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Hanok Industrial Trend 2013

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### **1. Introduction**

The national and local governments have been enforcing various Hanok-related policies in response to a recent increase of social interest in Hanok. A number of programs are currently under progress in order to establish an institutional framework, develop relevant techniques, and construct buildings for preserving and promoting Hanok. However, there is a lack of base data regarding the current Hanok-related businesses and market that can be used for establishing policies to vitalize Hanok.

For this reason, the major goal of this study is to provide information of Hanok construction industry as a base data for policy establishment. This report includes the current trends in Hanok-related policies and Hanok industry, a study on awareness of Hanok and the characteristics of Hanok demand, and implementation and management of the database of Hanok construction industry.

### **2. Current trend in Hanok construction policy**

This chapter describes the current trend in Hanok construction

policy. Most of policies for Hanok vitalization are being enforced by the national government. In particular, Ministry of Land, Infrastructure and Transport has been operating the “Program supporting Hanok construction of local governments” to recreate Hanok modernity through supplying and expanding Hanok buildings, which has supported 3.45 billion KRW to 22 areas for six years. The ministry also has been operating “R&D program for Hanok technique development” since 2008, supplying and expanding Hanok with reduced building costs. Ministry of Culture, Sports and Tourism recognizes Hanok as tourism resources. Although Ministry of Agriculture, Food and Rural Affairs does not have any program to directly supply and vitalize Hanok, the ministry has indirectly support Hanok through programs such as improvement of houses in rural areas and comprehensive development of farm villages. Ministry of Security and Public Administration has supported Hanok-related programs such as “Program for well-being towns” in order to suggest a vision for 21st-century Korean farm villages with well-preserved traditional culture and natural environment.

### **3. Current trend in Hanok construction industry**

This section identifies the definition and scope of the target of the present study, Hanok construction industry, and estimates its market size. We used two methods for the estimation. First, we analyzed the amount of order of traditional buildings from construction industry investigation of Statistics Korea. As a result, the market size of Hanok construction industry is estimated as 54.2 billion KRW in average for the past four years (2008-2011). Note that this estimation has a limitation as the investigation of Statistics of Korea does not include construction by the government, public institutions, and business owners without a license.

In order to overcome the limitation, we estimated the market size in another way where the current licensing and pricing of Hanok buildings are analyzed. Among all the buildings that were licensed from 2007 to 2010, we counted the number of buildings that are thought to be Hanok from analysis of aerial photographs and road views. The number of the candidate Hanok buildings is 6,133 for four years, that is, 1,533 per year in average (new 789 and reconstructed 735), implying that the market size of Hanok construction is very small. In contrast, the Hanok market is relatively stable compared to the construction markets of wooden houses or all types of houses, as can be seen in the fact that the number of built Hanok is 1,566 (2007), 1,379 (2008), 1,585 (2009), and 1,603 (2010).

We also discuss implementation and management of a database of Hanok construction companies that can be used for matching consumers to suppliers or as base data for policies and programs for vitalizing Hanok construction industry. As the current system of industry categorization does not have a particular area of Hanok, it was not feasible to use present industry lists such as USICON. Therefore, the present study implemented the database by investigating Hanok-related national and local institutions, companies listed in the relevant academic societies and associations, and companies that joined various construction-related conferences. We developed an input system for implementing the database. The category of company was based on main components of Hanok in order to facilitate potential matching of supplier and consumer. Major company information of the database includes the overview, main products, product introduction, and representative pictures so that it is easy for consumers to realize the companies. In consequence, the database has information of about 500 Hanok construction companies.

For better maintenance and management of this database, we need to match Hanok-related suppliers to potential Hanok consumers and

upgrade it to a system where suppliers can share information of Hanok techniques and construction materials through multi-directional communication. In other words, we need to develop a system that enables Hanok-related users actively share their information obtained by construction activity with other users, rather than implementing information collector-oriented database or providing information in one-way manner.

#### **4. Characteristics of Hanok demand**

This chapter describes results of the questionnaire-based studies on awareness and demand characteristics of Hanok which are conducted nationwide every two years. The studies were performed on 1,100 persons (male and female; age between 30 and 69) that were randomly sampled from the pre-assigned pools based on the gender and age for 15 metropolitan cities in Korea. The result shows that people first come up with exterior components such as the tiled roof or garden when hearing the word ‘Hanok’, with associating tradition-related positive images and psychological stability through childhood memories such as the ‘old days’, ‘country house’ and ‘hometown feeling’.

Along with this positive perception, the result shows that most answerers have a good feeling about Hanok in recent years and the degree of good feeling was even higher when the answerer lived in a Hanok building or had cultural experience of Hanok. Modernized Hanok is understood as a building with a tiled roof on a wooden structure despite of a partially reformed modern space, with a tiled roof and the wooden structure being essential for Hanok even though the interior can be modernized. It also turns out that Hanok’s environment friendliness and features for healthy life are highly appreciated. Answerers with experience of living in Hanok particularly appreciate various utility of Hanok’s exterior spaces as the advantage of Hanok. Meanwhile, drawbacks of

Hanok include high building price and difficulties in management, and answerers without experience of living in Hanok exhibited larger concern on such drawbacks.

## **5. Lessons from the present study**

Chapter 5 suggests a means to vitalize Hanok construction industry, based on analysis of Hanok-related policies, the current trend in the industry, people's awareness and demand characteristics, and the database of Hanok construction companies.

Answerers with direct experience of Hanok exhibited higher preference on Hanok, lower awareness of Hanok's drawbacks, and smaller concern on living in Hanok. Although the government has encouraged direct experiences such as accommodation in Hanok, experiences in usual life may be more needed for further increasing the opportunity of direct and effective experience of Hanok. One of the ways to achieve this purpose can be to construct public offices and culture centers (e.g., dong office, kindergarten, and library) as Hanok so that many people can obtain direct experience of using Hanok.

The result of the present study also shows that people living in Hanok prefer individual custom building rather than a lot-solid building. However, such custom building increases the construction cost. Such high price turns out to be the most significant factor of making people hesitate buying Hanok. Therefore, we need to find a way to reduce the construction cost through modulation of Hanok as well as satisfying the needs of individual custom building. Finally, the present study suggests a way for Hanok consumers to utilize the database of Hanok construction companies. Hanok construction industry could be prospered by matching suppliers to consumers in an exemplary way by which (i) a consumer can

select an area of living or to live; (ii) the consumer can identify his/her objectives such as newly building, reconstruction, or repair; and then (iii) the consumer can obtain information of companies for each construction component.

**Key Words : Han-Ok(Korean Traditional House), Han-Ok Industry, Han-Ok Industry Database, Han-Ok Company Database**