载人eVTOL市场接受度研究报告

Research Report on Market Acceptance of Manned eVTOL

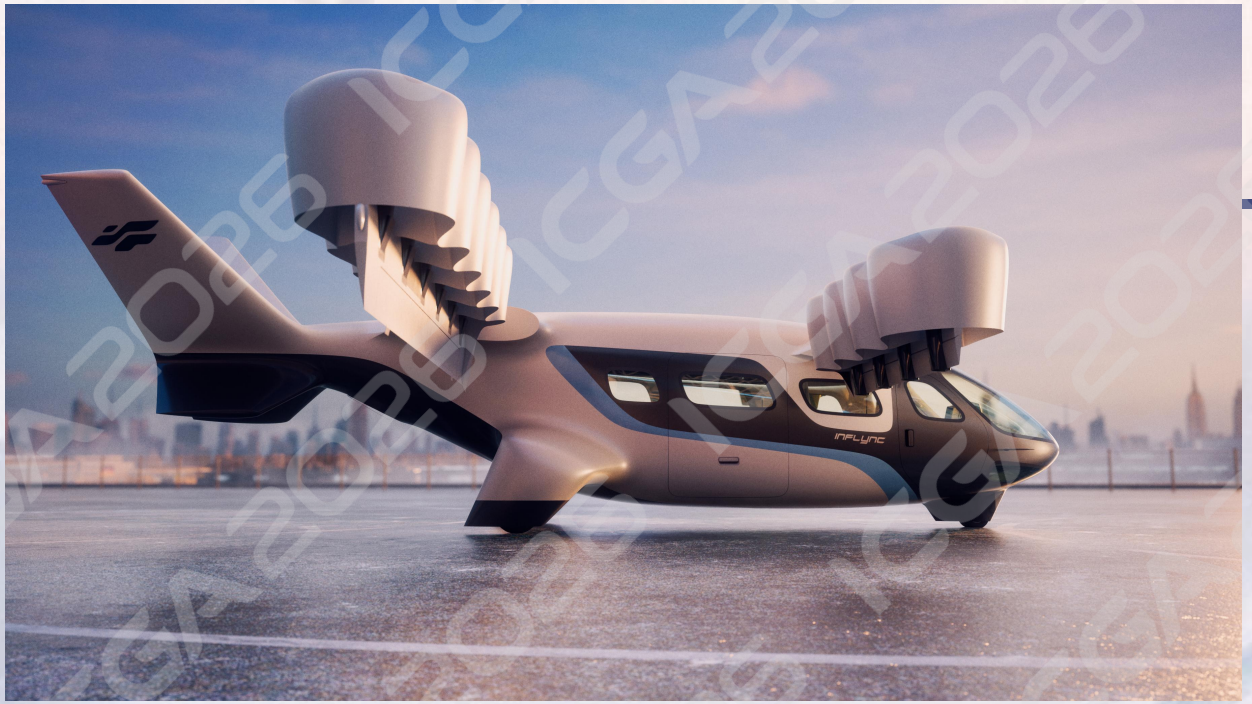
洞察低空交通新需求
开启商业化发展新篇章

New Mobility Demand
New Commercial
Opportunities

天翎科联合创始人兼CMO | 卢懿

Co-founder & CMO, INFLYNC | Louise LU

INFLYNC: *Pioneering Tilt-Wing Ducted-Fan eVTOL*



2023	90+	6	~1000
Establishment	Team	eVTOL Product	Pre-sale Order

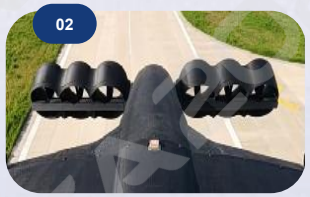
600km	360kph	6-8 Seats	56dBA
Max. Range	Max. Cruise Speed	Payload	@100m

Commercial Airliner	Range Extender	1.5RMB/km*seat
Safety Level	Hybrid Energy System	Lifecycle Cost



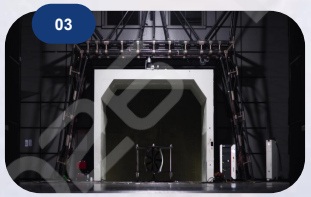
2023.12

Scaled Demonstrator Wind Tunnel Testing



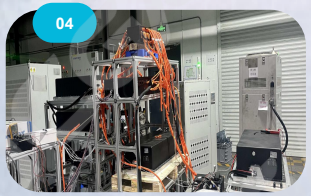
2024.05

Scaled Demonstrator Transition Flight



2025.04

Full-scale Single Ducted fan Wing Wind Tunnel Test



2025.09

Full-scale Iron Bird & Copper Bird Test



2025.12

Structural Static Test



2026.02

Full-Scale Prototype Flight Test

2016-2026 eVTOL development





UBER Elevate

Fast-Forwarding to a Future of On-Demand Urban Air Transportation

October 27, 2016

公众号 · 电动航空时代

低空经济战略定位持续升级，产业政策支持与安全有序约束并行

Upgraded strategy: policy support and safety regulation run in parallel

国内 • 产业政策支持

DOMESTIC • SUPPORTIVE

战略升级：
2024“新增长引擎”→2026“新兴支柱产业”
Strategy: from growth engine to pillar industry

统计分类：
2025.12首建低空经济专门统计口径
Stats: low-altitude economy caliber set, Dec 2025

标准体系：
2026.2十部门指南，2030年超300项
Standards: 10-ministry guide, 300+ by 2030

新质生产力定调：
2026.10《意见》明确安全前置
Positioning: Oct 2026 Opinion puts safety first

国内 • 运行监管趋严

DOMESTIC • TIGHTER OVERSIGHT

场景渐进开放：2025.5“三先三后”原则
Scenarios opened gradually since May 2025

准入提高：
2026.7新《民用航空法》实缴资本≥3000万
Access raised: paid-in capital ≥ RMB 30M, Jul 2026

飞行监管强化：
2026.5两项无人驾驶航空器国标
Ops tightened: two UAS national standards, May 2026

首都空域管控：2026.9首都禁飞区设定
Airspace control: 24/7 no-fly zone, Sep 2026

国外 • 安全高要求/试点运行

OVERSEAS • RAISED SAFETY BAR / PILOT OPERATIONS

FAA：2026.7动力提升“安全连续体”最终政策
FAA: safety-continuum policy for powered-lift

EASA：SC-VTOL专项适航条件，灾难性失效<1e-9/时
EASA SC-VTOL: failure < 1e-9 per hour

全球共识：以高安全目标发展载人eVTOL
Global consensus: eVTOL under high safety targets

美国：通过eIPP国家级试点项目，验证场景加速落地
Accelerate the implementation through the eIPP national pilot project

发布意义 | RELEASE SIGNIFICANCE

衔接行业标准与市场需求

Bridging standards and market needs

标准逐步建立，白皮书补充需求侧研究，支撑安全约束下的产品定义与商业化布局
Adds demand-side research

探索新型城市交通独特价值

Unique value of new urban mobility

并非通航电动化或无人机延伸，而是面向公众的新型交通服务体系
A new public mobility service

前置用户研究支撑长期商业化

Upfront research for commercialization

研制认证周期漫长，前置调研降低产品与市场错配风险
Reduces product-market mismatch

联合发布单位

Joint Publishing Partners

关于中国航空学会 | Chinese Society of Aeronautics and Astronautics

中国航空学会是由航空航天科学技术工作者及相关领域的单位自愿结成并依法登记成立的全国性、学术性、非营利性法人社会团体，是中国航空工业的专业学术组织，旨在促进航空科技的发展和创新，服务航空行业的发展和应用。

The Chinese Society of Aeronautics and Astronautics is a national, academic, non-profit organization serving professionals in aerospace science and technology. It promotes aerospace innovation and industry development.

关于天翎科 | INFLYNC

天翎科航空科技（上海）有限公司是一家eVTOL（电动垂直起降飞行器）整机设计制造商，致力于用高安全、高性能、低噪声的飞行器，构建未来空中交通网络，实现高品质的空中出行。

The Chinese Society of Aeronautics and Astronautics is a national, academic, non-profit organization serving professionals in aerospace science and technology. It promotes aerospace innovation and industry development.

关于陕直股份 | Shaanxi Helicopter

陕西直升机股份有限公司（简称：陕直股份）成立于2017年，隶属于陕投集团旗下陕西航空产业发展集团有限公司。作为陕投集团未来打造“3+N”科技IP产业集群的重要支持力量，陕直股份致力于发展直升机维修与改装、销售与租赁、PMA零部件生产等业务，构建由“销售租赁、航材保障、维修服务、通航运营、专业培训”为核心的直升机全产业链体系。

Founded in 2017, Shaanxi Helicopter is part of Shaanxi Investment Group’s aviation industry portfolio. Its business spans helicopter sales and leasing, maintenance and modification, PMA parts manufacturing, general aviation operations and professional training.

关于多维思博 | INVESTARGET

多维思博是多维投控旗下的咨询业务品牌，聚焦为中国产业经济发展提供咨询服务和支持赋能。多维投控总部位于上海，并在北京、深圳、美国加州等设有分支机构，旗下有资本运营业务平台“多维资本”，战略咨询业务板块“多维思博”，以及科创中心，出海平台“多维海拓”等。

Headquartered in Shanghai, INVESTARGET provides strategic and management consulting to support China’s industrial development, with offices in Beijing, Shenzhen and California.

战略合作单位

Strategic Partner

关于NexAvian

NexAvian因可持续航空技术的蓬勃发展而创立，致力于为多元化的载人飞行活动提供航空咨询服务，涵盖虚拟现实飞行、个人飞行器，乃至未来电动航空器的商业化运营。

Inspired by new developments in sustainable aviation technologies, NexAvian was founded to offer aviation advisory for a variety of human flight activities, including virtual reality, personal air vehicles, and ultimately the commercialization of future electric air vehicles.

JOINT ISSUERS

01 研究缘起与客群识别
Research Background &
Target Audience Identification

02 产业图景与先行实践
Industry Landscape & Early Applications

03 市场接受与场景验证
Market Acceptance & Scenario Validation

04 产品定义与付费逻辑
Product Definition & Willingness to Pay

05 商业化路径与未来展望
Commercialization Pathways & Future Outlook

纸上得来终觉浅，
绝知此事要躬行

分批递进的三角验证：从全景扫描到核心客群深访

Sequential triangulation: 1,000 scans → tiering → 100 deep research

1000份定量全景扫描 → 客群分层筛选 → 核心用户深度调研，专家与第三方数据交叉验证

1,000 quantitative scans → segment tiering → deep research on core users, cross-validated by experts and third-party data

n=1,000

第一批 • 定量全景扫描

Wave 1 • Panoramic Scan

216

核心目标用户 21.6%

Tiered core users • 21.6%

n=100

第二批 • 核心用户深访

Wave 2 • Core Deep Research

筛选逻辑：硬条件（基础匹配+出行意愿）一票否决 + 辅助评分（票价上限、票价对标）→ 综合分层：高潜593 • 可培育117 • 非目标74

Hard criteria veto, plus auxiliary score (price ceiling & benchmark) → 593 high-potential • 117 cultivable • 74 off-target

专家访谈 • B/C/G端

Expert interviews across B/C/G ends • 9 organizations

覆盖运营商、用户与监管视角，验证调研结论

第三方数据对标

Third-party data benchmarking

行业报告与公开数据交叉验证调研发现

五类潜在客群 | 共性：省时间、少折腾 • 差异：场景与体验诉求分化

Five segments | Common: save time • Differ: scenario and experience demands

商务精英45% • 旅行家35% • 高净值10% • 科技尝鲜者5% • 亲子家庭5%

客群画像 | 共同关注出行效率，体验诉求存在差异

Customer Persona | While Travel Efficiency Is a Common Priority, Experience Expectations Vary

五类潜在客群对“省时间、少折腾”存在共识，但在场景与体验诉求上明显分化。

While all five potential segments agree on the need to "save time and minimize hassle," they diverge significantly regarding specific scenarios and experience expectations

共性 Common

五类人群的共同关注点
Common Focus of the Five Segments

- 节省时间 Time-saving
- 减少换乘 Minimize transits
- 提升确定性 Improve reliability

差异 Difference

不同客群的核心诉求
Core Demands by Segment

- 商务看 效率与体面 Business: efficiency+decency
- 文旅看 接驳与舒适 Tourism: Transit+Comfort
- 家庭看 安全与娱乐 Family: Safety+Entertainment

01 商务精英 Business Professionals

典型场景 Typical Scenario
跨城商务
Intercity business trip

★ 核心诉求 Core demands

- 高效准点 High Efficiency& Punctuality
- 快速接驳 Fast Connecting Transit
- 途中可办公 Work-friendly Onboard

一句洞察 Key Insight
把时间价值看得最重，适合率先切入高频商务接驳场景。
Values time most highly; suitable for prioritizing entry into high-frequency business connecting transit scenarios



02 旅行家 Travelers

典型场景 Typical Scenario
长途旅行
Long-distance Travel

★ 核心诉求 Core demands

- 少折腾 Less transit
- 行李友好 Luggage-friendly
- 旅程舒适 Comfortable Journey

一句洞察 Key Insight
更关注旅程衔接是否顺畅，适合文旅接驳与跨城出游场景。
Focuses more on smooth journey connections; suitable for cultural/tourism transit and cross-city travel scenarios.



03 科技尝鲜者 Early Adopters

典型场景 Typical Scenario
首乘体验
First Flight Experience

★ 核心诉求 Core demands

- 科技感 Tech Vibe
- 新鲜体验 Novel Experience
- 社交话题 Social Topics

一句洞察 Key Insight
除效率外，也愿意为新技术体验和身份表达买单。
Beyond efficiency, they are willing to pay for new tech experiences and identity expression.



04 高净值人群 High-net-worth Individuals

典型场景 Typical Scenario
私密社交与专属出行
Private Socializing & Exclusive Travel

★ 核心诉求 Core Demands

- 私密性 Privacy
- 舒适体面 Comfort & Decency
- 安静平稳 Quiet & Stability

一句洞察 Key Insight
更重视私密与品质，适合高端定制化接驳服务。
Values privacy and quality more; suitable for high-end customized connecting transit services.



05 亲子家庭 Parent-child Families

典型场景 Typical Scenario
亲子出游
Family Outing

★ 核心诉求 Core Demands

- 安全舒适 Safe & Comfortable
- 儿童友好 Child-friendly
- 娱乐体验 Entertain-ment Experience

一句洞察 Key Insight
安全与陪伴体验优先，是亲子出行场景的关键吸引[illegible]
Safety and companionship experience come first; key att[illegible] for family travel scenarios.

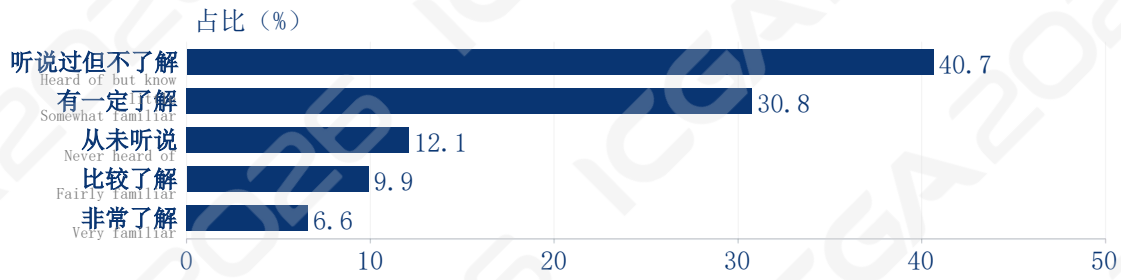


用户认知：市场了解有限，但尝试意愿较高

User Awareness | Familiarity remains limited, yet willingness to try is high

01 了解程度 • 认知仍处低位

Awareness level: have you heard of eVTOL?



02 联想 • 天然视为下一代主流交通工具

First associations with eVTOL

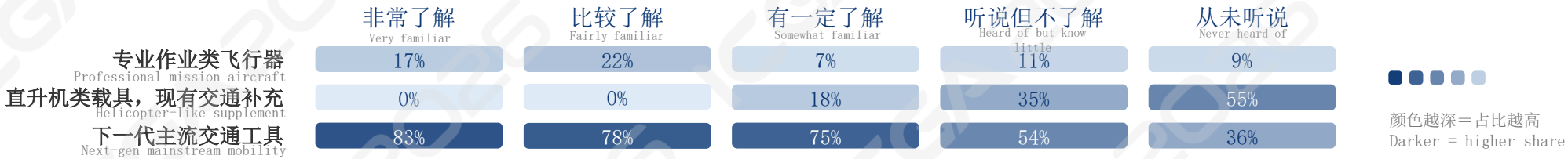
62.6%	下一代主流交通工具 Next-gen mainstream mobility
28.6%	直升机类载具，现有交通方式的补充 Helicopter-like supplement
8.8%	专业作业类飞行器 Professional mission aircraft

03 联想差异 • 认知越深，越倾向定位为下一代主流出行方案

Associations vary by awareness level—deeper awareness maps eVTOL to next-gen mainstream mobility

深度认知用户仅占 16.5%（非常了解 6.6%＋比较了解 9.9%），却是主流出行定位最坚定的群体；整体 62.6% 的用户仍将 eVTOL 联想为下一代主流交通工具。

Deeply-aware users are few (6.6% very familiar + 9.9% fairly familiar = 16.5%) yet hold the strongest mainstream positioning; overall 62.6% associate eVTOL with next-gen mainstream mobility.



认知越深，越倾向主流定位：深度认知群体中，将 eVTOL 视为下一代主流交通工具的占比分别达 83%、78%，显著高于浅层认知群体；超 7 成用户认知停留在浅层，市场教育仍是前置课题Deeper awareness correlates with stronger recognition of eVTOL as next-gen mainstream mobility (83% / 78% among deep-awareness cohorts). Over 70% of users remain at shallow awareness; market education stays a prerequisite.

用户调研揭示：认知有基础、信任靠背书、场景愿付费、价格锚高端

Survey: awareness exists, trust needs endorsement, pay per scenario, price anchors premium

四重市场信号：市场窗口打开、期待超越飞行、商业化从场景起步、经得起真实运营考验

Market window opening • expectations beyond flight • scenario-led commercialization • real operations as the test

01 认知度仍处低位，但有基础可引导

Awareness is low but cultivable

用户对eVTOL概念认知有限，但受教育程度高的关注者更易理解并建立认知

Awareness is limited, yet better-educated users grasp the concept quickly and can be guided

02 信任依赖安全与监管背书

Trust hinges on safety and regulatory endorsement

旋翼安全与噪音是首要关切：80.2%认为需旋翼防护，71.4%将噪音对标高铁55-65dB

Rotor safety and noise top concerns: 80.2% demand rotor guards, 71.4% expect HSR-level 55-65dB

03 分场景付费意愿清晰

Willingness to pay is scenario-based

跨城、机场与医疗急救等时间敏感场景意愿最强，商务与应急付费意愿更高

Time-sensitive scenarios (cross-city, airport, emergency) show the strongest willingness to pay

04 价格锚定高端出行价位

Price anchors at premium mobility

用户心理价位落在高端出行区间，与专车、高铁商务座对标，为定价提供参考

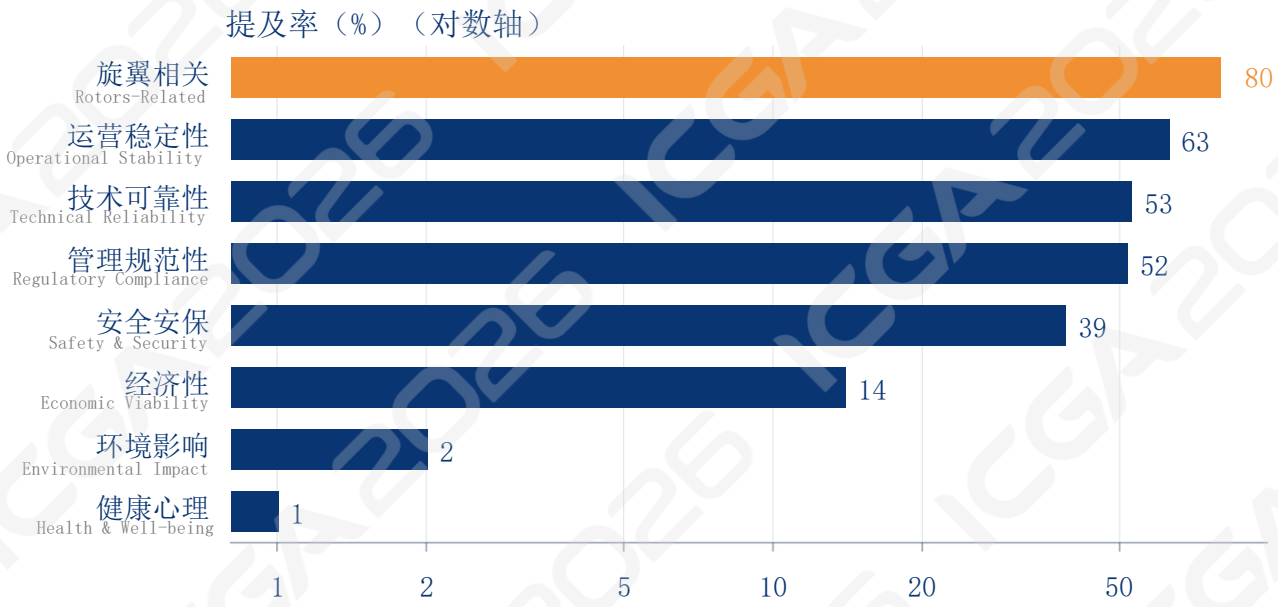
Perceived price anchors to premium travel, benchmarked against premium ride-hailing and HSR business class

安全信任：旋翼风险是用户最核心的安全焦虑点

Safety & Trust | Rotor-related risk ranks as passengers' top safety concern

核心乘客担忧事项 • 提及率

Top passenger concerns by mention rate (%)



旋翼相关担忧拆解 • 按关注度排序

Decomposing rotor-specific concerns

01

地面公众安全

风险感知延伸至地面第三方

Public Safety——
Ground-level safety risks

02

机外噪音

飞行器对外界的噪音影响

External Noise——
Noise impact on the environment

03

生态影响

对周边生态环境的担忧

Environmental Impact—
Concerns over ecological impacts

04

对旋翼/风扇的恐惧感

对近距离飞行器的直观不安

Fear of Exposed Rotors—
Unease around aircraft at close range

风险感知不只局限于舱内乘客，还延伸至地面第三方

Risk perception extends beyond cabin passengers to third parties on the ground

整体来看，各人群对 eVTOL 安全大多持合规可信的理性观望态度，

但仍有相当比例人群类比直升机事故存在顾虑，不同客群的安全担忧程度存在小幅差异

Most segments take a rational wait-and-see stance on eVTOL safety, yet a notable share still worry by analogy with helicopter accidents—concern levels vary modestly across groups.

从市场空间到运营经济性：eVTOL商业化路径

From market size to operating economics: the commercialization path



行业发展沿革预测 • PEST分阶段驱动

Industry evolution forecast • PEST-driven phases

导入期 2026-2028

决定能否飞起来：产业政策为核心驱动，适航审定与运行准入标准逐步明确，以技术验证与场景试点为重点

Policy-led; certification and pilots first

成长期 2028-2035

决定适航效率与成本：运行政策在风险可控区域逐步释放，商业化从单试点走向网络化、规模化

Policy release; network and scale build-up

成熟期 2035-

持续降本与规模化运营：商业模式成熟，规模效应推动成本下降，行业向高效率可持续运营发展

Scale lowers cost; operations normalize

商业化落地取决于运营体系成熟与运营经济性改善的双重兑现

Roll-out hinges on operating-system maturity and operating-economics improvement

Thank You

感谢观看



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