

Yemen Shelter/NFI/CCCM Cluster Housing

Rental Market **Assessment**

September 2018

Hadramaut Governorate



SHELTER CLUSTER
تنسيق المأوى الإنساني



CCCM CLUSTER
دعم مجتمعات النازحين

YEMEN



YHF

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The Samples of The assessment



Tenants
246



Landlords
95



KII
33



FGD
23



CBOs
32



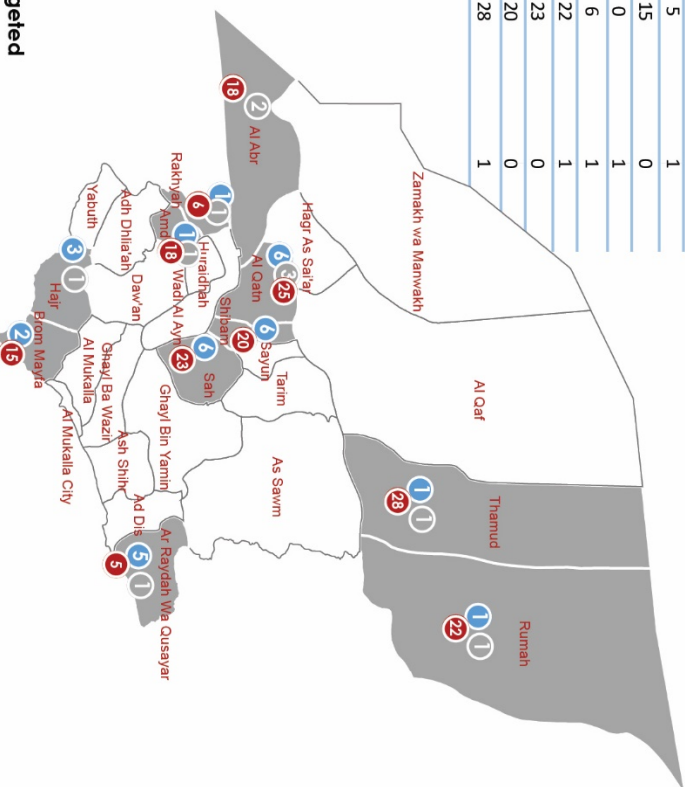
Suppliers
180



Financial Points
11

CBOs, Suppliers, and Financial Points Sample

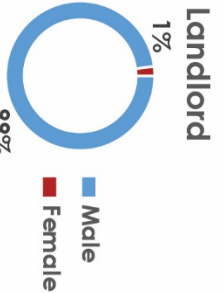
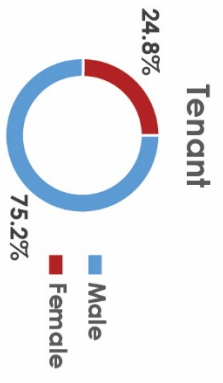
Districts Name	CBOs	Suppliers	Financial Points
Al Abr	0	18	2
Al Qatn	6	25	3
Amd	1	18	1
Ar Raydah Wa Qusayar	5	5	1
Brom Mayfa	2	15	0
Hajr	3	0	1
Rakhyah	1	6	1
Rumh	1	22	1
Sah	6	23	0
Shiban	6	20	0
Thamud	1	28	1



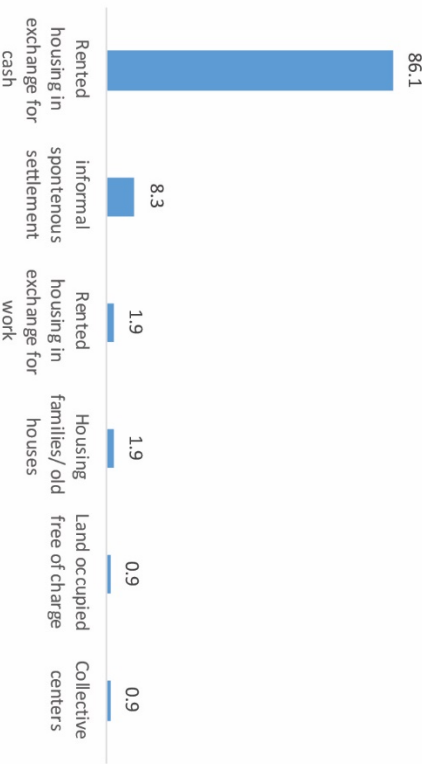
* The other districts are not targeted



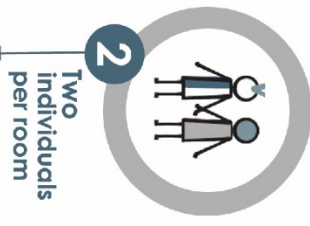
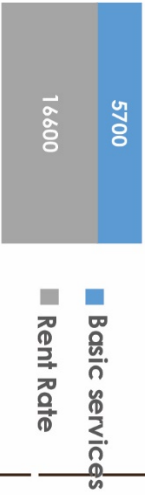
Gender



The Majority of Housing Inhabited by the IDPs



Income and Expenses and The Crowding Index





Introduction

General information about the Governorate:

Hadramaut Governorate covers an area of 191,737 km² (74,030 sq. mi). Its population, according to the 2004 Yemeni census, is “1,0828,556”. The number of IDPs in the Governorate has reached (18,654) 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 Hadramaut Governorate

The districts distributed among the targeted sample of Hadramaut Governorate are 11: Hajr, Rakhyah, Ar Raydah Wa Qusayar, Al Abr, Amd, Brom Mayfa, Rumah, Shibam, Thamud, Sah, and Al Qatn .The data was collected from 10 districts except for Hajr district because there were no tenants located in that district.

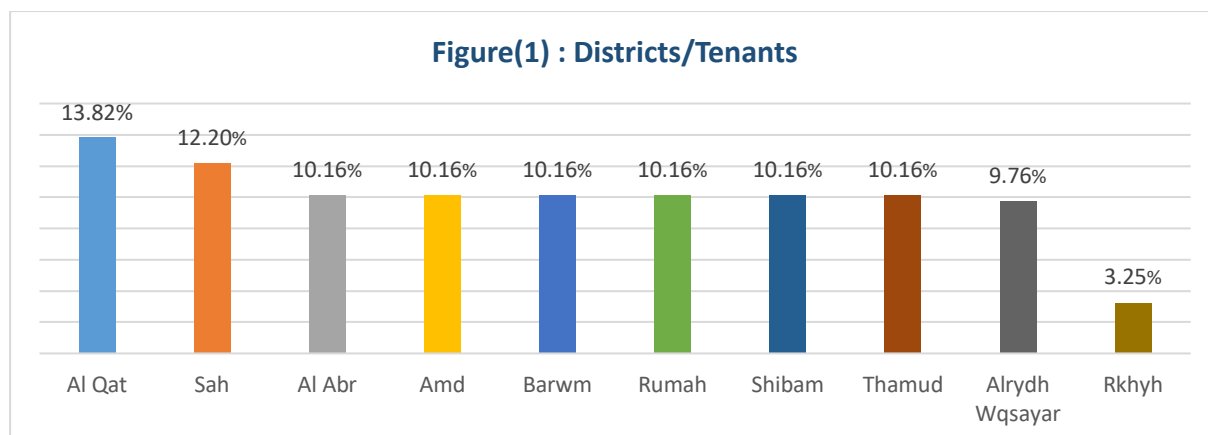


Section 1: Housing Rental Market Assessment

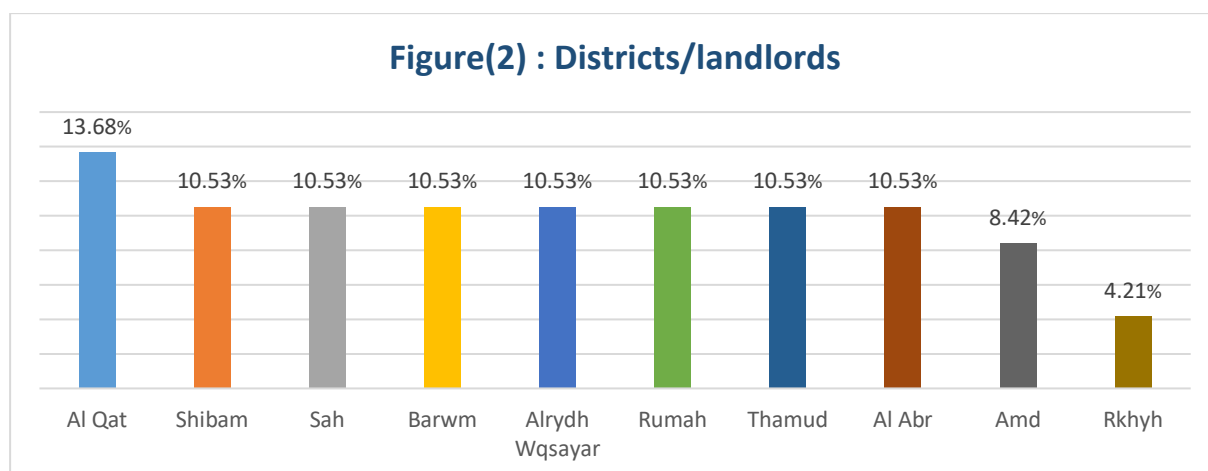
1 Demographic Details

1.1 Targeted Districts

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

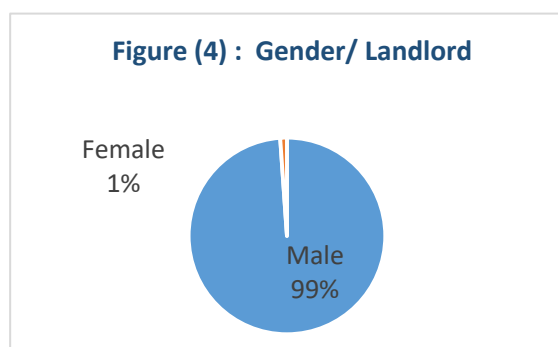
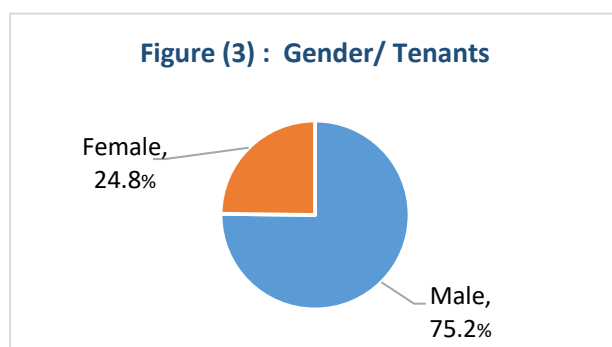


In the same context, the distribution of landlords among the ten districts is shown in Figure (2).



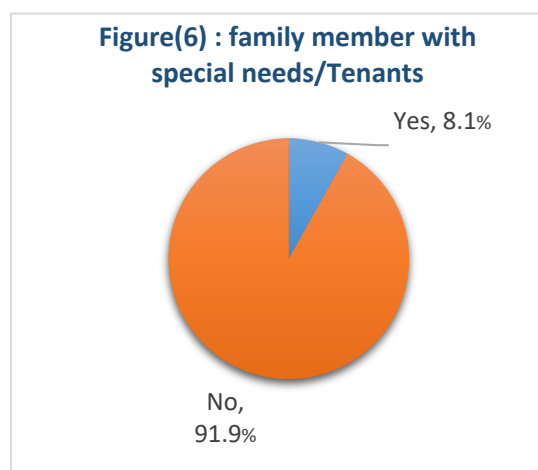
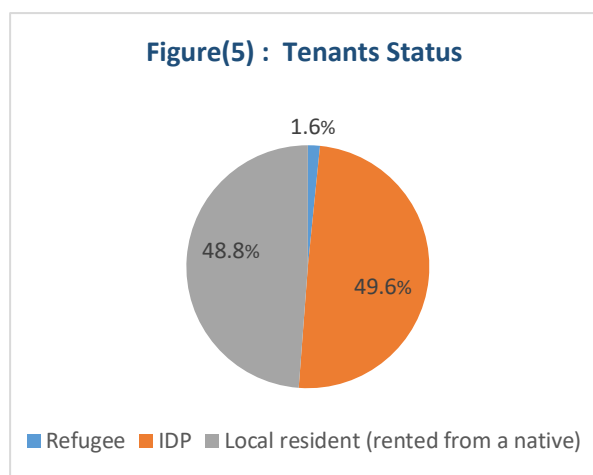
1.2 Gender (Landlords / Tenants)

Figure (3) shows that the tenants' gender distribution is males 75.2% and females 24.8%. Whereas landlords' gender distribution (Figure 4) is male landlords 99% and female landlords 1%, which reflects male domination in social, political, and economical aspects of life in this area.



1.3 Tenant Characteristics

The results of the study indicate that 48.8% of tenants were local residents of the area, 49.6% were IDPs tenants, and 1.6% were refugees (Figure 5). This reflects the size of IDPs presence in this Governorate. The study also shows that 8.1% of tenants have family members with special needs. However, individuals who stated that the area is suitable for members of the family with special needs, is limited to accessibility to the residence. The lack of a comprehensive understanding of what it actually means for places to be suitable for people with special needs is not confined to Hadramaut but all over the country, where the minimum requirements for individuals with special needs does not exist (Figure 6).



1.4 Household Age Category (Tenants)

Table (1) clarifies how most tenants' family members of the targeted districts fall between the following two age group categories: more than 18 years to 55 years 39.99%, and more than 5 years to 18 years 36.43%. Followed by the category of children under five years 20% and more than 55 years 3.56%. The study also showed that family members of the tenants' sample are females 47.23%, and males 52.77%. These statistics reveal the magnitude of the suffering endured by the greater part of the tenants' households which are children and women, especially for IDPs families.

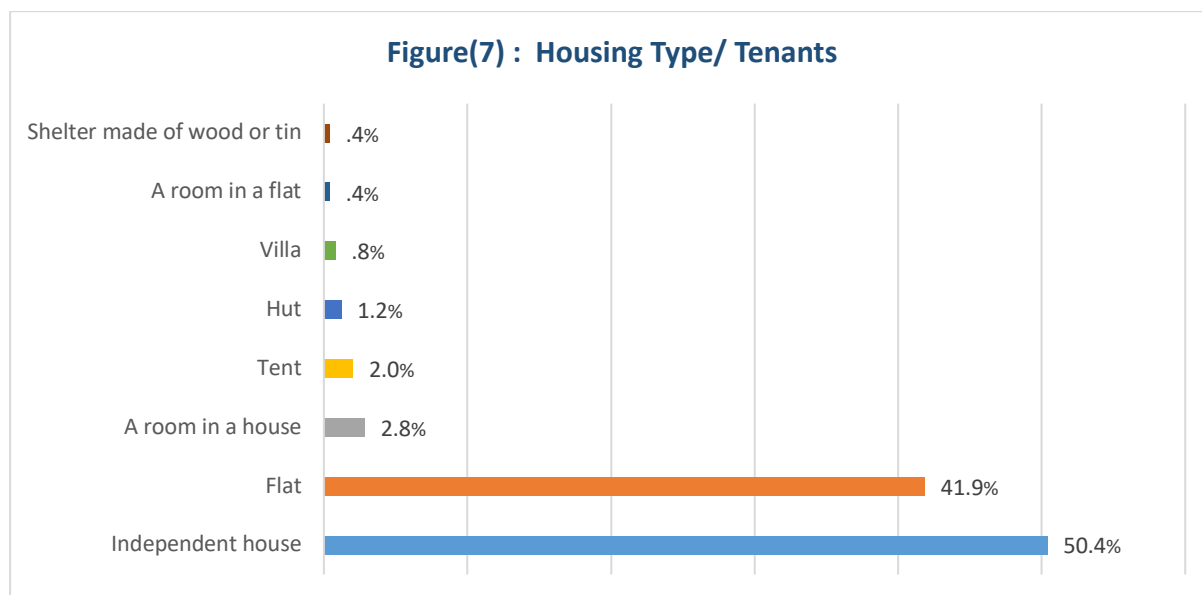
Table (1): Age and Gender of the Tenant Family Members

Gender	Less than 5 years		From 5-18 years		More than 18-55 years		More than 55 yeras		Total of members in the households	
	Number	%	Number	%	Number	%	Number	%	Number	%
Male	182	54.82	322	53.31	338	50.98	33	55.93	875	52.77
Female	150	45.18	282	46.69	325	49.02	26	44.07	783	47.23
Total	332	100	604	100	663	100	59	100	1658	100
% within age	20 %		36.43%		39.99%		3.56%		100%	

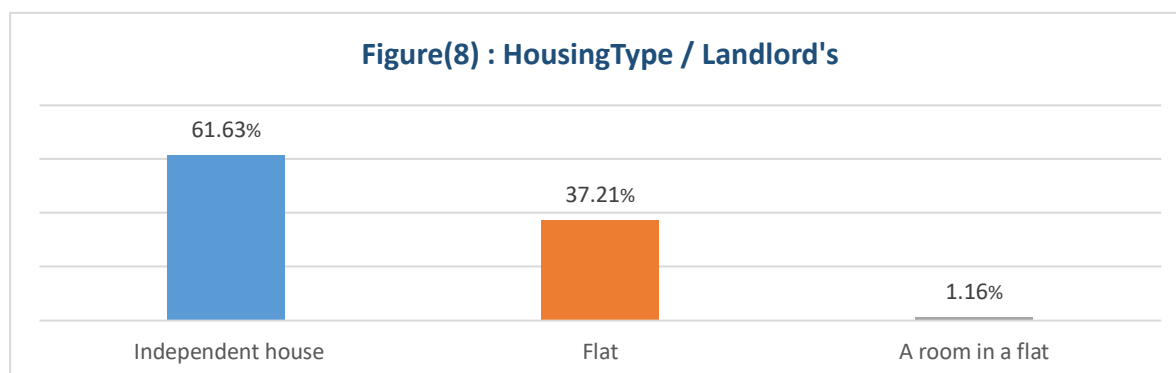
2 Details of the Rented Housing

2.1 Type of Housing (Tenant / Landlords)

(Figure 7) shows types of housing rented by tenants. 50.4% of tenants rented independent housing, 41.9% rented flats, and the rest of the percentage is shown in the figure (7).

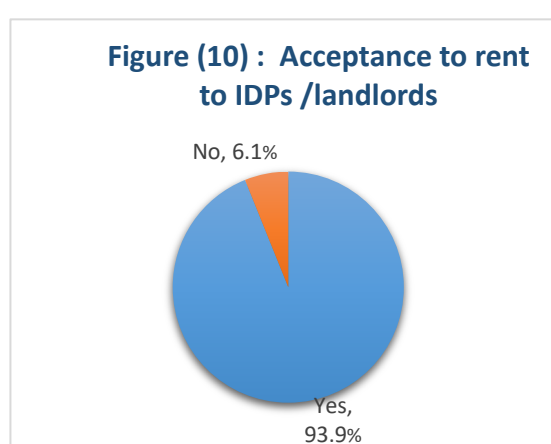
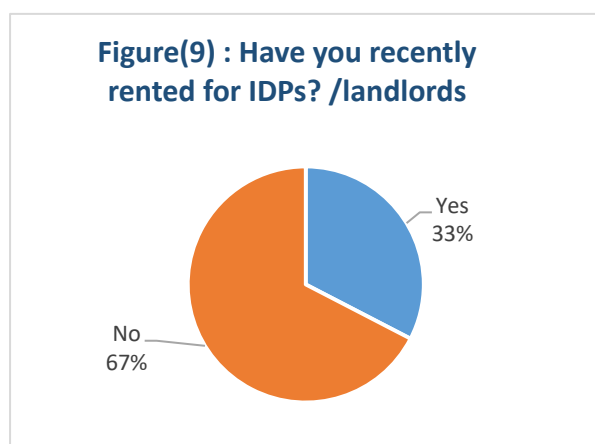


In the same context, when consulting with landlords they mentioned the following housing types: 61.63% independent housing, 37.21% flats, and 1.16% a rented room in a flat (Figure.8).



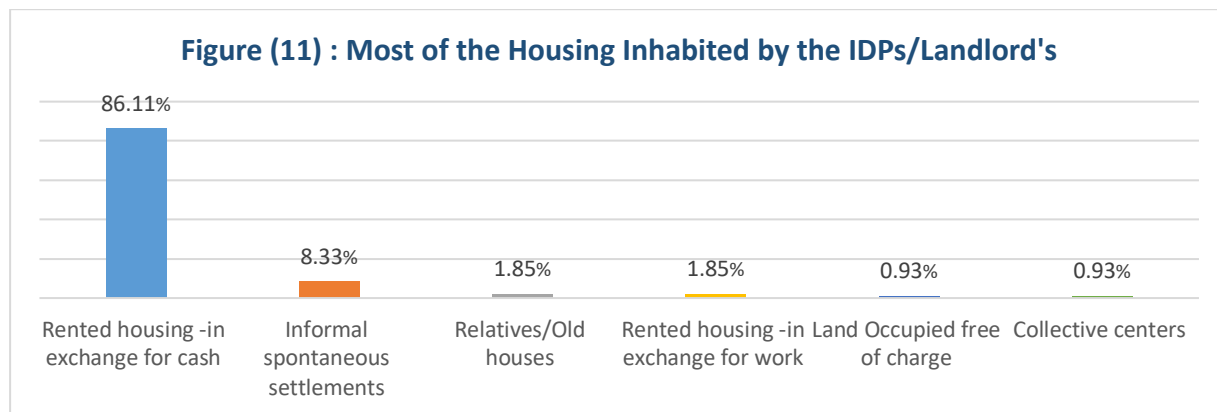
2.2 Rent for IDPs

The results of the landlords' analysis (Figure 9) show that 33% of landlords rented housing for IDPs, whereas 67% of landlords did not rent for IDPs. The analysis of the landlords' data



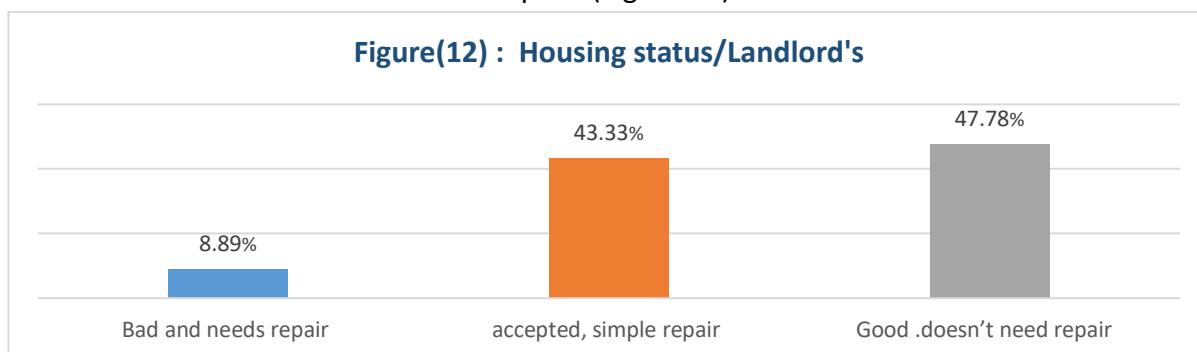
shows that 93.9% accept to rent to IDPs, while 6.1% of landlords do not accept to rent to IDPs (Figure.10).

In the same context, the hosting community of this area is supportive of IDPs and is willing to host them. According to the assessment’s data, around 86.11% of IDPs rented housing in exchange for cash, 8.33% live in informal spontaneous settlements, 1.85% housing in exchange for work, 0.93% collective center (e.g. school facilities), and 0.33% with hosting families for free or in old housing Figure (11).



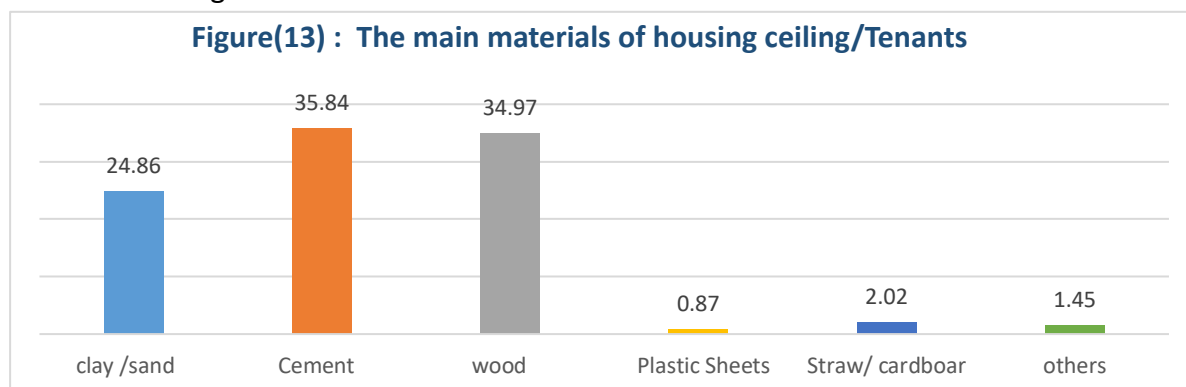
2.3 State of the Housing

Results from the data analysis indicates that 47.78% of housing were managed by landlords were in good conditions and did not require any maintenance, 43.33% of the housing were in acceptable conditions and only needed minor repairs, and 08.89% were in bad conditions and needed maintenance and structural repairs (Figure 12).



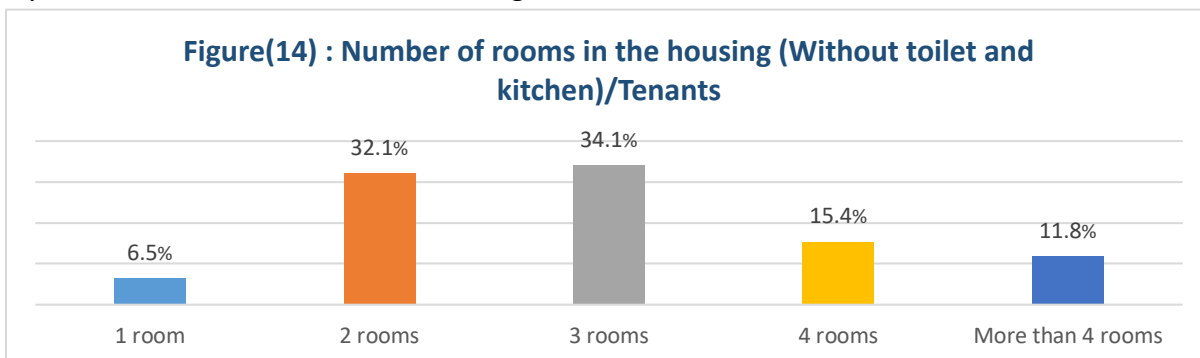
2.4 Materials used for Ceilings of Housing

Figure (13) shows that the main materials used for the ceilings of the rented housing were: cement 35.84%, wood 34.97%, clay 24.86%, straw/cartons 2.02%, plastic sheets 0.87%, and 1.45% was categorized as other.

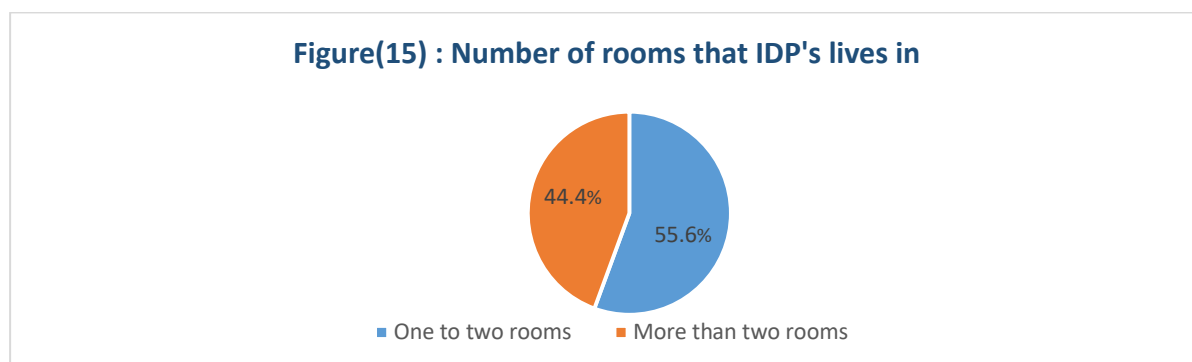


2.5 Number of Housing rooms

The results of the tenants' analysis (Figure 14) indicate that 34.1% of tenants rented housing that consisted of three rooms, 32.1% consisted of two rooms, 15.4% consisted of four rooms, 11.8% consisted of more than four rooms, and 6.5% consisted of one room. These results indicate that the majority of tenants rented housing that have two to three rooms. The crowding index of Hadramaut Governorate shows that there are two individuals per room in a rented housing. According to Table (1), to the number household members (1658) is divided by the total number of rooms excluding kitchen and toilet.

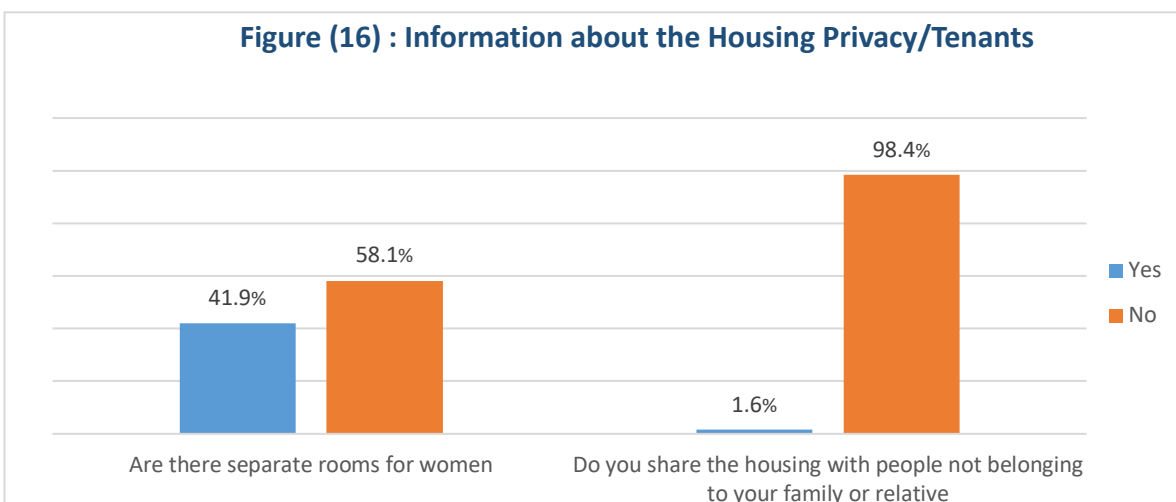


IDPs tenants in Hadramaut Governorate as previously mentioned are 49.6% of the tenants Figure (5), of these IDPs, 55.6% of them live in one to two rooms.



2.6 Privacy of the Housing

Figure (16) shows that 41.9% of housing rented by tenants have separate rooms for women, whereas 58.1% do not have separate rooms. The study also revealed that 98.4% of rented housing were not shared by any members from outside the family of the household, while 1.6% were shared (Figure 16).



2.7 Availability of Toilet in the Housing

The results of the tenants' sample analysis (Figure 17) show that 98% of rented housing have a toilet, while 2% do not have a toilet. As for the availability of separate toilets for women, 42.86% of housing had a separate toilet for women, whereas 57.14% did not have a separate toilet for women. The results also showed that 98.3% of the rented housing had toilets inside the housing, and 1.7% had toilets outside of the housing.

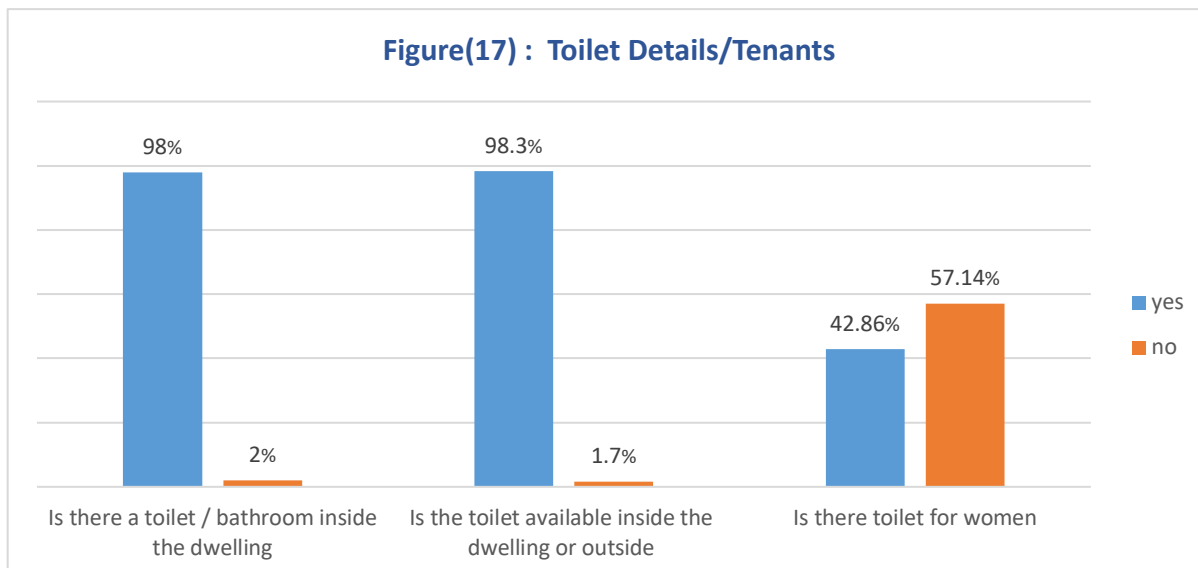
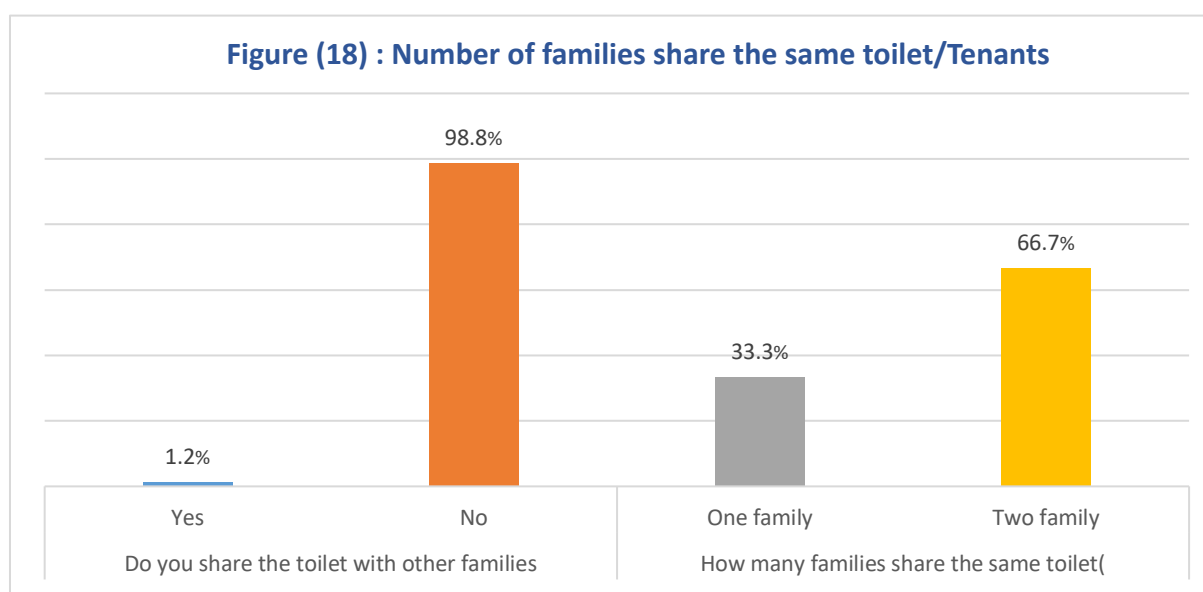


Figure (18) shows that 98.8% of tenants did not share the toilet with other families, whereas 1.2% shared the toilet with other families. The study also shows the number of families that shared a toilet. 66.7% of tenants' households shared a toilet with two other families, 33.33% shared a toilet with one other family.

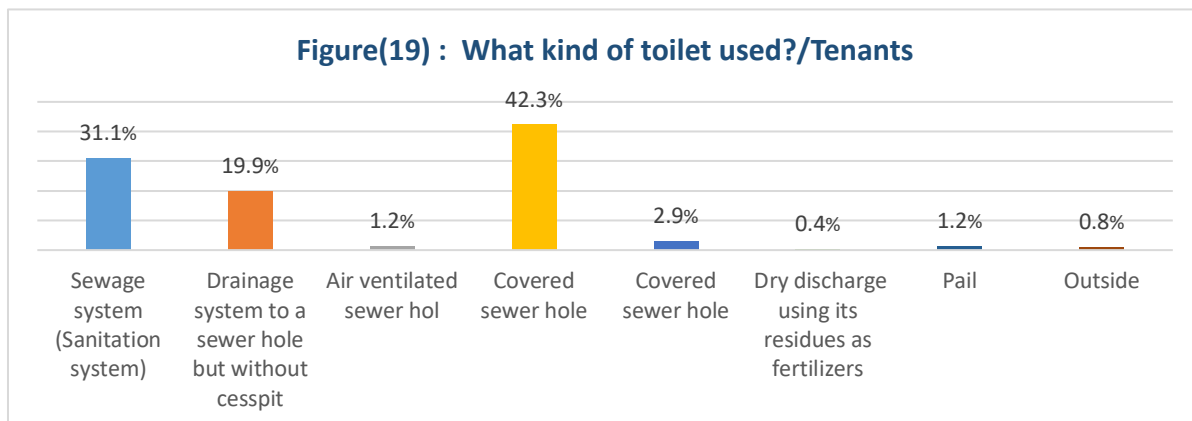
The result of the FGD and KII indicates that in case of unavailability of a toilet, tenants use the outdoor area as an alternative.

2.8 Type of Sanitation System

The results of the tenants' analysis in (Figure 19) indicate that 42.3% of housing of the tenants' sample used covered cesspits, 31.1% used the sanitation cesspit system (proper



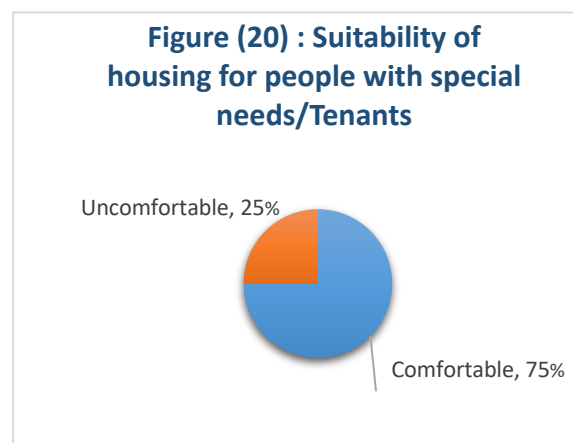
disposal system), 19.9% used a drainage system without cesspit, 2.9% used uncovered cesspits, 1.2% used dry ventilated cesspits, 1.2% used pails, 0.8% used the outdoors, and 0.4% used a dry drainage utilizing waste as fertilizer. These results indicate that the types of sanitation systems used in this area are unsanitary for both the people and the environment.



2.9 Suitability of Housing for People with Special Needs

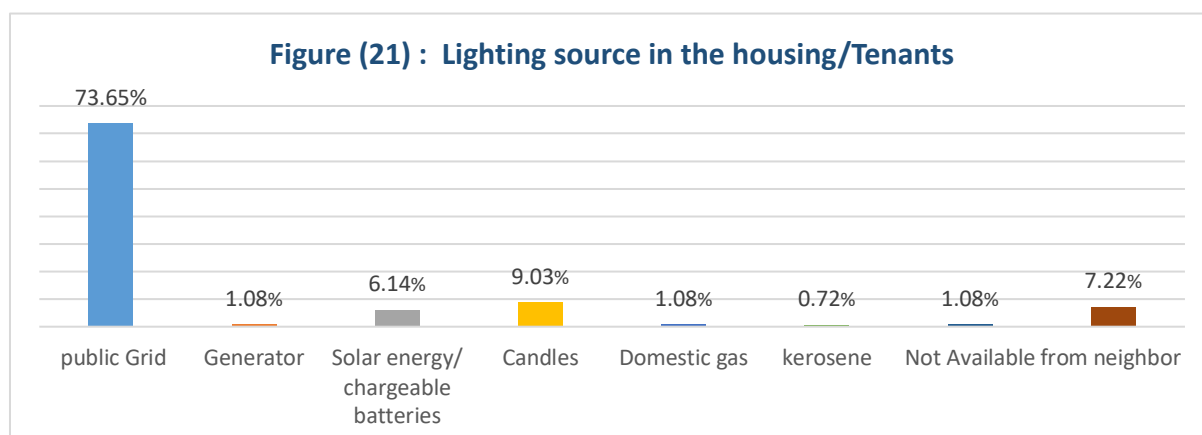
The results of the analysis indicate that 25% of rented housing are not suitable for family members with special needs, and 75% are suitable for special needs (Figure. 20).

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.



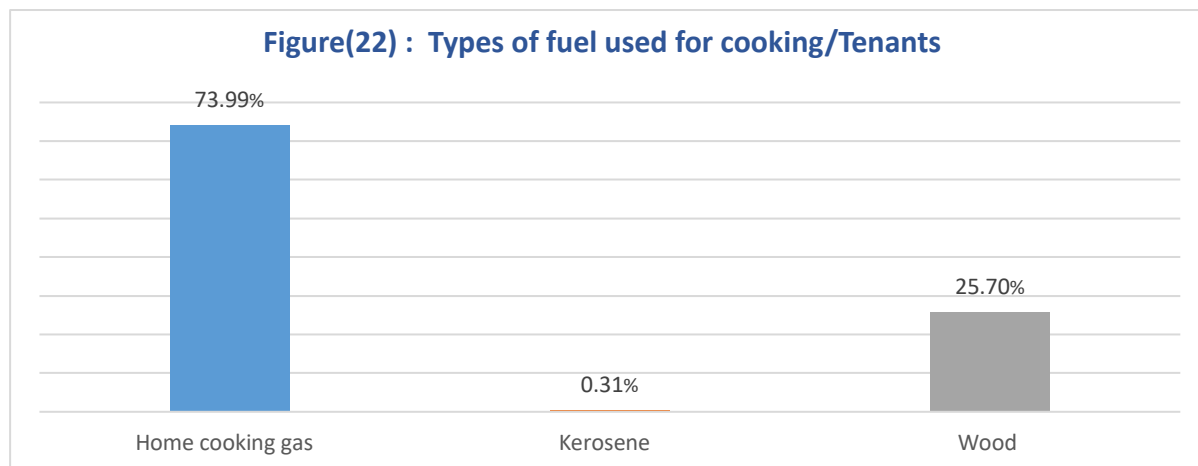
2.10 Source of Lighting

The results of the tenants' sample analysis shows that the main sources of lighting in the rented housing of the targeted area is the public electricity grid 73.65%. Followed by 9.03% candles, 6.14% solar energy and rechargeable batteries, 7.22% tenants connecting from the neighbors, and the rest is shown in the figure (21). These results show that the public electricity grid is the primary source of lighting in this Governorate.



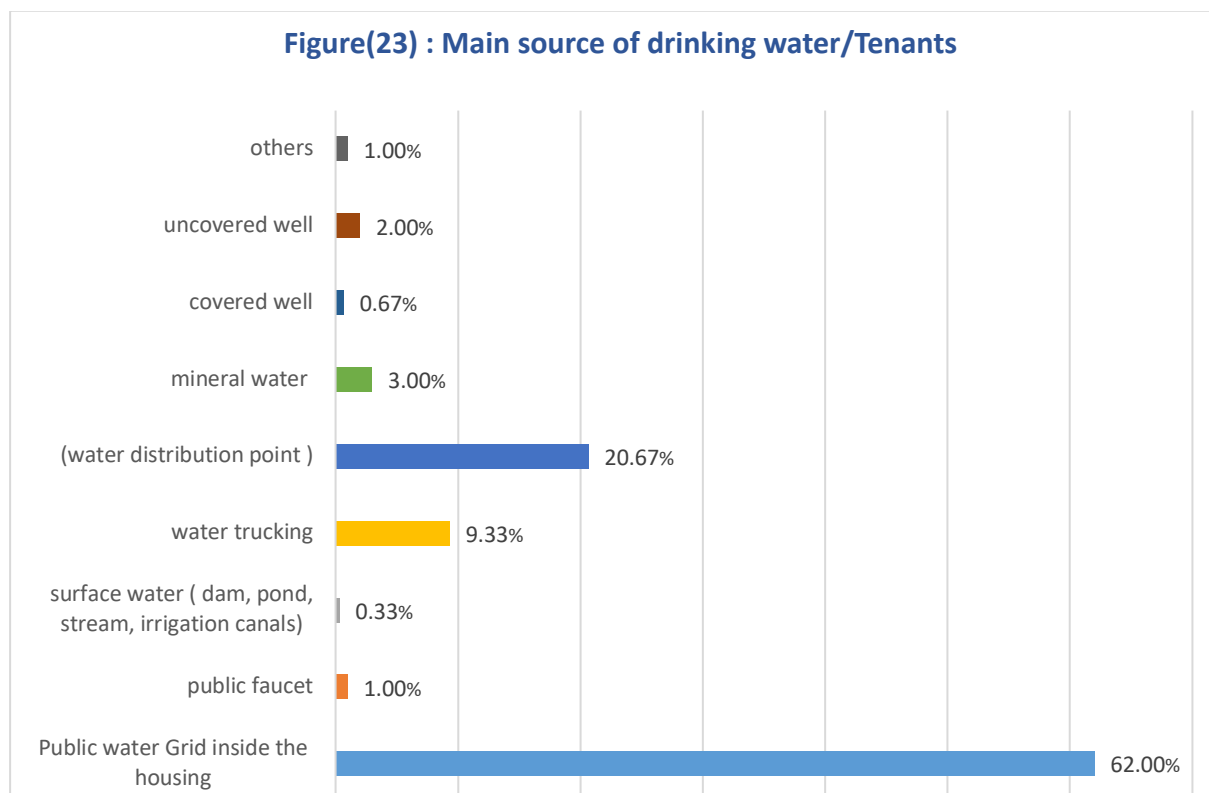
2.11 Type of Fuel used for Cooking

In the context of the geographical sample of Hadramaut Governorate, the tenants' analysis showed that the types of fuel used by the tenants' households for cooking purposes are: home cooking gas 73.99%, wood 25.70%, and kerosene 0.31%. These results reflect the difficult circumstances faced by some of the tenants, especially the 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 22)



2.12 Source of Drinking Water

The results of the tenants' sample analysis show that the main sources of drinking water for tenants are as follows: the public water grid inside the housing 62%, water distribution point 20.67%, water trucks 9.33%, mineral water 3%, uncovered wells 2%, public faucet project 1%, covered wells 0.67%, surface water (dams, ponds and streams) 0.33%, and 1.00% was categorized as other (water from farmers) Figure (23).



3 Accessing Housing

3.1 Transfer from Area of Origin (Geographical Area):

Figure (24) shows that 55% of tenants are IDPs, whereas 45% are original residence of the local area.

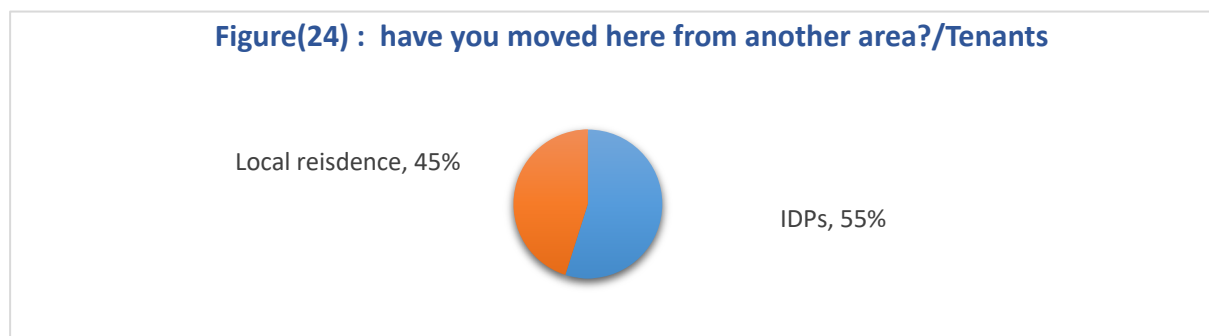
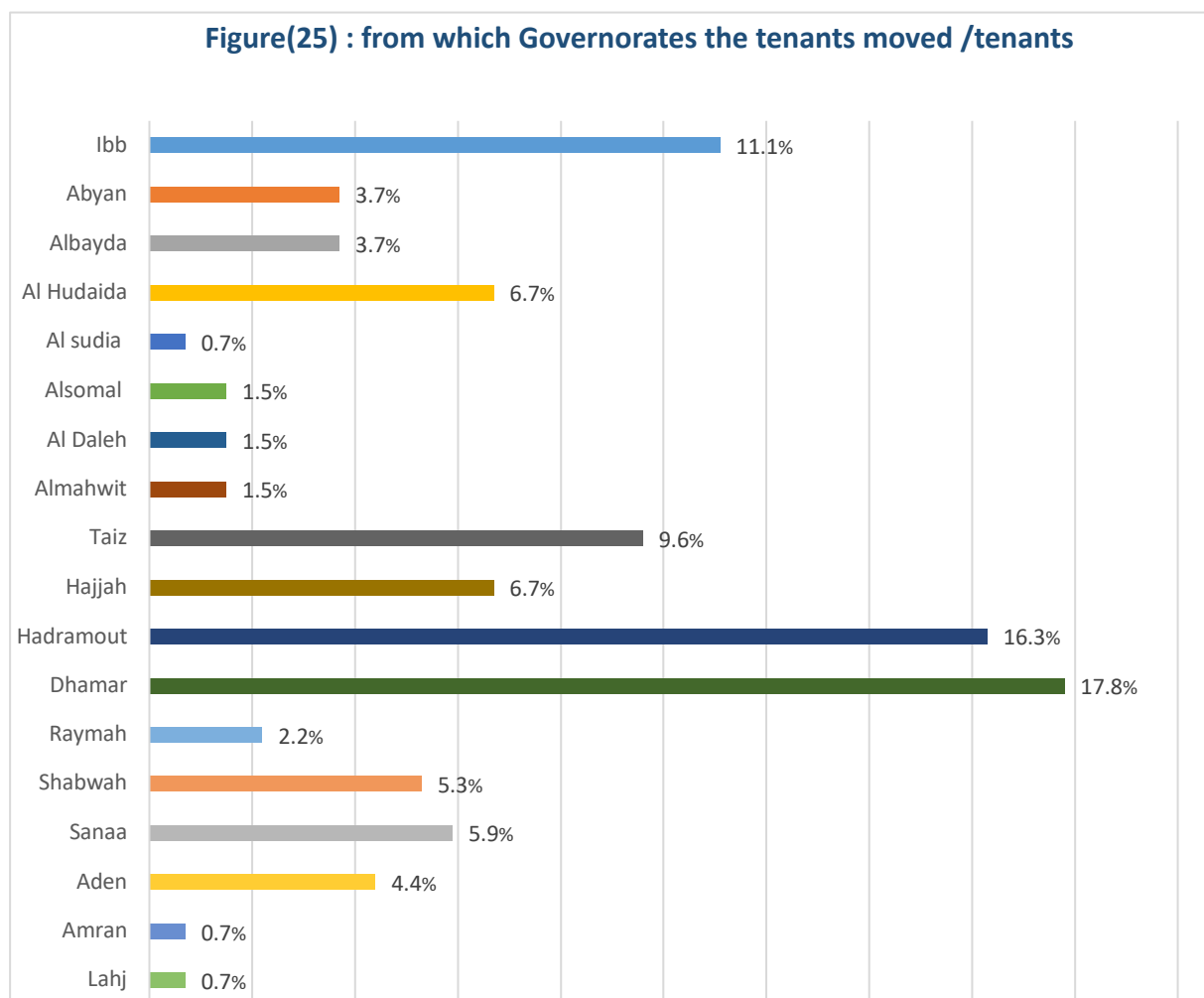


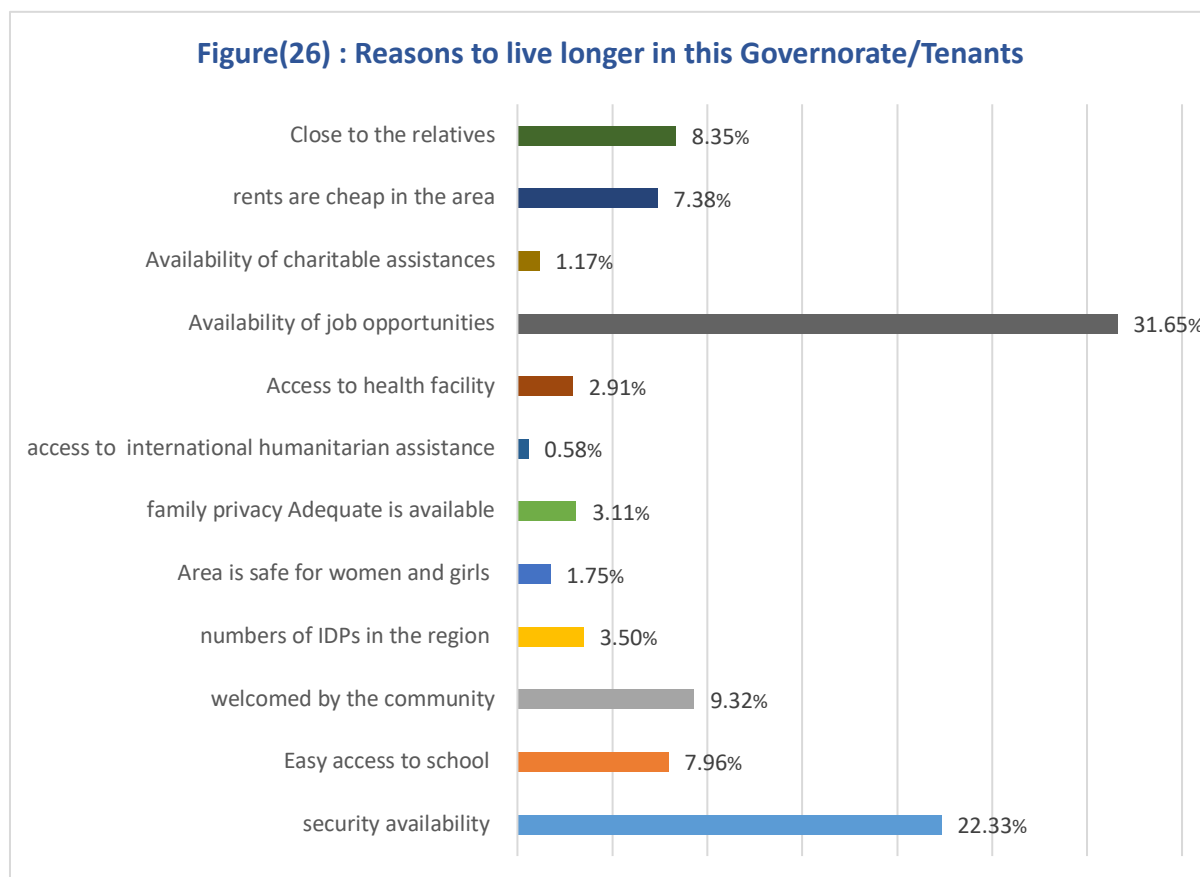
Figure (25) shows that tenants who moved to Hadramaut Governorate are from Dhamar 17.8%, and from the districts of Hadramaut 16.3%, Ibb 11.1%, Taiz 9.6%, Al-Hudaydah 6.7%, Hajjah 6.7%, Sana'a 5.9%, Shabwah 5.3%, Adeb 4.4%, Abyan 3.7%, Al-Bayday 3.7%, Raymah 2.2%, Alsomal 1.5%, Al-Daleh 1.5%, Al-Mahwit 1.5%, Amran 0.7%, and Lahj 0.7%, Figure (25).

The results of the analysis of the group discussions and key informant interviews states that the local community of Hadramaut Governorate is very welcoming and is willing to host people from outside the area whether IDPs or others. The analysis also shows that the majority of IDPs who moved to this area started arriving in the years 2015 and 2016.



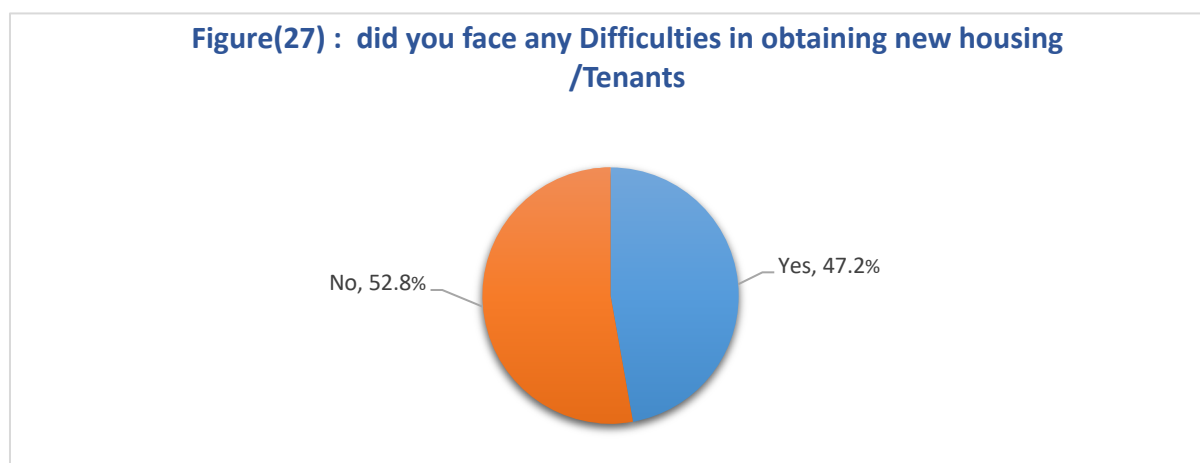
3.2 Choosing the Governorate for Residence

The results of the qualitative analysis of the data indicate that there are a number of reasons for choosing this Governorate for housing, especially by the IDPs. The reasons are as follows: 31.65% availability of job opportunities, 22.33% safety, 9.32% being welcomed by the local community, 8.35% close to relatives, 7.38% affordable rents, 7.96% ease of access to schools. The remaining reasons are shown in Figure (26). The results reflect that safety and availability of job opportunities are key factors for choosing to move to Hadramaut.

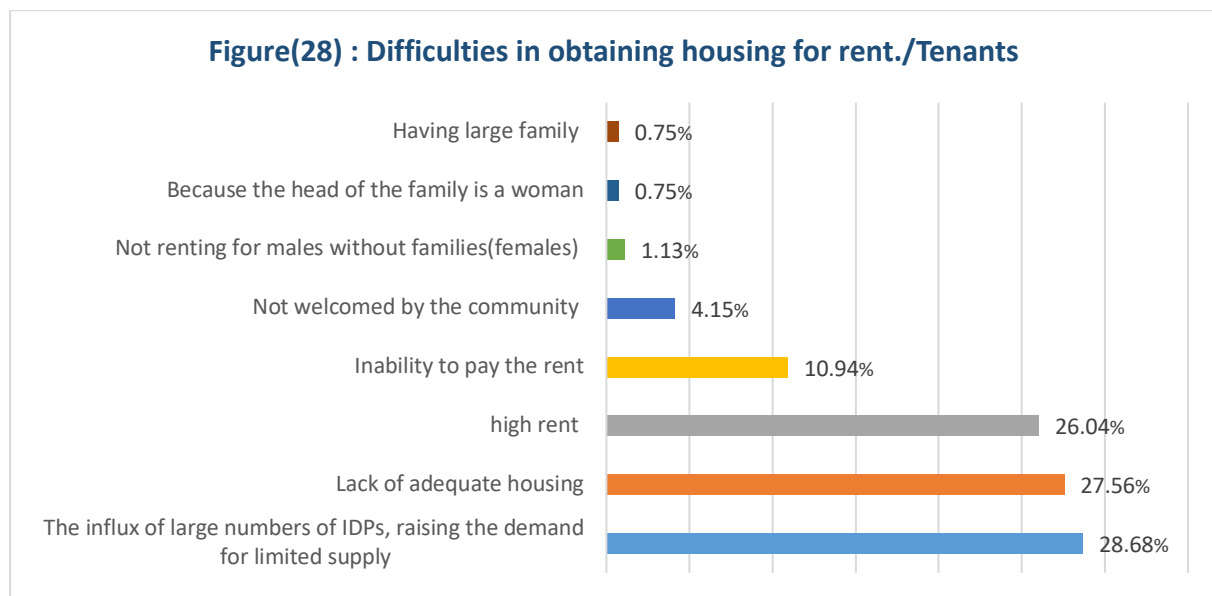


3.3 Difficulties in Obtaining Housing and Stability

Figure (27) shows that 47.2% of tenants faced difficulties in obtaining a rented housing and 52.8% did not face any difficulties.



These difficulties according to the tenants' sample analysis are as follows: large influx of IDPs to the area at 28.68%, lack of adequate housing at 27.56%, high rent costs at 26.04%, inability to pay rent at 10.94%. The remaining difficulties are shown in the Figure (28).



In the same context, difficulties faced by landlords in the rental market are as follows: 22.63% the demand of housing exceeds the availability of housing for rent (demand vs supply of rented housing), 17.37% high demand for housing, 14.21% high rate of nonpayment, 10.53% high costs of rent, 9.47% lack of basic services, 6.84% eviction of tenants, 5.79% lack of options in the housing market, the remaining challenges are shown in the Figure (29). The results of the analysis confirm that the most urgent assistance that IDPs in this area need are rental payment support and repairs and maintenance for the housing they live in.

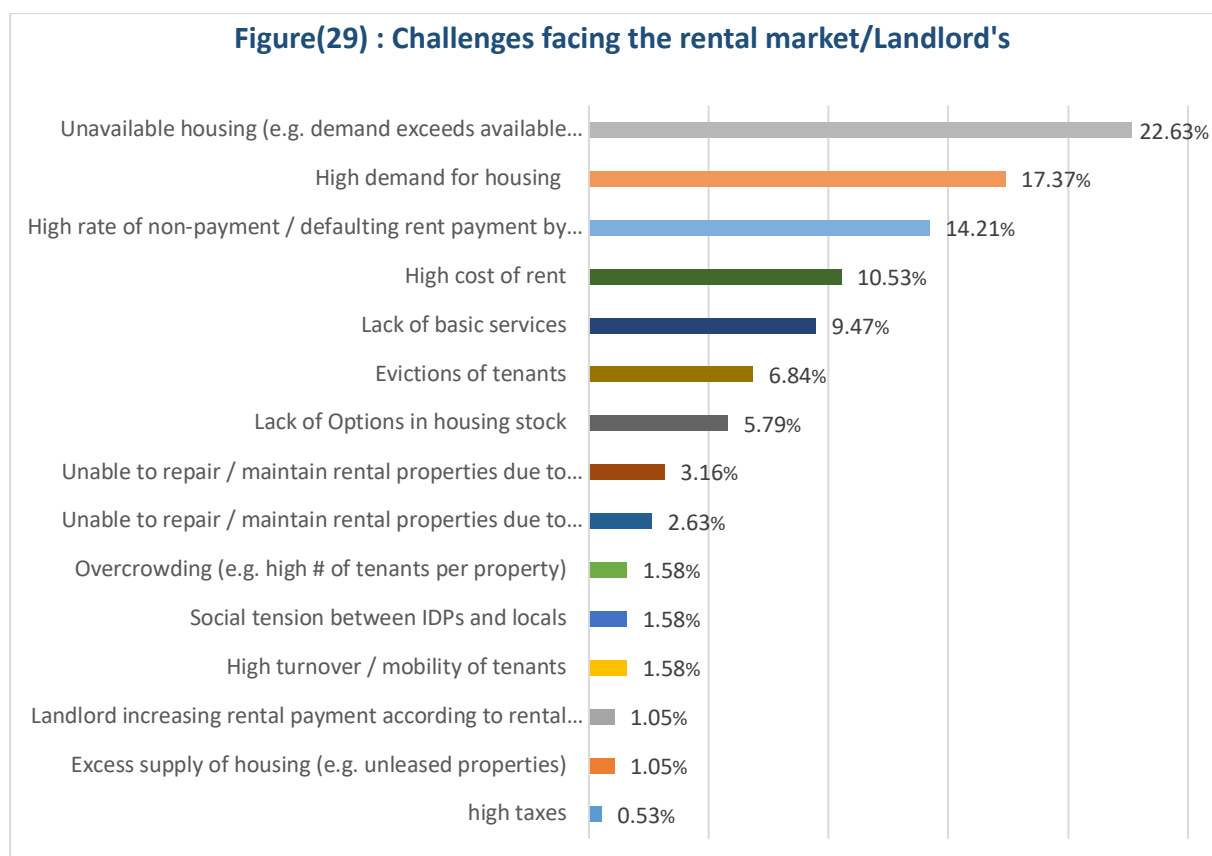


Figure (30) illustrates the average period of time it takes a tenant to find a rented housing. 40.7% was more than one month, 30.5% was one month, 17.5% was less than a week, and 11.4% was one week to two weeks.

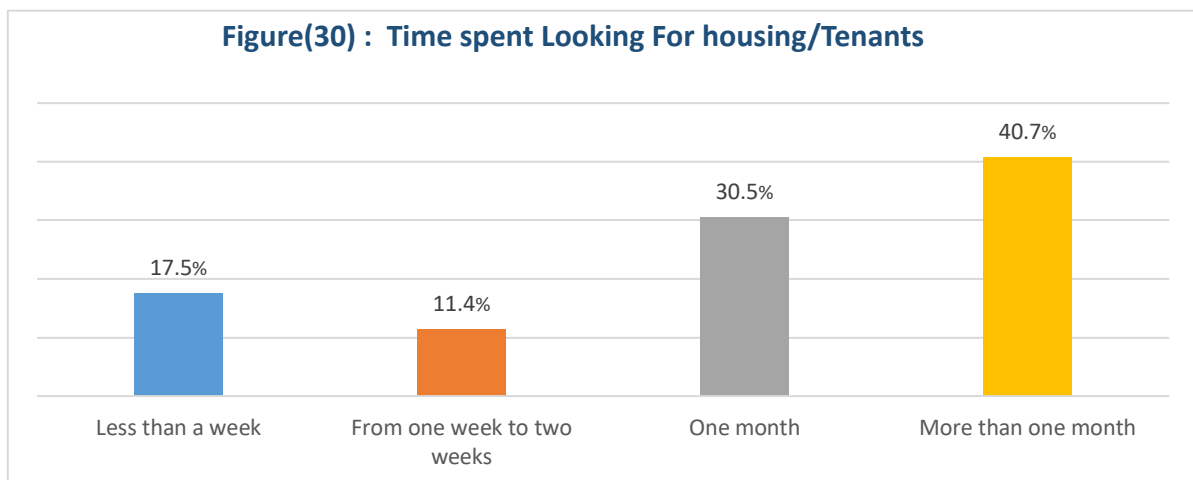
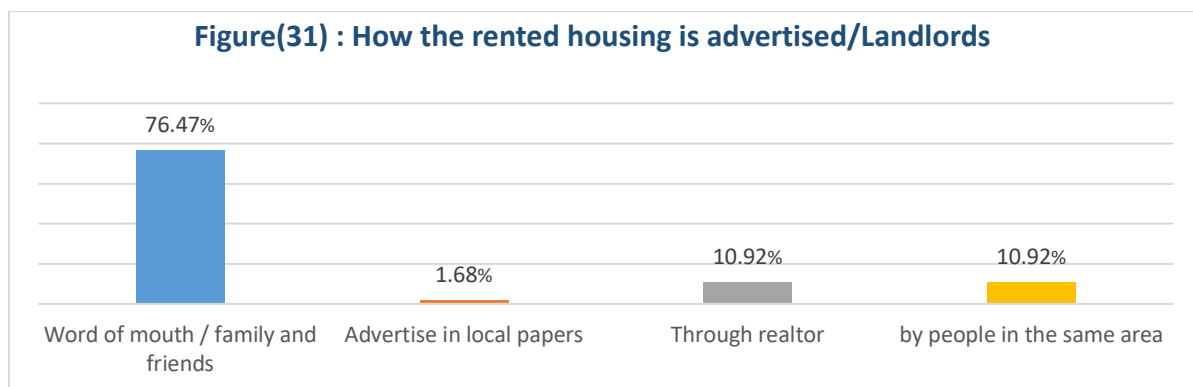
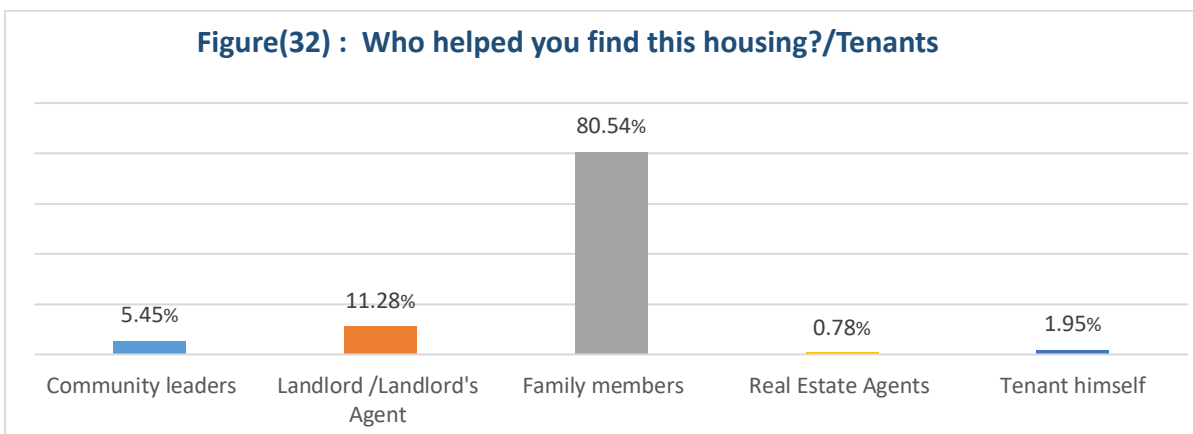


Figure (31) shows how rented housing are being advertised in this Governorate according to the landlords' sample analysis. 76.47% of vacant housing are advertised through friends or relatives, 10.92% are advertised through real estate offices or realtors, 10.92% are advertised through people in the same area, and 1.68% are advertised in local papers.



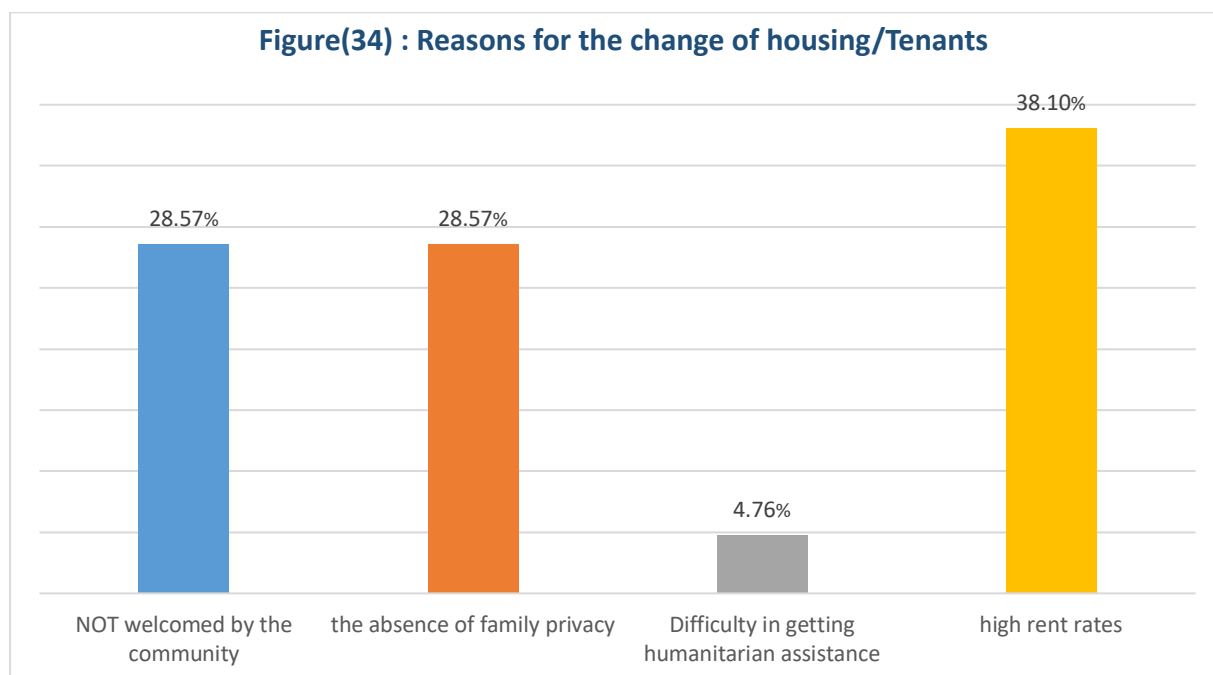
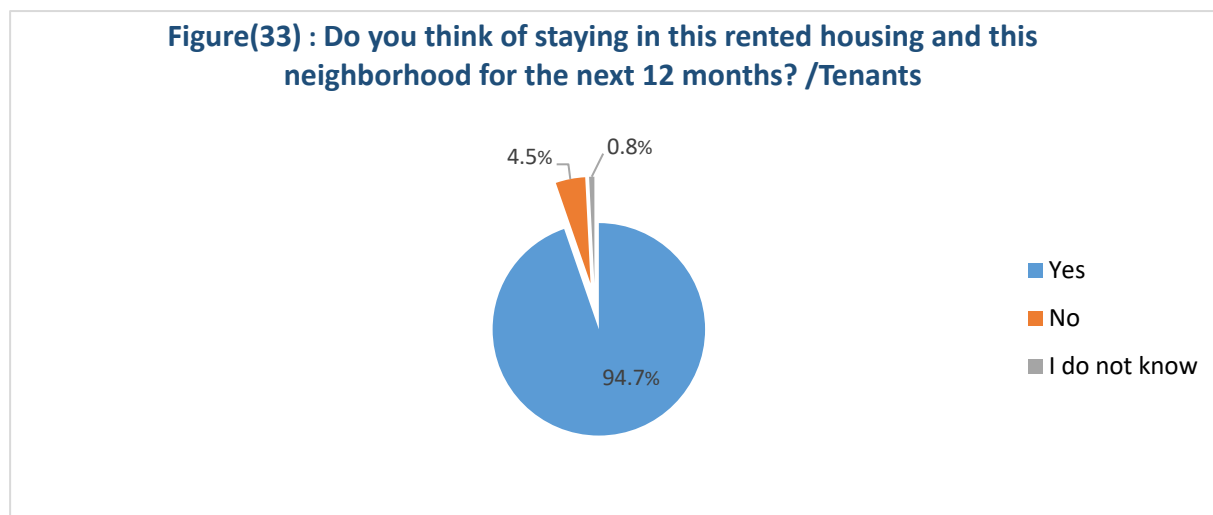
3.4 Key Actors in the Renting Market and Housing Access

According to the tenants' sample results, 80.54% of tenants rented the housing through friends and relatives, 5.45% through community leaders / Sheikhs, 11.28% through landlord's / landlords' agents, 0.78% through real estate agents and realtors, 1.95% of tenants found the housing themselves, Figure (32). This result shows the minor role of real estate offices and how tenants rely mostly on friends and family in order to find adequate housing to rent.



3.5 Stability in the Housing

Figure (33) shows the percentage of tenants who decided to settle in their rented housing for the next 12 months. 94.7% of the tenants will stay in their rented housing, 4.5% were unable to make any decision (due to war circumstances and financial instability), and 0.8% were unwilling to continue to live in the area due to: high costs of rents 38.10%, the absence of family privacy 28.57%, not being welcomed by the local community 28.57%, and lack of access to humanitarian aids 4.76%, Figure (34).

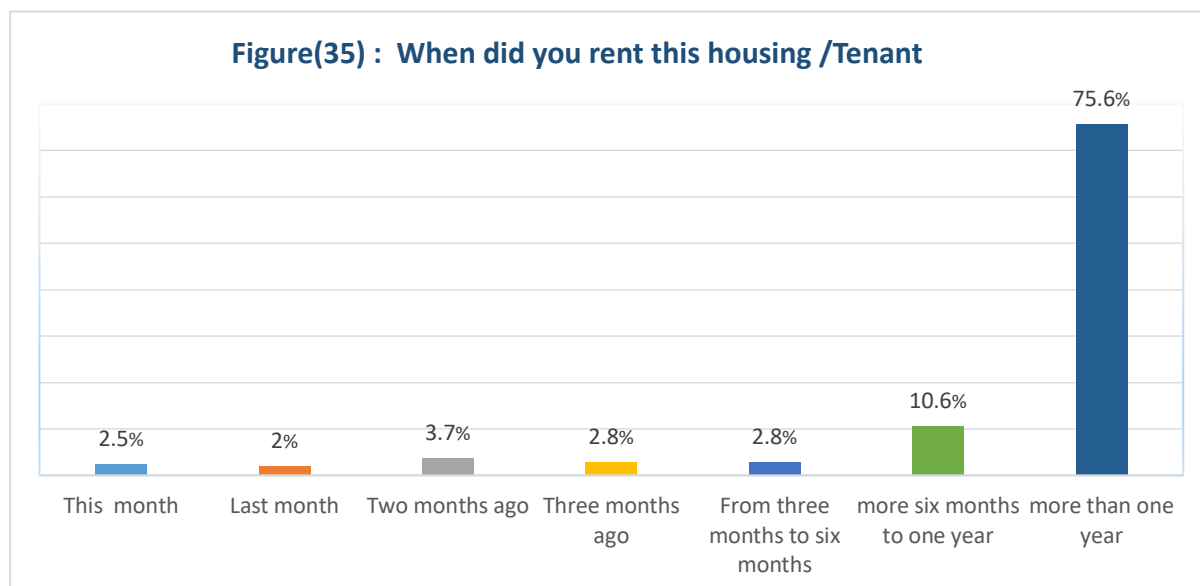


The results of the analysis of the focus group discussions and key informant interviews of both males and females state that the main reasons for stability in this area are the availability of job opportunities, safety, and access to humanitarian aids.

4 Rent and the Main Sectors of the Rental Market

4.1 The Rental Period of the Housing

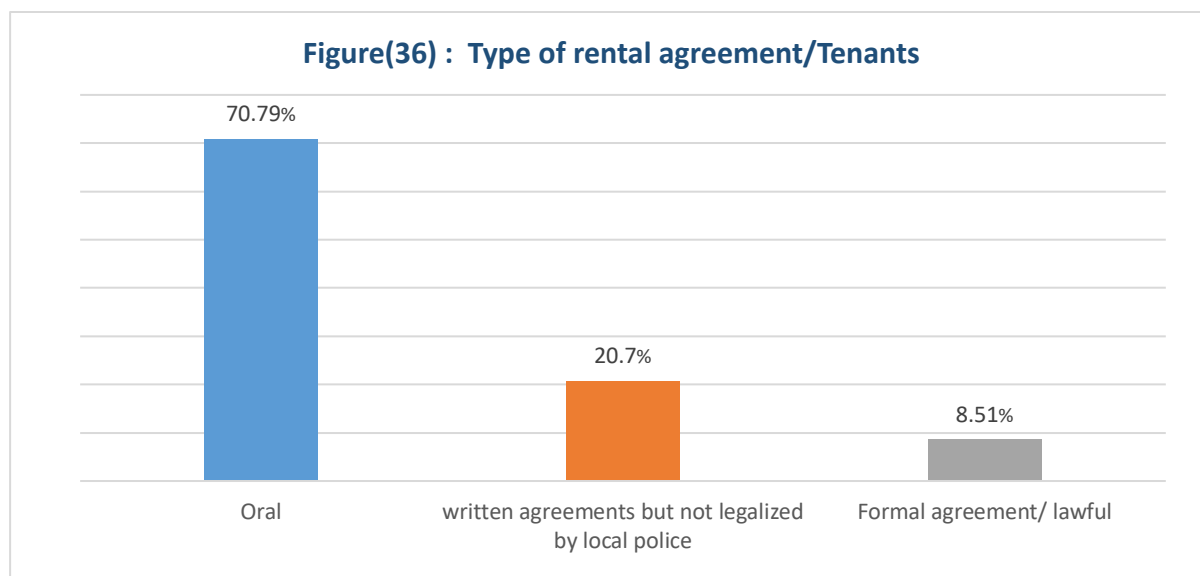
Figure (35) shows that 75.6% of the tenants' sample have rented housing for over one year, 10.6% for more than six months to one year ago, 3.7% two months ago, 2.8% from three months to six months ago, 2.8% three months ago, 2.5% rented the housing this month, and 2% rented the housing last month. These percentages reflect the fact that the majority of tenants are former stable residents of the target area.



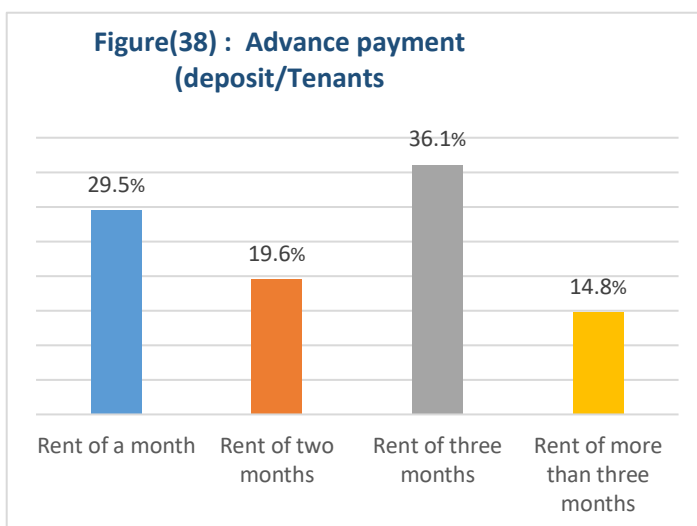
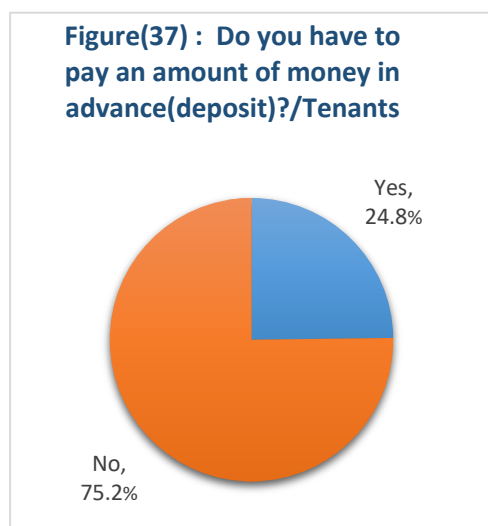
The results of the analysis of the focus group discussions and key informant interviews of both males and females state that the majority of tenants are former stable residents of the area since 2014-2015 and continue to arrive to this area due to ongoing conflicts in the country.

4.2 Renting Agreements

The results of the tenants' data analysis (Figure 36) indicate that 70.79% of tenants have rental agreements with verbal contracts, 20.7% are written agreements but not legal, and 8.51% are legal agreements. This reflects that most of the rental agreements in the Governorate of Hadramaut are informal agreements.



As for paying an advance payment upon signing the rental contract, Figure (37) shows that 75.2% of tenants are not obligated to make an advance payment in the rental agreement, whereas 24.8% have to pay a certain amount of money in advance. The details of the advanced payment is as follows: one month's rent was required by 29.5% of landlords, two months' rent 19.6%, more than three months' payment 14.8%, and 36.1% of landlords asked for three months' rent as an advance payment. (Figure (38)). The results of the study also indicated that the majority of IDPs started coming to this area with the beginning of the war especially in the years 2015 and 2016 as conflicts began to escalate.

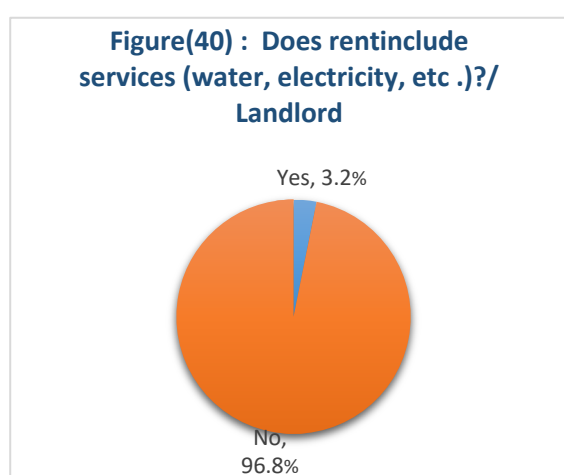
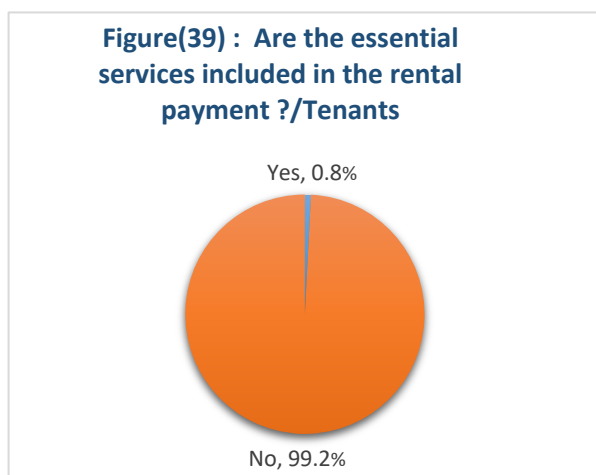


4.3 Services in the Governorate

The study also shows that a tenant pays an additional 5,727 YER on average for basic services, this number is subject to market prices fluctuation, especially water and fuel.

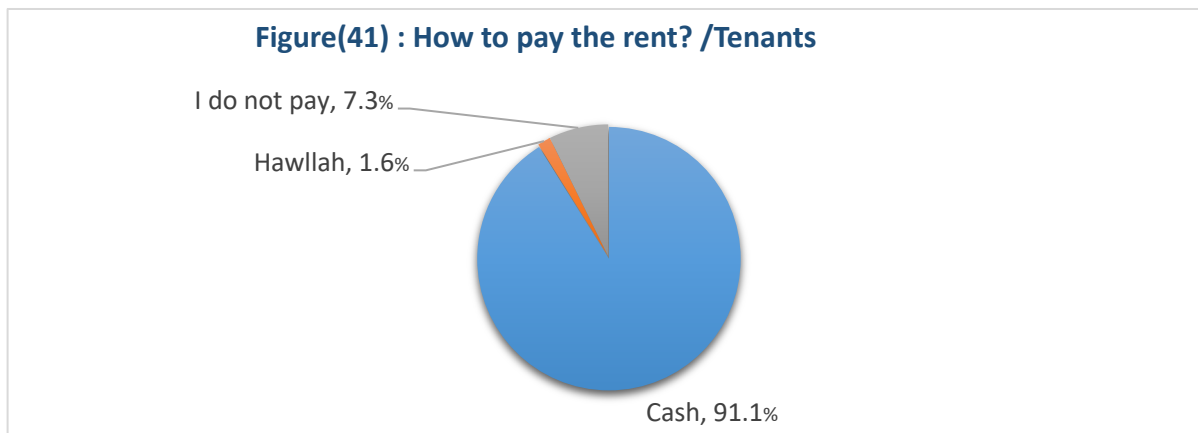
The results of the study (Figure 39) also indicate that 99.2% of the tenants' sample said rent does not include any of the basic services such as water or electricity and that these services are considered separate services and have a separate cost. However, 8% of the sample indicated that the rental payment covers the costs of basic services.

In the same context, the results of the landlords' analysis clearly show that 96.8% of landlords do not include any essential services such as water and electricity when renting housing to tenants, and 3.2% do include these services, but only to shared housing (Figure.40).



4.4 Rent Payment Methods

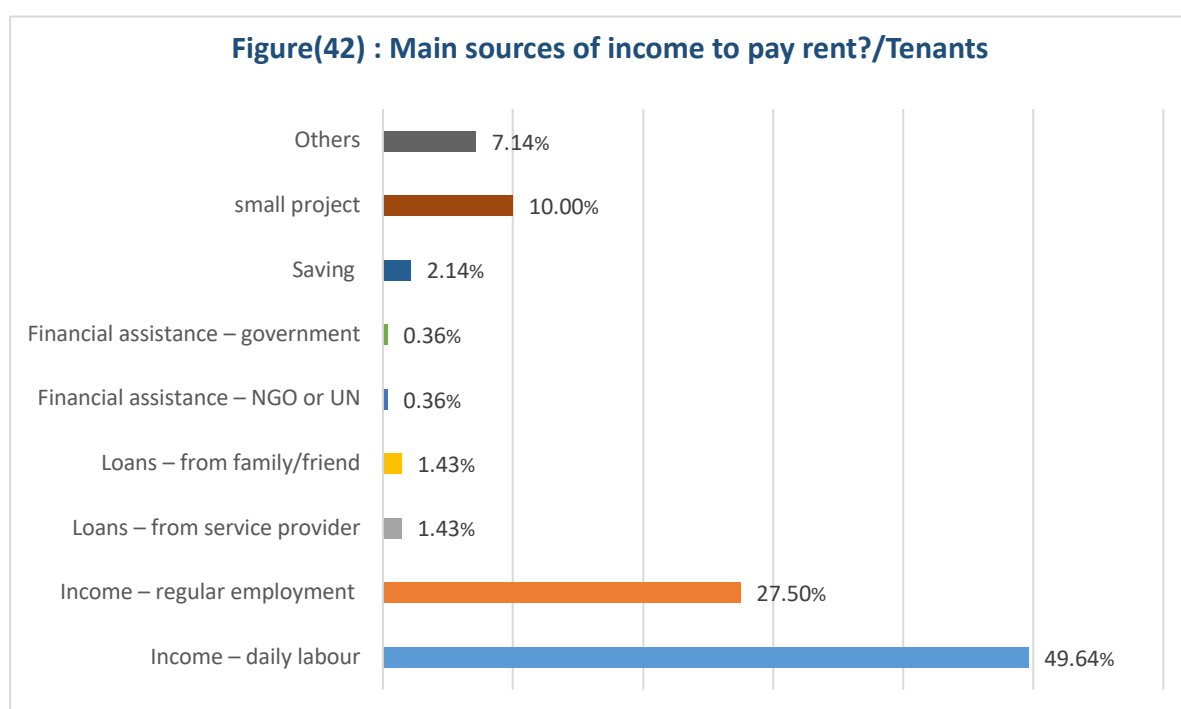
The results of the study (Figure 41) reveal that 91.1% of the tenants' sample pay rent in cash, 1.6% pay rent through money transfers (Hawllah), and 7.3% do not pay rent because they live in school facilities or free housing. The results of the landlord's sample data confirm that the main method of paying rent in Hadramaut Governorate is cash payment.



4.5 Source of Income to Pay the Rent

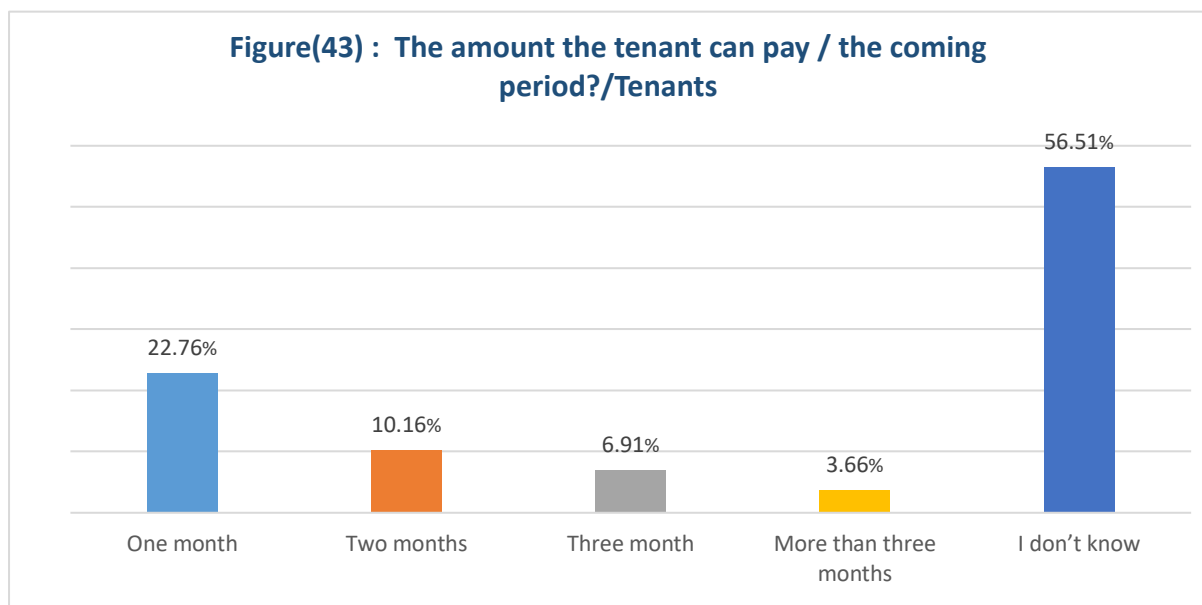
The results of the study show that 49.64% of the tenants' sample depend on their daily working labor to pay rent, 27.50% have regular employment with steady incomes, 10% paid rent through their own small projects, 1.43% paid rent through loans from friends or family members, 1.43% through loans from service providers, 0.36% paid rent with the financial assistance of international aid organizations, 2.14% through using their savings, and 0.36% through government financial assistance (Figure 42).

The results of the analysis of the focus group discussions and key informant interviews of both males and females show that the majority of IDPs pay rent through stable employment / small projects which is a significant advantage that the Governorate of Hadramaut provides for its residents.

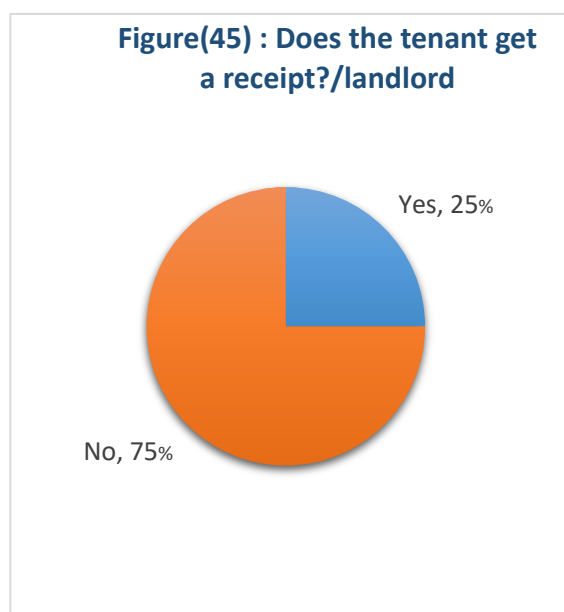
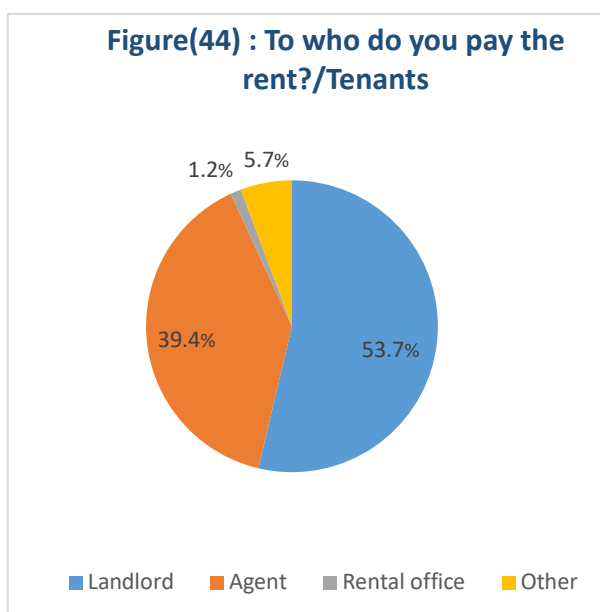


4.6 Paying the Rent

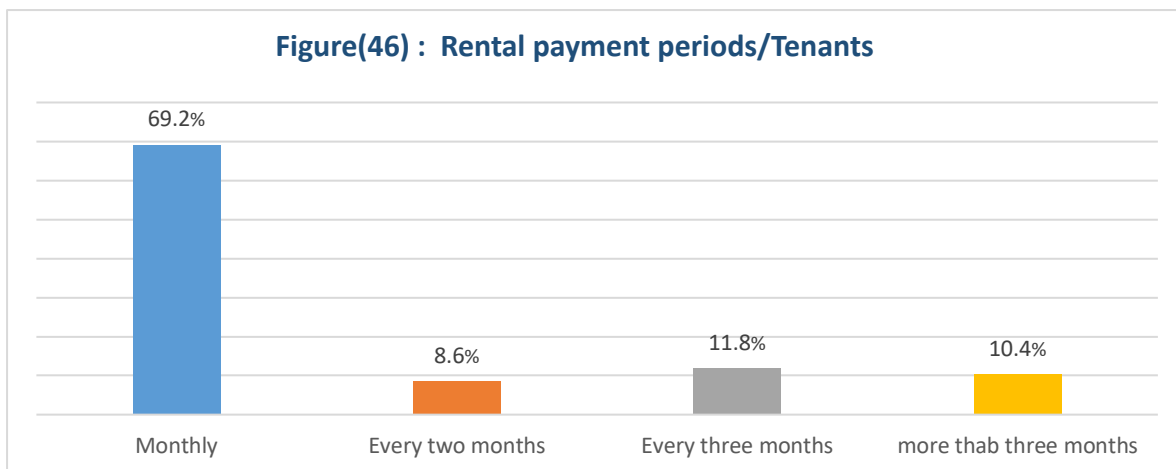
Figure (43) illustrates the amount of rent that tenants are able to commit to paying in the coming months. 56.51% of tenants stated that they cannot pay rent, 22.76% can pay one month's rent, 10.16% can pay for the next two months, 3.66% can pay rent for more than three months, and 6.91% can pay rent for the next three months. These results reflect the substantial economic situation of a sizable percentage of tenants in this area.



As for the methods of paying the rent, 53.7% of the tenants' sample hand rent money directly to landlords, 39.4% give rent payment to landlords' agents (act on behalf of landlord), 1.2% hand it to the real estate offices, and 5.7% was categorized as other (relatives of landlords) Figure (44). In regards to getting a receipt for rental payment, according to the landlords' analysis, results shows that 25% of landlords give a receipt for rental payment to tenants, whereas 75% do not give a receipt (figure 45).



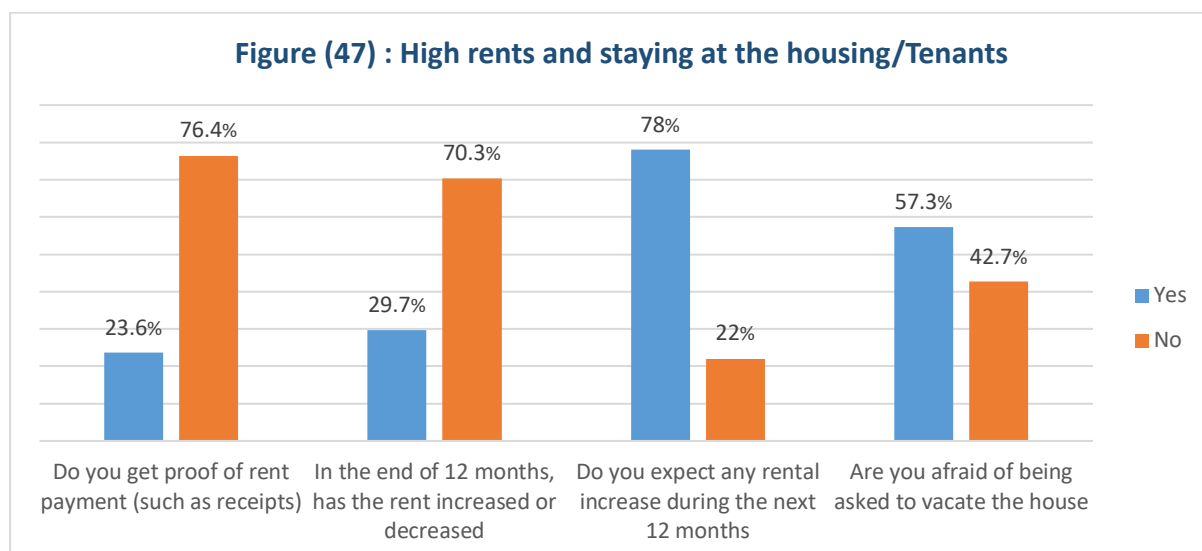
The results of the tenants' sample also show that rental payment dues vary, 69.2% pay on monthly basis, 11.8% pay rent every three months, 8.6% pay rent every two months, and 10.4% more than three months. These results show that there are no definite rent payment deadlines, rather it is according to the tenants' ability to pay due to loss of jobs and displacement (Figure. 46).



4.7 Rent Increase and Stability

Figure (47) shows the results of the study in terms of the correlation of rent fluctuation and housing stability. 70.3% of tenants stated that there was no increase in rent in the past twelve months, whereas 29.7% reported an increase in rent payment during the past year. 78.00% of tenants expected an increase in rent payment within the next twelve months, and 22% did not anticipate any raise in rent payment. Furthermore, 57.3% of tenants expressed their worries from the possibility of being evicted from the rented housing, while 42.7% did not have those fears.

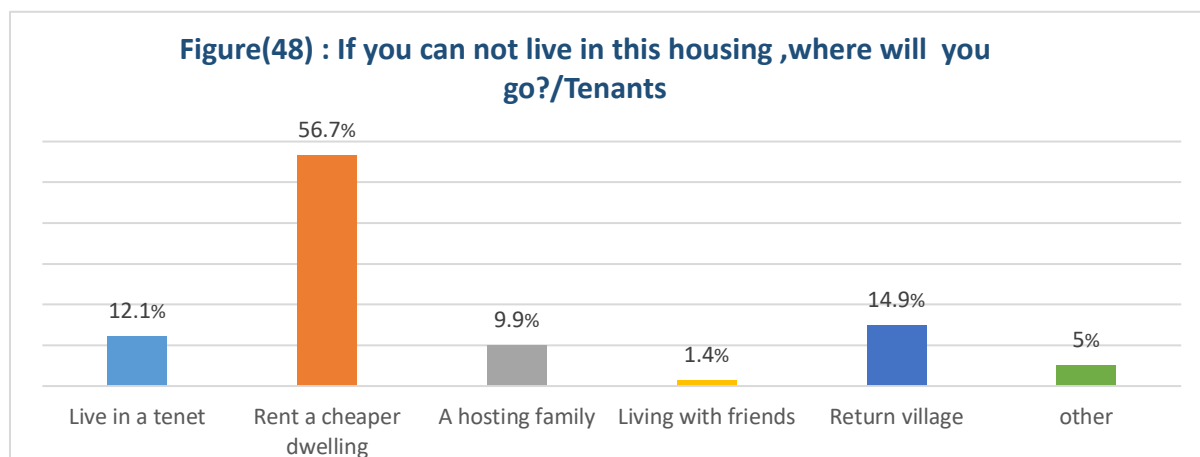
According to the tenants' sample analysis, study shows that of all rent payments, 23.6% of tenants got a receipt, whereas 76.4% of tenants did not get a receipt for rent payment,



The results of the analysis of the focus group discussions and key informant interviews of both males and females confirm that the lack of stability in the area is due to high demand / low supply of housing. This problem is a direct result of high increase of prices in building materials and instability of the dollar rate.

As for being evicted, the results confirm that IDPs are not forced to evict housing, and when tenants leave the rented housing, it is usually because they are looking for cheaper housing to rent.

Figure (48) illustrates the results of the tenants’ sample analysis in regards to alternatives that tenants are considering in case of eviction or unavailability of a housing. 56.7% will try to find cheaper and more affordable housing, 12.1% will live in tents, 14.9% will likely return to their hometowns / villages, 9.9% will stay with hosting families, 1.4% will stay with friends, and 5% was categorized as other (search for another housing - live with parents).



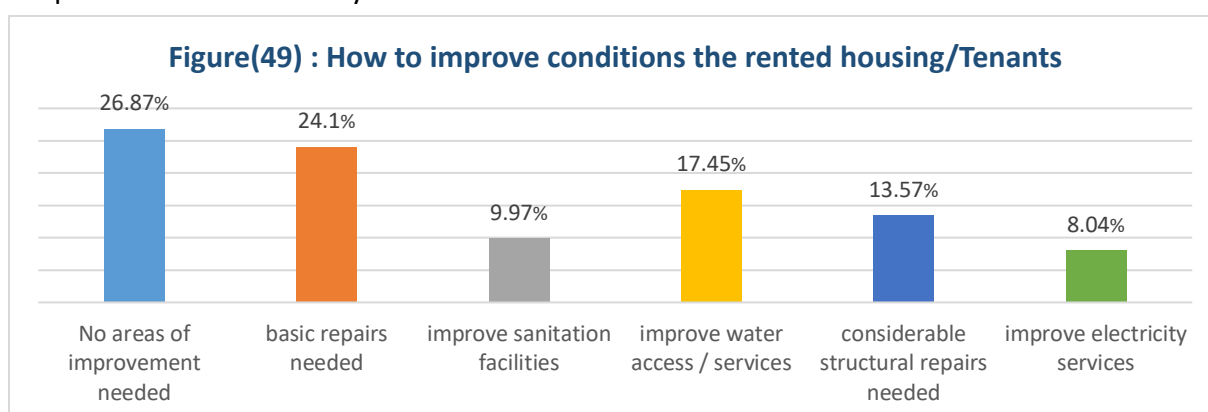
4.8 Total of income of tenants and their families

The results of the tenants’ sample analysis show that the collective income of partners of a housing (working members in the household) averages at 62,500 YER. As previously mentioned the average rent is (16,625 YER) in addition to the basic services (5,700YER), this means almost a quarter of the income goes to rent and basic services the rest of the income is not sufficient to sustain a good living. These results reflects the extent of the humanitarian and economic struggle that tenants are enduring especially because 49.6% of them are IDP’s as shown in figure (5).

5 Housing Improvement and Accessing Assistance

5.1 Housing Improvement

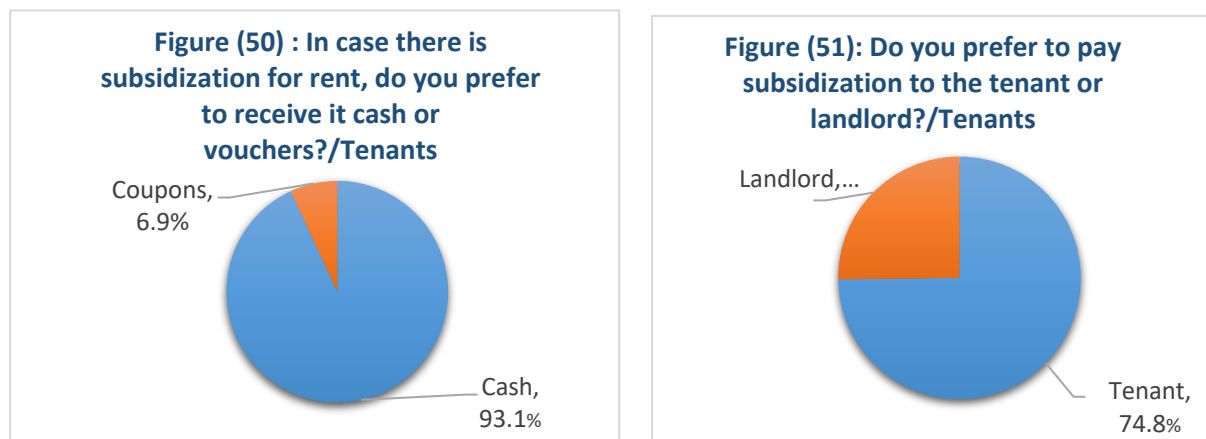
Figure (49) shows that 26.87% of the tenants’ sample said that there is no need for improvement for the rented housing that they are living in. 24.1% said that the housing need basic repairs to become suitable for living, 17.45% of tenants stated that improvement of water services is their priority, 13.57% said that the housing need considerable repairs and renovations, 9.97% required improvement in sanitation services, , and 8.04% required improvement in electricity services.



5.2 Accessing Assistance

The results of the tenants' sample analysis show that 93.1% of tenants prefer to receive rental assistance if available in cash, and 6.9% of tenants said through vouchers/coupons Figure (50).

In regards to rent assistance, Figure (51) indicates that 25.2% of tenants prefer rents to be paid directly to the landlord, whereas 74.8% preferred it to be paid to the tenant.



6 Taking Advantage and Participating in Support Programs:

6.1 Show property documents:

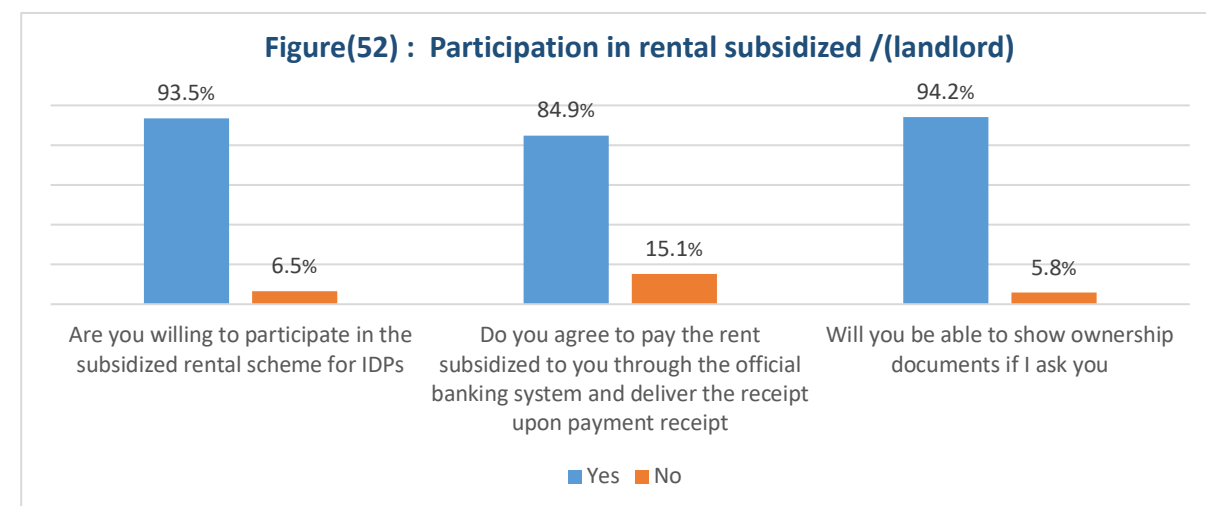
Figure (52) shows the results of the landlords' analysis study regarding rental payment assistance for IDPs. In regards to showing legal property documents, study shows that 94.2% of landlords are willing to show housing ownership documents, whereas 5.8% are not willing to do so.

6.2 Method of Receiving Rental Funds

When it comes to methods of receiving rental funds, 84.9% of landlords are willing to receive rent through the banking system and provide a delivery receipt, whereas 15.1% are not willing to do so (Figure 52).

6.3 Preparing for Participation

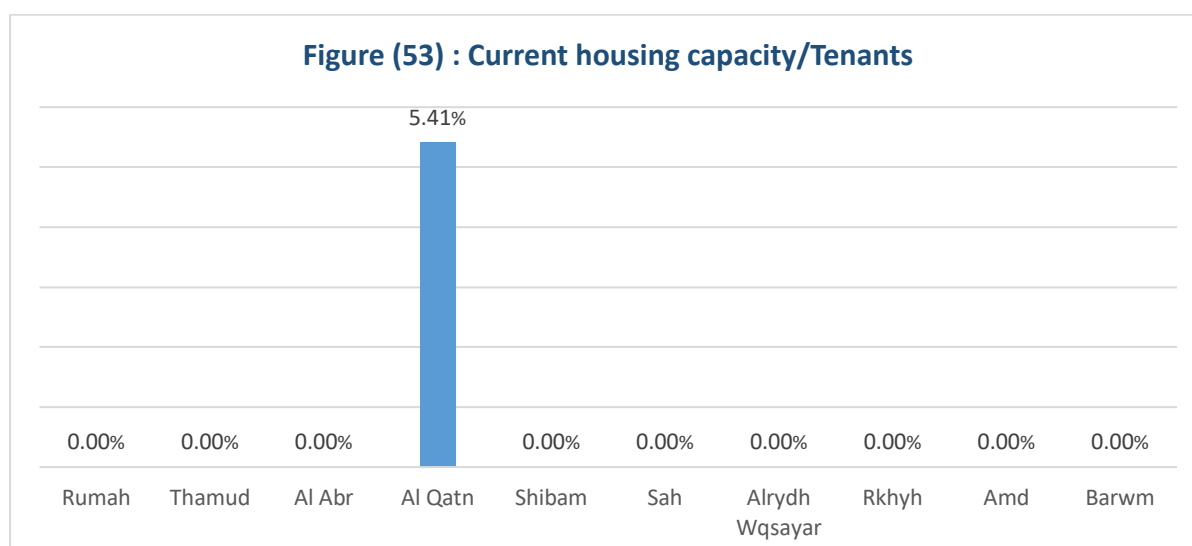
As for participation in a rental assistance program, results show that 93.5% of landlords are willing to participate in any future rental support programs for IDPs, and 6.5% are not willing to participate (Figure 52).



Section 2: Host Community Capacity Assessment

1. Rental Housing capacity and Rent Value.

The analysis reveals that the housing capacity in the Governorate of Hadramaut is limited. Study shows that landlords in Hadramaut stated that 99.19% of housing for rent are occupied, while only 0.81% are not occupied. Figure (53) shows that the current rental housing capacity is too limited in the district of Al Qatn which is 5.41%, while the other districts have no capacity at all. These results seem, to a large extent, consistent with the data extracted from the interviews of the key informant interviews that highlighted the difficulty in finding rental housing within their districts. For further information go to Annex (6).



The analysis of the data of the tenants' sample shows that the housing' rent in the Governorate of Hadramaut is 16,629 YER per month on average, which is a reasonable amount when compared to the quality and size of the rented housing.

2. Community hosting IDPs

Hadramaut is a Governorate that has witnessed an exodus of IDPs from districts from within Hadramaut as well as from several other Governorates such as: Ibb, Al-Baydha, Al-Hudaydah, Al-Dhaleh, Al-Mahweet, Taiz, Hajjah, Dhamar, Raymah, Shabwah, Sana'a, Aden, Amran, and Lahj.

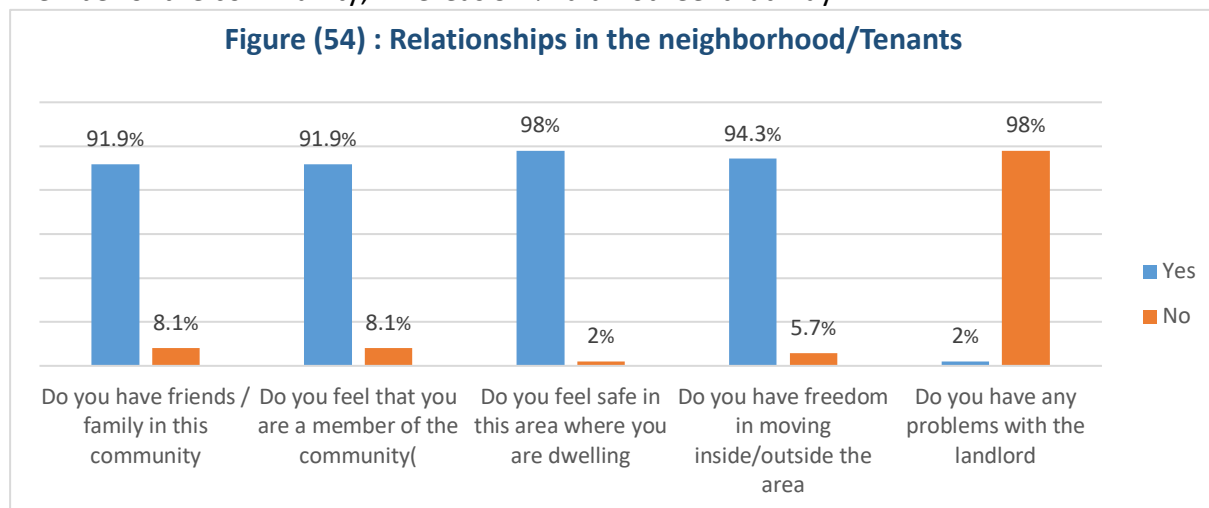
The analysis shows that the community of Hadramaut Governorate does not object to the presence of IDPs and there are no indications of violence against IDPs, which is a positive indicator. However the analysis of the KII and the FGD show that the rental market prices have increased and the availability of rental housing has decreased in spite of high demand. A participants in the FGD said: "Hosting IDPs in IDPs Hosting Camps is ok, but to host them in housing is not possible because we are a conservative society", another participants said: "If the IDP is a relative, he/she will be hosted in our housing, but it is very difficult to host a stranger in our homes".

The participants have also indicated other issues about the implications of the presence of IDPs in the hosting community. They complained about the lack of access to schools especially for girls due to the far distant from housing to schools, children and women, disease that have spread out, and job opportunities that have become less because IDPs' labor is cheaper.

The assessment reveals that the housing capacity in the Governorate of Hadramaut is too limited. The type and size of housing for rent are small to medium in size. The housing available for rent in the Governorate, which has received many IDPs over the last three years from different nearby Governorates, seem to be mostly rented out. The community, in terms of willingness to receive more IDPs, seems to be willing to receive IDPs with social relations. So far, the housing market does not seem to be responding quickly to the high demand.

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

The tenants’ sample analysis study (Figure 54) shows that 91.9% of tenants have friends and families inhabiting the area where they live, and 8.1% do not have friends or relatives in the same area. As for being part of the community, 91.9% of tenants stated that they feel as a member of the community, whereas 9.1% did not feel that way.

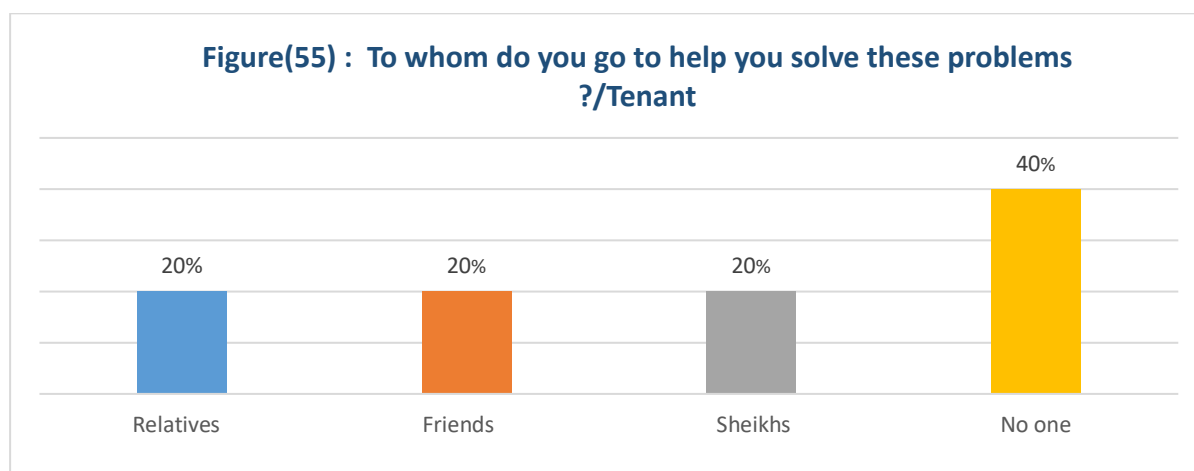


3.1 Feeling Safe and Freedom of Movement in the Neighborhood

The study shows that 98% of tenants said that they felt safe in the neighborhood where they live, while 2% of tenants did not feel safe. As for freedom of movement inside and outside the area, 94.3% stated that they had no problems, whereas 5.7% said that they did not have freedom of movement (figure. 54).

3.2 Tenants / IDPs Relationship with Landlords

In regards to tenants / IDPs relationship with the landlords (Figure 54), 98% did not have any problems with their landlords, while 2% reported that they do have problems with their landlords. As for settling problems with landlords, figure (55) shows that tenants go to: their friends 20%, Sheikhs 20%, relatives 20%, and no one 40%.



3. Community Based Organizations.

CBOs working in Hadramaut 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 Al- Hudaydah Governorate shows the availability of (11) 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 Hadramaut. The study's consultant was able to gather full data on NFI/shelter suppliers (full data is attached- Annex (4). Few districts lack sufficient number of suppliers, therefore, information on substitute suppliers from nearby districts was given.

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 11 districts of Hadramaut 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 Hadramaut, which can be summarized in the following points:

- Since the outbreak of the war, the Governorate of Hadramaut has witnessed an exodus of IDPs from districts from within Hadramaut as well as from several other Governorates such as: Ibb, Al-Baydha, Al-Hudaydah, Al-Dhaleh, Al-Mahweet, Taiz, Hajjah, Dhamar, Raymah, Shabwah, Sana'a, Aden, Amran, and Lahj.
- The Governorate of Hadramaut is considered one of the most important Governorates where IDPs seek refuge because it is regarded as a safe and stable area, and also due to its geographical proximity to most of the major areas of conflict.
- Table (1) clarifies how most tenants' family members of the targeted districts fall between the following two age group categories: more than 18 years to 55 years 39.99%, and more than 5 years to 18 years 36.43%. Followed by the category of children under five years 20% and more than 55 years 3.56%. The study also showed that family members of the tenants' sample are females 47.23%, and males 52.77%. These statistics reveal the magnitude of the suffering endured by the greater part of the tenants' households which are children and women, especially for IDPs families.
- The results of the tenants' data analysis indicate that 70.7% of tenants have rental agreements with oral contracts, 20.7% are written agreements but not legalized, and 8.51% are legal agreements. This reflects that most of the rental agreements in the Governorate of Hadramaut are informal agreements.
- The analysis of the tenants' sample data shows that the housing' rent in the Governorate of Hadramaut is 16,626 YER per month on average, which is a reasonable amount when compared to the quality and size of the rented housing. The study also shows that a tenant pays an additional 5,727 YER on average for basic services, this number is subject to market prices fluctuation, especially water and fuel.
- The results show that there is a possibility of increase in rent by 20% - 90% in the coming months, which is a relatively reasonable percent when compared to the prices of commodities and other services that have went up by 300%.
- Results from the landlords' sample analysis show that 43.33% of the housing managed by landlords were in acceptable conditions and only needed minor repairs, 47.78% of the housing were in good conditions and did not require any maintenance, and 08.89% were in bad conditions and needed maintenance and repairs.

- As for the tenants' analysis in regards to housing' improvement, study shows that 17.45% of tenants stated that improvement of water services is their priority, 24.1% said that the housing need basic repairs to become suitable for living, 26.87% said that there is no need for improvement, 9.97% required improvement in sanitation services, 13.57% said that the housing need considerable repairs and renovations, and 8.04% other.
- The tenants' sample analysis study shows that 91.9% of tenants have friends and relatives inhabiting the area where they live, and 8.1% do not have friends or relatives in the same neighborhood. As for being part of the community, 91.9% of tenants stated that they feel as a members of the community, whereas 9.1% said that they did not feel that way.
- Study also shows that the urgent type of assistance that most IDPs need is support in: rent payment, services, and housing' repairs and maintenance, especial when the head of the IDPs family is women.
- In regards to participation in rental payment programs, results show that 93.5% of landlords are willing to participate in any future rental support program for IDPs, 94.2% of landlords are willing to show housing ownership documents, and 84.9% of landlords are willing to receive rent through the banking system and provide a delivery receipt.

Summary of Assessment:

Districts	Number of presence CBO's	Supplier				Financial Points	Average Rent Rate
		Household items	Furniture	Cloths	Shelter wood		
Al Abr	0	5	4	7	2	2	13980
Al Qatn	6	6	6	6	7	3	8500
Alrydh Wqsayar	5	0	1	2	2	1	16640
Amd	1	2	3	7	6	1	12920
Barwm	2	3	4	3	5	0	12120
Hajr	3	0	0	0	0	1	11000
Rkhyh	1	1	1	2	2	1	12500
Rumah	1	5	6	5	6	1	19430
Sah	6	6	6	6	5	0	12000
Shibam	6	5	5	5	5	0	22800
Thamud	1	9	7	7	5	1	20083

Annexes:

Annex (1): Assessment Maps

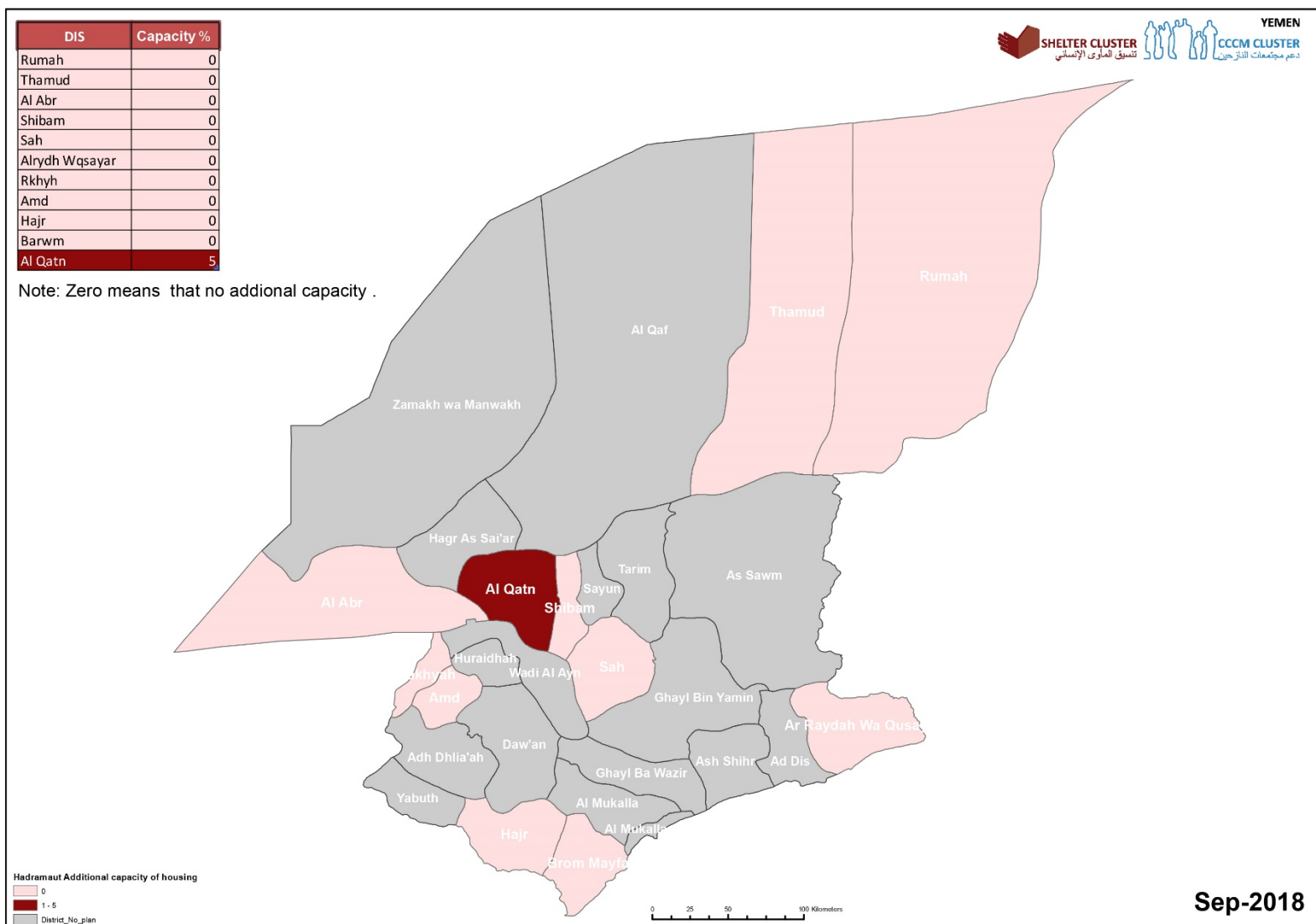
Annex (2): Community Based Organizations

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

Annex (4): Voucher Based suppliers.

Annex (5): Local Authorities

Annex (6): Housing capacity Map



Index

Section 1: CBOs

Activities provided by CBOs:

Relief, 249-250, 262, 267, 271, 276
Development, 251-254, 256, 265-266, 268-270, 272, 274, 277, 279
Charity, 264
Health - Education, 263
Education, 258, 275
Relief health development, 259
Development- Relief, 255, 257, 273, 278
Health –Development charity Relief, 261
Health- development Charity Relief Education, 280
Health- Education-Relief -Development, 262

Validity of license

Not valid, 249-250, 253, 256, 267, 272, 275, 279
Valid, 251-252, 254-261, 263-264, 266, 268, 270-271, 273-274, 277-278, 280

Bank Accounts

Available: 249-251, 253-259, 261, 263-264, 266, 268-280
Not Available: 252, 260, 262, 265, 267

Section 2: Exchangers and remittance agents.

Al-Amal Bank

Al-Kuraimi Exchanger

Section 3: Voucher Based suppliers.

Type of Goods are provided by Vendors:

Cloths, 1546,1548,1558,1559,1561,1576,1580,1582,1585-1587,1589-1591,1594-1600,
1604-1606,1611,1612,1622-1625,1631,1632,1634,1636,1637,1639,1642-1644,1646,1650,
1657,1670,1679,1680,1682,1684,1686-1688
Furniture, 1547,1551,1560,1563,1564,1566,1569,1572-1574,1579,1609,1611,1613,1615,
1617-1619,1621,1633,1634,1636,1639,1640,1649,1653,1653,1656,1657,1663,
1665-1669,1671,1677,1680,1682,1684,1690,1694,1695
Shelter materials , 1549,1550,1552,1554-1556,1565,1567,1568,1577-1579,1588,
1591-1593,1607,1614,1616,1620,1630,1635,1641,1645,1547,1655,1659-1662,1664,
1673-1676,1678,1681,1683,1689,1691-1693
Household items , 1553,1557,1562,1575,1578,1579,1581,1583,1584,1588,1591,1593,1600-
1603,
1605,1608,1610,1611,1613,1616,1618,1626-1630,1634,1635,1638,1639,1648,1651,1652,
1657,1658,1672,1685-1688

Previous experience in voucher program:

Available: 1562,1563,1571,1585,1596,1607,1629,1667,1677
Not Available: 1546-1561,1564-1570,1572-1584,1586-1595,1597-1606,1608-1628,
1630-1666,1668-1676,1678-1695

Willingness to respond in emergency:

Willing: 1546-1601,1603-1607,1609-1616,1618,1621,1622,1624-1663,1665,1666,
1668-1695

Not willing: 1602,1608,1617,1619,1620,1623,1664,1667