



OPENVAULT

2Q26 Report

Upstream Ascending

OpenVault Broadband
Insights



Introduction

The return path comes of age

For three consecutive years, upstream consumption has grown faster percentage-wise than downstream. That long-running divergence has become the defining story of the 2Q26 OpenVault Broadband Insights Report (OVBI).

As downstream growth cooled to a multi-year low, upstream accelerated at its fastest pace ever. The drivers are structural: cloud sync, always-on connected devices, and a new layer of AI-assisted workflows that treat the upload channel as a first-class path.

For operators, the conclusion is unavoidable - return-path capacity, long treated as secondary, must be freed from performance constraints.

As with every edition of OVBI, this 2Q26 report is based on analysis of the data traffic generated by millions of subscribers and aggregated by OpenVault's solutions. The report is designed to help DOCSIS and Fiber broadband providers identify usage patterns that impact network performance, operator revenue and customer satisfaction.

+19.2%

Upstream Usage Growth YoY 3rd year of acceleration

+6.1%

Downstream Usage Growth YoY a multi-year low

711.0 GB

Average usage +7.1% YoY

Key findings - 2Q26

Average Usage

711.0 GB

+7.1% YoY

Upstream Surge

+19.2%

3rd consecutive year of accelerating growth

Median Usage

482.3 GB

+11.8% YoY

Avg Downstream Usage

652.8 GB

+6.1% YoY

Super Power Users (2 TB+)

5.9%

+16.7% YoY

Avg Upstream Speed

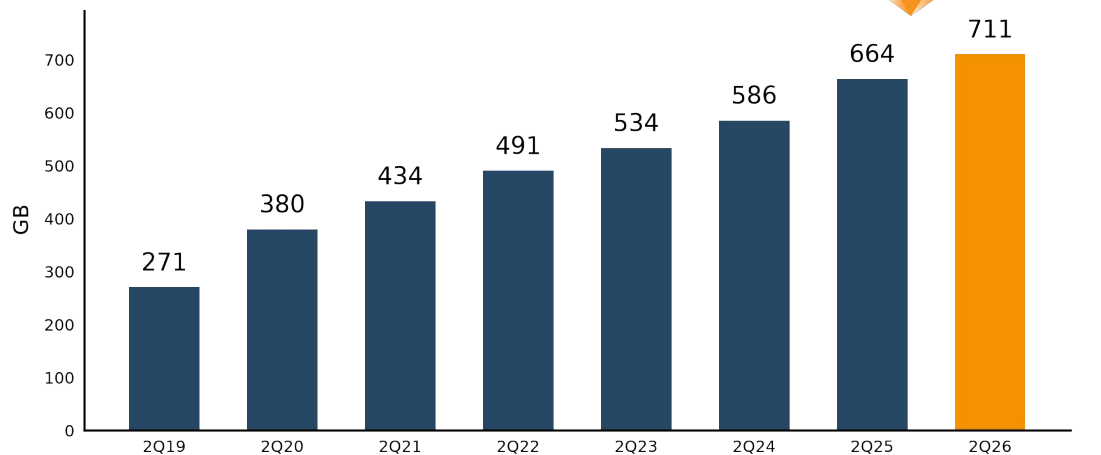
47.3 Mbps

+33.7% YoY

DOCSIS usage growth



2Q Annual Average Usage Growth



711.0 GB +7.1% YoY

Average Usage

652.8 GB +6.1% YoY

Average Downstream Usage

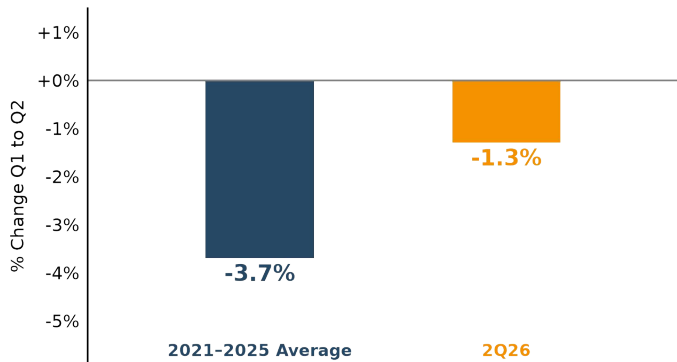
58.2 GB +19.2% YoY

Average Upstream Usage

- Average usage reached 711.0 GB, up just 7.1% YoY - the slowest 2Q-to-2Q YoY gain on record as pandemic-era growth normalizes.
- The median is closing on the average, indicating that growth is broadening across the base. The median-to-average ratio hit a record 0.68, and the typical household usage has compounded faster (18.8%/yr) than the average (14.8%/yr).

The spring slowdown lowdown

Q1 to Q2 Average Usage Change



smallest in years

Likely Factor

Sports Streaming



World Cup effect

- In past years, broadband usage has fallen predictably in 2Q compared to 1Q. In 2Q26 the pullback was smaller than in prior years.
- The increase in live sports streaming, including World Cup coverage, is a plausible contributor to the seasonality differences.

Upstream: three straight years of acceleration

↑ +19.2%

Upstream growth is accelerating year-over-year.

Downstream usage has traditionally tracked video streaming growth whereas multiple factors are compounding upstream growth - new cloud-synced devices, security cameras and AI workflows create a persistent return-path load.

+15.9%

2024

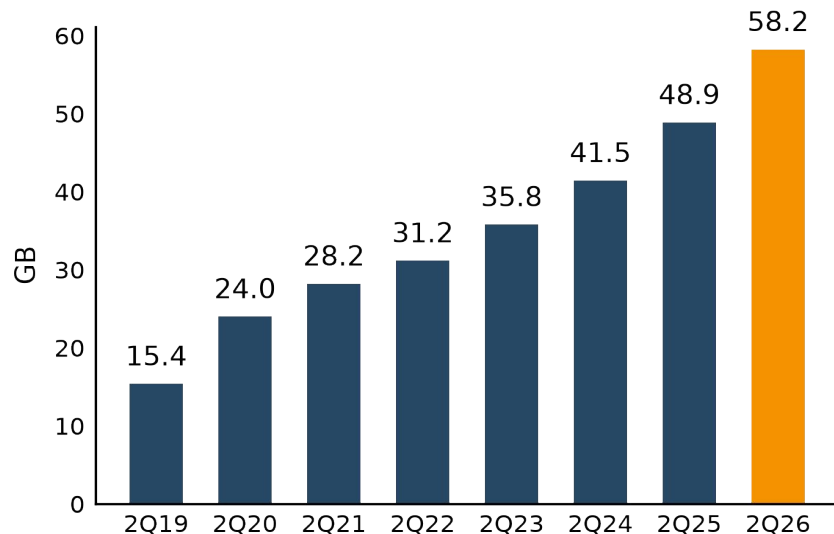
+17.9%

2025

+19.2%

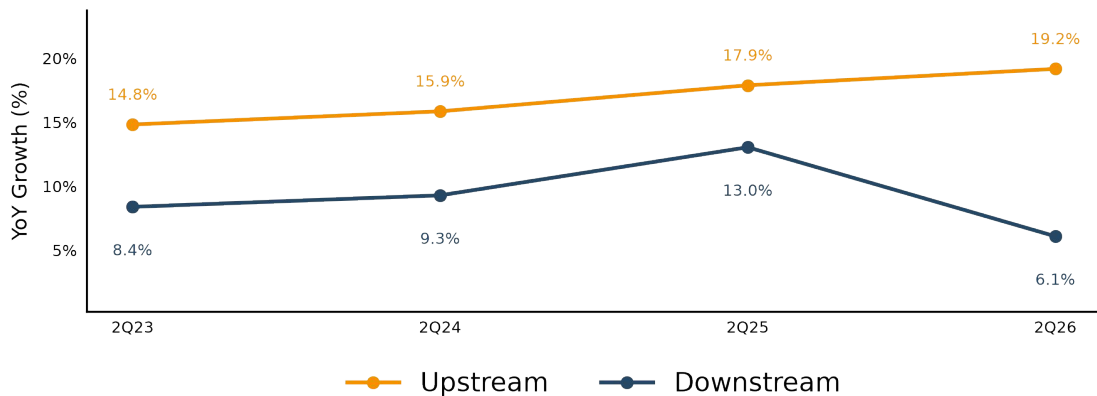
2026

Average Upstream Usage per Subscriber (GB)



Upstream accelerates as downstream cools

2Q YoY Average Upstream & Downstream Usage Growth



+19.2%

Upstream

record pace, still rising

+6.1%

Downstream

half of 2025's +13.0%

- The gap between upstream and downstream growth is now the widest observed to date- a structural inflection, not a seasonal blip.
- Operators need to prioritize increased upstream speeds and capacity to meet growing demand.

The traffic mix is rebalancing

DOCSIS downstream-to-upstream usage ratio has fallen by almost one-third over the past seven years

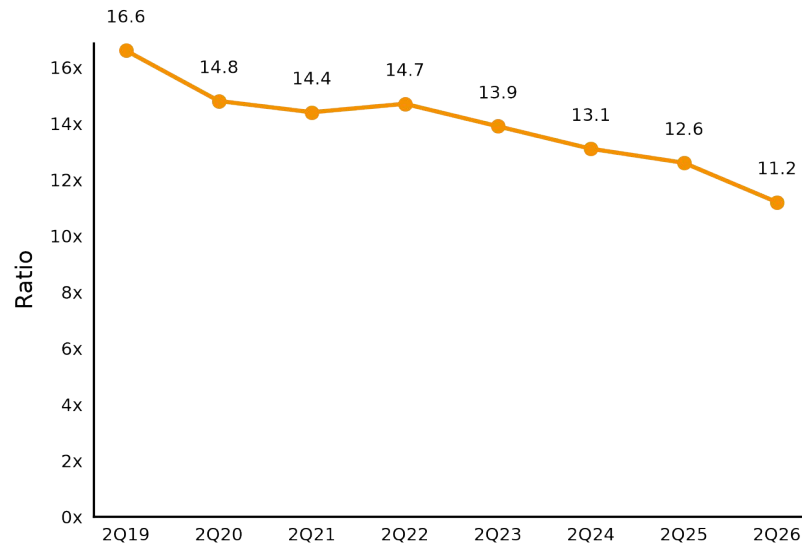
DOWNSTREAM : UPSTREAM USAGE RATIO

11.2 : 1

↓ down from 16.6 : 1 in 2019

Upstream's share of total traffic has climbed from 5.7% to 8.2%, with no sign of leveling off.

Downstream : Upstream Usage Ratio



Fiber vs. DOCSIS: the upstream premium holds

Average upstream usage per subscriber



+61.6%

Across every cut - monthly, hourly, peak - fiber subscribers consume 60-75% more upstream bandwidth.

Monthly Average Usage Comparison



Fiber



94.1 GB

DOCSIS



58.2 GB

Growth accelerates at higher usage tiers

Percentage of subscribers by usage tier & growth rate

>250 GB

65.08%

+3.9% YoY

>1 TB

23.51%

+8.7% YoY

>2 TB

5.86%

+16.7% YoY

>5 TB

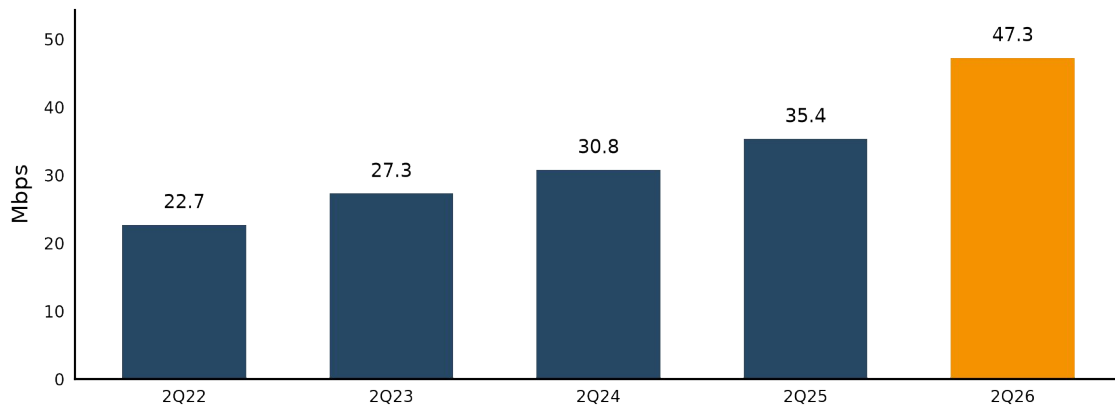
0.23%

+34.2% YoY

- 1 TB is going mainstream: nearly 1 in 4 DOCSIS subscribers now exceed 1 TB per month, up from about 1 in 25 in 2019 (4.1% → 23.5%).
- The higher the tier, the greater the growth - the 5 TB+ extreme tier expanded ~9× faster than the >250 GB tier this year.

Upstream speed is rapidly increasing

2Q DOCSIS Average Provisioned Upstream Speed



47.3 Mbps

Upstream Speed **+33.7% YoY**



609.2 Mbps

Downstream Speed **+7.2% YoY**

- Upstream speed jumped 33.7% YoY - nearly 5× the downstream speed gain - as operators deploy mid-split and high-split options and aggressively deploy OFDMA.
- Faster upstream speeds are both a response to and an enabler of upstream growth: as headroom expands, cloud sync and real-time upload applications fill the pipe.

The average broadband household - 2Q26



A snapshot of the average U.S. DOCSIS household, 2Q26



711.0 GB

Average Bandwidth Usage



652.8 GB

Average Downstream Usage



58.2 GB

Average Upstream Usage

609.2 Mbps Average Downstream Speed

47.3 Mbps Average Upstream Speed

Conclusion

Four key takeaways impacting subscribers' quality of experience

● Upstream growth is now structural

Upstream usage is up +19.2% YoY, the third straight year of accelerated growth, and the downstream-to-upstream ratio has compressed to 11.2:1 from 16.6:1 in 2019. This growth will increase as operators prioritize upstream headroom to accommodate increasing traffic.

● Downstream consumption is stabilizing

Average downstream usage growth slowed to +6.1% and total usage growth to +7.1%, both multi-year lows. Operators should continue to implement AI-powered PNM and PMA solutions that optimize subscriber experiences.

● Fiber's upstream premium holds

Average fiber upstream usage runs 60–75% higher than DOCSIS across every time period (monthly/daily/hourly).

● Plan for continued growth at the extremes

The 5 TB+ tier grew 34% YoY. This small but growing cohort contributes disproportionate load to the network, making congestion management tools essential.



OpenVault's Modular Solution Suite



Vantage PNM

Proactive Network Maintenance with alarming — detects and localizes RF impairments before they impact subscribers



Vantage PMA

Dynamic profile management for OFDM/OFDMA channels — recovers capacity as conditions change



Vantage Fiber

Proactive Network Maintenance for PON networks — detects and localizes impairments in the fiber plant before they impact subscribers

About OpenVault

Market Leader in Broadband Network Optimization Solutions

OpenVault and OpenVault Europe GmbH are market-leading sources of broadband technology solutions and data-driven insights into worldwide broadband consumption patterns. Using the companies' solutions, service providers can optimize network performance, increase revenue, and improve subscriber satisfaction.

Actionable Data Intelligence

OpenVault aggregates and analyzes data collected from broadband networks to provide unparalleled granular views of consumer usage and network health. This data analysis drives a suite of actionable and automated solutions that dramatically improve subscribers' Quality of Experience, providing operators with tremendous value through software while avoiding the need for large-scale infrastructure spending.

Contact Us

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**Register here for the OVBI
Webinar on 9/16 to hear more:**

https://us02web.zoom.us/webinar/register/WN_uORUjgbRQTqhzqHDGg3mWg



Unlocking the potential of broadband