

건축도시공간연구소
공간문화정책연구본부
국가한옥센터

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1. 출장 개요

- ☐ 출장유형 : 국제세미나 등 행사 참석 업무수행
- ☐ 출장기간 : 2014. 10. 14.(화) ~ 10. 17.(금) , 3박 4일
- ☐ 출장도시 : 중국 항주(China, Hangzhou)
- ☐ 출자인원 : 신치후 부연구위원

2. 출장 목적

- ☐ The 10th International Symposium on Architectural Interchanges in Asia (ISAIA) – Cultural Elements in Architectural Advancement – 참석

※ The International Symposium on Architectural Interchanges in Asia (ISAIA)는 대한건축학회, 중국건축학회, 일본건축학회 3단체가 격년마다 공동 주최하는 국제심포지엄으로 올해는 중국건축학회의 주관으로 Cultural Elements in Architectural Advancement이라는 주제로 중국 항주에서 행사가 진행

3. 세부일정

일 자	현지시간	일 정
10월14일 (화)	12:40	인천공항 출국
	14:00	중국 항주공항 입국
	14:00	항주공항 - 숙소 이동
	15:00	체크인
	16:00	숙소 - 심포지엄 장소이동
	16:30	등록
10월15일 (수)	16:30	심포지엄장소 - 숙소 이동
	18:00	
	08:30	숙소 - 심포지엄장소 이동
	09:00	
	09:00	Opening Ceremony and Keynote Speeches 참석
	21:00	Special Sessions 참석
10월15일 (수)	21:00	심포지엄장소 - 숙소 이동
	21:30	

일 자	현지시간	일 정
10월16일 (목)	08:30 09:00	숙소 - 심포지엄장소 이동
	09:00 19:00	Academic Session 참석 및 발표 토론
	19:30 20:00	심포지엄장소 - 숙소 이동
10월17일 (금)	08:30 09:00	숙소 - 심포지엄장소 이동
	09:00 14:00	Xiangshan campus of China Academy of Art 등 건축명소 탐방
	14:00 15:00	심포지엄장소 - 항주공항 이동
	15:00 18:10	중국 항주공항 출국 인천공항 입국

4. 출장 성과

- ☐ 직원역량증진 강화를 위한 국제심포지엄 참석
- ☐ The International Symposium on Architectural Interchanges in Asia (ISAIA)는 아시아 10여 개국의 건축 관련 교수·엔지니어·연구원·대학원생 등이 전공분야별로 연구된 논문을 발표하고 정보를 공유하는 학술의 장으로 국가한옥센터에서 진행되는 연구와 관련된 이슈를 교류
- ☐ 2012년도에 수행한 “수요창출에 기반한 한옥시장 활성화를 위한 정책방향 연구”의 내용을 바탕으로 우리나라 전통주거인 한옥 보급을 확대하기 위한 사업실행과 정책방향과 관련된 내용을 소개하고 각국의 전통 및 주거분야 전문가들과 전통주거 확산 이슈 및 지식 교류

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A Study on the policy of Revitalizing Hanok Market According to Socio-Demographic Change

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Abstract

The general public interest on Hanok in Korea is recently increased. As a result, both central and local governments have provided legislative and institutional support. This study develops its stance away from the previous supply-oriented perspective to encompass a demand inducing policy direction, and by understanding the particular characteristics of the demands and supplies of Hanok, propose policy directions to enliven the Hanok market.

To discuss the revitalization of the Hanok market, the demand for Hanok was discussed based on the analysis of changing patterns in population structure and housing markets. Additionally, statistics regarding the construction industry and housing stocks by type were analyzed, together with statistics on timber houses in order to estimate growth possibilities of the Hanok market.

This study proposed 'the promotion of a self-sustaining Hanok market' as its main policy objective, and presented policy directions as 'generating demand for Hanok' and 'creating a stable supply market'.

(Hanok is a traditional house type of Korean architecture)

Keywords: Hanok Market; demand generation for Hanok; market policy direction

1 Introduction

In recent years the demand for diverse housing types and amenities and the awareness of environmental values have culminated into an increased interest in Hanok. As a result, both central and local governments have provided legislative and institutional support, allocating funds for relevant projects. And They concentrated research efforts on the development of construction technologies in order to promote the use of Hanok. However, despite such efforts, the discussions of promoting Hanok have primarily focused on the available stocks of Hanok and then policies focused on increasing the Hanok production. This pointed out the limitation of such approach in creating an effective link between the demands and supplies of Hanok. Therefore, generating real demand for Hanok is of foremost importance in sustaining Hanok as a viable housing option. Consequently the support of a rational model of

supply and self-sustainability of the Hanok market is essential. Thus, this study develops its stance away from the previous supply-oriented perspective to encompass a demand inducing policy direction. And by understanding the particular attributes of the demands and supplies of Hanok, propose policy directions to enliven the Hanok market.

2 Subject and Statistical Analysis

To discuss the revitalization of Hanok market, the demand for Hanok was discussed based on the analysis of changing patterns in population structure and housing markets. Additionally, statistics regarding the construction industry and housing stocks by type were analyzed, together with statistics on timber houses in order to estimate growth possibilities of the Hanok market. Through such investigation the policy direction for enlivening the Hanok market were presented.

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2.1 Subject of policy

This study does not recommend to sustain the Hanok market by relying on conservation of traditional Hanok (which consists of the majority of current Hanok stocks) or by maintaining modern Hanoks. Rather in order to instigate a sizeable Hanok market, policies need to introduce a new model of Hanok which suits current lifestyles and enable mass-production of Hanok to a certain extent.



Fig.1 Traditional Hanok



Fig.2 Modern Hanok



Fig.3 Contemporary Hanok

2.2 Socio-Demographic Change

Detailed and multi-dimensional approach for changing demands in housing is required, and the long-term diverse housing policies need to be developed to accommodate various income levels, age, and social class. Such policies are also required to address the fluctuating housing demands according to different building life cycles.

Based on the demographics of Korea and its quickly aging society since 2000, there needs to be acknowledgement that the future housing market is likely to be led by middle-aged and senior members of society, especially baby-boomers. Senior members, in particular, are considered to become one of the main potential tenants of Hanok since they are likely to opt for 1 or 2 person housing after selling own properties and housing. In reflection of such observations, Hanok's success as a housing strategy can be approached in a senior-friendly perspective.

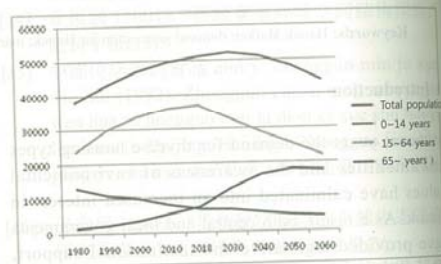


Fig.4 Ratio of the population aged 65 over

In housing type of elderly households, the case of the baby-boom generation live in apartment (50%), previous generation has the characteristic that the proportion of single-family housing is high. Development of models and techniques that can guarantee the residential convenience and qualified living performance which have been provided by co-housing and apartments is required for the Hanok market activation.

In all age groups, a feature that is displayed in the area of housing in accordance with the age, the distribution appears the highest in the 49.5-82.5 square meters almost. Percentage living in the large house of 115.5 square meters or more in a group of 55 to 65-year-old appears high. Percentage living in the small house

of 49.5 square meters or less, 115.5 square meters or more in 65 years or more appears high. The proportion of senior's large-scale housing is high, this tendency is maintained even after their retirement.

Table 1 Comparison between Hope and Available Type

	number	Hanok		Apartment	
		Hope (%)	Available In 3 years	hope	Available In 3 years
total	550	53.1	30.0	28.7	46.2
age					
30~45	188	42.6	21.8	41.0	58.5
46~55	181	56.9	28.2	28.2	45.3
56~65	181	60.2	40.3	16.6	34.3

2.3 Housing Industry

Hanok industry still account for very small portion of in entire revenues of building construction. Building construction revenues of Korea in 2007 was approximately \$158,838 million. Among them, about \$119 million(0.07%) was for revenues of Hanok. Building construction in 2010 was reduced from \$158,838 million to \$129,600 million(about 19%), and Hanok construction was also decreased from \$119million to \$113 million(about 5%).

It is possible to derive a predictable conclusion to the growth of Hanok industry. In 2008, the number of wooden buildings has reached 10,000, it should be noted that the growth of more than 20% was made up to 2005 on the basis of the number of wooden building was under construction in practice. Well to take advantage of the market of wooden architecture by focusing on point total construction market whereas recorded a negative growth continued until 2005 since 2002, the market for wooden building that continues to grow more than 20%. Of the wooden buildings in Korea over the past five years, housing is the 38,312 buildings, accounting for about 76% of the entire 50,429 buildings.

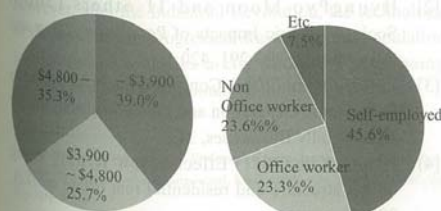


Fig.5 Monthly Income

Fig.6 Job Type

3 Characteristics of Hanok Consumer

In order to extrapolate the attributes of demand for Hanok, this study has conducted in-depth interviews with 550 surveyed potential tenants(include owner who are willing to live in a Hanok in the future. Age range is composed of 35 to 65 years old.

The general characteristic of the participant in the survey is that 61% has been investigated in middle class population more than \$ 3,900 in monthly income and it was found that the self-employed (45.6%), clerical (23.3%) workers in many cases.

Apartment among their current housing types account for 61.3%. Less than 66 square meters for their current housing space is 48.1% and around 99 square meter is 40.9%.

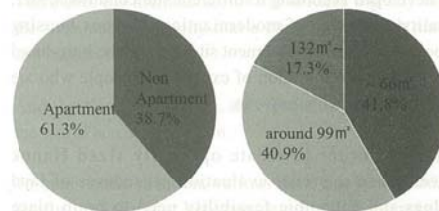


Fig.7 Housing Type

Fig.8 Area

For the hope housing in the future, Hanok is 53.1%, apartment is 28.7%. But for the types of housing that can be available within three years, apartment is 46.2%, Hanok is 28.7%. This means that Hanok is the most preferred hope housing type, but the actually available housing type is apartment.

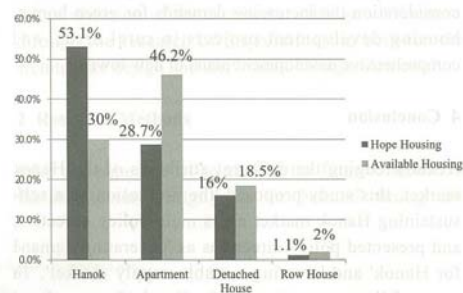


Fig.9 Hope and Available Housing Types

Based on above findings, this study presents both short and long-term policy directions for a sustained Hanok market. First, in order to promote comprehensive understanding and awareness of Hanok there needs to be a broader foundation of the cultural standing of Hanok. This can be achieved through increased opportunities of first-hand occupancy in Hanok and through a recognized platform for Hanok education and communication. There is a strong need for educational programs which provide architectural and structural information that could educate maintenance of their own Hanok for tenants.

Second, a housing market which identifies a housing not as a means of investment but as of living, and a Hanok market which effectively addresses the particular demands of potential inhabitants is required. Instead of wholly focusing on reduction of unit costs and the modernization of Hanok, various models of Hanok can be developed according to different site conditions, size, quality and level of modernization. Various housing types and Hanok development sites need to be introduced through the collaboration of experts and people who are expected to actually move in.

Third, in order to create optimally sized Hanok developments, proper evaluation procedures of land values and economic feasibility need to be in place together with improved policy support. Land alternatives such as development project areas in the suburb, green districts and forestland use permission areas can be considered as means of securing cheaper sites.

Last, Hanok policies related to new constructions not only need to align with conservation laws of existing traditional Hanoks, but also need to take into consideration the increasing demands for green homes, housing development projects in rural areas, and comprehensive development plans of new towns.

4 Conclusion

Acknowledging the different attributes of the Hanok market, this study proposed 'the promotion of a self-sustaining Hanok market as its main policy objective, and presented policy directions as 'generating demand for Hanok' and 'creating a stable supply market'. To successfully generate demand for Hanok, first, a cultural approach to Hanok needs to be established. This study suggests providing ample opportunities for first-hand

experiences and education of Hanok, promotion of Hanok as a public architectural style, and introducing empirical management opportunities for potential Hanok tenants. Second, a consumer-oriented market that reflects the needs and requirements of potential tenants needs to be encouraged through diverse legislative support. In conjunction, to achieve a stable supply market, first, regulations for Hanok related educational programs, experts, building and materials have to be installed. Second, sophistication of the Hanok industry is required through support for Hanok construction technologies, rational building material supply systems, etc. To sufficiently support previously mentioned policy directions, the government needs to first, improve housing distribution procedures based on the accurate understanding of potential tenants, and review relevant legislations. Second, the government needs to secure a basic database system of Hanok, and create a reliable Hanok trading system in order to establish grounds for further Hanok industry promotion.

Although private sector demand for Hanok is essential, for now the public needs to lead the market by increasing procurement and broadening the foundation of the Hanok industry. Public organizations such as LH (Korea Land & Housing Corporation) need to be involved in introducing models which could increase Hanok turnover.

Acknowledgement

This study is based on complement of the survey in "A Study on the Policy of Revitalizing Hanok Market through Creating Effective Demand" by Architecture & Urban Research Institute(2012).

References

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