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Research article

Tracking the cost of flying: Empirical insights into airfare volatility and price variation in South Africa's domestic market

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ABSTRACT

This study examines the price competitiveness of South Africa's domestic airline market by analysing 2,277 published fares across five airlines and three major routes. The objective is to determine how airline type, route distance, and booking horizon influence airfare levels and variability. A quantitative longitudinal design was applied. Descriptive statistics, ANOVA, correlation analysis, and multiple regression were used to compare fare structures between low-cost and full-service carriers and across different booking horizons. The analysis reveals a mean airfare of USD 86.92 with substantial variation. Low-cost carriers consistently offered lower fares per kilometre than full-service carriers. Route distance emerged as a significant determinant of unit pricing, with shorter routes displaying higher costs per kilometre. Regression analysis confirmed that distance and airline type jointly explain a meaningful portion of the variation in airfares, while booking horizon exerted minimal influence. Full-service carriers exhibited greater fare volatility than low-cost carriers. The results indicate that structural and competitive factors, rather than booking timing, shape domestic airfare behaviour. The study contributes a longitudinal, airline-level comparison of domestic airfare structures based on published market data and offers insight relevant to pricing strategy, policy considerations, and consumer decision-making.

KEYWORDS

Airfare pricing;
domestic aviation markets;
low-cost carriers;
airfare competitiveness;
South Africa

Introduction

Since the earliest days, tourism has played a significant social and economic role in destination development and product performance (Cook & Billig, 2023). Following the COVID-19 pandemic, the tourism industry has demonstrated strong recovery, contributing approximately 10% to global GDP and supporting one in every ten jobs worldwide (WTTC, 2024; Njoya & Nikitas, 2020). Globally and in South Africa (SA), tourism and aviation remain important contributors to economic activity, with approximately 45,600 people directly employed within aviation locally (IATA, 2024a; IATA, 2024b). South Africa is classified as an upper-middle-income developing economy (World Bank, 2024), which faces structural challenges, including electricity shortages, high unemployment and subdued economic growth averaging below 1% over the past decade. In 2023, inflation reached 6.3%, significantly affecting household purchasing power. Although inflation has since moderated to below 4%, persistent cost pressures continue to heighten price sensitivity and influence discretionary spending on services such as air travel and tourism (Discovery Bank, 2023). Price competitiveness is therefore critical in South Africa, where discretionary travel expenditure is shaped by income constraints and broader socio-economic conditions (Lubbe, 2015), and where variables such as income, occupation and leisure time remain established determinants of tourism demand (Dwyer et al., 2000). The South African domestic airline industry was deregulated in the 1990s (Samunderu, 2024; Luke & Walters, 2013) and currently comprises both Full-Service Carriers (FSCs) and Low-Cost Carriers (LCCs). LCCs have emerged as strong competitors, contributing to shifts in pricing structures and competitive dynamics within the domestic market (Caliao et al., 2023). FSCs provide bundled services within the airfare, including baggage, seat selection and in-flight amenities, whereas LCCs operate on cost-efficient models

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offering unbundled base airfares with ancillary charges (SACAA, 2023; Hasan, 2025). Balancing consumer affordability with sustainable airline profitability remains a persistent challenge, particularly under rising fuel and operating costs (Du Plessis & Saayman, 2018). As air transport and accommodation represent the largest components of tourism expenditure (Haarhoff, 2017), sustained increases in airfares place greater financial strain on price-sensitive travellers and may limit participation in domestic travel.

This study investigates the price competitiveness of domestic airlines operating in SA. Currently, five airlines operate domestically: three FSCs (Airlink, CemAir and South African Airways) and two LCCs (FlySafair and Lift). Published airfares across three major passenger routes (ACSA, 2024), Johannesburg to Cape Town, Johannesburg to Durban and Cape Town to Durban were analysed. To ensure comparability, LCC airfares were standardised by incorporating the average calculated baggage and catering costs. The longitudinal analysis evaluates airfare levels, cost-per-kilometre efficiency and pricing volatility across carriers and booking horizons to assess consumer affordability and airline competitiveness. Recent studies have examined differentiation between low-cost and full-service carriers in the South African domestic market (Fuyane, 2021), broader aviation–tourism interrelationships across African economies (Chakamera & Pisa, 2021), and financial constraints influencing domestic travel participation (Bama & Nyikana, 2021). While these studies advance understanding of aviation and tourism dynamics, longitudinal empirical analysis of published airfare competitiveness across booking horizons in the South African domestic market remains limited. This study addresses that gap through a comparative route-level airfare analysis. It examines airfare levels, unit pricing, and volatility in South Africa's domestic airline market over a twelve-month period and considers their implications for price-sensitive consumers.

Literature review

Price competitiveness and dynamic pricing

In the airline industry, price competitiveness refers to the airline's ability to offer airfares at prices lower than those of its competitors, in order to attract passengers and achieve market share (Heshmati & Kim, 2016). This is influenced by factors such as cost control, strategic pricing decisions and production efficiency. The objective of price competitiveness is to strengthen an airline's market position through fare levels, service differentiation and ancillary benefits, including loyalty programmes and lounge access (Mantey & Naidoo, 2016). Dynamic Pricing represents a revenue management strategy where airfares are adjusted in real-time based on external factors such as demand, supply and competitor pricing (Wittman & Belobaba, 2018). Airlines consider market conditions, use algorithms and data analysis to set prices aimed at maximising revenue and profits. These prices are highly variable and change frequently, even within the same day, reflecting demand and supply. Price is a critical factor in passenger decision-making (Caliao et al., 2023). In South Africa, domestic airfares are not regulated, allowing airlines significant discretion in setting prices (SACAA, 2023). The restructuring and liquidation of airlines between 2020 and 2022 raised concerns regarding reduced competition and potential airfare increases (Dube et al., 2021). Consequently, attracting price-sensitive consumers, particularly leisure travellers and students, remains essential for maintaining high load factors, especially during low-demand periods when discounted airfares are applied strategically (Wilfred et al., 2024). The airline industry uses various strategies to manage its perishable inventory, where airline seats 'expire' if not sold. Revenue optimisation is achieved through the application of sophisticated technologies in yield management and dynamic pricing as adaptive mechanisms responding to demand fluctuations, competition, and lead booking times.

Airline pricing and market dynamics

Yield management relies on statistical models and historical data to predict demand, and passengers have become used to the idea of being charged different airfares for the same flight (Kimes, 2002). This optimisation strategy is applied through demand forecasting using data such as seasonality and trends or even external factors such as events or economic indicators. Passengers are segmented, and the inventory is divided into airfare classes, ensuring that a portion of seats is sold at higher fares (Vinod, 2021). Dynamic pricing, on the other hand, is AI and big data driven, more tactical and responds to market conditions, making real-time adjustments based on the number of remaining seats, current demand, time of departure or even competitor airfares (Kopalle et al., 2023). It is a continuous pricing trend aimed at maximising sales by stimulating demand. The Dynamic Pricing Framework of Narangajavana et al. (2014) categorises pricing into strategic, yield-based and demand-based approaches, which, if applied to the SA market, suggests that the LCCs prioritise yield and demand-based pricing (Avogadro et al., 2021) compared to the FSCs that focus on strategic pricing (Doganis, 2020). LCCs are no-frills airlines that offer low base unbundled airfares with additional separate charges for baggage and meals, while FSCs traditionally position themselves toward corporate and higher-income passengers offering bundled airfares that are inclusive of baggage, snacks and

meals, priority boarding, the use of airport lounges and loyalty programs. Not only do LCCs and FSCs follow differentiating strategies in terms of service offerings, but they also differ in terms of pricing decisions (Khan et al., 2019). The LCCs raise airfares earlier due to their limited capacity, while FSCs maintain stable pricing (Fageda & Flores-Fillol, 2024). In the South African domestic market, Fuyane (2021) reports hybridisation between low-cost and full-service carriers, indicating reduced differentiation in service attributes and competitive positioning. This duality complicates not only airfare comparisons but also influences the perceived value for price-sensitive passengers.

Market instability has intensified airfare volatility in South Africa. Between 2012 and 2022, the exit of airlines such as 1time, Mango, Comair/Kulula and Skywise, reduced competition, while in 2019, SAA was placed under business rescue and SA Express was liquidated in 2020. New entrants such as FlySafair and Lift, and the promise of Mango's return in December 2025 signal recovery, but challenges such as high fuel prices and airfare increase still exist (Parliamentary Monitoring Group, 2025; BusinessTech, 2024). Airfare volatility which often results from dynamic pricing strategies leads to unpredictability that may limit early bookings (Groves & Gini, 2013) while Fageda & Flores-Fillol (2024) note that short-haul flights, such as Johannesburg to Durban, face competition from cars (<600 km) while longer routes such as Johannesburg to Cape Town and Cape Town to Johannesburg (>1300 km) see higher airfares due to cost and convenience. At the continental level, longitudinal evidence demonstrates the contribution of air passenger transport to tourism performance and economic growth across African economies (Chakamera & Pisa, 2021), underscoring the structural relevance of aviation within domestic markets.

Consumer behaviour and price sensitivity

As uncertainty following the COVID-19 era persists, price remains a critical component of consumer behaviour. Global and South African surveys reveal strong price consciousness, with consumers actively seeking value and promotions (McKinsey, 2025; PWC, 2023). In South Africa's tough economic environment, this is reflected in heightened deal-oriented purchasing behaviour. The Price Fairness Theory suggests that consumers judge airfares based on reference prices, competitor behaviour, and transparency, perceiving opportunistic pricing as unfair, eroding trust in low-competition markets (Bolton et al., 2003; Friesen, 2020). Once pricing is perceived as opportunistic or inconsistent, trust erodes, and consumers interpret the prices as unfair. In the airline industry, academic research indicates that passengers have a limited understanding of how airfares are charged (Anuwichanont & Rajabhat, 2011) and perceptions of airfare fairness are further shaped by the complexity of dynamic pricing and other revenue management strategies used by airlines. In SA, despite a positive perception of the country's tourism industry, affordability remains a major constraint of travel intention and participation (Dlomo & Ezeuduji, 2020). Similarly, domestic travel intentions research in South Africa has highlighted financial constraints and disposable income limitations as key determinants influencing participation in tourism activities (Bama & Nyikana, 2021). The National Department of Tourism's Domestic Tourism Growth Strategy 2012 – 2020 (NDT, 2012) and the 2015 National Tourism Sector Strategy (NDT, 2015) have consistently identified affordability as a barrier to domestic tourism growth, whilst emphasising that the 'absence of inclusive pricing structures' restricts participation and directly competes with essential household spending (Burger & Fourie, 2019). The government continues to recognise affordability and inclusivity as priorities in tourism policy. The South African Tourism Five-Year Strategic Plan (2025–2030) identifies affordability as one of three core components of the Brand Strength Index (BSI), alongside stature and awareness (Parliamentary Monitoring Group, 2024). The consumer's heightened price sensitivity and South Africa's constrained economic environment emphasise the need for airlines to adopt pricing models and management that reinforce consumer trust whilst remaining competitive. Examining fare levels and volatility within this context provides insight into how pricing structures interact with broader affordability constraints.

Airfare volatility and theoretical foundations

Airfare volatility reflects the complex interaction between market competition, cost structures, and dynamic pricing strategies. In South Africa's deregulated industry environment, airlines employ various revenue management strategies to respond to the market environment. (Vinod, 2021; Fageda & Flores-Fillol, 2024). While frameworks such as the Price Sensitivity Measurement (PSM) model and the Theory of Planned Behaviour (TPB) are relevant for understanding consumer responses to price variation, the present study focuses on observable fare structures and volatility within the domestic market. The PSM model establishes price thresholds that reflect on the consumer's tolerance levels varying between 'too cheap' and 'too expensive' (Lipovetsky, 2006; Kintler et al., 2023), which quantifies tolerance levels, forecasts demand elasticity and optimises airfare structures in a very competitive environment. Baghirov & Sarkhanov (2023) confirm that consumer behaviour is sensitive to price changes. The TPB add depth to the PSM by linking three core constructs, namely attitudes towards travel behaviour, subjective norms and perceived behavioural

control. In terms of this study, these constructs present themselves as perceptions of airfare value amidst volatility, social influences on travel choices and access barriers such as economic constraints (Nguyen, 2020; Kim & Lee, 2019). In the South African context, these frameworks provide a structured basis for evaluating how airfare volatility influences both LCC and FSC passengers, with implications for pricing strategies that balance demand and profitability. The integration of the PSM and TPB enables analysis of how price dynamics shape consumer travel decisions within a volatile pricing environment.

Research methodology

This research used a quantitative, longitudinal design to analyse airfares in South Africa's domestic airline market, including both LCCs and FSCs: Airlink, CemAir, FlySafair, Lift and SAA. A total of 2,277 direct, one-way, economy-class published airfares were systematically collected manually from the official airline websites, excluding any intermediaries, over a period of 12 months from 2024 to 2025 across three high-traffic routes between Cape Town (CPT), Johannesburg (JNB) and Durban (DUR). The published airfares included airport taxes, statutory charges and VAT and were recorded at three booking horizons: one day, one week and one month prior to departure, enabling assessment of temporal pricing variability. To ensure fair comparison between LCCs and FSCs, all airfares were standardised to include equivalent service components such as baggage and complimentary in-flight catering as part of the bundled standard economy class airfare. FlySafair and Lift typically exclude complimentary onboard meals and checked baggage; as such, the airfares were adjusted upward to align with the offerings of Airlink, CemAir and SAA. The alignment was based on an average checked baggage cost of USD 10.81 per passenger. Catering adjustments were derived from FlySafair's onboard menu, calculated at an average of USD 5.46. For Lift, catering adjustments were based on menu pricing; as selected drinks and snacks are included in the base fare, an additional USD 3.30 was applied. The resulting total USD fare for each airline reflects comparable service inclusions and provides a consistent basis for cross-carrier comparison. FSC airfares required no adjustment as bundled ticket prices are inclusive of baggage and complimentary onboard catering. This standardisation enabled equitable benchmarking of airfare structures between LCCs and FSCs. In support of international alignment with global airline research, all airfares, published in the currency of the country of commencement of travel, South African rand (ZAR), were converted to United States Dollars (USD) using a fixed arithmetic average exchange rate of ZAR 18.5 per USD 1, reflecting the mean rate during the data collection period (South African Reserve Bank, 2025). The USD conversion enhances global comparability while maintaining data integrity within the SA context. Using a fixed average exchange rate prevented exchange-rate fluctuations from influencing airfare comparisons and ensured temporal consistency throughout the study. Flight distances between city pairs were calculated using a standard air-miles distance calculator (Air Miles Calculator, 2025). The distances from Johannesburg to Durban (477 km), Johannesburg to Cape Town (1, 271 km), and Cape Town to Durban (1, 278 km) were used to compute cross-route average airfare per kilometre, enabling consistent comparison of price competitiveness across routes of varying distances.

Using Microsoft Excel, the analysis process was aimed at understanding how domestic airfares behave across different routes, airlines and booking horizons. After cleaning the dataset, additional fields were incorporated to make provision for advance purchase differentiation for the next day, one week and one month in advance, after which the flight distance calculated (AMC, 2025) was added to support comparisons. The analysis included basic descriptive measures, including mean, median, minimum and maximum airfares, and standard deviations were calculated for each airline route combination to give an overview of typical price levels and the spread of airfares. The coefficient of variation was then used to compare airfare volatility across airlines, as it provides a standardised measure that is not affected by the scale of the fares. To test whether average prices differed between airlines, a one-way ANOVA was conducted, which showed statistically significant variations in airfares across airlines. Correlation analysis was used to check the relationship between distance and price per kilometre, showing a strong negative relationship that longer routes tended to have lower airfares per kilometre. This approach allows assessment of structural price relationships across routes and carriers. Booking-horizon comparisons were also carried out by examining the average airfares recorded one day, one month, and on the day of travel, which helped highlight how airline pricing changes as the departure date approaches. This progression provided insight into the degree of price sensitivity across booking windows and the extent to which airlines adjust airfares strategically as departure nears due to the perishability of the product. These methods were combined to provide a clearer picture of airfare patterns, competitiveness, and route-specific differences within the South African domestic market.

Results and discussion

This study analysed 2,277 published airfares from the five domestic airlines operating in South Africa, namely Airlink, CemAir, Lift, SAA, and FlySafair, across three main routes: Johannesburg to Cape Town (JNBCPT), Johannesburg to Durban (JNBDUR), and Cape Town to Durban (CPTDUR). The objective was to assess how airfares differ by airline type, route, and booking horizon, and to identify observable pricing patterns across the domestic market. The descriptive average domestic airfare is USD 86.92, with individual fares ranging from a minimum of USD 30.35 to a maximum of USD 302.38. The standard deviation of 34.63 reflects substantial variation in airfares across airlines, routes, and booking periods, which highlights the heterogeneity in pricing strategies within the domestic airline market. The positive skewness value of 1.38 indicates a right-skewed distribution of airfares, with the majority of airfares clustered at the lower end, while a small number of higher airfares elevate the mean. The kurtosis value of 2.86 suggests that airfare values are relatively concentrated around the mean, although a few outliers are present. Understanding this average airfare is important, as it provides a baseline measure for assessing price competitiveness across airlines and routes. The mean airfare serves as a central reference point for comparing individual airline pricing, evaluating the effectiveness of low-cost versus full-service carrier strategies, and interpreting airfare behaviour under different booking horizons. The observed variability and skewness also indicate that mean values alone may not capture the full complexity of airfare structures, emphasising the importance of examining the distribution alongside measures of central tendency. Overall, these results indicate that domestic airfares exhibit considerable variation, reflecting standard pricing dynamics influenced by booking timing, route distance, and airline category.

Table 1: Descriptive statistics of domestic airline airfares

Mean	86.92
Standard Error	0.73
Median	79.31
Mode	57.33
Standard Deviation	34.63
Sample Variance	1199.04
Kurtosis	2.86
Skewness	1.38
Range	272.03
Minimum	30.35
Maximum	302.38
Sum	197911.83
Count	2277
Confidence Level (95.0%)	1.42

In Table 2, the average airfare results are refined into an airline-specific per-kilometre table indicating the average price per kilometre for each airline. The overall mean airfare of USD 86.92 exceeds both LCCs, with Lift having the lowest overall airfare (USD 83.42), followed closely by FlySafair at USD 84.05. Airlink has the highest average airfare at USD 90.81.

Table 2: Average airline airfare and distance comparison

Airline	Average Airfare (USD)	Average Price/km (USD)
Airlink	90.81	0.1187
CemAir	90.63	0.1017
Lift	83.42	0.1001
SAA	86.15	0.1036
FlySafair	84.05	0.0945
Overall Mean	**86.92**	**0.1026**

When route-based airfares are compared in Table 3, results confirm that shorter routes are associated with a higher price per kilometre. The Johannesburg to Durban route (477km) recorded the highest average price of USD 0.1414 per kilometre, whereas the longer routes exhibited lower average prices per kilometre. This pattern is consistent with cost distribution effects observed in airline pricing literature, where fixed operating costs are spread across different route lengths. A one-way ANOVA test was done to check if there were significant differences in airfares between airlines. The ANOVA results in Table 4 show a significant difference in airfares ($p < 0.001$) between airlines. Airlink and CemAir had the highest average airfares (around USD 90), while Lift and FlySafair had the lowest (around USD 83–84). This indicates statistically significant differences in average fares across airlines, consistent with structural differences between carrier types.

Table 3: Route-based airfare and distance metrics

Route	Average Price/km (USD)	Distance (km)
CPTDUR	0.0799	1,278
JNBCPT	0.0815	1,271
JNBDUR	0.1414	477

Table 4: ANOVA test

Source of Variation	SS	Df	MS	*F*	P-value	F crit
Between Groups	23,109.38	4	5,777.34	**4.85**	**0.00068**	2.38
Within Groups	2,705,910.79	2,272	1,190.98	—	—	—
Total	**2,729,020.16**	**2,276**	—	—	—	—

In Table 5, the average airfares and prices per kilometre are compared between LCCs, FlySafair and Lift and FSCs, Airlink, CemAir and SAA. Overall, LCCs offered lower airfares per kilometre, confirming their position as the more affordable option. However, the difference between LCCs and FSCs is relatively small, indicating that South African airlines remain closely competitive on pricing despite differences in service offerings. A two-sample t-test comparing price per kilometre between LCCs and FSCs revealed a statistically significant difference ($t = -5.48$, $p < 0.001$). This result confirms that LCCs record significantly lower prices per kilometre than FSCs.

Table 5: Average airfare and price per kilometre by airline type

Type	Average Airfare (USD)	Average Price/km (USD)
LCC	83.78	0.0968
FSC	89.38	0.1070

This was followed up with a multiple regression, which was used to test how distance and airline type affect the total airfare in Table 6. The regression model was statistically significant ($F = 485.0$, $p < 0.001$, $R^2 = 0.30$), indicating that the model accounts for approximately 30% of the variation in airfares. These results confirm that distance and airline type are statistically significant predictors of airfare variation.

Table 6: Multiple regression results for total airfare with distance and airline type

Variable	Coefficient	Interpretation
Intercept	44.67	Base airfare before distance and airline effects
Distance (km)	+0.048	The positive distance coefficient (+0.048) indicates that airfares are positively associated with route length, with longer routes linked to higher total airfares.
Airline Type (FSC vs LCC)	-7.54	The negative coefficient (-7.54) indicates that, on average, LCC airfares are approximately USD 7.54 lower than FSC airfares when distance is held constant.

To verify how much the airfares, fluctuate within each airline, the coefficient of variation (CV) was calculated in Table 7. A higher CV indicates greater price variability over time, whereas a lower CV reflects more stable pricing. Among all airlines, SAA had the highest CV (0.49), indicating the largest airfare fluctuations, while FlySafair had the lowest (0.32), demonstrating more stable pricing. This suggests differences in pricing variability across carrier types, which may reflect contrasting revenue management approaches.

Table 7: Airfare volatility (Coefficient of variation)

Airline	Average Airfare (USD)	Standard Deviation	Coefficient of Variation
Airlink	90.81	38.09	0.42
CemAir	90.63	35.26	0.39
Lift	83.42	31.81	0.38
SAA	86.15	42.55	0.49
FlySafair	84.05	26.71	0.32

The airfares were grouped based on how far in advance the airfares were retrieved from the airline website: one week, 1 day before departure, and one month before departure. Results in Table 8 show that airfares did not drop significantly for earlier bookings. In fact, tickets bought one month before departure were slightly higher (USD 89.29) than those recorded within the same week or on the day of departure. This pattern suggests that early retrieval does not guarantee lower airfares within the South African domestic market. This may reflect revenue management strategies that prioritise demand conditions and seat availability over booking lead time. In Table 9, the correlation test supported this, showing very weak relationships between airfare and booking horizon ($r = 0.02$) and between airfare and distance ($r = 0.005$). This indicated that factors such as airline strategy or competitive dynamics exert a greater influence on pricing than the timing of airfare retrieval or route length. The correlation between distance and price per kilometre was –0.59,

indicating a strong negative relationship. This suggests that longer routes are associated with lower unit prices per kilometre. This pattern is consistent with cost-spreading effects commonly discussed in airline pricing literature, where fixed operating costs are distributed over greater distances.

Table 8: Booking horizon analysis

Booking Horizon (Days)	Average Airfare (USD)	Standard Deviation	Count
One week before departure	86.96	34.26	1,772
1 *(Next Day)*	84.25	38.59	254
One Month before departure	89.29	32.90	251

Table 9: Correlation matrix of airfare, price per kilometre, distance, and booking horizon

Variable	TOTAL AIRFARE USD	PRICE per KM USD	DISTANCE per KM
Booking Horizon	0.023	0.019	0.005
Price per KM USD	0.289	1	—
Distance (KM)	0.005	-0.591	1

Conclusion

The analysis of 2,277 domestic airfares provides a clear account of how airfare pricing in South Africa's domestic airline market is shaped by airline type, route characteristics, and competitive structure. The mean airfare of USD 86.92, combined with considerable variation and positive skewness, indicates that most airfares cluster at lower levels, higher-priced outliers remain present across routes and airlines. Comparisons between carriers show that low-cost airlines, particularly FlySafair and Lift, consistently offered lower airfares per kilometre than full-service carriers such as SAA, Airlink, and CemAir. These differences were confirmed through both ANOVA and t-test results, which demonstrated statistically significant distinctions in airfare levels, although the magnitude of the difference between carrier types remained moderate, reflecting strong price competition in the domestic market. Route-level patterns further reinforce the differentiated cost structure across the network. Shorter routes, notably Johannesburg to Durban, showed the highest price per kilometre, whereas longer routes such as Johannesburg to Cape Town and Cape Town to Durban reflected considerably lower unit costs. This pattern was supported by a strong negative correlation between distance and price per kilometre, consistent with cost distribution dynamics observed in airline pricing research. The regression analysis confirmed that distance and airline type together accounted for approximately 30% of the variation of airfares, with each additional kilometre adding approximately USD 0.048 to the airfare and low-cost carriers offering lower airfares than full-service carriers when distance was controlled. An examination of pricing volatility showed notable differences between carriers. SAA displayed the highest variability in airfares, whereas FlySafair maintained the most stable pricing, illustrating differences in revenue management practices across airline types. Booking-horizon analysis revealed no consistent price advantage for earlier airfare retrieval. In fact, airfares retrieved one month before departure were marginally higher than those retrieved closer to the travel date, and correlations between booking horizon and airfare were negligible. These results indicate that booking horizon explains limited variation relative to structural and competitive factors. Taken together, the findings show that domestic airfare behaviour in South Africa is shaped primarily by airline business model, route distance, and competitive dynamics, with booking timing exerting limited influence. Low-cost carriers remain the most cost-effective option on a per-kilometre basis, while longer routes exhibit lower unit costs, consistent with operational cost distribution patterns. These patterns outline a pricing environment in which structural and competitive factors, rather than the booking horizon, determine airfare outcomes across the domestic network.

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