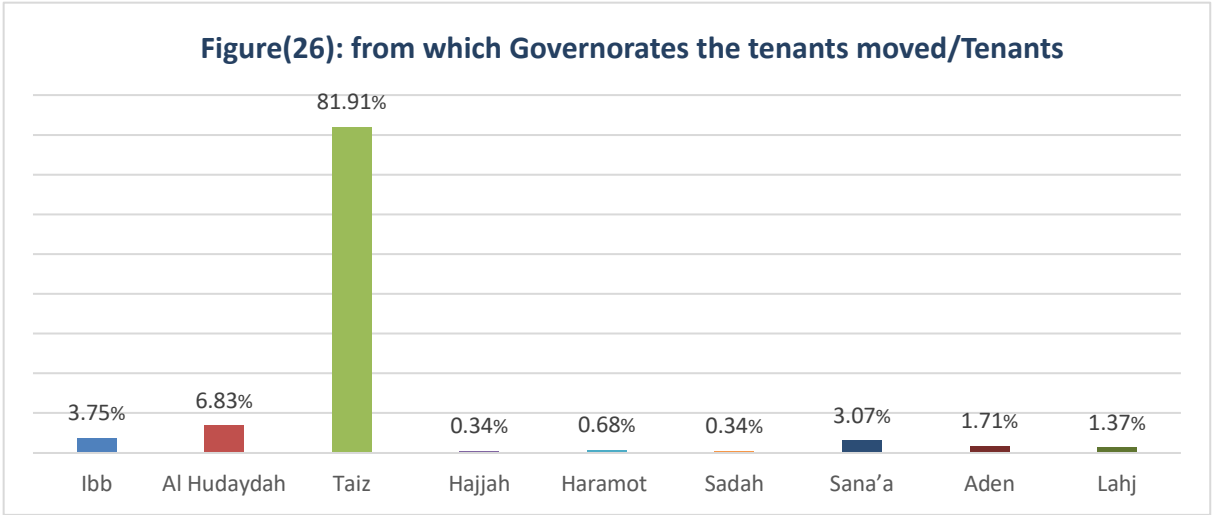


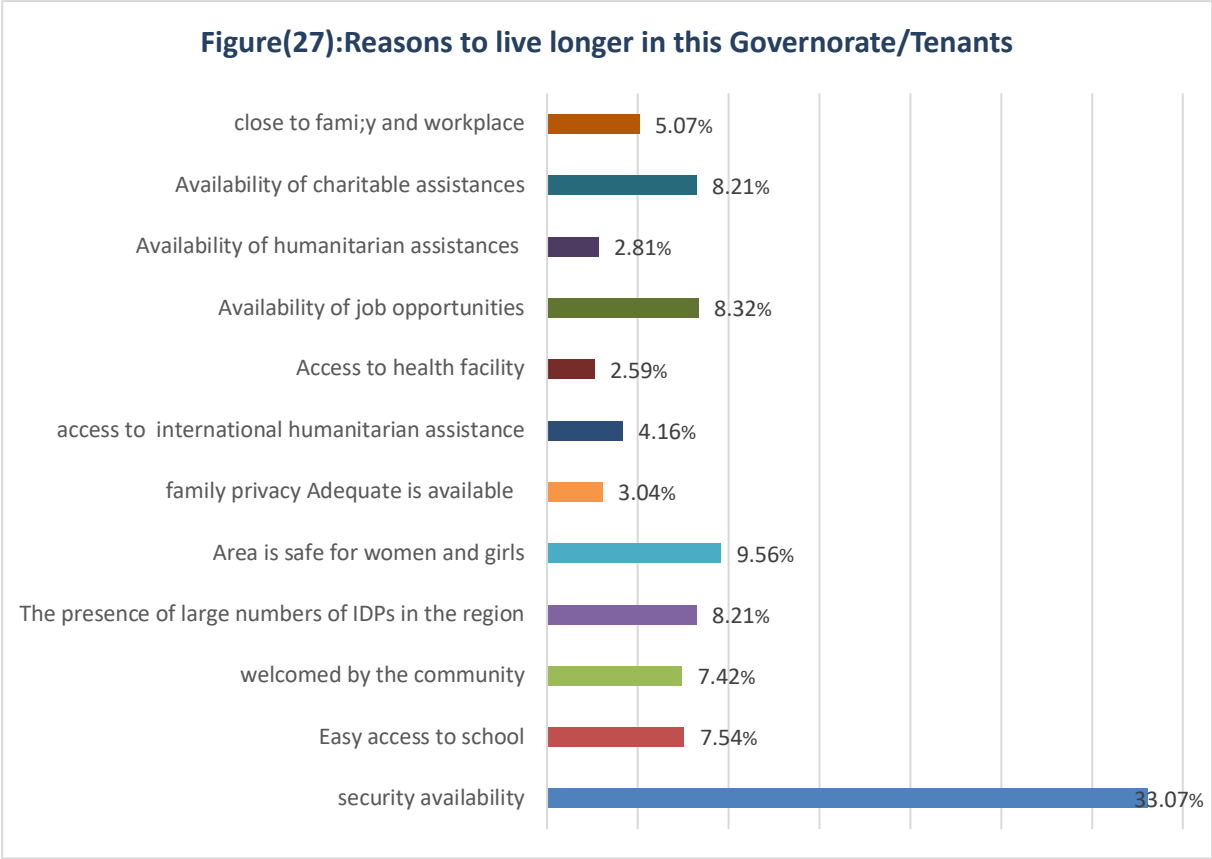
Figure (26) shows that 81.91% of the tenants are IDPs displaced from within the districts of Taiz itself, 6.83% are IDPs from Al-Hudaydah, 3.75% from Ibb, 3.07% from Sana’a, 1.71% from Aden, 1.37% from Lahj, 0.68% from Hadhramaut, 0.34% from Sa’adah, and 0.34% from Hajjah. The qualitative analysis of the KII and the FGDs shows that most of the IDPs that moved from within Taiz came from the districts of Salah, Al Mokha and Al-Waziyah, which have witnessed conflicts during the past few years. Although, there are IDPs that moved from other areas, yet the percentages do not reflect wide displacement of people from other Governorates. This is due to the fact that many districts in Taiz are conflict areas.



3.2 Choosing the Governorate for Residence

The analysis shows that a large percentage of tenants decided to settle down in different parts of Taiz Governorate due to the following reasons: safety 33.07%, the area is safe for women and girls 9.56%, availability of jobs 8.32%, the presence of large numbers of IDPs in the same area 8.21%, availability of charitable assistance 8.21%, ease of access to schools 7.54%, being welcomed by the local community 7.42%, access to international humanitarian assistance 4.16%, family privacy is ensured 3.04%, availability of humanitarian assistance 2.81% ease of

access to health services 2.60%, and proximity to relatives and workplace 5.07% (Figure 27). These results reflect that priority is given to security, which is an essential human need, followed by safety for women and children which is another area of concern for IDPs.

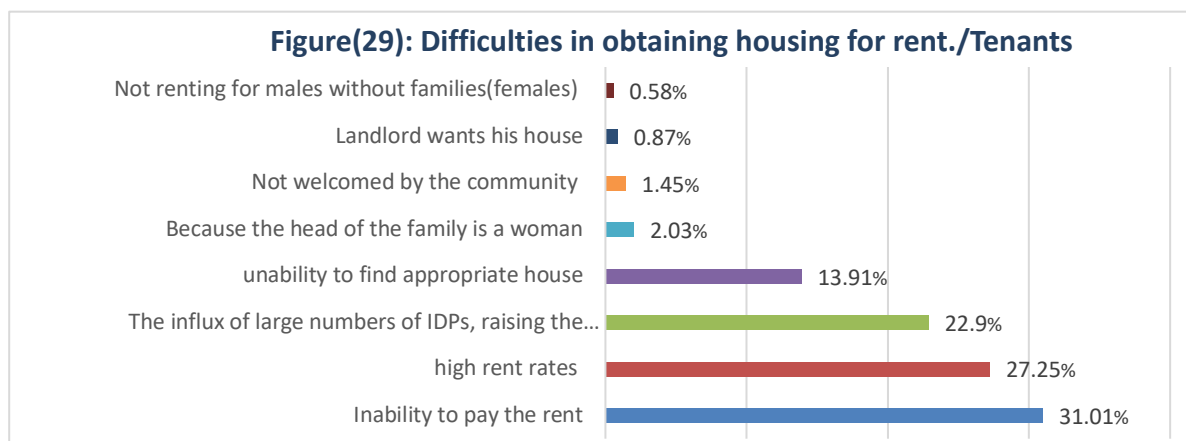


3.3 Difficulties in Obtaining Housing and Stability

The tenants’ sample study shows that 54.1% of tenants did not experience any difficulties in finding a housing to rent, whereas 45.9% faced difficulties (Figure. 28).



The tenants that faced difficulties in finding a rented housing stated the following reasons: 27.25% high rent costs, 22.90% the influx of IDPs (high demand vs low supply), 19.71% inability to pay rent, 13.91% inability to find appropriate housing, 11.30% because the tenant family is poor, 2.0% because the head of the family is a woman, 1.45% not being welcomed by the community, 0.58% not renting for males without families, and 2.3% were other reasons (Figure. 29).



The analysis of the KIIs and the FGDs illustrates that the main challenges facing tenants including IDPs are: high rental rates, the influx of large numbers of IDPs raising the demand for housing in a limited rental market, and the inability of poor tenants to afford the rent. These results are, to a large extent, consistent with the data from the tenants’ analysis.

According to the landlords’ sample analysis, the main challenges in the rental market are: 16.57% high demand for rental housing, 14.86% lack of rental housing where demand exceeds supply, 14.29% high costs of rent, 12.57% high rate of non-payment of rent, 9.71% inability to repair/maintain rental properties due to insufficient financial resources, 6.86% unleased property, and the remaining challenges are shown in (Figure 30). The results show that some of the challenges are shared between tenants and landlords such as high rate of rent and high demand and low supply of housing.

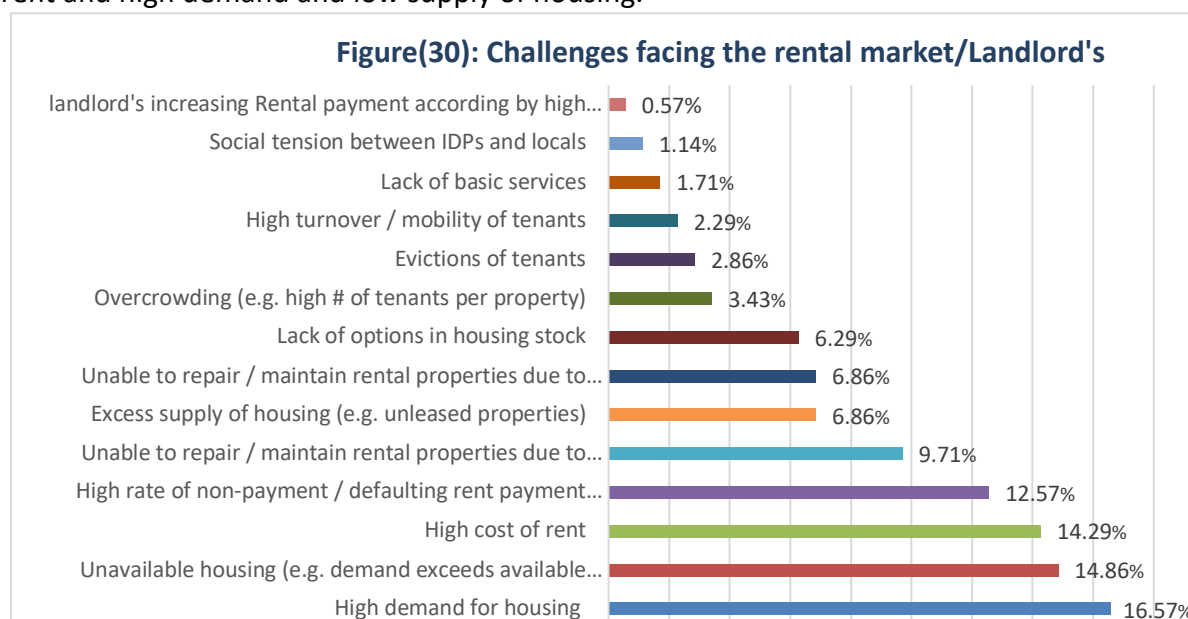


Figure (31) shows that 44.4% of tenants in the Governorate of Taiz spent a month to find a housing, 22.4% more than a month, 17.1% from one week to two weeks, and 16.1% spent less than a week.

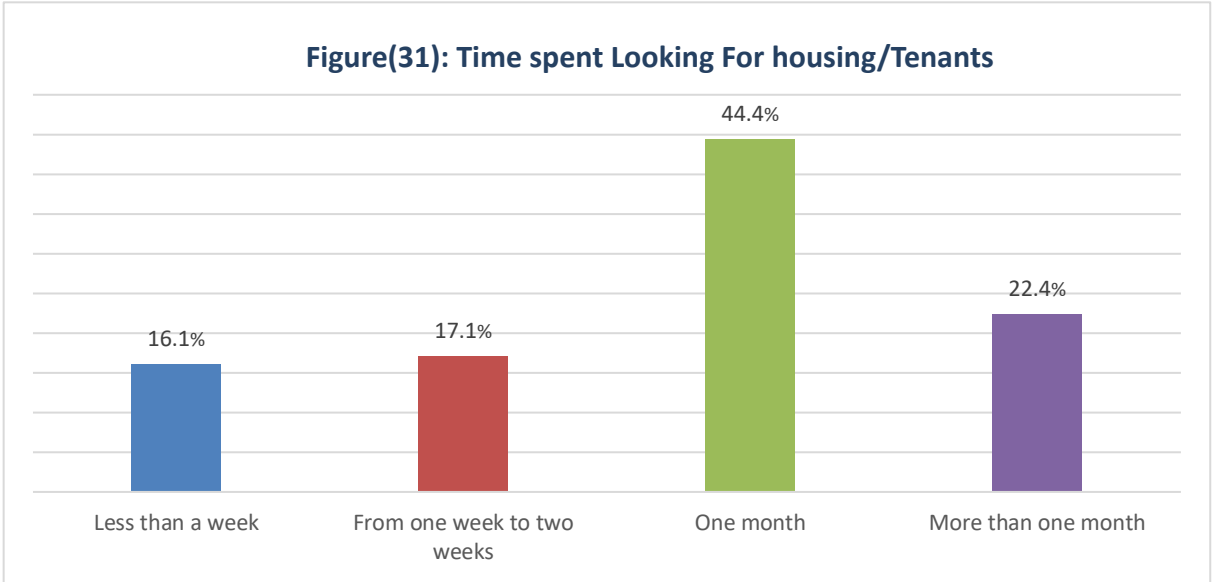
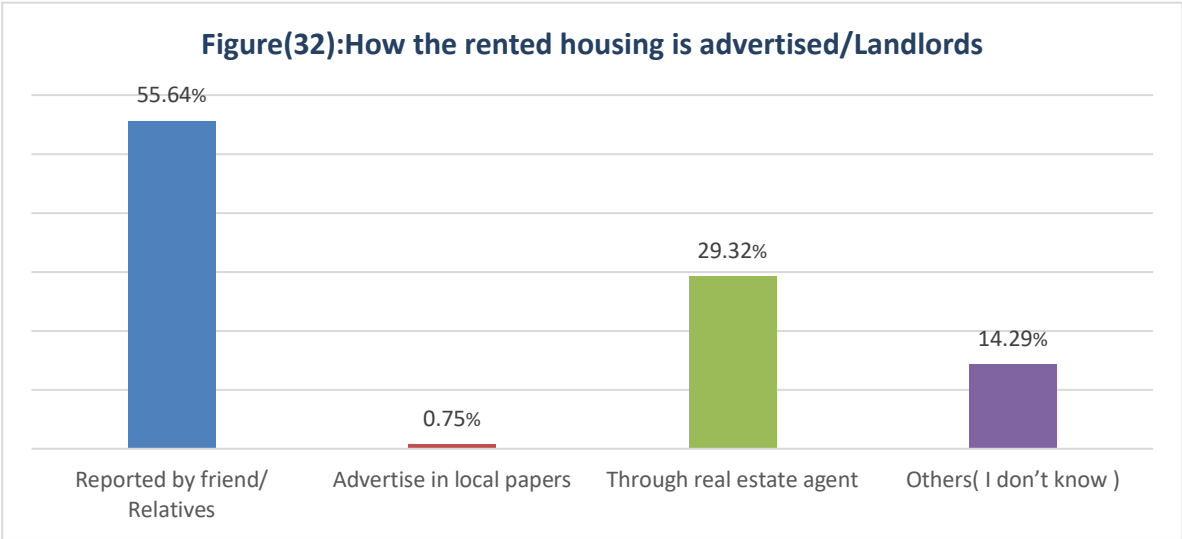


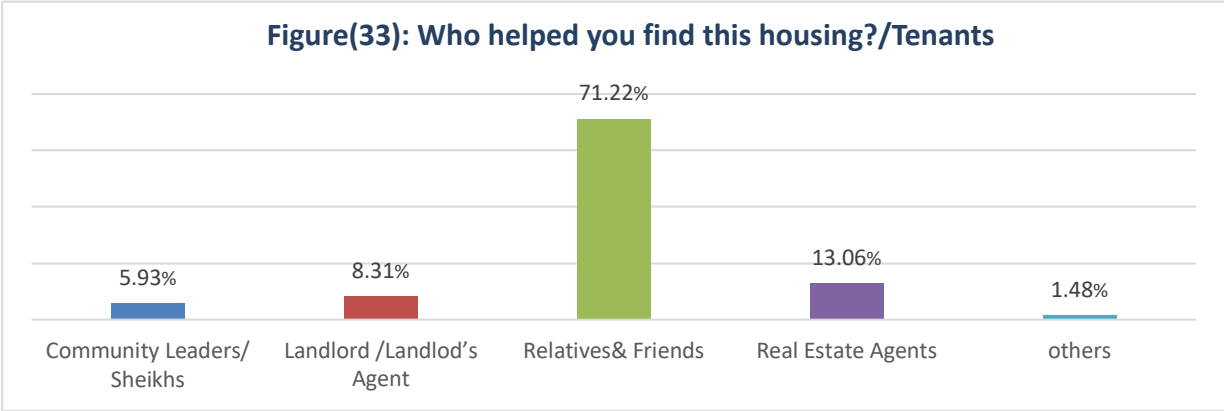
Figure (32) shows how rented housing are being advertised. The landlords’ analysis reveals that 55.64% of landlords in the Governorate found a rental housing through family and relatives, 29.32% through real estate offices or realtors, 0.75% through advertisement in the local papers, and 14.29% was categorized as other. These results reflect the minor role of real estate offices in the Governorate



3.4 Key Actors in the Rental Market and Housing Access

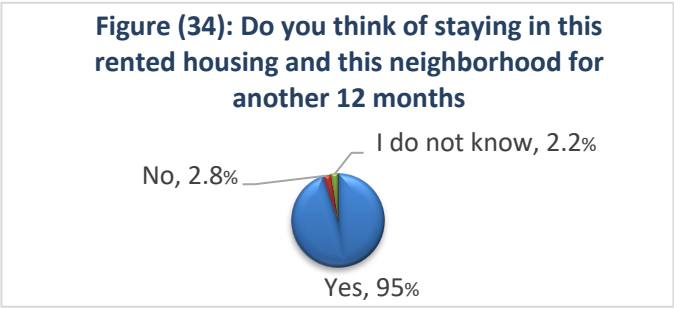
In the same context, the tenants’ sample analysis shows that 71.22% of tenants found rented housing through friends and relatives, 13.06% through real estate agents and realtors, 8.31% through landlords/landlords’ agents, 5.93% through community leaders/Sheikhs, and 1.48%

was other, Figure (33). The results of both the tenants’ and landlords’ analysis confirm that housing advertisement is largely done through friends and relatives. In fact, depending on family and friends in rural districts is quite normal considering the number of housing available for rent.

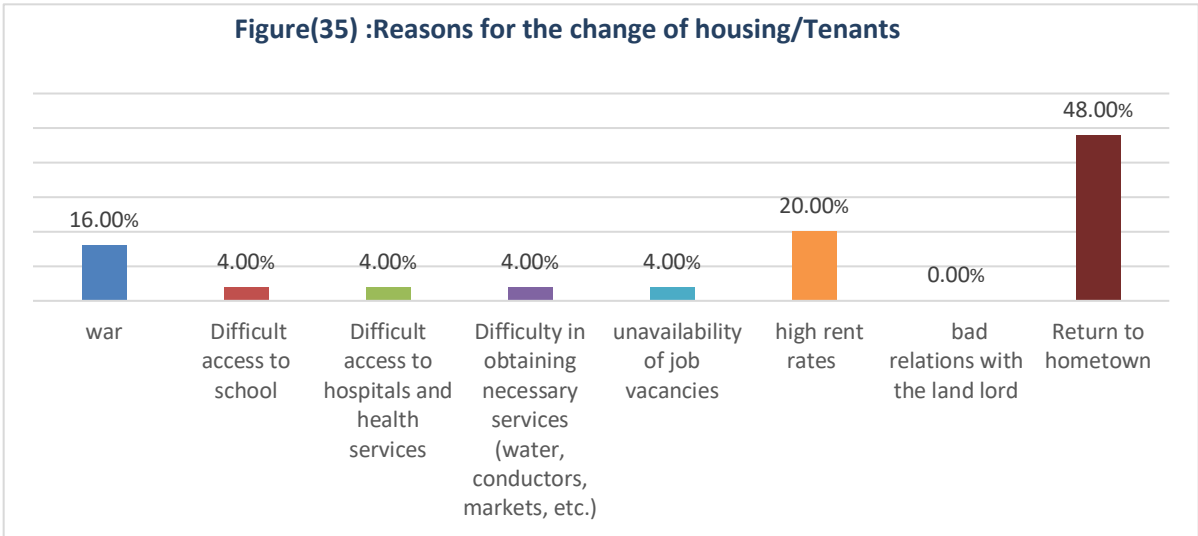


3.5 Stability in the Housing

Figure (34) shows that 95.0% of tenants decided to continue living in the same rented housing for the next 12 months, while 2.8% have the intention to move, and 2.2% do not know whether they will stay or move.



The following reasons are why some of the tenants are moving from their current housing: 20% due to high rent rates, 16% due to the war, 4% difficulty in accessing schools, 4% difficulty in accessing hospitals and health services, 4% difficulty in accessing necessary services (water, markets, etc.), and 4%unavailability of job opportunities, and 48% returning to home villages (Figure 35).

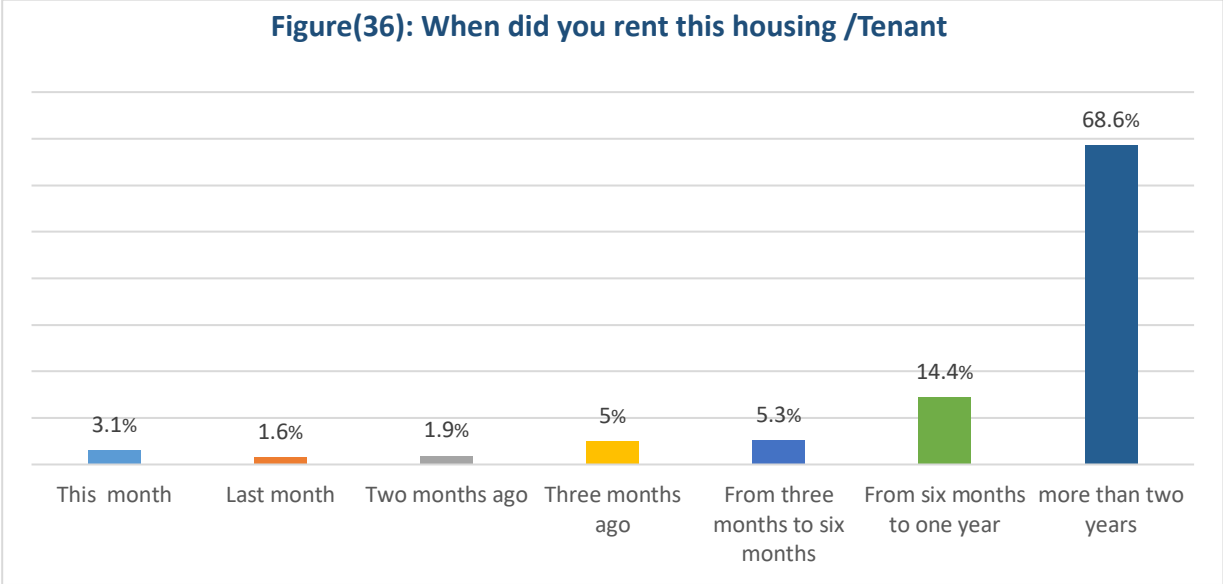


4. Rent and the Main Sectors of the Rental Market

4.1 The Rental Period of the Housing

The tenants’ analysis shows that 68.6% of tenants rented the housing two years ago, 14.4% from six months to one year ago, 5.3% three to six months ago, 5.0% three months ago, 3.1% rented this month, 1.9% two months ago, and 1.6% rented a month ago (Figure. 36). The high percentage of tenants who have been renting a housing for more than two years in the same area reflects stability supported by the local community.

The participants in FGDs and KII indicated that displacement started even before the war of 2015. According to the informants, some of IDPs moved to different areas since 2011 as a result of the 2011 Revolution.



4.2 Renting Agreements

The results of the analysis of the tenants’ sample (Figure 37) indicate that 79.38% of the tenants have rental agreements with verbal contracts, 17.81% are legal written agreements, and 2.81% are informal written agreements. These results reflect that most of the rental agreements in the Governorate of Taiz are informal agreements, which shows that the rental market in the Governorate is not governed by formal contracts/agreements. Landlords may prefer to have verbal/informal agreements in order to avoid paying tax for rented property.

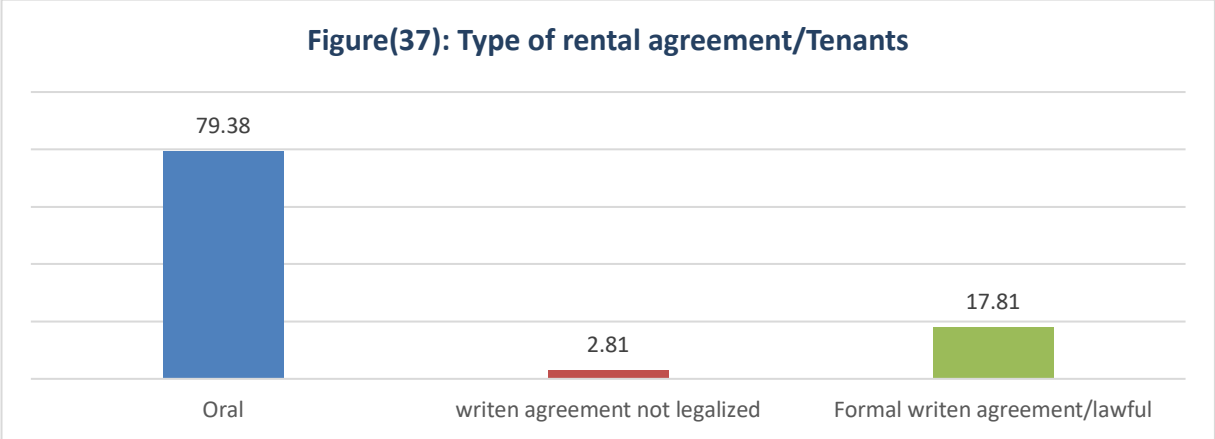
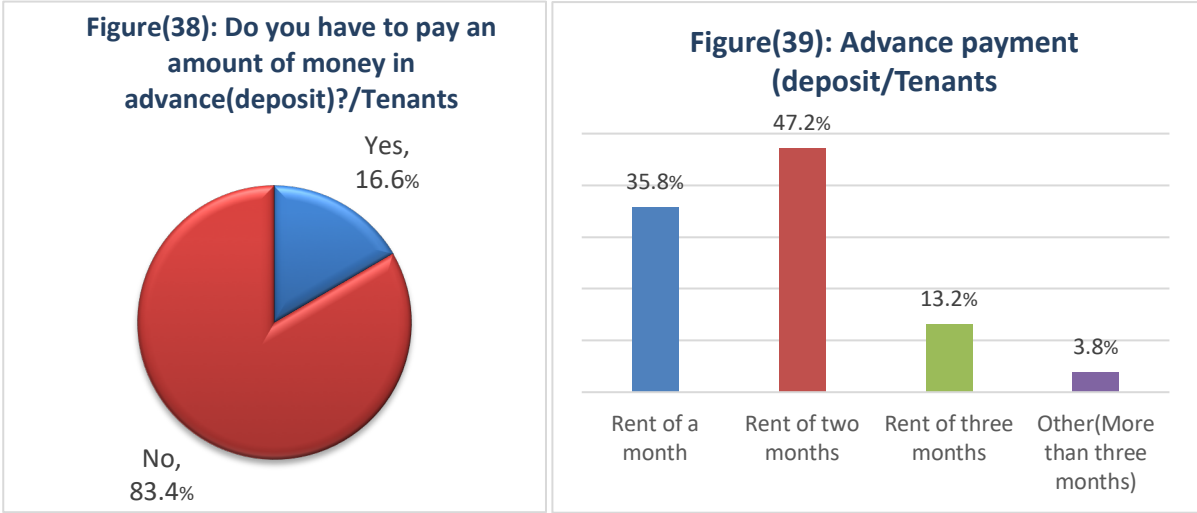


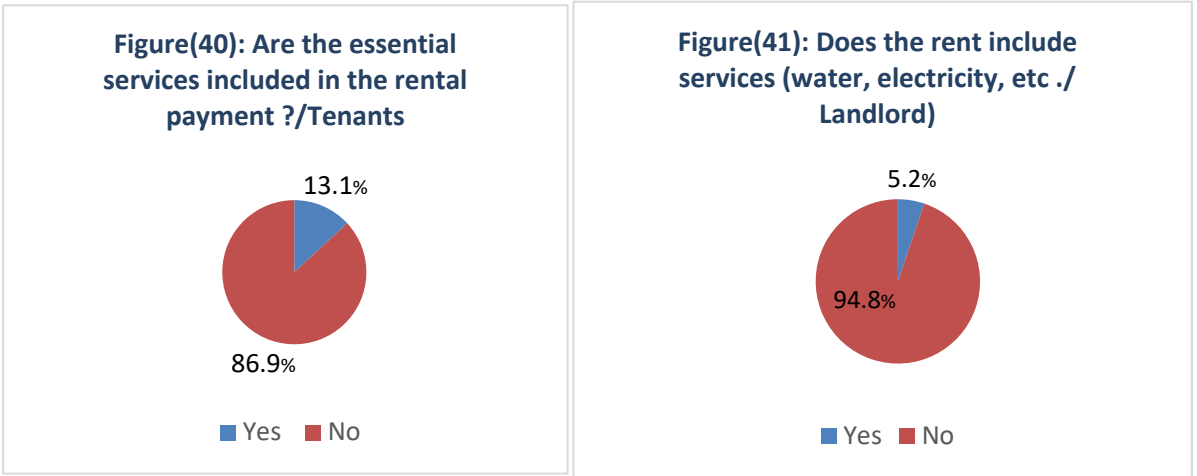
Figure (38) shows that 83.4% of tenants are not obligated to make an advance payment in the rental agreement, whereas 16.6% have to pay a certain amount of money in advance. The details of the advanced payment are as follows: 35.8% of landlords required a one month's rent, 47.2% two months' rent, 13.2% three months' rent, and 3.8% of landlords asked for more than three months' rent as an advance payment (Figure. 39).



4.3 Services in the Governorate

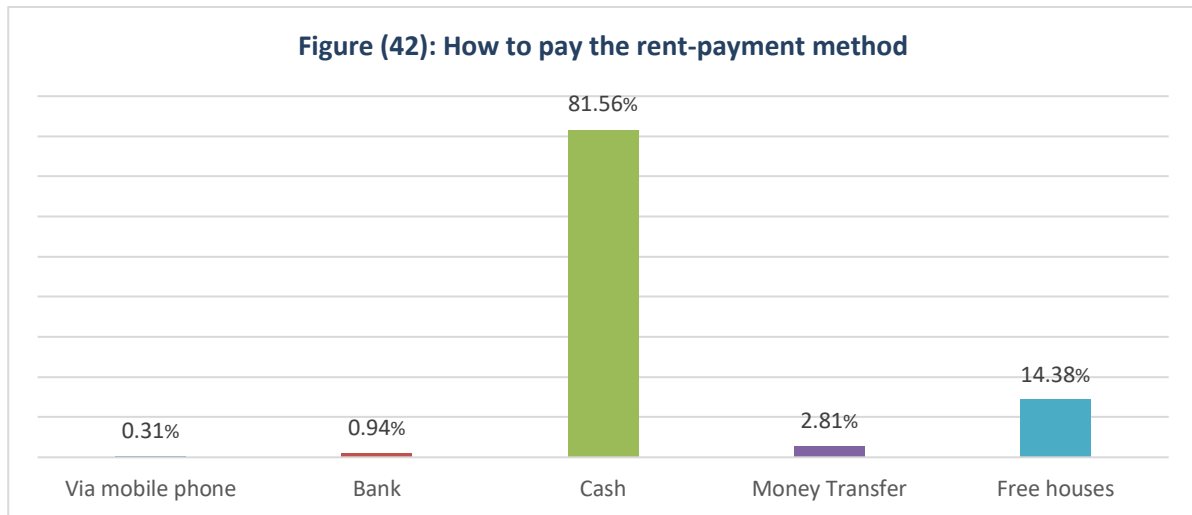
The results of the study (Figure. 40) indicate that 86.9% of the tenants' sample said that the rental payment does not include any of the basic services such as water or electricity and that these services are considered separate services and have a separate cost, while 13.1% of the sample indicated that the rental amount covers the costs of basic services.

The results of the landlords' analysis show that 94.8% of landlords do not include any essential services such as water and electricity when renting housing to tenants, and 5.2% do include these services, but only to shared rented housing (Figure.41).



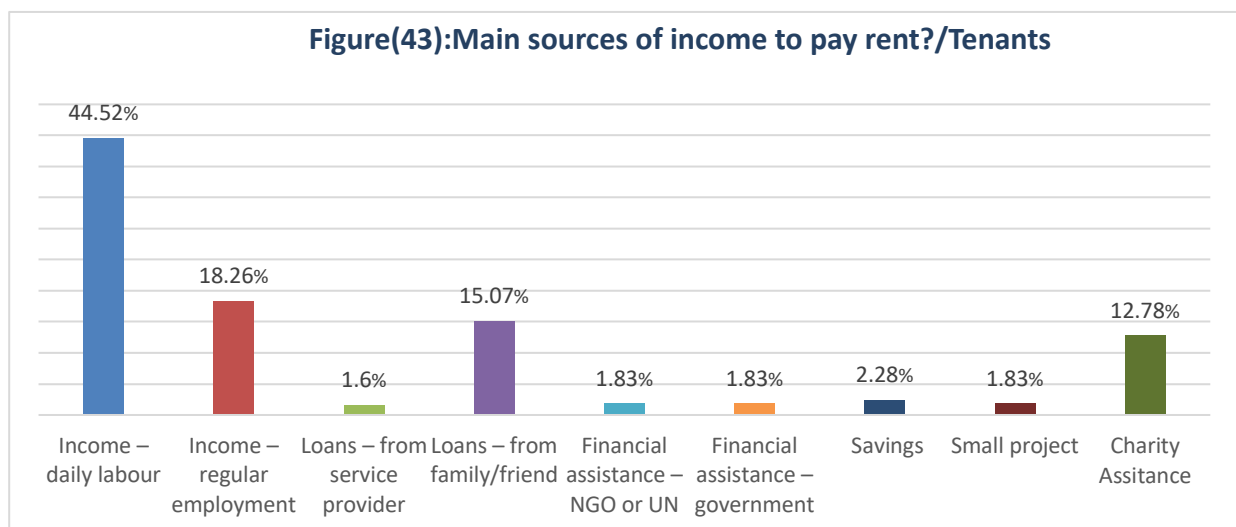
4.4 Rent Payment Methods

The results of the study (Figure 42) reveal that 81.56% of the tenants' sample pay rent in cash, 2.81% pay through money transfers, 0.94% pay through the bank, 0.31% via mobile phone, and 14.38% do not pay rent because they live in school facilities or free housing. The results of the study confirm that the main method of paying rent in Taiz Governorate is cash payment.



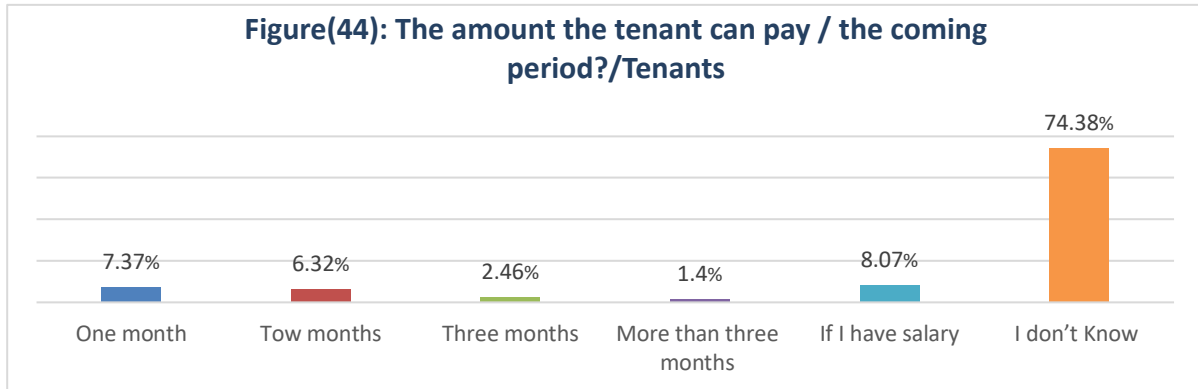
4.5 Source of Income to Pay the Rent

The study (Figure 43) shows that 44.52% of the tenants' sample depend on their daily working labor to pay rent, 1.83% paid the rent with the financial assistance of international aid organizations, 18.26% have stable employment with steady incomes, 1.83% paid the rent through their own small projects, 15.07% had the rent paid through loans from friends or family members, 2.28% through using their savings, 1.6% were loans from service provider, 1.83% were financial assistance from the government, and 12.78% charity assistance.

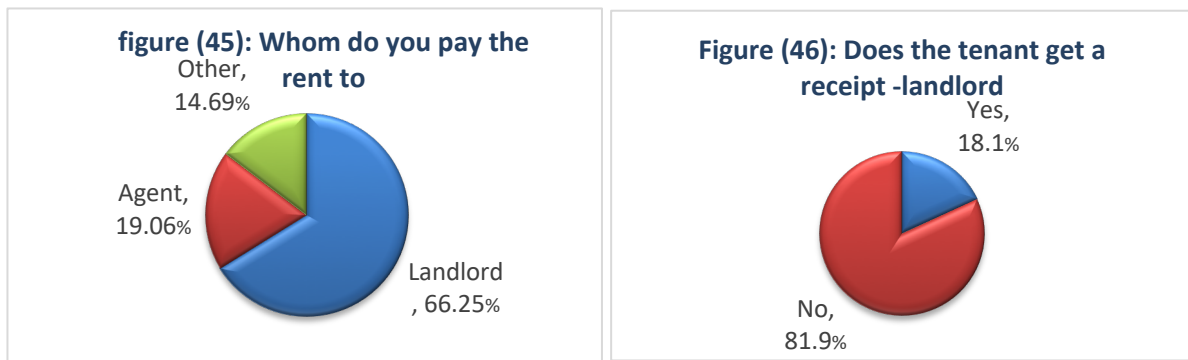


4.6 Paying the Rent

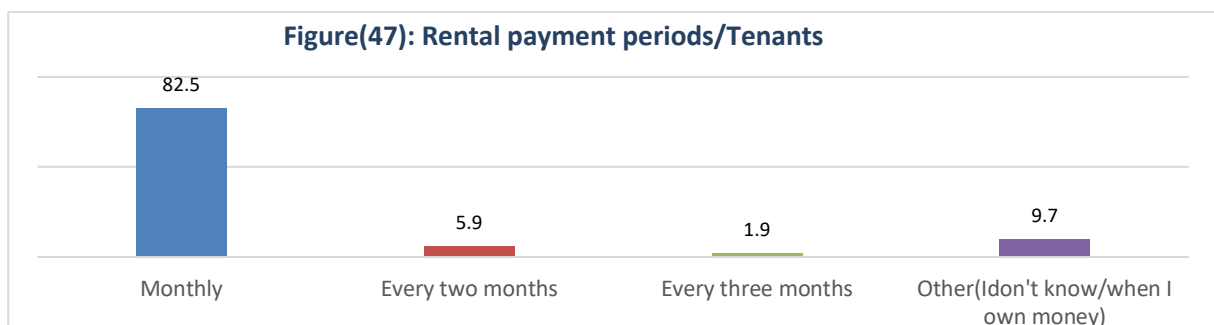
Figure (44) illustrates the amount of rent that the tenants are able to commit to paying in the coming months. 74.38% of tenants said that they do not know. 8.07% can pay rent if they receive salary, 7.37% can pay for one more month, 6.32% can pay for two more months, 2.46% can pay for the next three months, and 1.4% can pay for more than three months. These results reflect the poor financial status of tenants. As for tenants who are not receiving salaries they are likely to be evicted at any time.



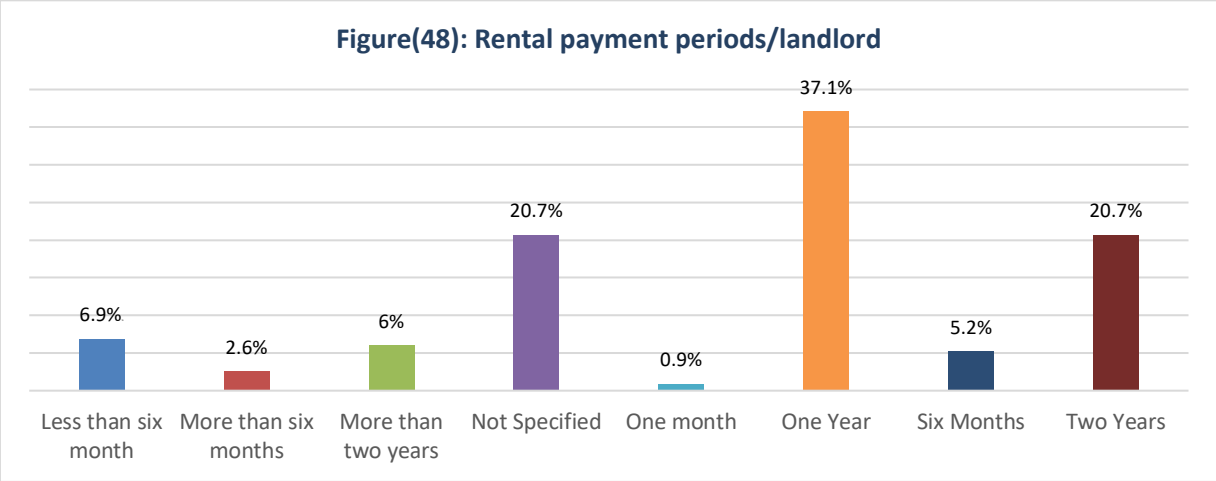
As for the methods of paying the rent, 66.25% of tenants hand the rent money directly to the landlords, 19.6% give the rent payment to the landlords' agents, and 14.69% is other (Figure 45). In regards to getting a receipt for rental payment from the landlords Figure (46), study shows that 18.1% of tenants get a receipt, whereas 81.9% of tenants do not get a receipt.



The results of the tenants' study also show that rental payment due dates vary, 82.5% pay on monthly basis, 5.9% pay rent every two months, 1.9% pay the rent every three months, and 9.7% was other (I do not know/ when I have money), Figure (47)



The results of the landlords’ sample data analysis show that landlords reported that the rental payment deadline is fixable. The study shows that landlords keep rent due dates open according to the ability of tenants to pay. These periods can be one year by 37.1% of landlords, 20.7% two years, 6.9% less than six months, 6% more than two years, 5.2% six months, 2.6% more than six months, and 0.9% monthly. However, 20.7% of landlords stated that rent payment time is an open period and there was no specific deadline for when tenants are forced to pay, instead it is according to tenants’ is financial ability, (Figure 48).



4.7 Rent Increase and Stability

Figure (49) illustrates the study’s results in regards to the correlation of rent fluctuation and housing stability. 88.1% of tenants stated that there was no increase of rent in the past twelve months, whereas 11.9% reported an increase in rent payment during in the past year. 41.9% of tenants expected an increase in rent payment in the next twelve months, and 58.1% did not anticipate any raise in the rent payment. 69.69% of tenants expressed their worries from the possibility of being evicted from the rented housing, while 30.31% did not have those fears. The study also showed that of all rent payments, 15% of tenants got a receipt, whereas 85% of tenants did not get a receipt for rent payment.

The expectations of rent increase may lead tenants to move out of the rented housing either by eviction or by choice (Figure 49).

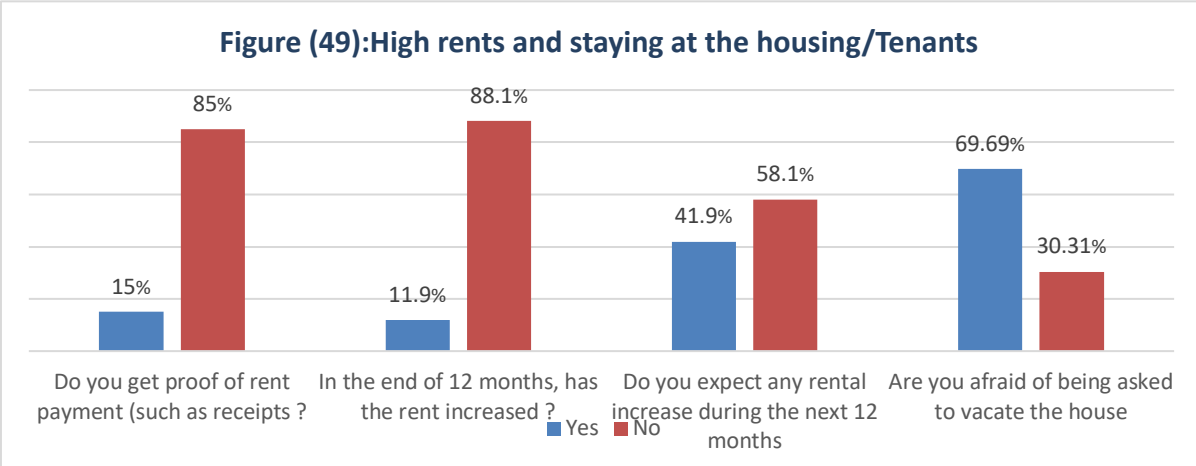
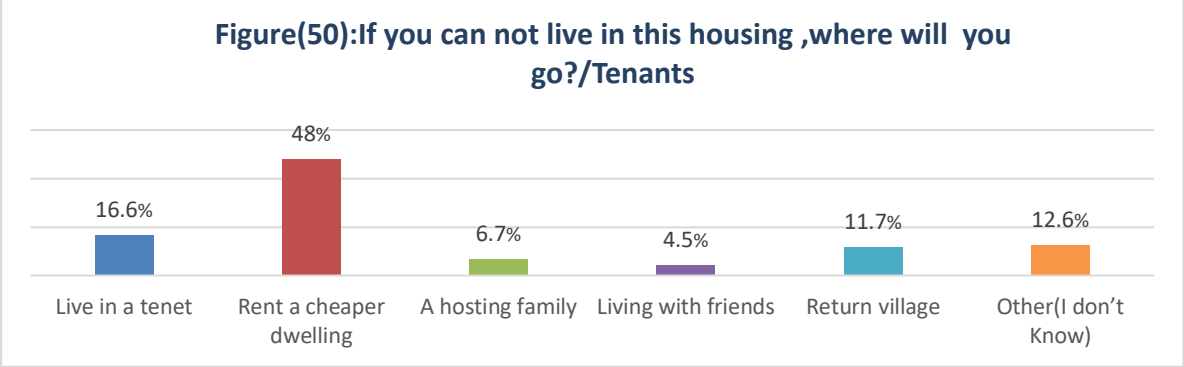


Figure (50) illustrates the results of the tenants’ sample analysis in regards to alternatives that tenants are considering in case of unavailability of rented housing. 48% will try to find cheaper / more affordable rented housing, 16.6% will live in tents, 6.7% will stay with hosting families, 4.5% will stay with friends, 11.7% will likely return to their hometowns/villages, and 12.6% said that they do not know.



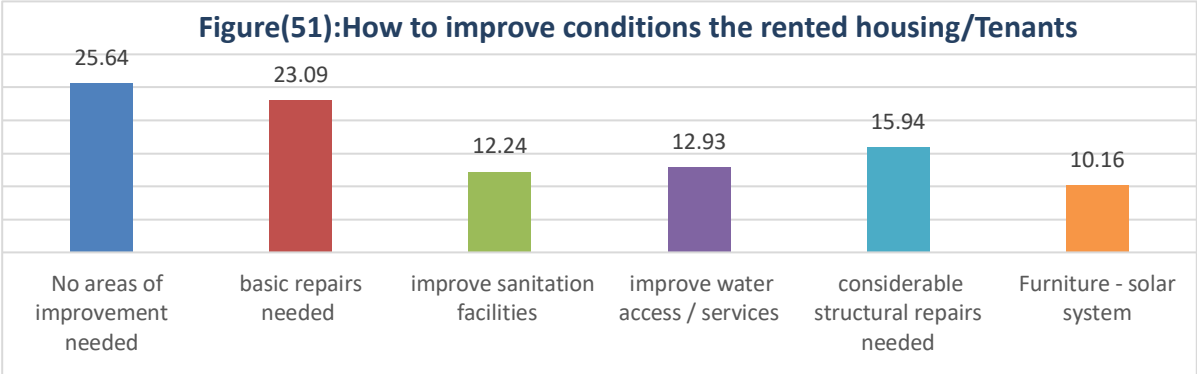
4.8 Total Income of tenants and their families

The results of the tenants’ sample analysis show that the collective income of partners of a housing averages at 40,476 YER. As previously mentioned, the average rent is (18,945 YER) in addition to the cost of basic services at (6,051 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, especially IDPs, are enduring.

5 Housing Improvement and Accessing Assistance

5.1Housing Improvement

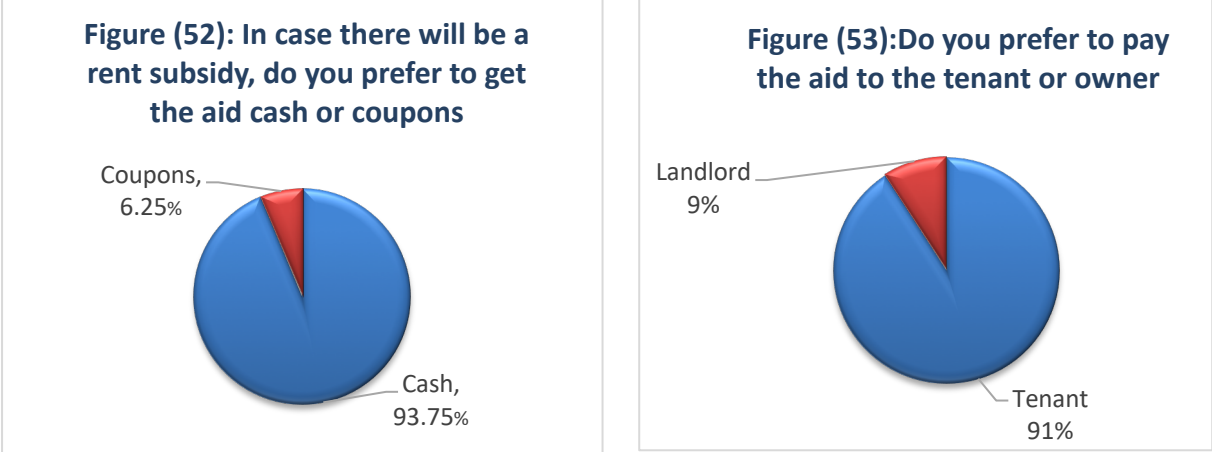
Figure (51) shows that 23.9% of tenants said that the rented housing need basic repairs to become suitable for living, 12.93% of tenants stated that improvement of water services is a priority, 25.64% said that the housing are in good conditions and there is no need for improvement, 15.94% said that the housing need fundamental repairs and renovations, 12.24% of tenants required improvement in sanitation services, and 10.16% was other (furniture / solar system).



This reflects that some tenants live in old housing. Tenants who asked for improvement in water services represents those who depends on truck vendors and/or other sources of water that were already mentioned earlier in Figure (24).

5.2 Accessing Assistance

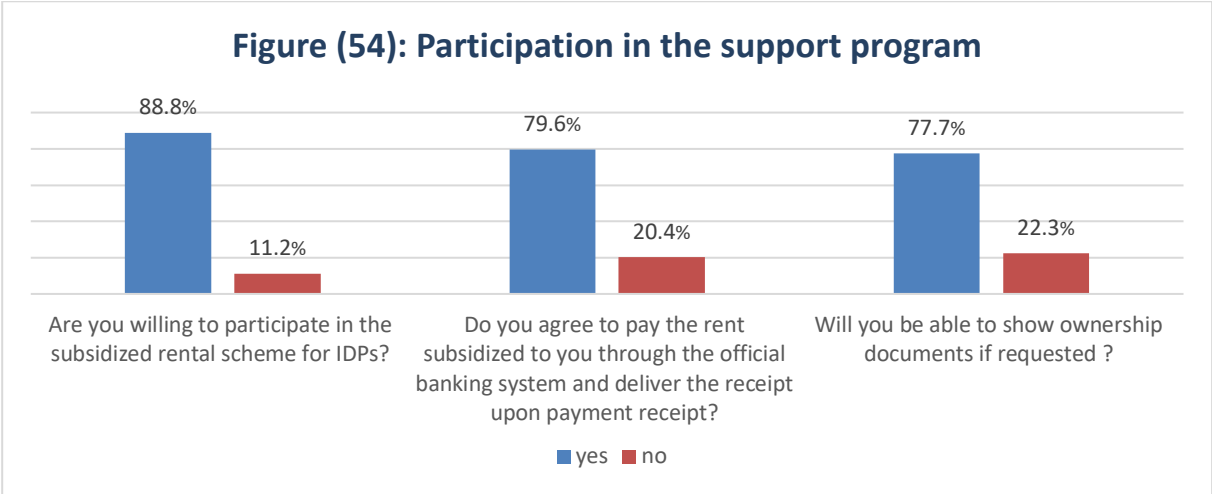
The results of the analysis of the tenants’ sample figure (52) shows that 93.75% of tenants prefer to receive rental assistance if available in cash, and 6.25% of the tenants said through vouchers. Figure (53) shows that 9% of the tenants prefer the rent be paid directly to the landlords, whereas 91% 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 77.7% of landlords are willing to show housing ownership documents, whereas 22.3% are not willing to do so.



6.1 Method of Receiving Rental Funds

AS for the methods of receiving rental funds, 79.6% of landlords are willing to receive the rent through the banking system and provide a delivery receipt, whereas 20.4% are not willing to do so (Figure 54).

6.2 Preparing for Participation

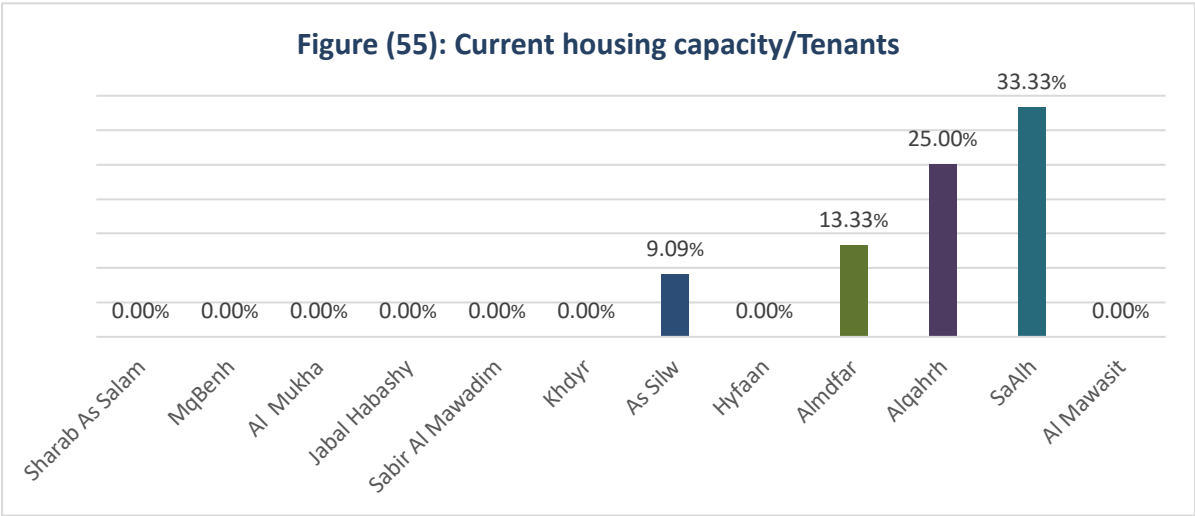
In regards to participation in a rental assistance program, results show that 88.8% of landlords are willing to participate in any future rental support program for IDPs, while 11.2% are not willing to participate (Figure 54)

Section 2: Host Community Capacity Assessment

1. Rental Housing capacity and rent value

The analysis reveals that the current rental housing capacity in the Governorate of Taiz is very limited in some districts and nonexistent in other districts. The results of the landlords’ analysis shows that 89.26% of the housing are occupied, while 10.73% were vacant. Figure (55) shows the current rental housing capacity at the district level. The analysis shows that, at the time of the study, the rental housing capacity in the districts covered in the study was: Saalh 33%, Alqahrh 25%, Almdfar 13.33%, As Silw 9.09%, while in the remaining districts it was non-existent. These results show that the main districts of Taiz have, to some extent, vacant housing to rent. This is due to the fact that Taiz still witnesses conflicts from time to time.

Participants in the FGDs and the KII indicated that the rental housing capacity is limited and many families rent small commercial shops for housing. One of the key informants said: “there are no available housing in the area, the city is full of IDPs”. Another informant said “there are people/IDPs who slept for weeks in their cars while looking for vacant housing”. In Al Wazieyah district, the participants indicated that “there are no housing for rent”. Therefore, concluding that finding vacant rental housing in many districts of Taiz seems to be slim. For more details at the district level, check the housing capacity table in Annex (6).



The analysis shows that the rent rate varies between districts especially that there are a number of rural districts and other districts that are near conflict areas. As mentioned earlier, the type of housing rented by tenants in Taiz Governorate include independent housing, flats, converted commercial properties, room in a flat, room in a housing, villas, and other. The analysis shows that the average rate of rent in the Governorate of Taiz is estimated at 18,945 YER/month, and the estimated amount for basic services is 6,051 YER/month.

2. Community Hosting IDPs

The analysis shows that the Governorate of Taiz has received IDPs from different Governorates including Al-Hudaydah, Sana’a, Aden, and Lahj, however, most IDPs (85.3%) are from districts of Taiz itself (due to the ongoing armed conflicts in a number of districts in the Governorate).

The hosting community sympathizes with IDPs and are willing to host them in their housing as much as possible. 96.6% of IDPs feel safe in the community, and 98.4% have freedom of movement (Figure 51). However, choosing Taiz Governorate by IDPs seems to be associated with social relations, 88.4% of tenants have relatives and friends in the area (Figure 51). Moreover, 71.22% of tenants/IDPs were assisted by relatives and friends when looking for rental housing (Figure 32). This may suggest that most IDPs returned to their home towns and villages. The existence of such family/social relation with the hosting community not only facilitate stability in the Governorate, but also ensured nondiscrimination against IDPs, which may occur in other areas.

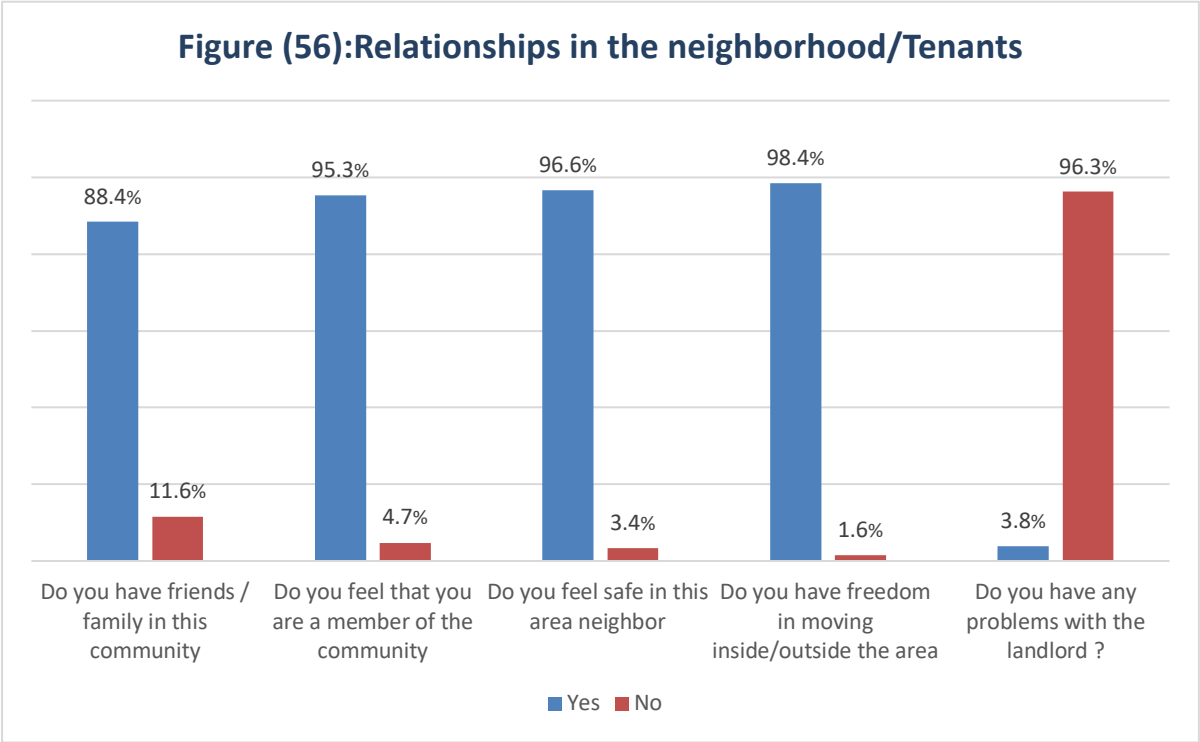
Opinions regarding hosting IDPs was discussed in the FGDs and KII. In fact, various views were presented. The key informants illustrated that the current limitation in the rental housing market is a result of the influx of IDPs to the Governorate. One of the Key informants in Al-Mokha district said: “there is no possibility to host additional numbers of IDPs as rental housing are already full of IDPs who moved to the district earlier”. A female participant in the focus groups said: “most rental housing have two households and more sharing a single housing”. The social factor is another important aspect that cannot be ignored as many key informants and participants in the focus groups have referred to. According to one of the informants: “hosting non-family members is difficult, and even when hosting family members, it can only be up to a month or two”. The participants in the focus groups implied that the economic factor is an important aspect in hosting IDPs just as much as the social factor. One participant said: “financially, I do not think that there is a possibility to host IDPs”. Another one said “currently, it is impossible to host IDPs unless they are family members”. Another factor that was mentioned during the focus group sessions is the size of the housing of the hosting community itself. The participants have mentioned that the predominant size of housing in the Governorate is small to medium which is a real obstacle when hosting other families. Another important issue that needs to be addressed is that there are a number of districts in the Governorate where armed conflict are still going on.

Although the community of Taiz was willing to receive IDPs during the past few years, there are a number of factors that currently seem to be standing in the way of hosting more IDPs in the Governorate of Taiz. These factors can be summarized as follows: overcrowded rental and non-rental housing, hosting IDPs is limited to family members, the financial situation of the hosting community, and the ongoing conflicts in a number of districts including the city of Taiz.

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

Figure (56) shows that 88.4% of tenants/IDPs have friends and relatives in the same area where they live, whereas 11.6% do not have friends or relatives in the same neighborhood. This may indicate that choosing this area to settle in is associated with social relations. The figure also shows that 96.6% of the tenants feel safe in their housing, while 3.4% do not feel safe. Such fears might be related to ongoing clashes in some part of the Governorate including the main city of Taiz. The analysis shows that 95.3% of tenants feel as a member of the community, while 4.7% do not feel that way, which reflects social harmony between IDPs and the hosting community.

The issue of relations between IDPs and the hosting community is of great importance, and it was part of the discussions in the FGDs. The participants in the focus groups reported that good relations exist between the community and IDPs. However, a number of participants indicated the presence of large numbers of IDPs resulted in pressure on services including water, education, and health. On the other hand, the key informants also highlighted the positive side of hosting IDPs such as returning to plant their lands which is helps improve the local economy that is based on agriculture.

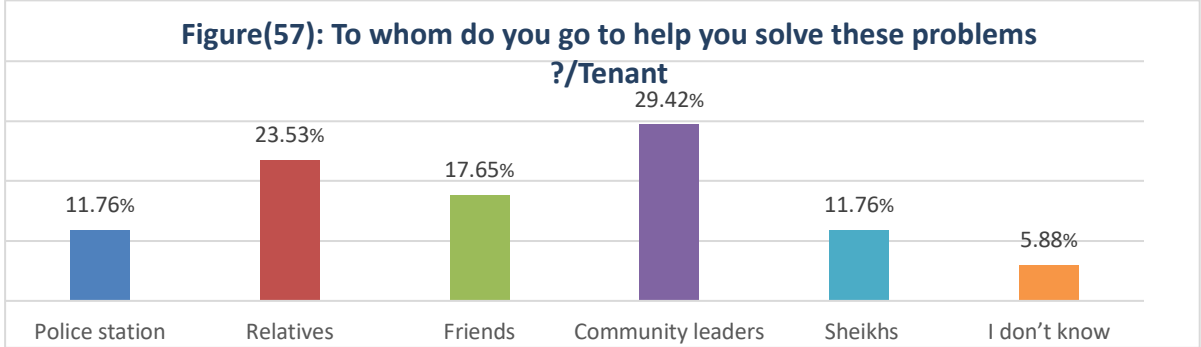


3.1 Feeling Safe and Freedom of Movement in the Neighborhood

Figure (56) shows that 96.6% of the tenants feel safe in their housing, while 3.4% do not feel safe. The results also show that 98.4% of the tenants have freedom to move in the area where they live, while only 1.6% reported that they do not have such freedom.

3.2 Tenants / IDPs Relationship with Landlords.

In regards to the tenants/IDPs relationship with the landlords, 96.3% did not have any problems with their landlords, while 3.8% reported that they do have issues with the landlords. As for settling problems with landlords, figure (57) shows that tenants go to: community leaders 29.42%, their friends 17.65%, their relatives 23.53%, the police 11.76%, 11.76% Sheikhs, and 5.88% of tenants said they don not know.



3. Community Based Organizations.

CBOs working in Taiz 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. 32 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 Taiz Governorate shows the availability of (73) 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).

voucher based suppliers.

The data collected shows positive indicators on the availability of suppliers for NFI/shelter materials in the Governorate of Taiz. 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.

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 targeted districts of Taiz Governorate is attached in - Annex (5)

6. Conclusion

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

- Taiz Governorate has received large numbers of IDPs during the past few years, specifically from the districts of Taiz, and from the Governorate of Al Hudaydah, Sana'a, Aden, and Lahj. The percentage of IDPs among the tenants' sample is 85.3%. The main reasons for choosing Taiz as a target area by IDPs are security and job opportunities. Moreover, the quantitative and the qualitative analysis of the key informant interviews and the focus groups stated that IDPs' decision to move to Taiz is associated with social relations as 88.4% of the tenants' sample have friends and family members in the target area.
- The study analysis shows that the majority of the tenants' households are vulnerable groups (women, children and elderly people) that forms 63.3% of the total number of tenants' households covered in this study (Table 1).
- The assessment reveals that the majority of tenants' sample live in independent housing 44.30% and flats 42.20% (Figure 7).
- The analysis reveals that 60.8% of tenants live in one to two rooms. The crowding index in Taiz Governorate shows that every three individuals share a room according to the number of household members 2081 divided by the total number of rooms 750 room excluding kitchen and toilet, Table (1).
- Housing standards do not meet the minimum standards of each area allocated for an individual in the housing. Privacy for women and children, good sanitation and access to safe drinking water are areas of concern that need to be taken into consideration.
- The real estate offices/agents do not play an active role in helping tenants housing comparing with other actors in this area (Figure 32). The tenants' sample analysis shows that 71.22% of tenants found rented housing through friends and relatives, 13.06% through real estate agents and realtors, 8.31% through landlords/landlords' agents, 5.93% through community leaders/Sheikhs, and 1.48% was other, Figure (33).

- The results of the study revealed that the housing capacity in the Governorate of Taiz, based on the landlords' sample analysis, is quite limited. The current housing capacity is estimated at 10.73%. The high demand on the rental housing market is due to the large influx of IDPs. Although, the analysis showed a housing capacity in the districts of Salah33%, AlQaherah25%, and AlMuthafar 13.3%, the ongoing conflicts may not encourage IDPs to settle in these districts.
- The qualitative analysis and KII showed that there are a number of factors that seem to be standing in the way of hosting more IDPs in the Governorate of Taiz. These factors can be summarized as follows: overcrowded rental and non-rental housing, hosting IDPs is limited to family members, the financial situation of the hosting community, and the ongoing conflicts in a number of districts including the city of Taiz.
- The analysis showed that the average rent is (18,945 YER) in addition to the cost of basic services at (6,051 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, especially IDPs, are enduring.
- Tenants, key informants, and participants in the focus groups are expecting an increase in rent rate during the coming 12 months.
- The assessment reveals that 95.3% of tenants feel that they are members of the community, 96.6% feel safe in their housing, and 98.4% have freedom to move in the area where they live, Figure (56).
- The results of the analysis showed an approval of 88.8% among landlords to participate in any future programs to support rent for IDPs. 77.7% of landlords are willing to show housing' ownership documents, and 79.6% of landlords are willing to receive the rent through the banking system and provide a delivery receipt.

8 Summary of Assessment

District	Number of presence CBOs	Suppliers				Financial point	Average Rent Rate
		household items	Furniture	Cloths	Shelter materials		
Al Mukha	4	4	3	6	4	2	18250
Al Mawasit	1	1	2	1	2	5	17478
Almdfar	4	5	5	5	3	3	19192
Alqahrh	3	1	4	3	0	3	18984
Alwazayh	0	1	0	4	2	2	10923
As Silw	5	5	5	6	5	5	7769
Hyfaan	3	8	6	9	6	3	15881
Jabal Habashy	0	2	3	1	3	7	13350
Khdyr	2	5	5	5	5	4	18280
Mawza	2	2	1	5	2	2	0.00
MqBenh	3	5	8	8	5	19	28461
SaAlh	2	4	2	5	0	3	16458
Sabir Al Mawadim	0	1	1	1	2	3	10172
Sharab As Salam	3	7	5	8	7	12	16846

Annexes

Annex (1) Assessment Maps

Annex (2): Community Based Organizations

Annex (3): Exchangers and remittance agents.

Annex (4): Voucher Based suppliers.

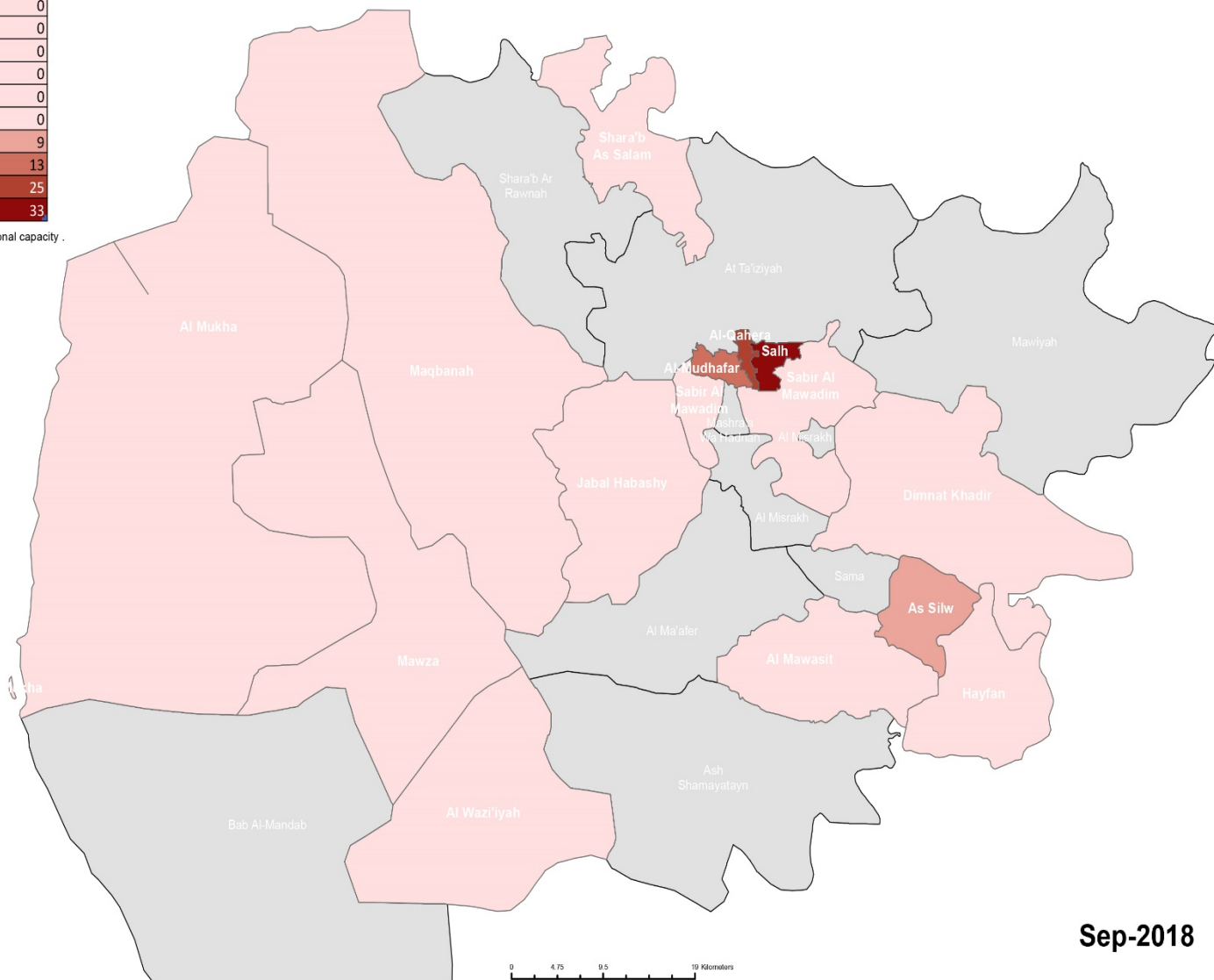
Annex (5): Local Authorities

Annex (6): Housing capacity Map



DIS	Capacity %
Sharab As Salam	0
MqBenh	0
Al Mukha	0
Mawza	0
Jabal Habashy	0
Sabir Al Mawadim	0
Khdyr	0
Alwazayh	0
Hyfaan	0
Al Mawasit	0
As Silw	9
Almdfar	13
Alqahrh	25
SaAlh	33

Note: Zero means that no additional capacity .



Sep-2018

Index

Section 1: CBOs

Activities provided by CBOs:

Development-Relief, 403-404, 406, 412, 414-415, 418-419, 422-425, 428
Development, 399, 408-411, 413, 416, 420, 426-427, 429-430
Development-Charity- Relief-education-health, 405
Development-charity, 400-401, 407, 417
No activities, 402
Relief, 421

Validity of license

Not valid, 400, 422, 426-427
Valid, 403-408, 410-411, 413-417, 420, 423-425, 429-430

Bank Accounts

Available, 400, 403-408, 410-411, 413-415, 420, 422, 424-425, 429-430
Not Available, 189,191,192,199,202,206-209,211,213,216-218

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, 1164,1165,1171-1173,1181,1183-1185,1188,1189,1193,1195,1196,1198,1199,
1201,1205-1207,1211,1212,1215,1217,1218,1225,1230,1234-1236,1238,1240,1241,1244,
1249,1253-1258,1271,1272,1277,1284,1288,1289,1292,1294,1295,1298,1299,1300-1313,
1317,1318,1321-1324,1338,1342,1343,1346,1350
Furniture, 1163,1137,1168,1177-1179,1185,1207,1210,1226,1227,1231,1232,1236,1237,
1243,1244,1248,1250,1253-1256,1261-1263,1265,1266,1268,1274,1275,1278,1279,1283,
1290,1291,1293,1297,1308,1310,1314,1315,1325,1328,1329,1333,1336,1339,1342,1343
Shelter materials , 1182,1190-1192,1197,1200,1202-1204,1207,1210,1213,1214,
1222,1223,1237,1239,1247,1248,1251,1259,1260,1264,1267,1276,1280-1282,1285,1286,
1301,1306,1309,1320,1326,1327,1334,1337,1341,1343,1347,1348
Household items, 1162,1166,1169,1170,1174-1178,1180,1186,1187,1194,1207-
1209,1216,1219,
1220,1221,1223,1224,1228,1229,1233,1237,1242,1244-1246,1252,1269,1270,1273,1287,
1296,1297,1307,1316,1319,1330-1332,1335,1340,1342-1345,1349,1351

Previous experience in voucher program:

Available: 1164,1167,1187,1190-1192,1202,1204,1208,1222,1223,1227,1261,1266-1268,
1270,1273,1281,1282,1286,1292,1293,1313,1327,1334,1337,1341
Not Available: 1162,1163,1165,1168-1186,1188,1189,1193-1201,1203,1205-1207,
1209-1221,1224-1226,1128-1260,1262-1265,1269,1271,1272,1274-1280,1283-1285,
1287-1291,1294-1312,1314-1326,1328-1333,1335,1336,1338-1340,1342-1351

Willingness to respond in emergency:

Willing: 1162,1163,1165,1166,1168-1180,1182-1186,1188,1189,1193,1194,1196-1201,
1203,1205-1207,1210-1221,1224-1226,1228-1260,1262-1265,1271,1272,1274-1280,
1283-1285,1286-1291,1294,1296-1312,1315,1317,1319-1326,1328-1333,1335,1336,
1338-1340,1342-1351

Not willing: 1181,1195,1209,1269,1295,1314,1316,1318