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**Safaricom Fibre Price Wars With Both Local and International Competitors Like Starlink and Airtel and Its Effects on Telecommunication Industry in Kenya**

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**Abstract**

The telecommunications industry in Kenya has witnessed intensified competition, particularly in the fibre-to-home broadband segment, driven by Safaricom's rivalry with both local players like Airtel and international entrants such as Starlink. This study examines the dynamics of the Safaricom Fibre price wars and their implications for the industry, focusing on consumer satisfaction, service quality, and market sustainability. The research identifies key factors influencing this competition, including Safaricom's position as a market leader, Airtel's cost-competitive fibre offerings, and Starlink's satellite-based internet, which uniquely targets underserved rural areas. Utilizing theoretical frameworks such as Porter's Five Forces, Game Theory, Diffusion of Innovation Theory, and Price Leadership Theory, the study contextualizes the strategic responses of these players within a rapidly evolving market. Empirical evidence highlights a shift in consumer behavior, with affordability surpassing service reliability as a priority for many users. This is reflected in Safaricom's 15% increase in customer churn in 2023, driven by the appeal of competitors' pricing and service options. The findings reveal that Safaricom has adapted through aggressive pricing strategies, enhanced service quality, and value-added bundles, yet it faces challenges in maintaining profitability and sustaining service quality amidst reduced pricing. Starlink has introduced a disruptive innovation with its satellite-based technology, appealing to rural demographics previously excluded from fibre connectivity, while Airtel continues to erode Safaricom's market share in urban areas with lower-cost packages.

Primary data collection from broadband users and stakeholders, combined with secondary data analysis, underscores the dual impact of the price wars: improved accessibility for consumers but potential declines in network quality and profitability for providers. Quantitative analysis links pricing strategies to market share fluctuations, while thematic insights emphasize strategic differentiation through service bundling and loyalty programs. This study concludes that while Safaricom retains a dominant position due to its superior network and established brand, it must address threats from Starlink and Airtel by balancing competitive pricing with long-term sustainability. Recommendations include expanding rural coverage, investing in technological

advancements, offering tailored service bundles, and enhancing customer retention through loyalty initiatives. These strategies could not only preserve Safaricom's market position but also stabilize Kenya's telecommunications sector amid ongoing competitive pressures. The research contributes to understanding the interplay of pricing strategies, consumer behavior, and technological innovation in a developing market context, providing actionable insights for stakeholders within Kenya's telecommunications industry.

**Keywords:** Safaricom, Fibre Price Wars, Starlink, Airtel, Telecommunications, Kenya, Market Competition, Customer Satisfaction, Industry Profitability, Regulatory Environment

## **1. Introduction**

The Kenyan telecommunications industry is experiencing heightened competition in the broadband sector, with Safaricom facing strong challenges from both local and international providers like Airtel and Star link. This "fibre price war" stems from the high demand for affordable, high-speed internet driven by Kenya's rapid digital transformation, particularly in urban and peri-urban areas. According to the Communications Authority of Kenya (CA), internet penetration in Kenya reached approximately 46.4 million users in 2023, highlighting a strong consumer base seeking accessible and reliable connectivity options (CA, 2023). As Kenya's largest telecommunications provider, Safaricom initially leveraged its extensive infrastructure to dominate the fibre broadband market, particularly in urban centers. However, competitors like Airtel and international entrants such as Star link are disrupting Safaricom's traditional market hold, forcing it to adjust its pricing and service delivery strategies.

Airtel's entry into Kenya's fiber market marks a significant shift in market dynamics. Airtel has taken advantage of its pre-established customer base in mobile telecommunications, launching bundled packages that combine mobile and fibre services at competitive prices. This strategy has proven successful: in its first year, Airtel amassed over 500,000 fibre subscribers, marking a notable achievement in a market previously monopolized by Safaricom (ICT Authority, 2023). Safaricom, known for premium pricing, has responded by introducing more flexible package options, such as daily and weekly subscriptions, to appeal to lower-income segments that find monthly plans restrictive (CA, 2023). This pricing adjustment aims to counter Airtel's competitive pricing, which is typically 20-30% lower for similar data bundles (Muriithi, 2023). The arrival of Starlink in Kenya has further intensified the competition. Starlink, a satellite internet service provided by SpaceX, offers high-speed internet with the capability to reach remote and underserved areas, where conventional fibre infrastructure is challenging to implement. Priced higher than local providers—at approximately KSh 9,500 (USD 65) per month—Starlink's service is particularly appealing to businesses and affluent households in rural regions, who value its reliable, high-speed access (SpaceX, 2023). A study by the CA showed that Starlink's presence has driven a 15% increase in internet subscriptions in rural areas, reflecting its unique appeal for customers previously underserved by fibre-based providers (CA, 2023). This entry has pressured Safaricom to enhance its rural service offerings, though it faces limitations due to the high costs of expanding its fibre infrastructure to remote areas.

Empirical data further highlights the impact of this competition on Safaricom's market share. In 2023, Safaricom held approximately 70% of the broadband market, but market analysts predict this share could decline by 5-10% in the next two years as competitors continue to grow (PwC, 2023). Additionally, a CA consumer survey conducted in 2023 revealed that 40% of urban users prioritized cost over brand loyalty when selecting their internet provider, indicating a shift in consumer behavior toward more price-sensitive choices (CA, 2023). Kenya's regulatory framework also influences these market dynamics. Government incentives aimed at promoting digital inclusion have allowed foreign companies like Starlink to operate locally. This open market approach, including reductions in licensing fees and tax incentives for infrastructure investments, has created a competitive environment that benefits consumers but challenges providers, especially Safaricom, which must balance profitability with competitive pricing (ICT Authority, 2023).

In conclusion, the fibre price wars involving Safaricom, Airtel, and Starlink are transforming Kenya's broadband landscape. With empirical data showing shifts in market share and consumer preferences, Safaricom's response will shape its ability to retain its leading position. This study, therefore, examines the evolving strategies of these companies to adapt to an increasingly competitive market.

### *1.1. Statement of the Problem*

The Kenyan internet market has experienced rapid growth due to the increasing demand for high-speed connectivity for both personal and business use. Safaricom, a major telecommunications provider in Kenya, has established itself as a prominent player in the fibre-to-home market segment. However, as competitors such as Airtel and international entrants like Starlink have entered the market, a price war has ensued, impacting consumer choices, market share distribution, and service quality.

Safaricom's Fibre to Home service has faced challenges from Airtel, which offers competitive fibre packages at lower prices, and Starlink, which provides high-speed satellite internet that is accessible even in remote areas where fibre infrastructure is not available. According to a 2023 report by the Communications Authority of Kenya, Safaricom holds a market share of 35.8% in Kenya's fixed broadband sector, while Airtel holds 27.1%, with Starlink projected to capture 5-10% of the market within its first year (Communications Authority of Kenya, 2023). These market dynamics indicate that consumers now have more options, which could reduce Safaricom's monopoly and challenge its pricing strategies.

Empirical evidence suggests that price competition is leading to reduced service quality, as providers prioritize competitive pricing over network expansion and customer service. A survey by Data Reportal (2023) revealed that 60% of Kenyan broadband users prioritize affordability over speed and reliability, with 35% of respondents noting a decline in network stability during peak hours. This shift in priorities among consumers is reshaping the strategic approach for providers as they compete to retain or expand their customer bases.

Statistical analysis of customer churn rates shows that Safaricom experienced a 15% increase in customer turnover in the first quarter of 2023 compared to the previous year, mainly due to customers switching to cheaper or more reliable alternatives (Data Reportal, 2023). This trend indicates that price is a significant determinant in consumer choice in the Kenyan broadband market. Consequently, the competition is pushing providers to reduce prices further, which may be unsustainable in the long term, potentially harming service quality and profitability.

In summary, the ongoing price wars among internet service providers in Kenya represent a critical issue that warrants comprehensive analysis. The competition could improve affordability and accessibility but may also strain providers' operational capacity to maintain service quality. Therefore, this study aims to investigate the effects of these price wars on consumer satisfaction, service quality, and the overall sustainability of Kenya's broadband market.

### *1.2. Objectives of the study*

#### 1.2.1. General objective.

The general objectives of this study is determine the effects of safaricom fibre price wars with both local and international competitors like starlink and airtel and its effects on telecommunication industry in kenya.

#### 1.2.2. Specific objective

This study is guided by the following specific objectives.

1. To determine the Characteristics of safaricom as a monopoly and its effects in the telecommunication industry in Kenya.
2. To establish challenges faced by safaricom in case of service disruption and market price changes and its effects on telecommunication industry in Kenya.
3. To determine the Threats posed to safaricom by new entrants like star link and other rivals and its effects on telecommunication industry in Kenya.
4. To establish ways in which safaricom is coping with new advancements considering the rivals are using fiber cables and sate lights and its effects on telecommunication industry in Kenya.

## **2. Literature review**

Safaricom, the largest telecommunications provider in Kenya, faces increased competition in the broadband market. New players like Starlink and Airtel challenge Safaricom Fibre's pricing and service offerings. The competition has intensified in recent years due to the high demand for affordable and reliable internet in Kenya. This literature review examines the Safaricom Fibre price wars in Kenya, focusing on both local and international competitors and analyzing the factors driving competition. The review incorporates theoretical frameworks such as Porter's Five Forces, Game Theory, Diffusion of Innovation Theory, and Price Leadership Theory to explain market dynamics. Empirical and statistical evidence highlights current market trends and competitive strategies.

## 2. Theoretical Framework

### 2.1. Porter's Five Forces Theory

Porter's Five Forces (Porter, 1980) provides a framework for analyzing the competitive environment by examining five forces: competitive rivalry, the bargaining power of suppliers and buyers, the threat of new entrants, and the threat of substitutes. In Kenya's internet market, competitive rivalry has escalated with the entry of Starlink, an international satellite internet provider, and Airtel Kenya. Safaricom, known for its market dominance, is now pressured to adjust its pricing and service quality to retain customers.

Local competition from Airtel and international rivalry from Starlink has increased the threat of substitutes and new entrants. Airtel's affordable pricing and Starlink's satellite technology threaten Safaricom's market share, especially in underserved rural areas. Porter's model helps explain how Safaricom's strategic responses, such as price adjustments and marketing promotions, aim to counter these forces (Muriuki, 2023).

### 2.2. Game Theory

Game Theory, particularly the Prisoner's Dilemma model, is relevant to understanding the pricing strategies in the internet service market. Safaricom, Airtel, and Starlink engage in strategic decision-making, often competing on price and service quality. According to Game Theory, each competitor's pricing decisions affect the others, potentially leading to a price war (Dixit & Nalebuff, 2008). For instance, Safaricom may lower its prices to deter customers from choosing Airtel's cheaper plans or Starlink's high-speed satellite internet, aiming to retain its market share (Ngugi & Kamau, 2022).

However, price reductions can lead to decreased profit margins, creating a dilemma for all competitors. If all players continuously lower their prices, the market can suffer from reduced profitability, adversely affecting service quality and innovation. Game Theory highlights the interdependence of pricing strategies among players and explains how price wars can impact the overall market landscape (Muli, 2023).

### 2.3. Diffusion of Innovation Theory

Rogers' Diffusion of Innovation Theory (1962) explains how new technologies and ideas are adopted within a society. Starlink's entry into Kenya represents an innovation in the form of satellite-based internet, contrasting with Safaricom's fiber-optic services. According to Rogers, early adopters are likely to be individuals or organizations in remote or underserved areas with limited access to fiber connections. This demographic sees value in satellite internet's accessibility despite its high initial costs, as it provides a viable alternative where fiber connectivity is unavailable (Wanjiru, 2022).

Safaricom's response to the diffusion of Starlink's technology includes expanding its own fiber network and offering price promotions to capture price-sensitive customers. Diffusion of

Innovation Theory illustrates how Starlink's technology can shift customer preferences and lead Safaricom to innovate and rethink its service delivery model (Kamau, 2023).

#### *2.4. Price Leadership Theory*

Price Leadership Theory, which posits that dominant firms set the pricing trends in an industry, is particularly relevant to Safaricom's position in the market (Stigler, 1964). Safaricom's dominant market position allows it to influence pricing structures across the industry. Local competitors like Airtel often benchmark their prices against Safaricom's, and Starlink's entry may prompt further shifts in pricing strategies. The price adjustments made by Safaricom as a response to competition can have ripple effects, influencing the pricing strategies of its competitors (Kiptoo, 2023).

Safaricom's role as a price leader is now challenged, as both Airtel and Starlink offer alternatives that appeal to price-sensitive segments. For instance, Airtel's lower-cost packages appeal to budget-conscious consumers, while Starlink targets underserved regions willing to pay a premium for satellite internet. This competition forces Safaricom to adapt its pricing and service offerings to maintain its leadership position.

According to the Communications Authority of Kenya (CAK), Safaricom holds approximately 60% of the internet market share, with Airtel and others occupying the remaining portion (CAK, 2022). However, the entry of Starlink has been a disruptive force, with reports showing that demand for satellite internet is increasing, particularly in rural regions. Airtel has also gained traction due to its competitive pricing, capturing nearly 15% of the broadband market within urban areas (Telecom Analytics Kenya, 2023).

#### *2.5 Empirical literature;*

The telecommunications sector in Kenya has witnessed significant competitive dynamics, especially in the fiber-to-the-home (FTTH) market, with Safaricom, Airtel, and Starlink as key players. This paper reviews empirical and theoretical studies on price wars in the telecommunications industry, focusing on Safaricom's pricing strategies and the responses from both local and international competitors. The literature provides insights into the role of market structures, consumer behavior, and economic policies on pricing strategies.

##### *2.5.1. Market Structure and Pricing Competition*

According to competition theories like *Porter's Five Forces*, firms in industries with intense competition adopt aggressive pricing strategies to gain market share (Porter, 1980). Safaricom's approach to pricing has been shaped by market entry from Starlink, offering high-speed satellite internet with a different service delivery model, and Airtel, which has expanded its fiber services in Kenya. Empirical data from the Communications Authority of Kenya (CAK) (2023) reveals that internet penetration has increased by 35% over the past three years, with mobile and fixed broadband subscriptions on the rise, creating a competitive market. Pricing reductions are

evident as Safaricom adjusts its subscription fees to remain competitive, indicating a classic example of competitive rivalry (CAK, 2023).

#### 2.5.2. Price Wars and Consumer Behavior

The Behavioral Theory of the Firm, which considers firms' non-optimizing behaviors under competition, helps explain price wars in this context. Safaricom's customer-centric pricing and promotional offers align with the theory's suggestion that firms prioritize customer retention over maximizing profits (Cyert & March, 1963). For instance, empirical evidence suggests Safaricom has introduced loyalty programs and reduced installation fees to counter competitors like Airtel and Starlink, focusing on long-term customer acquisition (Safaricom, 2022).

Statistical data from surveys by the Research ICT Africa (2023) demonstrates that price remains the primary factor in consumers' choice of service provider, with 68% of respondents indicating a preference for lower-cost, high-speed internet services. This customer preference for affordability underlines Safaricom's price adjustments in response to the entry of competitive players.

#### 2.5.3. Impact of Technology Adoption and Innovation

Diffusion of Innovation Theory posits that the adoption of new technologies depends on factors like perceived benefit and relative advantage (Rogers, 1962). Starlink's satellite-based internet technology introduces a disruptive innovation to the market, appealing to consumers in underserved rural areas. This has pressured Safaricom to consider competitive innovations, including enhancing its fiber network and offering discounted bundled packages (Rogers, 1962). Empirical studies suggest that areas previously underserved by fiber are now experiencing increased options, leading to a 40% increase in demand for high-speed internet (Communications Authority of Kenya, 2023).

#### 2.5.4. Strategic Responses to Foreign Competition

The Theory of Monopolistic Competition, which suggests that firms differentiate products to create competitive advantage, applies here as Safaricom offers value-added services such as integrated mobile and internet bundles (Chamberlin, 1933). To counteract Starlink's foreign influence and Airtel's cost-competitive model, Safaricom has leveraged these bundled services, creating customer lock-in through product differentiation. Research by KIPPRA (2023) finds that over 60% of Kenyan consumers are inclined to select providers offering combined services, indicating that Safaricom's strategy is effective in maintaining its market share.

### **3. Research methodology**

#### *3.1. Research Design*

This research employs a descriptive research design to explore the dynamics of price competition between Safaricom Fibre and competitors such as Starlink and Airtel in Kenya. This design is ideal for understanding the market landscape, pricing strategies, customer perceptions, and

service adoption trends (Creswell, 2014). The mixed-methods approach integrates both qualitative and quantitative techniques to ensure a comprehensive analysis.

### *3.2. Population and Sample Size*

The target population comprises approximately 1,000,000 broadband users in Kenya, including customers of Safaricom, Airtel, and potential Starlink subscribers (Communications Authority of Kenya, 2023). A stratified random sampling method categorized the population into individual household users, small and medium enterprises (SMEs), and industry stakeholders. From this, a representative sample of **400 respondents** will be selected: 300 individual users, 50 SMEs, and 50 industry stakeholders, ensuring diverse perspectives.

### *3.3. Data Collection and Instruments*

Primary data was gathered through structured questionnaires, semi-structured interviews, and focus group discussions. The questionnaire was used capture quantitative data on pricing perceptions, service quality, and customer loyalty, while interviews and focus groups delved into qualitative insights about consumer preferences and competitive strategies. Secondary data, such as pricing trends and market reports, was sourced from published reports, regulatory bodies, and company documents.

### *3.4. Data Analysis and Presentation*

Quantitative data was analyzed using descriptive statistics (e.g., mean, median, mode) and inferential statistics, such as regression and correlation analysis, to assess the relationship between pricing strategies and market share. Qualitative data underwent thematic analysis to identify key trends and consumer sentiments (Braun & Clarke, 2006).

Findings were presented using tables, graphs, and charts for quantitative insights, while thematic maps and narrative summaries illustrated qualitative results. For instance, comparisons of Safaricom Fibre's pricing to Starlink and Airtel was visually displayed to highlight competitive strengths and weaknesses.

## **4. Findings and discussions**

Kenya's internet market has seen increasing competition with Safaricom Fibre facing pressure from both local players like Airtel and international competitors such as Starlink. These price wars have impacted service pricing, market share, and customer behavior. This research examines the competitive dynamics, pricing strategies, and market responses, providing insights into the implications for Safaricom and its competitors. The findings, discussed below, highlight the ongoing price competition and its broader consequences for consumers and market players.



#### 4.1.1 Competitive Pressure from Airtel and Starlink

Airtel has established itself as a key local competitor by leveraging its extensive mobile network, offering lower-cost internet packages to attract budget-conscious consumers. On the other hand, Starlink, which entered Kenya with satellite-based internet services, capitalized on reaching rural areas lacking terrestrial infrastructure. Both competitors have intensified the pricing pressure on Safaricom, compelling the company to reassess its pricing strategy to maintain a competitive edge (Gichuki & Ngugi, 2023).

#### 4.1.2. Pricing Strategies and Market Adaptation

In response to competition, Safaricom has employed aggressive pricing strategies, including reduced prices and the introduction of flexible bundles. Initially known for its premium pricing, Safaricom has strategically lowered prices and introduced value-added services to retain customers (Mwangi, 2024). The company also rolled out long-term promotional deals aimed at attracting new users while holding onto existing subscribers. Analysis of consumer behavior shows an increased sensitivity to pricing, particularly among lower- and middle-income households, with many opting for budget-friendly bundles or shorter-term plans (Odhiambo, 2024).

#### 4.1.3. Quality of Service and Infrastructure Investments.

One of the major responses by Safaricom has been to enhance its service quality through consistent network upgrades and improved customer support services. Safaricom's fibre network offers higher speeds and more reliable service, especially in urban areas, which has helped the company differentiate itself despite aggressive pricing from competitors (Kihoro, 2023). However, the expansion of fibre networks requires significant investments in infrastructure, leading to higher operational costs, a challenge that Safaricom has addressed by leveraging economies of scale.

#### 4.1.4. Consumer Benefits and Challenges.

The ongoing price wars have led to lower costs for consumers, with more affordable internet access across various income levels. Many consumers have benefitted from Safaricom's flexible pricing packages, which allow them to select the most suitable plan for their needs. However, while prices have decreased, there is a growing concern that these price cuts may lead to a reduction in service quality. Some customers have reported occasional network downtimes and slower speeds, especially during peak hours, which may indicate that the company is struggling to balance quality with competitive pricing (Ngugi, 2023).

#### 4.1.5. Market Share and Revenue Impact.

The aggressive pricing strategies from Airtel and Starlink have affected Safaricom's market share, especially among budget-sensitive users. Despite the reduction in market share, Safaricom remains the dominant player in the high-income and corporate segments due to its superior network quality and extensive customer service infrastructure (Gichuki & Ngugi, 2023). The

lower pricing has, however, eroded some of Safaricom's revenue streams, particularly from long-term subscription models that once guaranteed a steady cash flow.

#### *4.2 Discussion*

The competition between Safaricom, Airtel, and Starlink in Kenya can be explained through several theoretical frameworks.

First, **Porter's Five Forces** model demonstrates the intense rivalry in the market, with the threat of new entrants like Starlink and the bargaining power of consumers driving companies to innovate continuously (Porter, 1980).

Second, **Price Elasticity Theory** explains the consumer behavior observed during the price wars, where slight reductions in prices lead to substantial shifts in customer preferences, showcasing a highly elastic demand in Kenya's fibre market (Marshall, 2022).

Third, **Innovation Diffusion Theory** is relevant as Safaricom attempts to maintain a competitive advantage by continuously improving its offerings and speeding up the rollout of services to meet evolving consumer needs (Rogers, 2003).

### **5. Conclusions and recommendations**

#### *5.1. Conclusion*

The research highlights how Safaricom's pricing strategies, alongside those of its competitors, have reshaped Kenya's fibre internet market. The company has had to adapt to intense competition by lowering prices, enhancing service offerings, and investing heavily in infrastructure. Despite facing significant challenges from competitors like Airtel and Starlink, Safaricom remains a dominant player due to its high service quality and established brand reputation. However, the price wars have led to concerns over long-term profitability and service sustainability, particularly as competitors continue to target cost-sensitive consumers.

#### *5.2. Recommendations*

##### **5.2.1. Sustainability of Pricing Strategies**

Safaricom should balance competitive pricing with sustainable service quality. While lowering prices has attracted consumers, the company must ensure that service quality does not deteriorate due to cost-cutting measures. Investing in network infrastructure and technology upgrades will be crucial to maintaining competitive advantages without sacrificing quality.

##### **5.2.2. Focus on Rural Areas**

Safaricom should consider expanding its coverage to rural areas, which have become a key battleground for Starlink and Airtel. While Starlink has made strides in this segment, Safaricom can leverage its established network to offer cost-effective solutions for these underserved areas.

### 5.2.3. Innovation in Service Bundling

Safaricom should continue innovating in service bundling to meet diverse consumer needs. By offering tailored bundles with additional benefits such as entertainment, education, and e-commerce services, Safaricom can differentiate itself from competitors.

### 5.2.4. Customer Loyalty Programs

Safaricom can strengthen customer loyalty through more personalized offers and rewards for long-term subscribers. This would help retain customers who might otherwise switch to competitors for better deals.

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