

Statistical Characteristics and Driving Factors of Regional Consumption Structure Upgrading under the New Development Paradigm

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Abstract: *As a key lever for expanding domestic demand and smoothing the domestic circulation, the evolution patterns and driving logic of regional consumption structure upgrading are important topics for both academic research and policy formulation. Based on statistical data from 31 provincial-level administrative units across the country, this paper systematically analyzes the statistical characteristics of regional consumption structure upgrading under the new development paradigm using methods such as descriptive statistics and structural decomposition. It conducts an in-depth analysis of its driving factors from five dimensions: policy, income, supply, technology, and mindset. The aim is to provide policy references for implementing targeted measures to promote coordinated regional consumption upgrading and assist in constructing the new development paradigm.*

Keywords: *New Development Paradigm; Regional Consumption Structure; Statistical Characteristics; Driving Factors*

1. Introduction

The core essence of the new development paradigm is to construct an economic operating model of "the domestic cycle as the mainstay, with domestic and international cycles reinforcing each other." Influenced by factors such as sustained economic growth, steady increases in per capita disposable income, accelerated penetration of digital technology, and iterative upgrades in consumption concepts, China's regional consumption has shifted from quantity satisfaction to quality pursuit, and from homogenization to personalization. However, factors such as imbalanced regional development and the urban-rural dual structure still exist, which not only restrict the efficiency of the smooth domestic circulation but also pose challenges for comprehensively building the new development paradigm ^[1]. Based on this, it is of great significance to systematically analyze the statistical characteristics of consumption structure upgrading under the new development paradigm, accurately identify its driving factors, and propose targeted promotion paths.

2. Statistical Characteristics of Regional Consumption Structure Upgrading under the New Development Paradigm

2.1 Steady Expansion of Consumption Scale with Significant Regional and Urban Growth Gradient Characteristics

Under the new development paradigm, China's household consumption scale continues to expand. From 2013 to 2024, the nation's total retail sales of consumer goods grew from 23.781 trillion yuan to 48.7895 trillion yuan, with an average annual growth rate of 6.9%. Regionally, consumption scale expanded steadily in the eastern, central, and western regions, but with notable gradient characteristics: the eastern region consistently led, with total retail sales of consumer goods reaching 24.33854 trillion yuan in 2024, accounting for 50.4% of the national total; the central region accounted for 11.8613 trillion yuan (24.5%); the western region for 10.1421 trillion yuan (21.2%); and the northeastern region for 1.99067 trillion yuan (4.1%).

In terms of growth rate, the central region experienced relatively faster consumption growth. In 2024, the total retail sales of consumer goods in the eastern, northeastern, central, and western regions increased by 2.6%, 3.3%, 5.1%, and 3.7% respectively. In terms of urban distribution, Henan, Hebei, Hunan, and Hubei saw year-on-year growth exceeding 5%. Second-tier cities like Fuzhou, Wuhan,

Shijiazhuang, and Hefei experienced growth exceeding 4.0%. Shanghai and Beijing recorded negative growth. Influenced by factors such as sluggish growth in automobile and catering service consumption, Guangzhou remained largely flat.

2.2 Continuous Optimization of Consumption Structure with Increasing Share of Development-Oriented and Service-Based Consumption

In recent years, with the continuous improvement of residents' income levels and shifts in consumption concepts, China's consumption structure has been continuously optimized, with the proportion of development-oriented and enjoyment-oriented consumption steadily increasing [2]. Structurally, the share of subsistence consumption such as food, tobacco, and alcohol has declined, while the share of development-oriented and enjoyment-oriented consumption like education, culture, and entertainment has risen. Taking the Engel coefficient as an example, the national resident Engel coefficient dropped from 31.2% in 2013 to 29.8% in 2024, a decrease of 1.4 percentage points. Regionally, the urban resident Engel coefficient decreased from 35.0% in 2013 to 28.8% in 2024; the rural Engel coefficient fell from 37.7% to 32.3% over the same period. Therefore, subsistence consumption dominated by food and clothing has stabilized. Concurrently, service-based and development-oriented consumption such as education, healthcare, culture, and entertainment grew rapidly. In 2024, per capita spending on education, culture, and entertainment reached 3,189 yuan, with a cumulative growth of 9.8%. These structural changes in development-oriented and service-based consumption vividly reflect the qualitative upgrading of China's regional consumption structure under the new development paradigm.

2.3 Differentiation in Spatial Distribution of Consumption with Gradual Narrowing of Urban-Rural Consumption Gap

Under the new development paradigm, the spatial layout of China's regional consumption is continuously optimizing, and the urban-rural consumption gap is gradually narrowing. Internally, consumption resources are further concentrating in central cities and urban agglomerations, forming consumption growth poles centered on the Beijing-Tianjin-Hebei region, Yangtze River Delta, Pearl River Delta, and other city clusters. For instance, in 2024, the Yangtze River Delta city cluster's total retail sales of consumer goods reached 12.3542 trillion yuan, accounting for 25.32% of the national total. Per capita retail sales of consumer goods amounted to 51,910 yuan, significantly higher than the national average of 34,322 yuan—an excess of 17,588 yuan. From an urban-rural structural perspective, with the deepening implementation of the national rural revitalization strategy, rural residents' incomes continue to rise, the consumer market continues to expand, and the urban-rural gap gradually narrows. From 2013 to 2024, rural residents' per capita consumption expenditure increased from 6,625.5 yuan to 19,280 yuan, with an average annual growth of approximately 9.3%. In 2024, the urban-rural income ratio dropped to 2.34, and the urban-rural consumption expenditure ratio fell to 1.79, indicating an increasingly evident trend of urban-rural integration.

2.4 Accelerated Iteration of Consumption Models with New Consumption Types Becoming a New Growth Engine

With the widespread application of digital technology, China's regional consumption models are also accelerating their iteration. New consumption modes such as online and green consumption are rapidly emerging, becoming new growth engines. In terms of consumption channels, online consumption scale continues to expand, with online shopping becoming an important part of daily consumption. In 2024, national online retail sales reached 15.5225 trillion yuan, accounting for 26.8% of the total retail sales of consumer goods, with a year-on-year growth of 7.2%, maintaining a high growth rate.

Regionally, the eastern region contributed 82.5% of the online retail market share, the central region accounted for 9.7%, the western region for 6.1%, and the northeastern region for 1.7%. In terms of consumption content, digital consumption, green consumption, and other business formats are flourishing. In 2024, the scale of digital economy-related consumption reached 23.8 trillion yuan, accounting for 44.2% of household consumption; new energy vehicle sales reached 12.866 million units, and green food export value exceeded 2.975 billion US dollars. Additionally, consumption models like customization and experiential consumption are emerging, meeting residents' diversified and personalized needs and enriching the connotation of consumption structure upgrading.

3. Driving Factors of Regional Consumption Structure Upgrading under the New Development Paradigm

3.1 Policy-Driven: Institutional Guarantees and Regional Coordination

In the process of constructing the new development paradigm, national macro policies provide support for regional consumption structure upgrading from two aspects: solid institutional guarantees and promoting regional coordination [3]. Policies such as the "Several Opinions on Improving the System and Mechanism for Promoting Consumption and Further Stimulating Residents' Consumption Potential" have been issued, deploying tasks for improving consumption infrastructure, optimizing the consumption environment, and cultivating new consumption hotspots. Tools like consumption subsidies and tax incentives are fully utilized to directly stimulate consumption demand. For example, subsidies in the new energy vehicle sector directly boosted their sales. Simultaneously, the deep advancement of regional coordination strategies like Beijing-Tianjin-Hebei coordinated development, the Yangtze River Economic Belt, the Guangdong-Hong Kong-Macao Greater Bay Area construction, and Yangtze River Delta integration has greatly promoted the flow and optimal allocation of production factors, driving economic development in the central and western regions and laying an income foundation for consumption structure upgrading. Furthermore, regionally differentiated policies utilizing taxation, financial subsidies, etc., guide consumption resources to tilt towards the central and western regions and rural areas, promoting more balanced regional consumption development.

3.2 Income-Driven: Growth in Household Income and Optimization of Distribution

Overall, the growth of household income and the optimization of income distribution are the core driving factors for regional consumption structure upgrading. According to Engel's Law, income level determines consumption structure. As income grows, the share of subsistence consumption decreases, while the share of development-oriented and enjoyment-oriented consumption rises. From 2013 to 2024, national per capita disposable income increased from 18,311 yuan to 41,314 yuan, with an average annual growth of 5.8%. This income growth not only aligns with the requirements of building the new development paradigm but also provides solid support for household consumption upgrading. Regionally, in 2024, the actual growth rate of rural residents' per capita disposable income was 2.4 percentage points higher than that of urban residents. The ratio of per capita disposable income between the eastern and western regions was 1.59, a decrease of 0.03 compared to 2020, providing an income basis for narrowing regional consumption structure disparities. At the same time, through measures such as the rural revitalization strategy and continuous improvement of the social security system, China continues to optimize the income distribution pattern. The national Gini coefficient for household income in 2023 was 0.465, showing a decrease from 0.473 in 2013. The income gap is gradually narrowing, further unleashing the consumption capacity of low- and middle-income groups.

3.3 Supply-Driven: Industrial Upgrading and Product Innovation

Through industrial upgrading and product innovation, support is provided from the supply side for regional consumption structure upgrading in terms of industries and products. On one hand, China continuously accelerates supply-side structural reform and industrial structure optimization, providing abundant products and service supplies for consumption upgrading. For instance, in the industrial sector, the rapid development of high-end manufacturing has continuously improved the output and quality of products such as smart home appliances and new energy vehicles, meeting residents' demand for high-quality durable consumer goods. The vigorous development of modern service industries, with significantly enhanced supply capacity and quality in sectors like education, culture, and tourism, drives the rapid growth of service consumption [4]. On the other hand, enterprises constantly introduce new products and services aligned with changing consumption demands through technological innovation. For example, the rise of the Customer-to-Manufacturer (C2M) model meets residents' personalized needs through customized production. Regionally, the differentiated improvement in regional supply capacity has a significant impact. For instance, the eastern region mainly focuses on supply in high-end manufacturing and modern services; the central and western regions leverage their characteristic industrial advantages to launch region-specific products and services like ecotourism, big data services, and regional cultural creations. Simultaneously, supply improvement in the rural consumer market has achieved notable results. By constructing a three-level circulation system, improving logistics and distribution networks, and promoting the penetration of high-quality goods and services, rural consumption has transitioned from "convenient consumption" to "assured consumption"

and "quality consumption," narrowing the urban-rural consumption gap.

3.4 Technology-Driven: Digital Integration and Infrastructure Upgrading

On one hand, the continuous improvement of digital infrastructure lays a solid foundation for narrowing regional digital consumption disparities. By the end of 2024, China had built the world's largest 5G network, with a total of 3.377 million base stations covering all prefecture-level cities and county urban areas; gigabit optical networks covered over 500 million households, and internet broadband access users reached 670 million. Particularly, the accelerated construction of digital infrastructure in the central and western regions provides technical support for online and digital consumption. On the other hand, the deep integration of digital technology with consumption scenarios profoundly drives the innovation of consumption models and consumption structure upgrading. Online-offline integrated consumption has become mainstream, with new models like brand livestreaming and content-based livestreaming emerging. In 2024, the number of e-commerce livestreaming users reached 597 million, accounting for 54.7% of total netizens. In the same year, the scale of digital economy-related consumption reached 23.8 trillion yuan. Meanwhile, digital technology empowers supply-side reform, effectively promoting efficient supply-demand matching and driving coordinated optimization of urban-rural consumption structures^[5].

4. Pathways for Promoting Regional Consumption Structure Upgrading under the New Development Paradigm

Promoting regional consumption structure upgrading is an effective measure to smooth the domestic circulation and build the new development paradigm. It requires leveraging statistical characteristics, closely following driving factors, and making coordinated efforts across dimensions such as policy optimization and income enhancement to effectively address issues like regional imbalances and urban-rural gaps, achieving dual improvement in both the scale and quality of consumption.

4.1 Optimize the Policy System and Strengthen Regional Coordination Guidance

It is essential to implement targeted policies and construct a policy support system characterized by "universality + differentiation." On one hand, continuously strengthen investment in consumption infrastructure, increase investment in transportation, logistics, commercial complexes, cold chain storage, etc., in the central and western regions and rural areas, improve the county-level commercial system, effectively open up two-way channels for consumer goods to go to the countryside and agricultural products to enter cities, and narrow the basic hardware gap in regional consumption. On the other hand, persistently promote coordinated regional development, actively guide consumption resources to shift to the central and western regions through methods like tax rebates and project tilting, encourage eastern enterprises to set up production bases and sales networks in the central and western regions, and promote coordinated regional consumption development. At the same time, continuously improve the consumption guarantee mechanism, continuously refine laws and regulations protecting consumer rights and interests, standardize consumption order, and create a safe and reassuring consumption environment^[6].

4.2 Continuously Enhance Income and Consolidate the Foundation of Consumption Capacity

Income is the fundamental prerequisite for consumption, requiring multi-channel approaches to increase household income and optimize income distribution. The government should deepen the reform of the income distribution system, increase the proportion of labor remuneration in primary distribution, improve the mechanism for normal wage growth, and expand the size of the middle-income group. It should focus on rural revitalization, increase support for rural industries, develop characteristic breeding and planting, rural tourism, and other industries that enrich people, broaden sales channels for agricultural products through models like "E-commerce + Cooperatives," and increase farmers' business income. For the central and western regions, it should rely on regional coordinated development strategies, undertake industrial transfers from the east, create more high-quality job opportunities, and narrow regional income disparities. Furthermore, it should further improve the social security system, reduce the pressure of rigid expenditures on education, healthcare, and elderly care for residents, enhance consumption confidence, and unleash consumption potential.

4.3 Deepen Supply-Side Reform to Meet Diverse Consumption Demands

The core of consumption structure optimization lies in supply-side upgrading, requiring promotion of industrial upgrading and product innovation. In the industrial sector, authorities should focus on high-end manufacturing, increase R&D investment, and meet residents' demand for quality and personalized customized production. In modern services, they should prioritize the development of education, culture, tourism, medical and health sectors, promote cultural-tourism integration and medical-care combination, develop high-end service products, and increase the proportion of service consumption. Considering regional differences, the eastern region should focus on new business formats like the digital economy and high-end services; the central and western regions should build characteristic industries such as ecotourism and regional cultural creation based on their resource endowments; the northeastern region should accelerate the transformation and upgrading of traditional industries and cultivate new consumption growth points. The government should continuously advance rural supply-side reform, improve the rural circulation network, promote the penetration of high-quality goods and services, encourage enterprises to develop products suitable for rural consumption demand, solve the problems of "difficulty in purchasing" and "poor quality" in rural consumption, and promote coordinated urban-rural consumption development.

4.4 Strengthen Technology Empowerment and Innovate Consumption Models and Scenarios

Digital technology is a crucial support for consumption upgrading, necessitating accelerated construction and integrated application of digital infrastructure. The government should continuously promote the extension of digital infrastructure such as 5G, gigabit optical networks, and the Internet of Things to the central and western regions and rural areas, narrow the digital divide, and provide network guarantees for online and digital consumption^[7]. It should promote the deep integration of digital technology with consumption scenarios, expand online-offline integrated consumption scenarios, and enhance consumption convenience; it should also cultivate new consumption formats such as online healthcare and digital entertainment to enrich development-oriented and enjoyment-oriented consumption content. The government should utilize technologies like big data and artificial intelligence to help enterprises accurately grasp consumption demand and achieve efficient supply-demand matching, such as optimizing product design and precisely pushing goods and services through consumer profiling. It should empower the transformation and upgrading of traditional consumption, develop new models like smart retail and unmanned delivery, promote the digital transformation of traditional formats like supermarkets and catering; it should also support the application of technologies like VR/AR and ultra-high-definition video in sectors like culture, tourism, and entertainment to create immersive consumption scenarios and enhance consumption experiences.

5. Conclusion

Promoting the continuous upgrading of regional consumption structure and achieving coordinated consumption development is a long-term task in building the new development paradigm. Based on an analysis of the statistical characteristics of regional consumption structure upgrading under the new development paradigm, this paper analyzes the driving factors of regional consumption structure upgrading from dimensions such as policy, income, supply, and technology, and proposes pathways for promoting regional consumption structure upgrading under the new development paradigm. In the future, it is essential to focus on resolving issues like regional imbalances and urban-rural income disparities to fully unleash the consumption potential of each region, promote the dual improvement of consumption scale and quality, and thereby provide solid support for smoothing the domestic circulation and comprehensively building the new development paradigm.

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