

Rapid Assessment of Gaza's Latest North-South Movement Dynamics

November 2025 | occupied Palestinian territory (oPt)

Key Findings

- **Families returning to the north are primarily motivated by untenable conditions in the south**, particularly the lack of shelter (82% of KIs). They are also driven by **strong emotional and social factors** such as land attachment (75%), shelter availability in the north (80%), and family reunification (39%). Economic opportunity and **service-related reasons remain secondary** for these returnees.
- **Those families who remain in the south are influenced primarily by access and stability.** Displaced northerners continue to stay where shelter (80% of KIs), basic services (52%), and humanitarian aid (42%) are available, with market access (13%) playing only a limited role. For these families, **the south offers relative stability compared to the unreliable infrastructure and volatile dynamics in the north.**
- **Future movement depends on recovery progress in the north.** Key informants identified adequate housing (85%), restoration of services (82%), and improved security (59%) as prerequisites for further returns. Until these conditions are met, most displaced families are likely to remain in the south highlighting the **need for simultaneous recovery efforts in the north and sustained humanitarian support in the south.**

Assessment Overview

Between the ceasefire on 10 October 2025 and early November 2025, over 470,000 movements from south to north have been recorded by the Site Management Cluster¹ as people who had fled Gaza City and North Gaza return despite extensive damage to housing, markets, and infrastructure. This assessment aims to contextualize these rapid shifts in displacement and return patterns observed since the ceasefire. It seeks to identify drivers of return and continued displacement and assess current living conditions in both northern and southern governorates. In doing so, the findings offer both a situational snapshot of current needs and a reference point for anticipating where vulnerability may concentrate as recovery efforts unfold.

To capture these trends, a rapid phone-based assessment was conducted on 29 October 2025. A total of **290 key informants (KIs) from 35 neighborhoods across the Gaza Strip** were interviewed using a structured survey tool covering **population movements, shelter and infrastructure/service conditions, and priority humanitarian needs**. KIs covered multiple sectors, including WASH, health, food security, and shelter, providing a cross-sectional understanding at the neighborhood level. The percentages provided in this brief reflect proportions of KI responses. Findings from KI interviews cannot be considered representative of household perceptions and the perspectives of some marginalized groups may be missed.

Return Trends and Drivers

The findings of the rapid assessment indicate that population movement back to Gaza and North Gaza governorates, hereafter referred to as the north, accelerated notably following the ceasefire. However, a considerable number of displaced people from these areas still remain in Khan Younis, Deir al-Balah, and to a much lesser extent in Rafah, hereafter referred to as the south, expressing apprehension to return for various reasons.

Figures 1 and 2 summarize the main reported drivers influencing displaced people's decisions to return to the north. Pull factors such as reuniting with family, availability of shelter (including accommodation with relatives), and land attachment indicate that **returns are driven more by emotional and social ties than by material recovery or restored functionality of basic infrastructure**. Land attachments further underscore a trend of strong place-based identity, with nearly all respondents (10 of 11) from older established neighborhoods like An-Naser citing "land attachment" as a key pull factor.

Figure 1: Main reasons for leaving the south (push factors) by percentage of key informants (n=142)

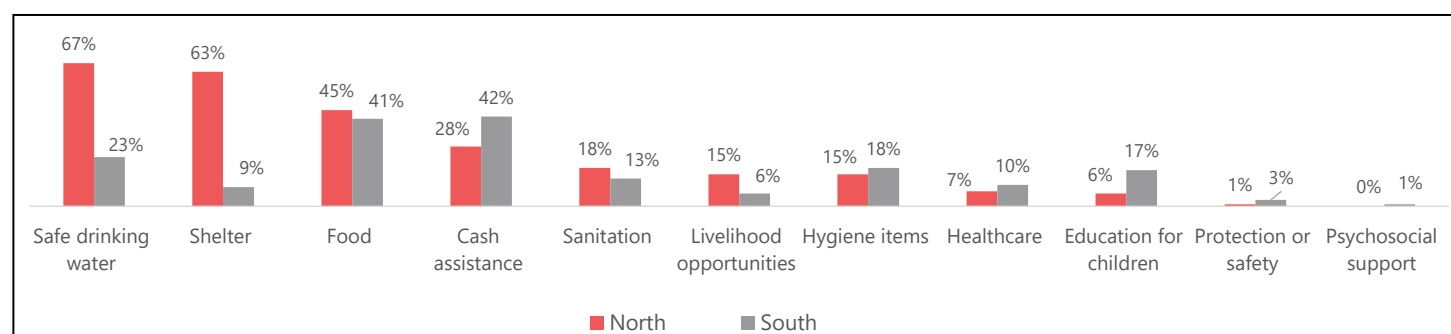
No shelter available or unsustainable shelter in the South	82%
No livelihood opportunities in the South	21%
No access to markets/no money to afford items in the South	15%
No access to humanitarian aid in the South	14%
No access to basic services in the South	11%

Figure 2: Main reasons for returning to the north (pull factors) by percentage of key informants (n=142)

Shelter availability	80%
Attachment to land	75%
Reuniting with family who stayed in the North	39%
Livelihood opportunities in the North	13%
Access to markets in the North	11%
Access to humanitarian aid in the North	11%
Access to basic services in the North	9%

¹ Population Movement Monitoring Flash Update, Site Management Cluster, 22-25 October 2025

Figure 3: Priority unmet humanitarian needs by percentage of key informants (n=142 north, n=158 south)



Conditions in the North

Returnees in Gaza City and North Gaza are living in extremely difficult conditions **marked by unsafe shelter and limited access to essential services**. Only 1% of KIs in the north (one KI from As Sabra and another from Tal el Hawa) reported that a majority of returnees in their neighbourhood were residing in undamaged housing. By contrast, **13% of KIs cited damaged homes, and nearly half (46%) indicated tents as the predominant shelter type. Another 24% reported that the majority of returnees in their neighborhoods continued to rely on collective or public shelters.** In Jabalya Camp, 3 of 3 respondents said most returnees live in damaged houses or tents, well above the area average. Neighborhoods where returnees are predominantly living in collective or public shelters were overrepresented in the coastal zones.

KIs in the north also shed light on the severity of unmet needs (Figure 3): **safe drinking water (67%), shelter (63%), and food (45%) were the most frequently cited unmet needs among returnees.** To meet basic needs, 47% of KIs said families primarily rely on markets, 38% reported primary reliance on humanitarian aid, and 17% reported dependence on community or family support.

Within the north, service functionality remains limited and uneven across neighborhoods. Approximately 52% of KIs in Gaza and North Gaza reported an operational medical facility in their neighbourhood. Running water was reported as being available by 48% of KIs, but sanitation, electricity, and fuel appeared nearly absent. Of the 17 neighborhoods assessed in the north, **functioning waste collection or sanitation systems were only reported in five neighbourhoods (Ad Darraj, An Nasser, Northern Remal, Southern Remal, and Tal el Hawa) and the availability of fuel for generators, vehicles, or services was only reported in three (Ad Darraj, Northern Remal, and Southern Remal).**

Overall, **the data suggests a fragile environment in the north where families are coming back to destroyed infrastructure and inadequate services**, with isolated signs of limited recovery in a few neighborhoods such as Tal el Hawa, Ad Darraj, and Northern and Southern Remal.

Conditions in the South

In the southern governorates, **many displaced families from the north continue to reside in precarious conditions**, though overall population pressure has likely eased since the wave of returns to the north.

Shelter conditions remain highly unstable. KIs reported that a **majority of displaced people lived in makeshift shelters across the following 10 assessed neighborhoods in the south: Al Bassa, Al Birkeh, Al Hikr, Al Mawasi, Al Mawasi East, Al Qarara, An Nuseirat, Deir al-Balah East, Dear al-Balah South, and Rafah Camp.** Only KIs from Al Amal (Khan Younis), Al Mawasi, and Khan Younis Camp reported damaged or undamaged buildings as a primary shelter type for some displaced families in the south.

Displaced people from the north were reported to have remained in the south mainly because of access to shelter (80% of KIs) and continued access to basic services (52%), humanitarian aid (42%), and livelihood opportunities (42%). **However, this did not always align with actual shelter types reported, as even areas dominated by tents or makeshift structures appeared to attract households on the basis of 'shelter availability,' suggesting that any form of shelter, however basic, was preferable to the limited options in the north.**

Among the 18 assessed neighbourhoods in the south, KIs from Al Mawasi (including Al Mawasi East) and An Nuseirat (including An Nuseirat Camp) were most likely to mention access to humanitarian aid as a reason displaced people were staying. An Nuseirat also stood out for reportedly better market access compared to other southern neighbourhoods.

Taken together, the data show that **conditions in the south remain fragile, shaped by temporary shelter solutions, persistent reliance on humanitarian aid, and limited livelihood and market recovery.** Neighborhood disparities, particularly between seemingly better-served areas such as An Nuseirat and Al Mawasi, highlight some **unevenness in recovery** even as critical service and infrastructure gaps continue to affect virtually all neighborhoods.

Future Projections

Looking forward, **most KIs expect the pace of movement to the north to slow considerably in the coming weeks.** Nearly half (47%) of KIs in the south anticipate fewer people will return to the north, and another 32% believe that no one else will leave for the north from their current location in the south. Only 15% expect more people to move north, while 3% foresee some returnees coming back south. These findings suggest an emerging stabilization in movement patterns, with many families having already decided whether to stay or move.

When asked what would be required for more people to move back north, KIs overwhelmingly cited availability of adequate housing or shelter (85%), restoration of basic services such as water, health, electricity, and communications (82%), and improved security and safety (59%). Only a small proportion of KIs pointed to reliable humanitarian aid access (13%), livelihood opportunities (9%), or freedom of movement and market access (9%) as determining factors for return.

In summary, while some movement northward is likely to continue, particularly among families with salvageable homes or strong remaining family ties in Gaza and North Gaza, the majority of displaced people in the south are likely to remain absent a major shift in current circumstances. **Without meaningful progress in restoring safety, services, and housing infrastructure in the north, large-scale additional returns are improbable, and those who have already moved back may be at risk of renewed displacement if conditions fail to improve.**

Limitations

The findings presented in this assessment should be interpreted with consideration of certain methodological and contextual limitations inherent to the rapid data collection process. Findings from KI interviews cannot be considered representative of household perceptions and the perspectives of some marginalized groups may be missed.

Additionally, the assessment was conducted soon after the ceasefire, under conditions of ongoing population movement and constrained communication networks. As a result, the information gathered represents a snapshot of a highly dynamic situation, and some conditions may have evolved rapidly since data collection. Finally, although sampling ensured broad geographic coverage across all five governorates, the number of respondents in some neighborhoods was limited (see Table 1). This makes neighborhood-level findings indicative rather than representative. In addition, variation in the sectoral composition of key informants (particularly between areas with differing humanitarian access) may have influenced how certain needs or service gaps were reported.

Table 1: Number of KIs by Neighborhood

Assessed Neighborhood	# of Key Informants (n)
<i>North Gaza Governorate</i>	
Al Attarta and As Siafa	2
Ibad ar-Rahman	1
Jabalya Camp	3
Jabalya el-Balad	1
Tal Az Zaatar	1
<i>Gaza Governorate</i>	
Ad Darraj	18
An Naser	11
As Sabra	7
Ash Shati Camp	1
Ash Sheikh Radwan	8
Ash Shujaiyeh Ijdeedeh	4
At Tuffah	2
Az Zaitoun	10
Gaza Old City	3
Northern Remal	32
Southern Remal	20
Tal el Hawa	18
<i>Deir al-Balah Governorate</i>	
Al Bassa	13
Al Birkeh	9
Al Hikr	13
Al Maghazi	7
An Nuseirat	11
An Nuseirat Camp	1
Ar Rahmeh	3
Deir al-Balah East	4
Deir al-Balah South	8
<i>Khan Younis</i>	
Al Mawasi	64
Al Qarara	9
An Naser	1
Khan Younis Camp	2
Al Amal	7
<i>Rafah</i>	
Al Mawasi East	1
Rafah al-Gharbieh	2
Rafah Camp	2
Tall as Sultan West	1