

ORIGINAL ARTICLE

An exploratory study on the construction context and driving forces of mansion-style vernacular dwellings in the Chaoshan region

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Abstract

Vernacular dwellings are increasingly recognized not only as climate-responsive shelters but also as material expressions of social institutions, ritual order, and collective identity. Based on field surveys, semi-structured interviews, and historical document analysis, this study examines 39 representative mansion-style vernacular dwellings in the Chaoshan region of southern China. It aims to clarify how historical conditions, construction practices, and socio-cultural mechanisms interacted to shape the formation and continuity of this distinctive dwelling type. The findings show that the emergence of Chaoshan mansion-style dwellings cannot be explained by economic accumulation or aesthetic preference alone, but by the interaction of multiple social and cultural forces. First, the rise of the scholar-official stratum provided both material resources and cultural legitimacy for mansion construction. Second, lineage-based ritual institutions structured a spatial order characterized by the integration of ancestral halls and residential spaces, reinforcing hierarchy, ancestor veneration, and collective identity. Third, feng shui beliefs and local customs exerted a lasting influence on site selection, orientation, and spatial organization. These dwellings should therefore be understood not merely as residential buildings, but as material expressions of lineage organization, ritual order, and local social authority. The study contributes to a better understanding of vernacular architecture in southern China and offers a case for comparative discussions of the social meanings embedded in domestic space.

Keywords: Chaoshan region; Mansion-style vernacular dwellings; Lineage organization; Ritual spatial order

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1 Introduction

The Chaoshan region, located along the southeastern coast of China, is known for its highly developed lineage-based culture. Since the Song (960–1279) and Yuan (1271–1368) dynasties, large-scale southward migration from the Central Plains had taken place (Y. Wang, 1995; D. Zhang *et al.*, 2005; C. L. Zhang, 2013). Within a distinctive ecological

and social environment, this process gradually gave rise to a rural settlement pattern characterized by lineage-based co-residence, forming a local social structure centered on clan organizations (Q. J. Wang, 1996). The stability of this lineage-based social system not only shaped patterns of local social organization but also profoundly influenced the spatial logic and formal characteristics of vernacular dwellings (Y. D. Lu *et al.*, 1981). Chaoshan mansion-style dwellings emerged in this socio-historical context. Although they inherited features from elite residences in the Central Plains, they were reshaped by local lineage rituals, social order, and regional beliefs. From the Ming (1368–1644) and Qing (1644–1912) dynasties onward, these dwellings gradually evolved into increasingly complex compounds that integrated residential, ritual, and representational functions, becoming one of the most distinctive vernacular housing forms in the region (Kim & Park, 2017).

Previous studies on traditional Chaoshan dwellings have produced a substantial body of scholarship. Early scholarship primarily focused on architectural forms (K. F. Chen, 2001; Tang & Shen, 2015) and documentation of decorative craftsmanship (Qiao, 2019; W. Li *et al.*, 2023), providing rich field survey records (Y. D. Lu, 2007; X. Lu *et al.*, 2025; Su *et al.*, 2022) and systematically outlining typical residential layouts from the Ming dynasty through the Republican period (1912–1949) (D. Chen, 2005; J. Huang *et al.*, 2018). Subsequently, research gradually moved beyond purely formal documentation to explore the cultural meanings embedded in building materials, construction techniques, and spatial decoration (Song & Liao, 2022). These studies analyzed the lineage-based educational and moral concepts implicit in mansion-style architecture, and examined the relationship between architecture and traditional ethical order from sociological and anthropological perspectives (X. Huang & Gu, 2020; Y. H. Liu, 2004; Yang *et al.*, 2025).

At the theoretical level, the introduction of approaches such as ethnoarchaeology (N. S. Wang, 1987; Whitehouse, 1983), cultural memory theory (Assmann, 2011), and diachronic-synchronic comparative analysis (W. Q. Liu, 2024) has provided new perspectives for interpreting traditional dwellings, revealing the cultural logic embedded within architectural space. Overall, current research is transitioning from an emphasis on material form toward deeper interpretations of spatial ethics and construction mechanisms. However, the construction context and driving forces of Chaoshan mansion-style vernacular dwellings remain insufficiently examined. This limitation constrains not only a fuller understanding of the heritage value of traditional Chaoshan architecture,

but also broader discussion of how vernacular dwellings embody social institutions and remain meaningful under changing historical conditions.

Beyond its regional specificity, this study also speaks to broader international debates on vernacular architecture, the social production of domestic space, and the conservation of living heritage. Across many parts of the world, vernacular dwellings are increasingly understood not merely as climate-responsive or materially adaptive buildings, but as spatial expressions of kinship, ritual practice, collective memory, and social authority (Blier, 2006; W. Liu *et al.*, 2026). From this perspective, domestic space is not simply a physical setting for everyday life, but a socially constituted field shaped by institutional structures, cultural norms, and routine practices (Brenner & Elden, 2009; Lefebvre, 2003, 2012). Vernacular dwellings, therefore, materialize not only functional needs but also enduring social relations and symbolic meanings (Philokyprou & Michael, 2021; Rapoport, 2003). In this sense, Chaoshan mansion-style dwellings provide an important non-Western case for understanding how domestic architecture links household life, lineage organization, moral order, and wider political structures. The study contributes not only to the architectural history of southern China but also to comparative discussions on how built form embodies social institutions and how culturally rooted dwelling traditions may be interpreted and conserved under conditions of modernization.

More specifically, when considered as a form of socially produced space, previous studies have generated important insights into form and symbolic meaning, but they have paid less attention to how the scholar-official stratum, lineage institutions, and local beliefs became coupled through architectural practice in the construction of Chaoshan mansion-style vernacular dwellings. In traditional Chinese society, mansion-style dwellings were not determined solely by economic conditions or aesthetic preferences, but were closely related to the social identity of the builders and their institutional roles (Lin, 2018). In the Chaoshan region, scholar-officials entered the state governance system through the imperial examination system while remaining embedded within local lineage networks, thereby linking state institutions with local society (Yu, 2013; Zeng & Zhang, 2024). Mansion-style vernacular dwellings thus became important spatial carriers through which social status, lineage structure, and local moral order were materially articulated.

Against this background, this study takes Chaoshan mansion-style vernacular dwellings as its primary object of investigation and seeks to explain how historical conditions, construction practices, and socio-cultural mechanisms

interacted to shape the formation and continuity of this dwelling type. More specifically, it asks how the scholar-official stratum, lineage institutions, and local belief systems became intertwined through architectural practice to produce a relatively stable mansion-building paradigm in the Chaoshan region. By integrating architectural form analysis, historical document interpretation, and field survey data, the study aims to clarify the social, historical, and cultural mechanisms underlying the emergence and persistence of these dwellings. In doing so, it contributes to broader international discussions on the relationship between architecture and social institutions, the spatial organization of kinship-based communities, and the conservation of vernacular heritage as a form of living cultural practice.

2. Research methods

2.1. Research samples

This study focused on mansion-style vernacular dwellings in the Chaoshan region. The research area covered three cities in eastern Guangdong, namely Chaozhou (Chao'an and Raoping), Shantou (Jinping, Chenghai, Chaoyang, and Chaonan), and Jieyang (Puning, Jiexi, and Rongcheng). The region contains strong lineage organizations, a dense concentration of mansion-style dwellings, and relatively good preservation conditions, making it suitable for systematic investigation. As shown in Figure 1, a total of 39 mansion-style vernacular dwellings in the Chaoshan region were selected as research samples.

Sample selection was based not only on building size or preservation but also on three criteria: patron identity, documentary evidence, and spatial configuration. First, the builders are clearly identifiable and fall into three categories: individuals who entered officialdom through

the imperial examination system, those who were granted official status through military merit, and overseas merchants who received honorary titles. Second, each sample is supported by reliable historical sources, including relatively complete genealogies, local gazetteers, or credible oral traditions, allowing cross-verification of construction periods, historical contexts, and the symbolic meanings of architectural decoration. Third, at the level of architectural form, the selected dwellings are required to present the typical spatial structures of mansion-style vernacular architecture in a relatively complete manner, including representative layout types of the Chaoshan region, such as *Xia shan hu* (下山虎; tiger descending the mountain), *Si dian jin* (四点金; four points of gold), *Si ma tuo che* (驷马拖车; four horses towing a cart), *Jiu long tu zhu* (九龙吐珠; nine dragons spitting pearls), and *Bai niao chao huang* (百鸟朝凰; hundred birds and a phoenix). Based on these criteria, 39 mansion-style vernacular dwellings were ultimately identified and selected as the research samples for this study.

2.2. Data collection

This study combined three complementary forms of data collection: field surveys, semi-structured interviews, and documentary research. Field surveys were used to document the spatial configuration, construction features, and present condition of the selected dwellings. Semi-structured interviews were conducted to supplement architectural observation with information on building history, lineage activities, lived experience, craftsmanship, and current conservation practices. Documentary research was used to reconstruct the broader historical and institutional context of mansion construction and to cross-check information obtained from field investigation and interviews. Together, these three sources enabled the

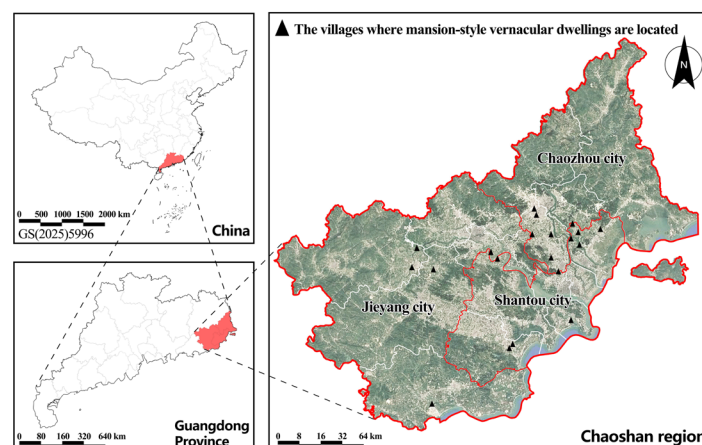


Figure 1. The location and spatial distribution of the 39 mansion-style vernacular dwellings. Source: Base maps from Aliyun DataV Atlas (GS[2025]5996); satellite image from Google Earth; mapping by the authors using ArcGIS 10.2

dwellings to be interpreted both as architectural forms and as socio-cultural institutions.

2.2.1. Field survey

Fieldwork consisted of on-site inspection, measured surveying, photographic recording, and architectural documentation. Through these methods, the study documented the general layout, axial order, courtyard organization, ancestral halls, decorative elements, construction details, and present conditions of use of mansion-style vernacular dwellings in the Chaoshan region. For selected representative cases, as shown in Figure 2, measured plans and sectional drawings were produced to demonstrate spatial relationships and key architectural details. These materials formed the primary empirical basis for the subsequent typological and socio-cultural analysis.

Based on the above methods, in-depth field investigations were conducted on the 39 selected mansion-style vernacular dwellings. These cases exhibit variation in geographical distribution, building scale, construction period, and social background, providing a comparative basis for analyzing spatial characteristics of mansion-style dwellings under different socio-economic conditions.

After systematically compiling basic information for each sample, the study integrated factors such as the geographical environment, the social identity of the patrons, and economic background to classify the surveyed dwellings into three major types: waterfront fishing–merchant type, overseas merchant–traveler type, and plain agricultural type.

As shown in Table 1, the waterfront fishing–merchant type of mansion-style vernacular dwellings is mainly distributed along the coastal areas of Chaoshan and in the lower reaches of rivers flowing into the sea, such as the Han River and Lian River. Their formation is closely related to regional water–land transportation conditions and to fishing and maritime trade economies. According to differences in location and economic structure, this type was further divided into two subcategories: the coastal fishing–merchant subtype and the riverine fishing–merchant subtype. The former directly faces the sea and is primarily found in coastal fishing villages or port-based settlements (e.g., Kongmei Village, Huilai, Jieyang; Fenggang Village, Haogang, Shantou; and Zhanglin Village, Chenghai, Shantou). The latter developed along inland river navigation systems, linking inland settlements with maritime routes (e.g., Chengyanggang Village,

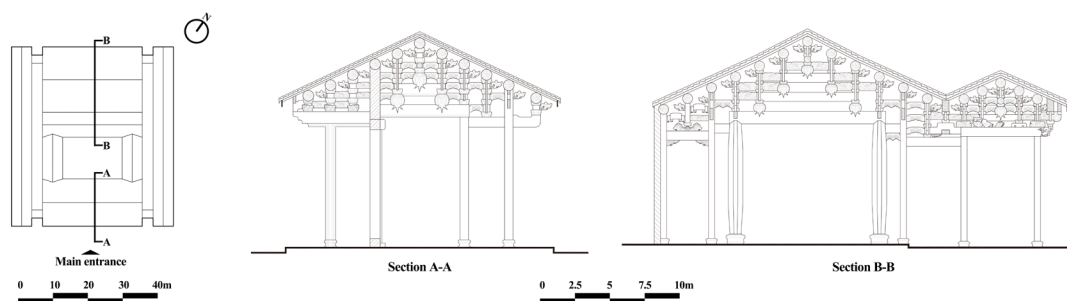


Figure 2. Measured plan and sections of Xu Clan Ancestral Hall. Source: Drawings by the authors

Table 1. Detailed information on waterfront fishing–merchant type mansion-style vernacular dwellings

Location	Building name	Construction period	Patron and social status
Kongmei Village, Huilai, Jieyang	Qingxi Ancestral Hall	Qing dynasty, 1763	Tang, Official–merchant
Fenggang Village, Haojiang, Shantou	Bangong Ancestral Hall	Qing dynasty, 1828	Zheng, Official–merchant
Zhanglin Village, Chenghai, Shantou	Xiqing Hall	Qing dynasty, 1900	Lan, Merchant
Chengyanggang Village, Chenghai, Shantou	Ke Clan Ancestral Hall	Song dynasty, 1279	Ke, Official–merchant
Chengyanggang Village, Chenghai, Shantou	Wenlin Residence	Kangxi reign of the Qing dynasty	Cai, Official–merchant
Chengyanggang Village, Chenghai, Shantou	Cai Jiumin Mansion	Late Ming dynasty to Early Qing dynasty	Cai, Official–merchant
Huayao Village, Chaonan, Shantou	Wang Clan Ancestral Hall	Jingtai reign of the Ming dynasty	Wang, Merchant
Dongli Village, Chaonan, Shantou	Zheng Family Ancestral Hall	Qing dynasty, 1763	Zheng, Merchant

Notes: Song (960–1279), Ming (1368–1644), and Qing (1644–1912) dynasties. Jingtai reign (1450–1457). Kangxi reign (1661–1722)

Chenghai, Shantou; Huayao Village, Chaonan, Shantou; and Dongli Village, Chaonan, Shantou), reflecting an evolutionary trajectory from fishing-based livelihoods toward commerce and official careers.

In terms of construction period and patronage, most examples of this type were built between the Song and Qing dynasties and were primarily commissioned by official-merchant families or merchant households. Mansion-style vernacular dwellings thus functioned as important spatial carriers of economic capital and social status.

As shown in Table 2, the overseas merchant-traveler type of mansion-style vernacular dwellings is primarily distributed in areas characterized by active external connections during the modern period. Their formation was closely associated with overseas migration, transregional commercial activities, and improvements in transportation conditions from the late Qing dynasty to the early Republican era. Settlements containing this type of mansion-style dwelling were often not grounded in traditional agricultural production or inland waterway systems; instead, they became integrated into broader economic networks through commercial mobility and overseas connections, exhibiting a high degree of openness and spatial fluidity.

Relevant examples are mainly concentrated in regions such as Chenghai, Jiexi, and Chao'an, where modern commercial development and overseas Chinese settlement were particularly prominent. Most of these dwellings were constructed from the late Qing dynasty to the Republican period. In terms of patronage, their construction was primarily commissioned by merchant families whose economic foundations were largely derived from

commercial operations and accumulated wealth. Despite the increasingly modernized social context, this type of mansion-style vernacular dwelling continued to adhere to traditional mansion-based spatial configurations. At the same time, it demonstrated a strong capacity to incorporate decorative elements from different regions, reflecting a pattern of continuity and adaptation centered on traditional ritual principles.

As shown in Table 3, the plain agricultural type of mansion-style vernacular dwellings is primarily distributed in plains and other areas with favorable agricultural conditions, and represents the most widely distributed type among Chaoshan mansion-style dwellings. This type developed on the basis of a stable agrarian economy and a highly mature lineage structure. Its construction logic is closely related to land resource conditions, lineage-based settlement patterns, and the long-term continuity of ritual order.

Chronologically, plain agricultural-type mansions were predominantly constructed during the Ming and Qing dynasties. With regard to patronage, their construction was mainly commissioned by scholar-officials who entered officialdom through the imperial examination system, as well as by local officials. Architecturally, these dwellings are generally large in scale and characterized by clearly articulated axial organization. They typically adopt traditional mansion-style spatial layouts and maintain close spatial connections with ancestral halls, accommodating functions such as residence and ancestor worship. As such, they most clearly embody the institutionalized spatial expression of traditional lineage-based society in the Chaoshan region.

Table 2. Detailed information on overseas merchant-traveler type mansion-style vernacular dwellings

Location	Building name	Construction period	Patron and social status
Shangbeihou Bang Village, Chenghai, Shantou	Rulin Residence	Qing dynasty, 1910	Huang, Merchant
Qianmei Village, Chenghai, Shantou	Zhonghan Residence	Qing dynasty, 1732	Chen, Merchant
Qianmei Village, Chenghai, Shantou	Langzhong Residence	Qing dynasty, 1910	Chen, Merchant
Qianmei Village, Chenghai, Shantou	Shanju Residence	Republic of China period, 1922	Chen, Merchant
Qianmei Village, Chenghai, Shantou	Shoukang Lane	Republic of China period, 1922	Chen, Merchant
Jinshayi Village, Chao'an, Chaozhou	Zizheng Residence	Qing dynasty, 1870	Chen, Merchant
Mianhu Town, Jiexi, Jieyang	Guo Clan Complex	Qing dynasty, 1733	Guo, Merchant
Mianhu Town, Jiexi, Jieyang	Shengde Residence	Modern period, 1960	Chinese migrants, Merchant

Notes: Qing dynasty (1644–1912) and the Republic of China (1912–1949)

Table 3. Detailed information on plain agricultural-type mansion-style vernacular dwellings

Location	Building name	Construction period	Patron and social status
Longmei Village, Chenghai, Shantou	Zhuangyuan Residence	Ming dynasty, 1532	Huang, Teacher
Gounan Village, Jinping, Shantou	Xu Clan Ancestral Hall	Qing dynasty, 1760	Xu, Scholar-official
Gounan Village, Jinping, Shantou	Shihu Xu Gong Ancestral Hall	Qing dynasty, 1883	Xu, Scholar-official
Xiadi Village, Chaoyang, Shantou	Huang Wuxian Mansion	Qing dynasty, 1888	Huang, Scholar-official
Yuemei Village, Jiexi, Jieyang	Zhuo Clan Ancestral Hall	Ming dynasty, 1471	Zhuo, Merchant
Jinggang Village, Rongcheng, Jieyang	Hanlin Mansion	Qing dynasty, 1751	Sun, Scholar-official
Jinggang Village, Rongcheng, Jieyang	Jinggang Mansion	Qing dynasty, 1906	Sun, Scholar-official
Deanli, Puning, Jieyang	Fang Clan Mansion	Qing dynasty, 1871	Fang, Scholar-official
Deanli, Puning, Jieyang	Jianwei Residence	Qing dynasty, 1890	Fang, Scholar-official
Shanbian Village, Chao'an, Chaozhou	Xie Clan Ancestral Hall	Early Ming dynasty	Xie, Scholar-official
Jingli Village, Chao'an, Chaozhou	Dafu Residence	Ming dynasty, 1582	Ke, Scholar-official
Jingli Village, Chao'an, Chaozhou	Ke Clan Ancestral Hall	Yongle reign of the Ming dynasty	Ke, Scholar-official
Licuo Village, Chao'an, Chaozhou	Zhenwei Residence	Qing dynasty, 1851	Li, Scholar-official
Licuo Village, Chao'an, Chaozhou	Longxi Old Residence	Republic of China period	Li, Merchant
Longhu Village, Chao'an, Chaozhou	Xu Clan Ancestral Hall	Ming dynasty, 1412	Xu, Scholar-official
Longhu Village, Chao'an, Chaozhou	Jinshi Residence	Ming dynasty, 1541	Liu, Scholar-official
Longhu Village, Chao'an, Chaozhou	Lin Clan Ancestral Hall	Ming dynasty, 1640	Lin, Scholar-official
Longhu Village, Chao'an, Chaozhou	Chen Clan Ancestral Hall	Qing dynasty, 1745	Chen, Scholar-official
Longhu Village, Chao'an, Chaozhou	Shihe Gong Ancestral Hall	Qing dynasty, 1826	Unknown
Longhu Village, Chao'an, Chaozhou	Jiangxia Old Residence	Qing dynasty, 1898	Huang, Scholar-official
Longhu Village, Chao'an, Chaozhou	Boteng Gong Ancestral Hall	Unknown	Unknown
Longhu Village, Chao'an, Chaozhou	Gaoyang Old Residence	Unknown	Xu, Merchant
Longhu Village, Chao'an, Chaozhou	Zhonghao Gong Ancestral Hall	Unknown	Unknown

Notes: Ming (1368–1644) and Qing (1644–1912) dynasties and the Republic of China (1912–1949). Yongle reign (1402–1424)

2.2.2. Semi-structured interviews

As shown in Table 4, the interview component involved 47 key informants and was designed to supplement architectural observation with social, historical, and experiential knowledge related to the investigated dwellings. These included 10 expert informants—such as local culture scholars, vernacular architecture researchers, architectural craft scholars, and inheritors of traditional decorative techniques—and 37 site-based informants, including descendants of mansion-owning families, current residents, caretakers, village-level managers, and local heritage protectors associated with representative dwelling cases. Informants were selected purposively according to three criteria: (i) demonstrated knowledge of Chaoshan traditional culture, vernacular dwelling history, construction craft, or architectural decoration; (ii) possessed direct residential, kinship, custodial, managerial, or conservation-related connections to the investigated mansion-style dwellings; and (iii) provided first-hand or

experience-based information relevant to building history, spatial use, ritual activities, craftsmanship, and current preservation conditions.

As shown in Table 5, the semi-structured interviews followed a common interview guide while allowing case-specific follow-up questions. The guide covered six interrelated dimensions: basic background information; historical origins and cultural significance of mansion-style dwellings; architectural characteristics and building techniques; lived experience and community relations; conservation challenges and intergenerational transmission; and personal memories or stories associated with specific dwellings. This design enabled the collection of comparable cross-case data while preserving the contextual richness of individual narratives.

Interview materials were analyzed using qualitative content analysis. Audio recordings and written notes were first organized and checked for completeness. The material

Table 4. Categories and composition of interview informants

Category of informants	Selection basis	Number
Local scholars of Chaoshan traditional culture	Familiar with regional history, lineage culture, local customs, and cultural interpretation of traditional dwellings	4
Scholars of vernacular architecture	Specialized in traditional dwelling research and architectural history in the Chaoshan region	2
Scholar of architectural craft and decoration	Specialized knowledge of vernacular building craft and decorative systems	1
Inheritors of intangible cultural heritage related to building craft and decoration	Practitioners and transmitters of traditional decorative and craft techniques (e.g., embedded porcelain, carving, and ornamentation)	3
Descendants, residents, caretakers, managers, and local protectors of mansion-style dwellings	Direct kinship, residential, custodial, managerial, or conservation-related ties to the investigated dwellings	37
Total		47

Table 5. Main themes and guiding questions of the semi-structured interviews

Theme	Main guiding questions
Basic information	How long has the interviewee lived in the Chaoshan region? Do they have long-term residential experience in or around mansion-style dwellings? Are their occupation or main activities related to such dwellings?
Historical and cultural background	What is the historical origin and development trajectory of Chaoshan mansion-style vernacular dwellings? What cultural status and symbolic meaning do these dwellings hold in local society?
Architectural characteristics and building techniques	What are the typical features of these dwellings in terms of layout, structure, and decoration? How are these features related to the natural environment and local customs? Does the interviewee have knowledge of or experience in construction, repair, craft techniques, or traditional tools?
Lived experience and community relations	Has the interviewee or their family lived in such dwellings? How were these spaces experienced in everyday life? How did the dwellings shape kinship relations, neighborhood interaction, or community organization?
Conservation and transmission	What are the main challenges currently faced by mansion-style vernacular dwellings? What are the interviewees' views on preservation and transmission? Do the interviewees participate in restoration or management projects, and what lessons can be drawn from these experiences?
Personal experiences and memories	Can the interviewee share personal stories, memories, or emotionally significant experiences related to specific dwellings? How do such experiences shape their understanding of these buildings?

was then coded according to the thematic structure of the interview guide, with particular attention to recurring references to building form, lineage practice, ritual use, craftsmanship, and conservation issues. Through comparison across respondent groups, key themes and sub-themes were identified and subsequently cross-checked against field observations, genealogies, local gazetteers, and relevant scholarship to strengthen interpretive reliability.

2.2.3. Documentary research

As shown in Table 6, this study built its analytical framework through a systematic review of literature on mansion-style vernacular dwellings in the Chaoshan region. Local gazetteers from the Ming and Qing dynasties were examined to reconstruct regional administrative

changes, settlement patterns, transportation networks, and economic conditions, providing historical context for the spatial distribution and formation of these dwellings. Genealogical records were used to identify the lineage backgrounds, social identities, and economic foundations of building patrons, clarifying the role of mansion-style dwellings in lineage organization and social mobility. In addition, traditional craft manuals and technical treatises on Chaoshan architecture were consulted to document region-specific construction practices and techniques. Existing studies on Chaoshan vernacular architecture and regional culture were further synthesized to establish typological characteristics and evolutionary patterns, supporting the classification and spatial comparison adopted in this study.

Table 6. Detailed information on relevant documentary sources

Type	Detailed references
Local gazetteers	<i>Chaozhou Prefectural Gazetteer</i> (Ying, 2005), <i>Chenghai County Gazetteer</i> (X. Q. Zhang, 1990), <i>Toponymic Gazetteer of Haogang District, Shantou City</i> (Shantou Shi Haojiang Qu Difangzhi Bangongshi, 2013), <i>Chaoyang City Gazetteer (1979–2003)</i> (Z. J. Yao et al., 2012), and <i>Lianxia Town Gazetteer</i> (Lianxia zhenzhi Bianzuan Weiyuanhui, 2011)
Genealogical records	<i>Cai Clan Genealogy</i> , <i>Chen Clan Genealogical Records</i> , <i>Clan Regulations of the Wang Ancestral Hall</i> , <i>Genealogy of the Sicengtang Branch of the Wang Clan in Chaoyi</i> , <i>Huayao Wang Clan Genealogy</i> , <i>Huang Clan Genealogy of Chaozhou</i> , and <i>Biographical Register of Notable Figures in Chaozhou</i>
Traditional craft manuals	<i>Architectural Construction of Traditional Buildings in the Chaoshan Region</i> (Ji & Xiao, 2025), <i>Spatial Patterns and Auspicious Motifs in Traditional Architecture of Chaozhou</i> (Y. Q. Li, 2015), <i>Stone Carving Art in Chaoshan Architecture</i> (X. H. Li, 2006), <i>Arts and Crafts of the Chaoshan Region</i> (J. P. Yang, 2005), <i>Folk Arts of the Chaoshan Region</i> (Chen & Chen, 2013), <i>Chaozhou Wood Carving</i> (J. P. Yang, 2005), and <i>The Inlaid Porcelain Art of Lu Zhigao</i> (Z. G. Lu, 2013)
Scholarly studies	<i>Vernacular Dwellings of the Chaoshan Region</i> (H. S. Cai, 2012), <i>Historic Architecture of Chaozhou</i> (Chaozhou Shi Jiansheju, 2008), <i>Chao-Style Architecture and Moral Culture</i> (D. X. Huang, 2017), <i>An Overview of Chaoshan Culture</i> (Z. H. Chen, 2001), <i>The First Overseas Chinese Mansion in Lingnan</i> (B. H. Shen, 2001), <i>The Rise of “Coastal Zoulu”: Studies on Chaozhou during the Song Dynasty</i> (Z. S. Chen, 2015), <i>China and the Oceans: A Brief History of the Chaoshan Region</i> (T. Huang, 2017), <i>Series on Ancient Villages of Shantou</i> (H. C. Chen, 2018), <i>Ancient Villages of Guangdong Province: Shantou—Exploring Historic Villages</i> (W. X. Yao, 2021), <i>Vernacular Architecture of the Chaoshan Region</i> (H. S. Cai, 2010), and <i>Traditional Houses of the Chaoshan Region</i> (K. L. Lin, 2004)

To guide interpretation, the study employed three analytical dimensions: historical, social, and spatial. These dimensions were chosen because Chaoshan mansion-style vernacular dwellings were treated here as products of long-term historical change, lineage-based social organization, and material spatial ordering. The historical dimension clarifies the temporal and institutional background of dwelling formation; the social dimension addresses patronage, lineage structure, ritual practice, and local beliefs; and the spatial dimension examines how these forces were materialized through layout, axial hierarchy, and the integration of ancestral and residential space.

While the three analytical dimensions are presented separately for clarity, they are dynamically coupled, as illustrated in **Figure 3**. The historical dimension provides the institutional conditions that enabled mansion construction; the social dimension captures the actors and norms that drove its development; and the spatial dimension represents the material outcomes. However, these dimensions are mutually constitutive: historical conditions shaped social structures, which in turn reshaped historical trajectories; spatial forms not only materialized these forces but also actively reinforced lineage identity and ritual order, feeding back into the social realm.

3. Results

The following sections present the results through four thematic components derived from the conceptual framework shown in **Figure 3**. Each component reflects a different intersection among the historical, social, and spatial dimensions, rather than corresponding to a single dimension in isolation.

3.1. The role of the scholar-official stratum and lineage-based ritual institutions

Patron identity decisively shaped both the spatial form and decorative program of Chaoshan mansion-style dwellings. Social status, educational background, and value orientation all influenced how these buildings were planned and organized. According to *Chaoshan History* (Vol. 1) (T. Huang and Chen, 2011), the Song period constituted a formative stage for Chaoshan lineage communities and regional culture, during which incumbent officials actively promoted Confucian learning and established educational institutions. In Song-dynasty Chaozhou, a strong emphasis on learning prevailed, and local officials commonly engaged in educational initiatives. An anecdote records Emperor Xiaozong (1162–1189) of the Song dynasty asking the official Wang Dabao (1094–1170) about local customs in Chaozhou: 宋孝宗赵昚问王大宝:“潮州风俗如何?”答曰:“地瘦栽松柏,家贫子读书。”¹ (Emperor Xiaozong of the Song dynasty, Zhao Shen [1127–1194], asked Wang Dabao, “What are the local customs of Chaozhou like?” Wang replied, “Although the land is barren and suited only for planting pines and cypresses, families, though poor, ensure that their children receive an education.”)

After the late Southern Song (1127–1279), with the diffusion of education and the accumulation of cultural capital, a local scholar-official stratum gradually emerged and expanded within regional society.

The Song period also witnessed major advances in the imperial examination system in Chaoshan, as *Yongle dadian* (永乐大典), juan 5343, “Chaozhou fu yi: Fengsu xingsheng” (潮州府一·风俗形胜), citing *Yu Chonggui wenji* (余崇龟文集).

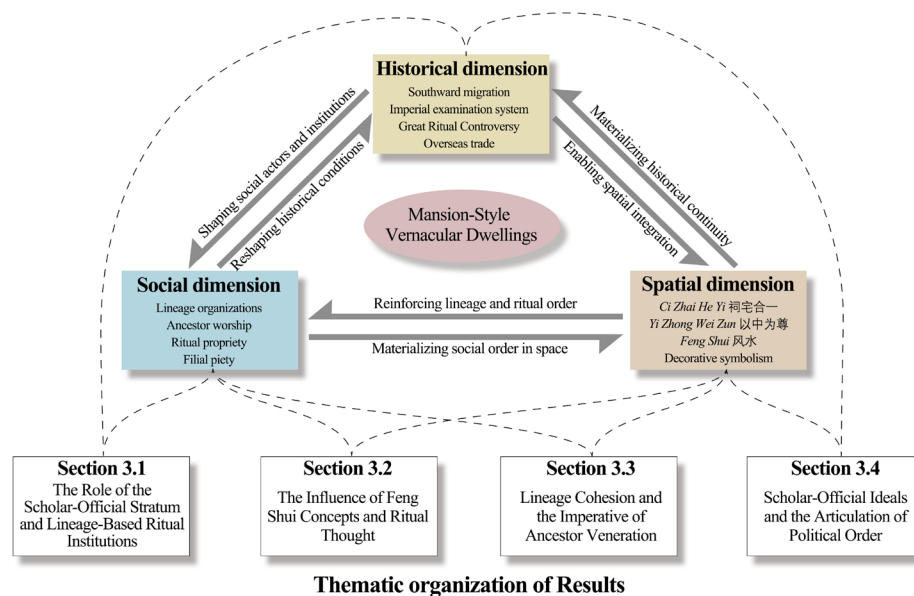


Figure 3. Conceptual framework of the study. Source: Image by the authors

increasing numbers of students entered official careers through examination success and became an influential force in local society (T. Huang & Chen, 2011). From the mid-to-late Ming dynasty onward, examination performance in the region improved markedly, and the proportion of candidates attaining official status through the examinations rose substantially. Under the sustained operation of the examination system, a cohort of local elites with cultural capital and political potential gradually formed. Statistics reported in *Chaoshan History* (T. Huang and Chen, 2011) indicate that after the 16th century, nearly 20 percent of *Ju ren* (举人; a provincial degree holder in the imperial examination system) in Chaozhou came from prominent lineages, while more than 80 percent of examination success cases originated from lower strata of rural society, producing a dual structure in which upward mobility among “humble-born achievers” coexisted with established elite lineages. The examination system gave scholar-officials access to political office and economic resources, both of which supported mansion construction. It also strengthened their cultural authority in local society, allowing their values and lifestyles to shape architectural form.

The 39 cases revealed a clear pattern in patronage structure. As presented in Figure 4, dwellings commissioned by scholar-officials constitute the largest group, with 16 cases or 41 percent of the sample. Their patronage was concentrated in the plain agricultural type, reflecting the close linkage between a stable agrarian economy and

examination-based career trajectories. In the waterfront fishing–merchant type, merchants and official–merchant groups accounted for a relatively higher proportion, underscoring the importance of fishing- and trade-based accumulation in mansion construction. The overseas merchant–traveler type was dominated by merchants and overseas Chinese patrons, with a comparatively smaller scholar-official share, indicating how modern commerce and overseas economic networks reshaped traditional social structures. Overall, scholar-official patrons constitute the dominant group in the sample and appear to be the most important institutional drivers of mansion construction in Chaoshan.

In traditional society, scholar-officials were more than status figures; they were also expected to govern and serve as moral exemplars. After entering office through examination success or appointment, they needed durable and recognizable spaces where this status could be displayed locally. For scholar-officials, building a mansion exceeded basic residential needs and became a rational choice embedded in institutional logic. On the one hand, as a durable architectural form, the mansion enabled the conversion of cultural capital and political resources into long-term family assets. On the other hand, by integrating residence, ancestral rites, and moral instruction, the mansion served as a key setting through which scholar-officials fulfilled lineage obligations and consolidated intra-family relations. Unlike ordinary dwellings, mansion-style vernacular architecture materialized scholar-official

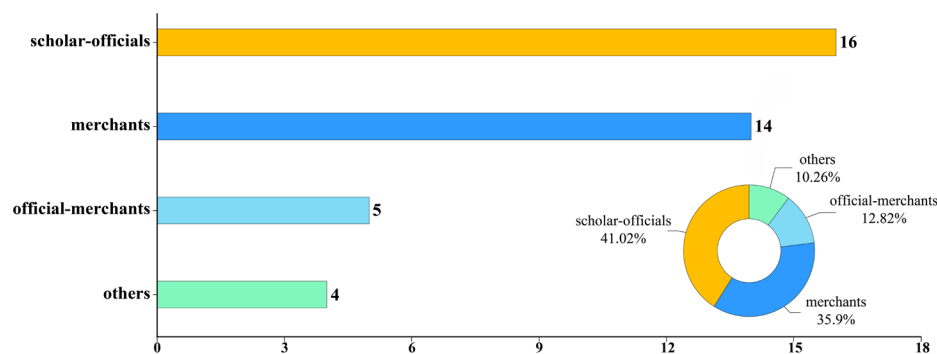


Figure 4. Statistics of the social identities of patrons of the research samples. Source: Graph by the authors

identity through scale, axial ordering, and ritualized spatial hierarchy, thereby linking individual achievement with family and lineage structures.

In summary, examination-driven social mobility enabled scholar-officials to acquire material and cultural capital, while lineage ritual institutions sustained local order and provided stable organizational frameworks. Together, these forces constituted the institutional context for the construction of Chaoshan mansion-style vernacular dwellings; through their spatial forms, scholar-official identity, lineage order, and local social structure were rendered durable and reproducible over time. From the perspective of historical conditions, these findings indicate that mansion construction in Chaoshan was inseparable from the expansion of the imperial examination system, the consolidation of lineage institutions, and the formation of a scholar-official stratum embedded in local society. In this sense, patronage patterns were not merely social background variables, but key historical mechanisms through which architectural form acquired institutional meaning.

3.2. The influence of feng shui concepts and ritual thought

In the Chaoshan region, site selection has long been considered crucial to family prosperity and lineage continuity. In local discourse, land is referred to as *Di mu* (地母; Earth Mother), symbolizing the nurturing of all living beings and the protection of future generations. Since the Qin (221–206 BCE) and Han (206 BCE–220 CE) dynasties, cultural traditions from the Central Plains gradually entered the Chaoshan region and became integrated with local practices, fostering a residential worldview characterized by reverence for the order of nature and the cosmos (Zheng, 2009). Within this framework, site selection was believed to affect a family's fate directly and therefore became the first concern in construction.

According to the *Gazetteer of Chaoyang County* (潮阳县志), “唐宋以来，创寨皆以其地之势。详作布局，依其局建宅，颇具匠心。(Since the Tang [619–907] and Song dynasties, the establishment of settlements has followed the natural terrain of the site. Layouts were carefully planned, and residences were constructed according to the spatial configuration, demonstrating considerable craftsmanship.)”

And in Chaoshan folk culture, there is a saying, “生勿住向北厝，死后勿葬向北坟。(In life, one should not live in a north-facing house; in death, one should not be buried in a north-facing grave.)”

Whether among scholar-official lineages or merchant families, once a certain level of wealth and status had been attained, patrons often returned to their native places to select auspicious sites for mansion construction. Through site selection and spatial configuration, ancestral commemoration, filial piety, and personal achievement were inscribed into the built environment. From this perspective, the siting of mansion-style vernacular dwellings was not merely a residential decision, but a symbolic practice through which ethical values, ancestor worship, and social status were spatially expressed.

Within this process, feng shui (风水; a traditional Chinese system of spatial planning and environmental assessment) concepts served as a mediating framework between the natural environment and social order. In Chaoshan, specialists responsible for site selection were commonly referred to as *Feng shui xian sheng* (风水先生; feng shui master). Classical feng shui theory emphasizes the regulation and containment of *qi* (气; the vital spatial energy in feng shui) through topography and water systems, providing cosmological justification for site evaluation (P. Guo, 1995). Feng shui masters frequently employed metaphorical or zoomorphic naming based on local landforms—such as *Niu di* (牛地; ox land), *Gui di* (龟地; tortoise land), and *Huo xie di* (活蟹地; living

crab land)—and adjusted architectural form accordingly, with the aim of ensuring demographic prosperity and household stability (Y. Q. Li, 2015).

For example, the village layout of Xinan Village in Puning, Jieyang, resembles the form of an ox and is locally known as ox land, where a sculpted ox is placed outside the village gate for protective purposes (Figure 5A). Xiangpu Village in Chao'an, Chaozhou, exhibits an overall tortoise-shaped configuration, termed tortoise land, in which gates and wells symbolize the tortoise's head and limbs, signifying long-term family stability (Figure 5B). In 1760, during the construction of the Xu Clan Ancestral Hall at Gounan Village in Shantou, the feng shui master identified the forecourt as living crab land and insisted that the original soil remain uncovered; covering it was believed to extinguish its vital force (H. C. Chen, 2018). To this day, the ground remains exposed and is only lightly covered with artificial grass as a gesture of respect (Figure 5C). These cases demonstrate that site selection and architectural form in Chaoshan vernacular dwellings were not purely technical decisions but culturally embedded practices that integrated natural symbolism and lineage belief systems.

If feng shui concepts primarily addressed how architecture should respond to the natural environment, ritual principles further defined how architectural space should regulate social relations. The formation of the spatial order of mansion-style vernacular dwellings is closely related to the Confucian ritual concept of *Yi Zhong Wei Zun* (中间为尊; the principle that the central position is regarded as the most honored in spatial hierarchy).

As recorded in *Zuo Zhuan* (左传) (translated and annotated by D. Guo *et al.*, 2018), “于是乎有礼。礼，经国家，定社稷，序民人，利后嗣者也。(Thus *Li* [礼; ritual propriety] was established. *Li* governs the state, stabilizes the altars of land and grain, orders the people, and benefits future generations.)”

At its core, ritual thought emphasizes order—establishing distinctions between superior and inferior, elder and younger, and inner and outer relations. Accordingly, Chaoshan mansions commonly adopt axial symmetry and hierarchically differentiated spatial layouts.

Among the most prevalent residential forms in Chaoshan, the *Xia shan hu* and *Si dian jin* types assign distinct spatial functions to ancestors, elders, younger generations, household members, and visitors. As illustrated in Figure 6, different spaces—marked by color—correspond to different social roles. The central hall typically functions as the site of ancestral worship and serves as the symbolic core of family authority and collective identity. Rooms adjacent to the hall are generally allocated to senior family members, while lateral rooms are used by junior generations. The central courtyard accommodates shared household activities, with flanking spaces commonly designated for storage or kitchens. Together, these elements constitute a spatial configuration that materializes ritual order.

Chaoshan mansion-style dwellings were shaped by both feng shui belief and ritual principle, rather than by a single conceptual system. While the former emphasizes

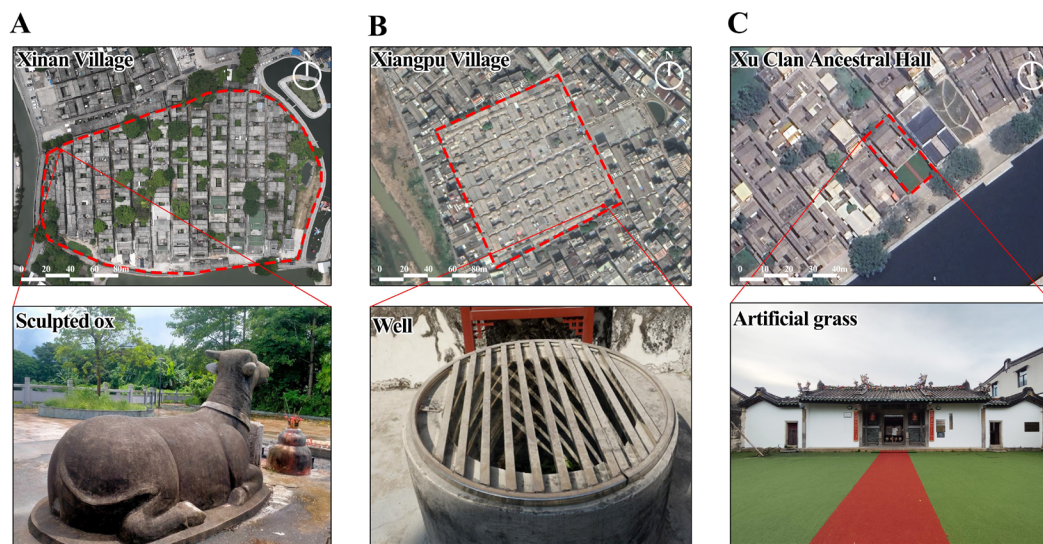


Figure 5. Examples of the application of feng shui concepts: (A) *Niu di* (牛地; ox land), (B) *Gui di* (龟地; tortoise land), and (C) *Huo xie di* (活蟹地; living crab land). Sources: Satellite images from Google Earth and photos by the authors (2025)

adaptation to the natural environment, the latter structures social hierarchy and ethical relations. Acting in concert, these two frameworks transform the mansion into a spatial medium that connects environmental conditions, lineage organization, and moral order. Viewed through the dimension of construction practices, these findings suggest that the Chaoshan mansion was guided not only by technical or environmental considerations but also by culturally codified rules of spatial arrangement. Feng shui and ritual thought, therefore, operated as practical design logics through which social hierarchy and moral order were translated into built form.

3.3. Lineage cohesion and the imperative of ancestor veneration

Following the *Da li yi* (大礼仪; Great Ritual Controversy) during the Jiajing reign (1521–1567) of the Ming dynasty, a nationwide surge in ancestral hall construction emerged (You, 2025). Although the Chaoshan region

was geographically peripheral, deeply entrenched lineage ideology provided the institutional context for the development of mansion-style vernacular dwellings characterized by *Ci zhai he yi* (祠宅合一; the spatial integration of ancestral halls and residential quarters) (R. M. Huang *et al.*, 2024). In the 15th year of the Jiajing reign, revised ritual regulations permitted non-elite lineages to establish joint ancestral halls for ancestor worship. This policy change removed earlier restrictions that limited ancestral hall construction to scholar-official families, enabling ordinary lineages to consolidate branches and establish shared ancestors and symbolic centers. Scholar-official families in Chaoshan were particularly active in this process, strengthening lineage identity and internal order through ancestral hall construction and the revision of genealogies.

As lineage groups expanded, the scale of common residential forms, such as *Xia shan hu* and *Si dian jin*,

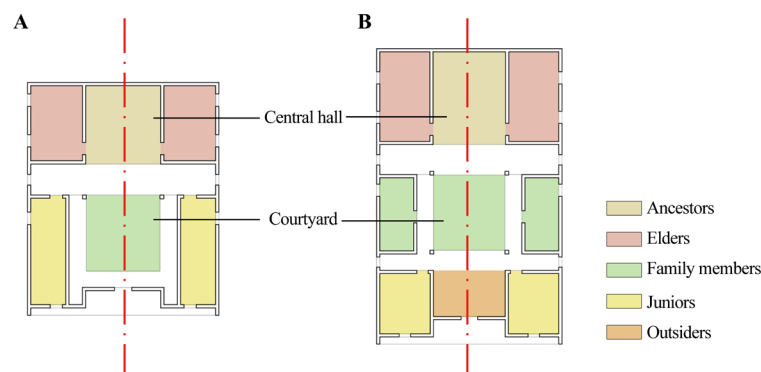


Figure 6. Layouts of (A) *Xia shan hu* (下山虎; tiger descending the mountain) and (B) *Si dian jin* (四点金; four points of gold). Sources: Drawings by the authors

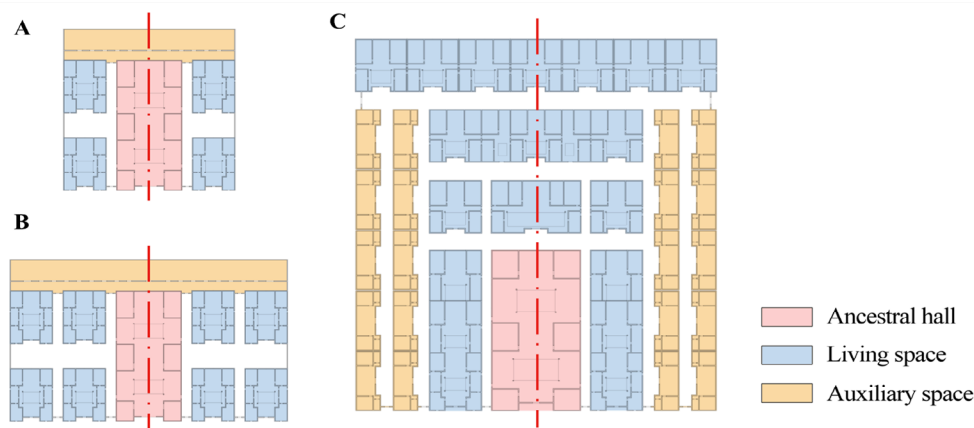


Figure 7. Layouts of (A) *Si ma tuo che* (驷马拖车; four horses towing a cart), (B) *Jiu long tu zhu* (九龙吐珠; nine dragons spitting pearls), and (C) *Bai niao chao huang* (百鸟朝凰; hundred birds and a phoenix). Sources: Drawings by the authors

increased, giving rise to large and complex configurations, including *Si ma tuo che* (Figure 7A), *Jiu long tu zhu* (Figure 7B), and *Bai niao chao huang* (Figure 7C). These enlarged forms intensified the ritual and symbolic dimensions of architecture by integrating ancestral halls with residential space. The ancestral hall occupies the center, marking the symbolic and institutional core of the lineage. Residential and auxiliary spaces are arranged to the sides and rear, while multiple courtyards or compound courtyard systems translate distinctions of hierarchy—such as seniority, generational order, and inner-outer relations—into architectural space. In this way, the built environment becomes a direct and legible expression of lineage order. This spatial pattern not only reflects the lineage-based co-residential lifestyle prevalent in the Chaoshan region but also reinforces cohesion and a sense of belonging among lineage members.

At the same time, *Xiao* (孝; filial piety) and *Jing* (敬; reverence) remain central values in Chaoshan lineage culture. Ancestor worship is therefore more than ritual performance; it also sustains collective memory and lineage identity. Within mansion-style dwellings, the ancestral hall serves both as the site of ritual activities and as a spatial repository of family history and memory. By organizing architectural layouts around the ancestral hall, multiple household units are incorporated into a single architectural system. While individual branches maintain relatively independent living spaces, daily activities are oriented toward the ancestral hall as the shared spiritual core. This arrangement accommodates multi-generational co-residence while supporting ancestor worship, and continuously reinforces recognition of common ancestry

through everyday life and ritual events.

In terms of specific architectural expression, the Huang Wu Xian Mansion in Chaoyang, Shantou (Figure 8), exemplifies the *Si ma tuo che* configuration, in which the ancestral hall occupies the central position, symbolizing the “cart,” while the residential wings representing the “horses” are positioned on either side. This spatial metaphor conveys the notion that descendants collectively sustain and advance the lineage centered on the ancestors.

The *Bai niao chao huang* configuration further amplifies reverence for ancestors through a more elaborate spatial narrative. In the Guo Clan Complex in Mianhu Village, Jiexi, Jieyang (Figure 9), a longitudinal sequence of multiple ancestral halls forms the central axis, while lateral residential buildings extend outward and are interconnected by alleys, creating a clearly hierarchical lineage spatial network. The ancestral halls occupy the axial core, symbolizing the “phoenix,” while surrounding residences represent the “hundred birds,” conveying the ideal of collective veneration of a shared ancestral center. To fulfill the symbolic requirement of 100 rooms, additional concealed chambers were even constructed, demonstrating the tangible projection of lineage-continuity ideals into architectural form.

Overall, Chaoshan mansion-style vernacular dwellings integrate residential and ritual spaces into a unified architectural system organized around the ancestral hall. Through this spatial configuration of *Ci zhai he yi*, the built environment functions not only as a setting for everyday family life but also as a medium for sustaining collective memory and lineage identity through ancestor worship,

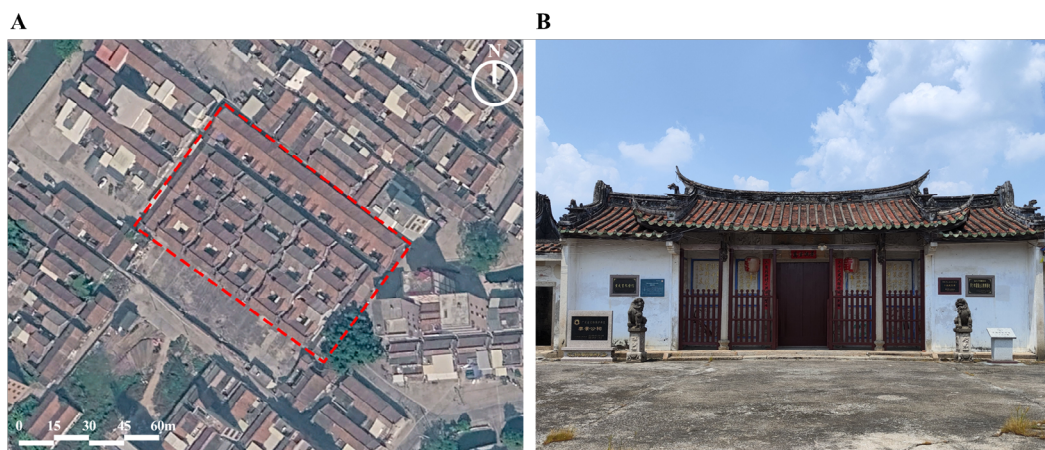


Figure 8. Huang Wu Xian Mansion in Chaoyang, Shantou. (A) Satellite image. (B) On-site view. Source: Satellite image from Google Earth and photo by the authors (2025)

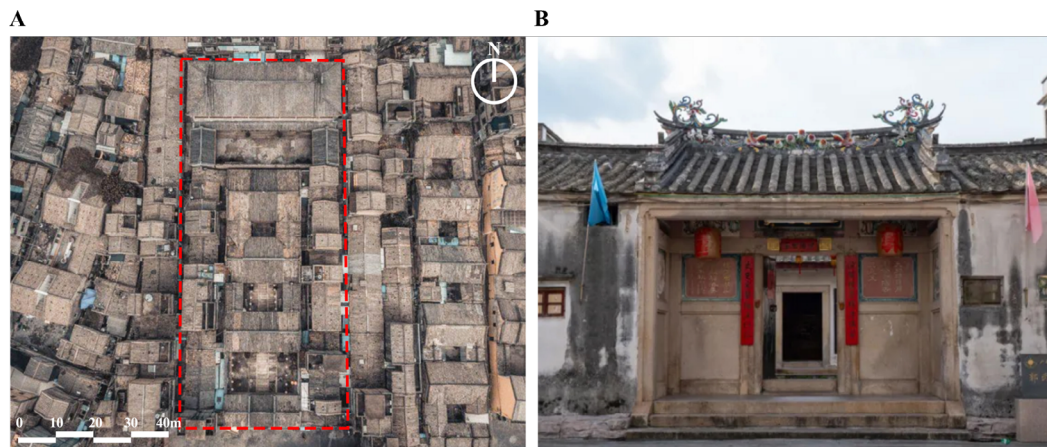


Figure 9. Guo Clan Complex in Mianhu, Jiexi. (A) Satellite image. (B) On-site view. Source: Photos by authors (2025)

thereby strengthening internal cohesion within the lineage. From a socio-cultural perspective, the integration of ancestral halls and residential quarters demonstrates that mansion space functioned not only as a living environment but also as a material device for sustaining lineage cohesion, collective memory, and ancestor-centered ritual practice. The architectural system of *Ci zhai he yi* thus reveals how socio-cultural institutions were stabilized through everyday spatial organization.

3.4. Scholar-official ideals and the articulation of political order

Since the 16th century, the expansion of the imperial examination system accelerated social mobility in Chaoshan and helped establish the scholar-official stratum as a major local social group. The cultural ideals and social aspirations of scholar-officials found spatial expression through mansion-style vernacular architecture. For

scholar-officials, the Confucian classics were both a source of political legitimacy and a language for expressing moral and political ideals (T. Huang & Chen, 2011). During the Jiajing reign, Neo-Confucian thought flourished in Chaoshan, and a group of influential scholars—including Xue Kan (1486–1545) and Weng Wanda (1498–1552)—actively participated in court debates on ritual reform. Their advocacy of standardized sacrificial rites, genealogical revision, and community compacts indirectly fostered a heightened cultural consciousness toward lineage construction among the Chaoshan literati. The return of scholar-officials to their native places to build ancestral halls and renovate residences thus represented the continuation and spatial materialization of this ritual ideology.

Scholar-officials emphasized the didactic function of mansion architecture. Internally, spatial order and ritual

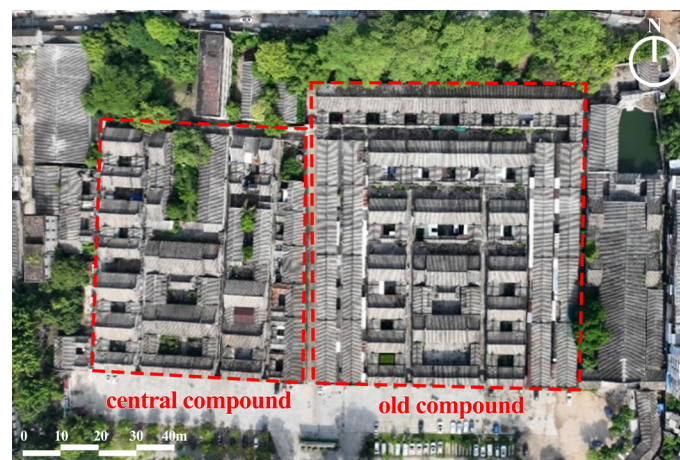


Figure 10. The central compound and old compound of the Fang Clan Mansion in Deanli, Puning, Jieyang. Source: Photo by the authors (2025)

practices were employed to regulate lineage relations; externally, architectural form and imagery were used to display cultural status and social prestige. As lineage activities became increasingly institutionalized after the sixteenth century, scholar-officials drew upon ritual culture to secure recognition from both local society and the state apparatus, thereby consolidating their role in local governance (Yan, 2020).

Among the various architectural configurations, *Si ma tuo che* represents the form that most clearly embodies the political ideals of the scholar-official stratum. With its strong central axis, strict symmetry, and multiple courtyards, this layout creates a clear spatial hierarchy and makes social status visibly legible in built form. As illustrated in Figure 10, one of the principal structures of the Fang Clan Mansion in Deanli, Puning, Jieyang—known as the *Zhong zhai* (中寨; central compound)—adopts the *Si ma tuo che* configuration. Storage rooms are arranged on both sides of the front hall, while the middle and rear halls function as ancestral halls. Each wing contains two *Si dian jin* units, and the complex is further articulated through alleys that separate inner and outer courtyard zones. The building faces a pond, serving both practical functions of drainage and moisture control and symbolic associations with the accumulation of wealth.

The *Bai niao chao huang* configuration represents one of the most elaborate symbolic expressions of mansion architecture. Taking the *Lao zhai* (老寨; old compound) of the Fang Clan Mansion as an example, its layout strictly adheres to axial symmetry, with parallel buildings arranged sequentially and separated by courtyards, forming a series

of enclosed spaces with increasing depth. Functional organization reflects a deliberate balance between ritual hierarchy and practical use: the front hall accommodates ordinary visitors, the middle hall receives distinguished guests and hosts lineage activities, and the rear hall is dedicated to ancestor worship. Rooms adjacent to the middle hall are assigned to senior family members, those beside the front hall serve as living quarters or guest rooms for junior generations, and the rear courtyard houses women's quarters; rear auxiliary structures are commonly used as studies. Together, these arrangements constitute a highly institutionalized spatial order. Through the integrated application of ritual hierarchy, lineage structure, and feng shui symbolism, this mansion translates the scholar-official understanding of political order and social ideals into architectural form.

In terms of decorative arts, mansion architecture continued the refined traditions of Chaozhou craftsmanship. Stone carving, wood carving, clay sculpture, and polychrome painting together create a distinctive symbolic vocabulary. The stone-carved murals *Shi nong gong shang* (士农工商; scholars, farmers, artisans, and merchants; Figure 11A) and *Yu qiao geng du* (渔樵耕读; fishermen, woodcutters, farmers, and scholars; Figure 11B) at the Congxi Ancestral Hall in Chaozhou exemplify how decorative imagery conveys lineage educational ideals and social values through narrative representation. Rich ornamental motifs and inscribed plaques not only reinforce ritual order but also express the scholar-official pursuit of moral self-cultivation and cultural aspiration.

Overall, the construction of Chaoshan mansion-style vernacular dwellings represents both the externalization

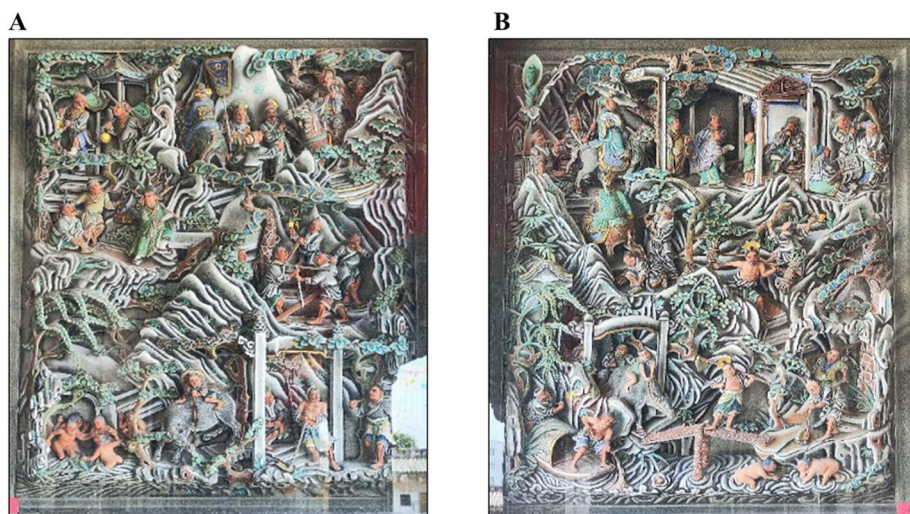


Figure 11. Stone-carved murals of Congxi Ancestral Hall in Chaozhou. (A) *Shi nong gong shang* (士农工商; scholars, farmers, artisans, and merchants). (B) *Yu qiao geng du* (渔樵耕读; fishermen, woodcutters, farmers, and scholars). Source: Photos by the authors (2025)

of family honor and a symbolic enactment of the political ideals of the scholar-official stratum. Through ritualized spatial organization and symbolic architectural language, Chaoshan scholar-officials translated abstract ideals into tangible built form, transforming architecture into a cultural medium that links individual moral self-cultivation, lineage governance, and state order. Mansion architecture was therefore more than a place to live. It condensed local political ethics and spiritual values, becoming one of the most symbolically charged forms in Chaoshan architectural culture. This also clarifies that the historical dimension of mansion construction was not limited to patron identity alone. More importantly, it involved the translation of scholar-official values, governance ideals, and ritualized political culture into architectural language, thereby linking built form to a broader institutional order.

4. Discussion

4.1. Ritual culture and the internal logic of social structure

The findings suggest that Chaoshan mansion-style vernacular dwellings are not simply culturally inflected architectural forms. Rather, they are institutionalized configurations of domestic space through which ritual culture and lineage-based social structure are mutually constituted. Rather than simply reflecting social hierarchy, mansion architecture actively participates in the spatial production and stabilization of lineage order, moral authority, and collective identity (Bourdieu, 1989; Buttner & Seamon, 1980).

This interpretation aligns with a substantial body of research that views vernacular dwellings as embedded in systems of kinship, ritual practice, and social hierarchy (Brenner & Elden, 2009; Lefebvre, 2003, 2012; Philokyprou & Michael, 2021; Rapoport, 2003). Previous studies have emphasized that domestic space often materializes cultural norms and social relations through spatial organization and symbolic form (Hernes, 2004; Lawrence, 1982). The Chaoshan case further demonstrates that domestic architecture may function as a durable institutional medium through which lineage authority is continuously reproduced across generations. In this sense, mansion space is not only culturally meaningful but also structurally operative in maintaining social order.

The spatial features identified in this study—including axial organization, hierarchical sequencing, and the integration of ancestral halls with residential quarters—indicate that these dwellings were structured as ritualized environments rather than neutral living spaces. Axial symmetry and spatial hierarchy reinforced distinctions of seniority and authority, while the configuration of *Ci zhai*

he yi embedded ancestor veneration into the daily spatial routines of the household. Through repeated use, these spatial arrangements transformed ritual principles into habitual practices, making lineage order both visible and continuously enacted in everyday life.

Moreover, the scholar-official stratum further strengthens this institutional dimension. As actors positioned between state governance and local society, scholar-officials translated Confucian ethical principles into spatial form, embedding moral order within the built environment. This process highlights how architectural practice mediated between formal institutions and local social structures, allowing mansion space to operate simultaneously as a domestic setting, a ritual arena, and a material expression of social authority.

From a broader perspective, the Chaoshan case extends existing interpretations of vernacular architecture by showing that domestic space can function not only as a cultural expression but also as a mechanism for the long-term reproduction of institutional structures. This suggests that the study of vernacular dwellings should move beyond symbolic readings toward a more integrated understanding of how spatial form, social organization, and institutional continuity are co-produced.

4.2. A dynamic balance between architectural form and cultural ethos

Another key finding of this study is that Chaoshan mansion-style vernacular dwellings exhibit a dynamic balance between formal transformation and cultural continuity. While architectural forms evolved in response to changing political, economic, and cultural conditions, the underlying spatial logic associated with lineage organization and ritual order remained remarkably stable.

This observation is consistent with broader research suggesting that vernacular architecture is not a static survival from the past, but a flexible cultural form capable of adaptation (Blier, 2006; Brown & Maudlin, 2012; Rapoport, 2003; Salman, 2018). However, the Chaoshan case provides a more specific insight: architectural change does not necessarily lead to the dissolution of underlying social and symbolic structures. Even as new decorative elements, construction techniques, and spatial extensions were introduced, the core principles of axial organization, ancestral-hall-centered layouts, and hierarchical sequencing persisted.

In this regard, the continuity of mansion architecture was not dependent on the preservation of fixed forms, but on the sustained reproduction of lineage-centered spatial principles. These principles operated as a stable framework within which architectural variation could

occur. As a result, transformation and continuity were not contradictory processes but structurally interrelated: change took place at the level of form and expression, while continuity was maintained at the levels of social meaning and spatial logic.

Compared with other vernacular contexts in which modernization often leads to the fragmentation of traditional spatial order, the Chaoshan case demonstrates a different trajectory. Here, architectural adaptation did not result in a loss of cultural coherence, but instead enabled the continued articulation of lineage identity and social hierarchy under changing historical conditions. This suggests that vernacular architecture may possess a degree of cultural resilience, enabling it to absorb external influences while preserving core social values.

This perspective has important implications for the interpretation and conservation of vernacular heritage. It indicates that the significance of Chaoshan mansion-style dwellings lies not only in their material form but also in the social and ritual logics embedded within their spatial organization. Accordingly, conservation strategies should move beyond the preservation of physical fabric to consider how these underlying cultural mechanisms can be recognized, interpreted, and sustained in contemporary contexts.

5. Conclusion

This study examined the construction context and driving forces of Chaoshan mansion-style vernacular dwellings through an integrated analysis of architectural form, historical documents, and field data. Based on 39 representative cases, it shows that the emergence and continuity of these dwellings cannot be explained solely by economic accumulation, aesthetic preference, or technical adaptation. Rather, they were shaped through the long-term interaction of historical conditions, construction practices, and socio-cultural mechanisms. In this sense, Chaoshan mansion-style vernacular dwellings should be understood not merely as residential buildings, but as spatial forms through which lineage organization, ritual order, moral values, and local social authority were materially stabilized and reproduced. The study therefore contributes not only to the understanding of vernacular architecture in southern China but also to broader discussions of how domestic architecture embodies social institutions and cultural memory under changing historical conditions. The specific contributions are as follows:

(i) This study clarifies the institutional and historical foundations of mansion construction in the Chaoshan

region. The findings indicate that the rise of the scholar-official stratum, supported by the imperial examination system and local lineage networks, provided both the material basis and the cultural legitimacy for mansion construction. The patronage structure identified across the 39 cases further suggests that mansion building was associated more closely with social identity and institutional position than with wealth alone. In this process, mansion architecture became an important medium through which scholar-officials articulated status, consolidated lineage relations, and embedded themselves within local society.

(ii) This study reveals that the spatial order of Chaoshan mansion-style vernacular dwellings was shaped by the interaction of ritual principles, lineage cohesion, and local belief systems. Feng shui concepts influenced site selection, orientation, and environmental adaptation, while ritual thought structured the internal hierarchy of space. At the same time, the integration of ancestral halls and residential quarters materialized ancestor veneration and reinforced lineage cohesion. Together, these mechanisms made the mansion more than a domestic environment: it became a ritual setting, a symbolic center of collective memory, and a durable spatial expression of local social order.

(iii) This study further shows that Chaoshan mansion-style vernacular dwellings maintained a dynamic balance between formal transformation and cultural continuity. Although mansion architecture changed over time in response to political restructuring, social mobility, commercial expansion, and external cultural influences, its core cultural ethos remained highly stable. The persistence of axial organization, ancestral-hall-centered layouts, and hierarchical spatial sequencing suggests that these dwellings were able to adapt without losing their underlying social meanings. The Chaoshan case thus supports a broader understanding of vernacular architecture as a culturally resilient form that reproduces social values through spatial change rather than static preservation.

Nonetheless, limitations and future directions warrant discussion. This study is primarily based on qualitative case interpretation and does not yet incorporate systematic spatial or quantitative analysis. In addition, the role of mansion space in translocal contexts and its relevance for contemporary heritage practice require further exploration. Future research may therefore combine interdisciplinary methods, extend the analysis to migratory and overseas Chaoshan communities, and further examine the implications of mansion architecture for heritage conservation, education, and community regeneration.

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Conflict of interest

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this article.

Author contributions

Conceptualization: Fei Gao, Wenqing Liu

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Writing – original draft: Fei Gao, Wenqing Liu

Writing – review & editing: Junhang Mai, Wenqing Liu

Ethics approval and consent to participate

This research involved field investigation and semi-structured interviews with adult participants. Before the interviews, all participants received a formal invitation letter describing the purpose and procedures of the study, and written informed consent was obtained from each participant. The research did not involve medical intervention or the collection of sensitive personal data. To ensure confidentiality, interview materials were anonymized throughout the processes of data collection, analysis, and reporting.

Consent for publication

Written informed consent for publication of anonymized interview data was obtained from all participants prior to the study. No identifiable personal information or recognizable images are included in this manuscript.

Availability of data

The data supporting the findings of this study are available from the corresponding author upon reasonable request. Interview materials will be shared in anonymized form where appropriate to protect participants' privacy.

Further disclosure

Part of this study was presented at the 30th Chinese Vernacular Architecture Academic Conference and International Symposium on Vernacular Architecture. The current manuscript substantially extends the conference

paper by incorporating additional case studies, expanded analysis, and a more comprehensive discussion of the construction context and driving mechanisms.

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