OpenVault

Power Users Pull Ahead

OpenVault Broadband Insights

3Q26 Report



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Introduction

Like a snowball rolling downhill, broadband usage grows faster the bigger it gets. That's a key finding from the 3Q 2026 edition of the OpenVault Broadband Insights (OVBI) report.

Subscribers who consume the most bandwidth are far and away the fastest growing cohorts. While upstream usage is exploding at the high ends of consumption, the trend is especially noticeable among subscribers in the Power User categories of 1 TB per month or more.

In 3Q26, the usage of Super Power Users of 2 TB grew more than twice as much year-over-year as that of Power Users of 1 TB or more. The percentage of Extreme Power Users of 5 TB or more grew at a meteoric 60% when compared with 3Q25, and is on track to grow seven-fold – or more – over the next five years, increasing providers' need for congestion management tools.

As with every edition of OVBI, this 3Q26 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.

Key findings - 3Q26

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Average Usage

695.6 GB

+8.6% YoY

Upstream Usage

59.4 GB

+23.7% YoY · 4th year of faster growth

Median Usage

478.4 GB

+9.0% YoY

Downstream Usage

636.2 GB

+7.3% YoY

Extreme Power Users (5 TB+)

0.24%

+60.0% YoY

Avg Upstream Speed

68.5 Mbps

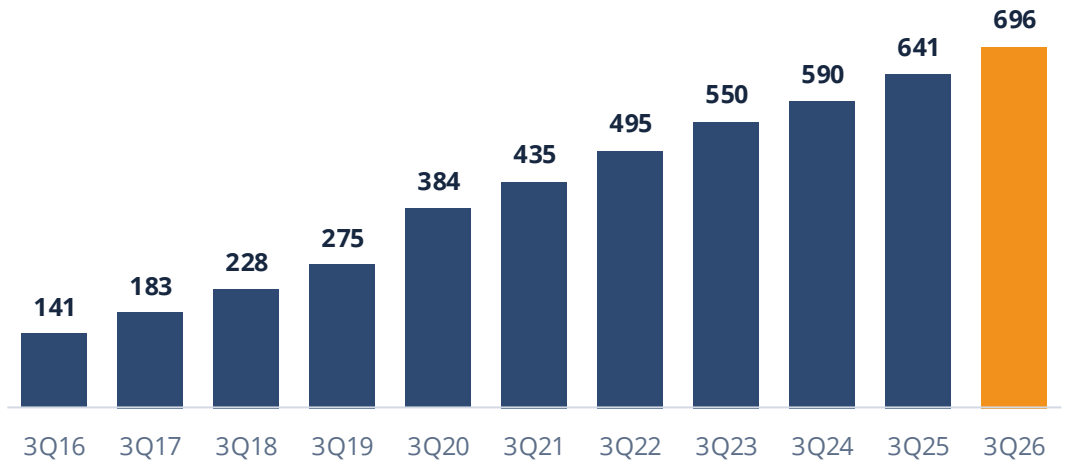
+73.7% YoY

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A decade of 17% average annual growth

695.6 GB a month in 3Q26 — 4.9x what it was 10 years ago

3Q average monthly usage per subscriber (GB)



695.6 GB +8.6%

Average usage · YoY

636.2 GB +7.3%

Average downstream · YoY

59.4 GB +23.7%

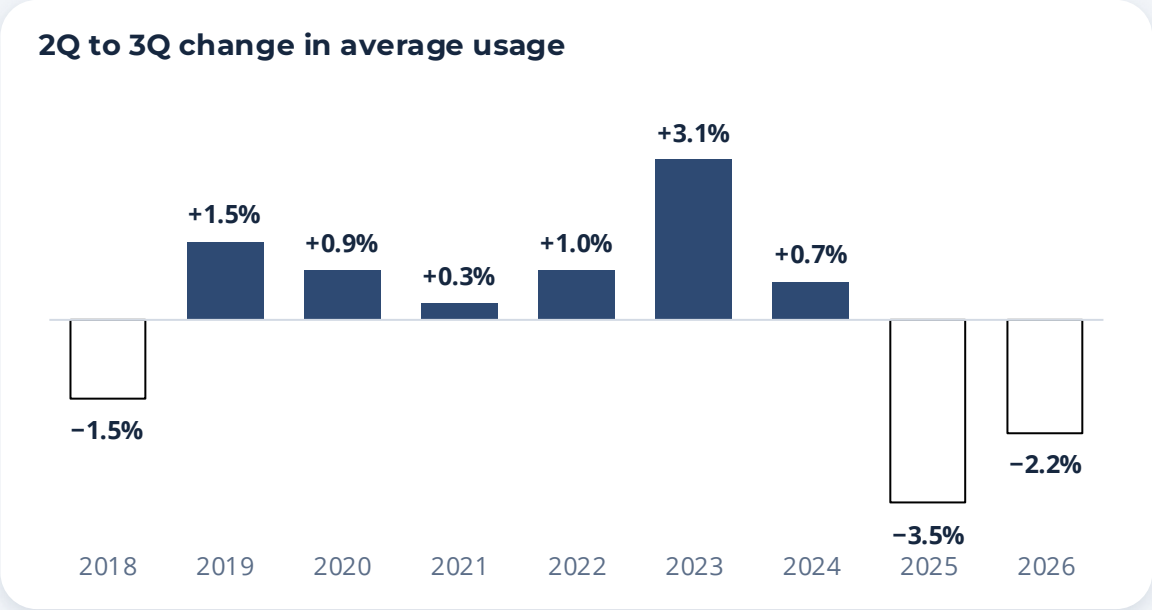
Average upstream · YoY

Average usage has grown 17.3% a year since 3Q16. Upstream is now the faster-growing side, up 23.7% this year vs. 7.3% for downstream.

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A second summer dip

2Q to 3Q average usage change, by year



−2.2%

3Q26 change from 2Q26 (711.0 to 695.6 GB)

+0.9%

2018–2024 average 2Q to 3Q change. 2025 and 2026 both fell.

Usage was steady or edged up from 2Q to 3Q every year from 2019 to 2024. It has now dipped two summers in a row, so quarter-to-quarter comparisons can mislead.

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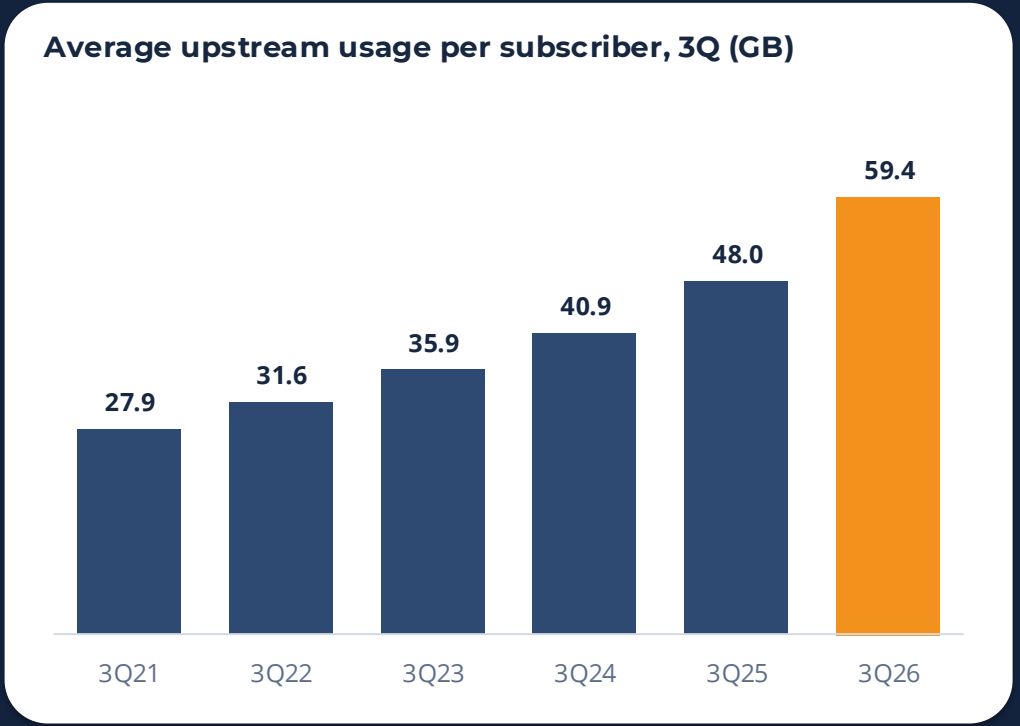
Upstream growth keeps accelerating

+23.7%

Upstream usage growth YoY, up from +17.4% a year ago

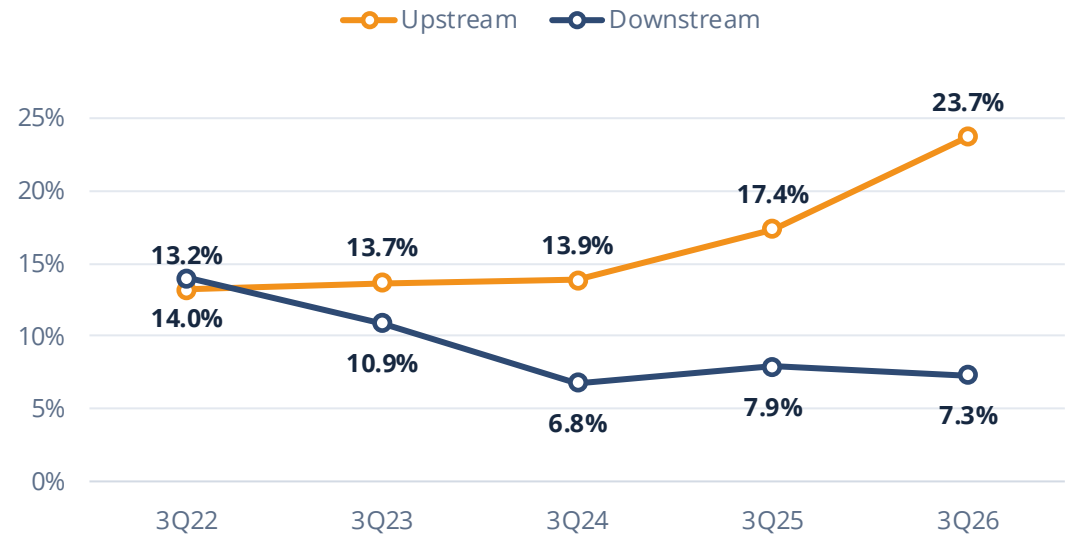
+13.9%	+17.4%	+23.7%
3Q24	3Q25	3Q26

Cloud-synced devices, cameras and AI workflows keep adding upstream load.



Upstream outpaces downstream

3Q year-over-year growth in average usage per subscriber



+23.7%

Upstream growth YoY

+7.3%

Downstream growth YoY. The gap is 16.4 points.

Downstream growth has settled at 7% to 8% a year. Upstream growth is three times that pace, the widest gap in five years.

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The traffic mix keeps rebalancing

DOWNSTREAM : UPSTREAM USAGE

10.7 : 1

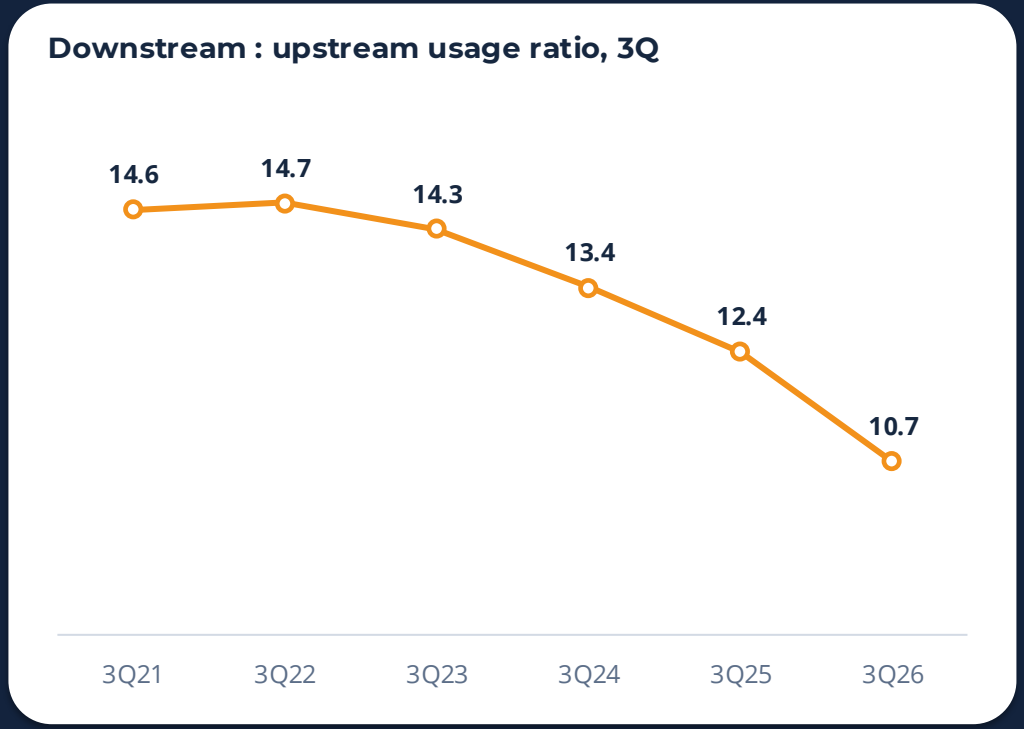
down from 14.6 : 1 in 3Q21

UPSTREAM SHARE OF TRAFFIC

8.5%

up from 6.4% in 3Q21

Each year upstream carries a larger share of every household's traffic.

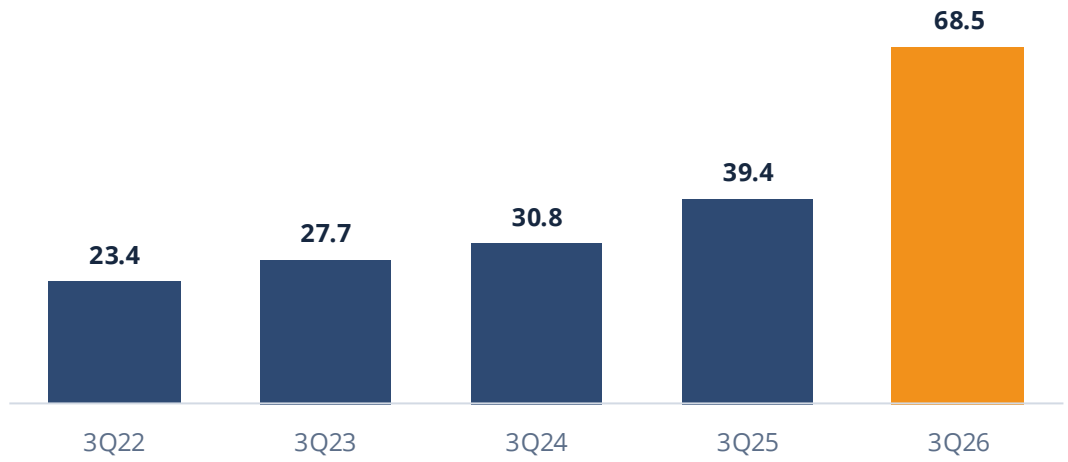


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Upstream speed jumps

Average upstream speed increased 45% YoY in 3Q26, from 47.3 to 68.5 Mbps

3Q average provisioned upstream speed (Mbps)



68.5 Mbps

+73.7% YoY

Average upstream speed

625.6 Mbps

+8.3% YoY

Average downstream speed

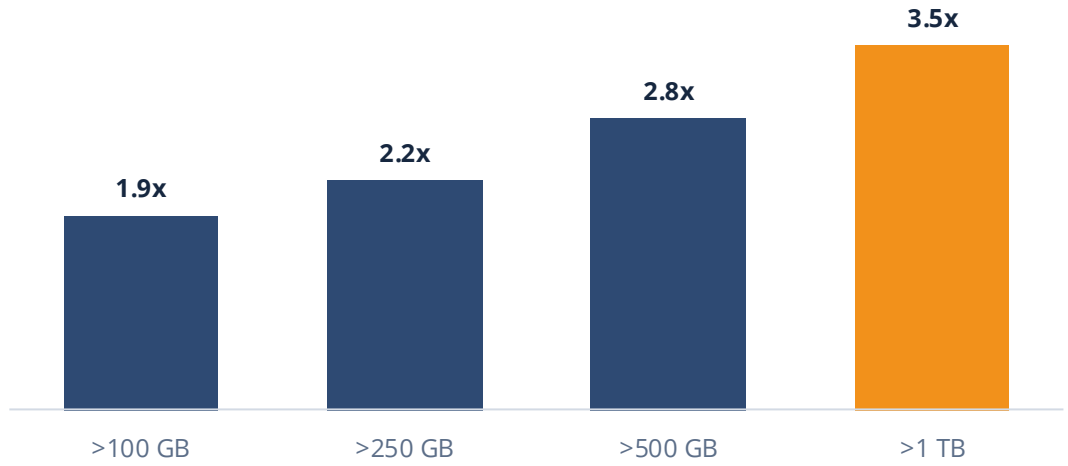
Upstream speed grew about nine times faster than downstream this year (+73.7% vs. +8.3%).

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Heavy upstream users grow fastest

Mid-split and high-split upgrades are opening the return path

Growth in monthly upstream users from 3Q23 to 3Q26



1.26%

use over 500 GB upstream per month, up from 0.45% in 3Q23

0.42%

use over 1 TB upstream, +75% YoY

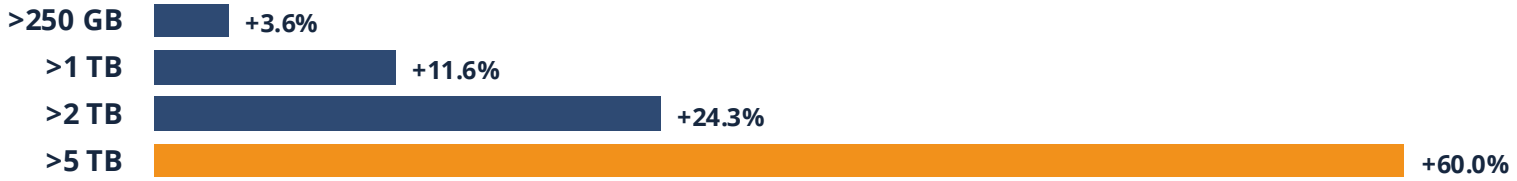
The heavier the upstream usage tier, the faster that group is growing. The >1TB share of upstream users a month has more than tripled since 3Q23.

The higher the tier, the faster the growth

Share of subscribers above each monthly usage level (total usage), 3Q26

>250 GB	>1 TB	>2 TB	>5 TB
66.50%	23.41%	5.48%	0.24%
+3.6% YoY	+11.6% YoY	+24.3% YoY	+60.0% YoY

Year-over-year growth in each tier's share



Nearly one in four DOCSIS subscribers now uses more than 1 TB a month. The 5 TB+ group is small, but its share grew 60% in a year.

The 5 TB tier to grow sevenfold within 5 years

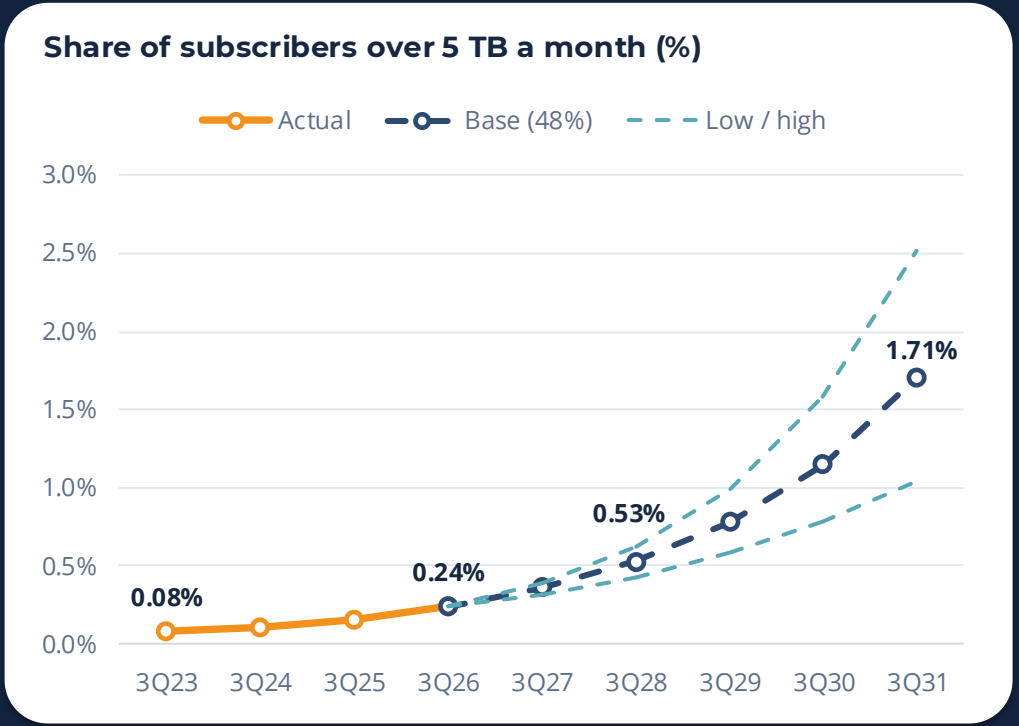
5 TB+ SHARE, 3Q31 BASE CASE

1.7%

of DOCSIS subscribers, from 0.24% today

Range **1.0%–2.5%**
Growth assumed **34% / 48% / 60% a year**

A small group with an outsized load on the network, which makes congestion management more important each year.



Fiber's upstream premium holds

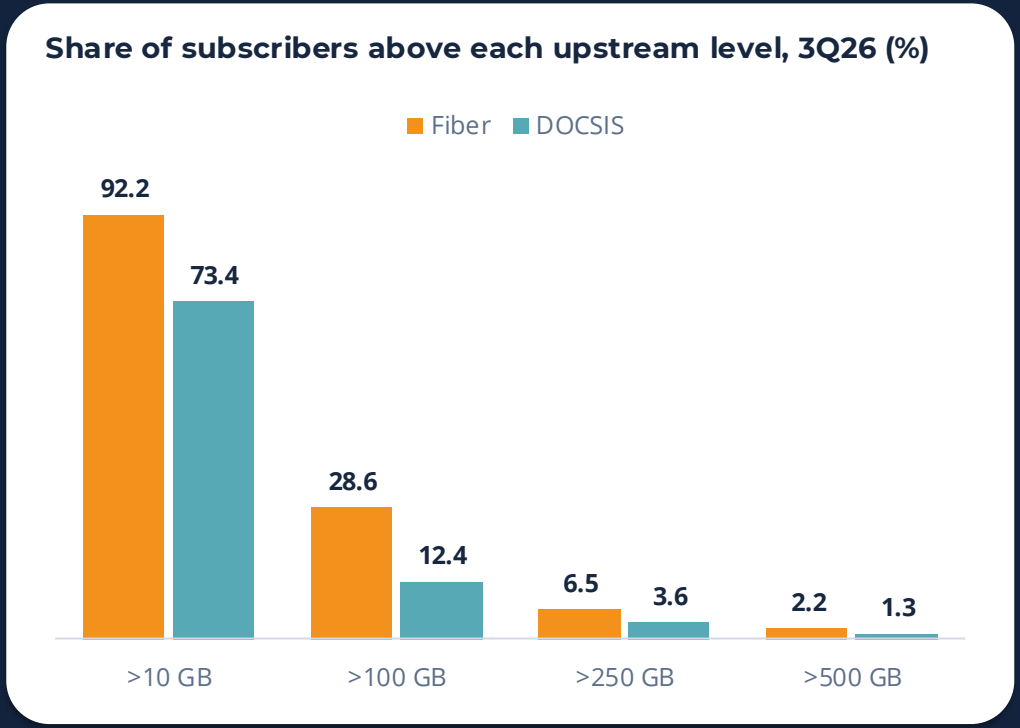
AVERAGE UPSTREAM USAGE

+64.4%

upstream usage per fiber subscriber



Fiber subscribers are more than twice as likely to consume more than 100 GB upstream per month (28.6% vs. 12.4%).



The average broadband household - 3Q26

A snapshot of the average U.S. DOCSIS household, 3Q26



695.6 GB

Average Bandwidth Usage



636.2 GB

Average Downstream Usage



59.4 GB

Average Upstream Usage

625.6 Mbps Average Downstream Speed

68.5 Mbps Average Upstream Speed

VANTAGE

OpenVault's Modular Solution Suite

OV PNM

AI-driven detection of suckouts, standing waves, FM and LTE ingress — from outside the plant to inside the home — with prioritized corrective action and a mobile app for field teams.

50% fewer repeat calls in 60 days	**80%** fewer Immediate Action modems	**~70%** of proactive troubles fixed on first roll

OV Advanced PMA™

Closed-loop automation that builds per-subscriber OFDM/OFDMA profiles for every channel and deploys them without human intervention — effectively virtual node splits on your existing DOCSIS 3.1 plant.

40% capacity gain over baseline, up & down	**0** new hardware or line drops required	**Auto** closed-loop, no human intervention

OV Congestion Manager

Detects congestion in real time, identifies the subscribers driving it, and applies OpenVault's patented business rule engine through DOCSIS-standard PCMM to enforce fair-share policy automatically.

100% cloud-based, no on-prem hardware	**2.0–4.0** DOCSIS versions supported	**Node Splits** defer or avoid

Vantage Fiber

Continuous monitoring of every OLT, PON port, and ONT — with Birth Certificates at install, OSP Correlation Groups that map shared-path faults, and automated work orders that direct crews based on priorities.

OLT → ONT health scores at every layer	**1-click** root cause with AI Smart Button	**Web + mobile** role-based dashboards & ONT diagnostics

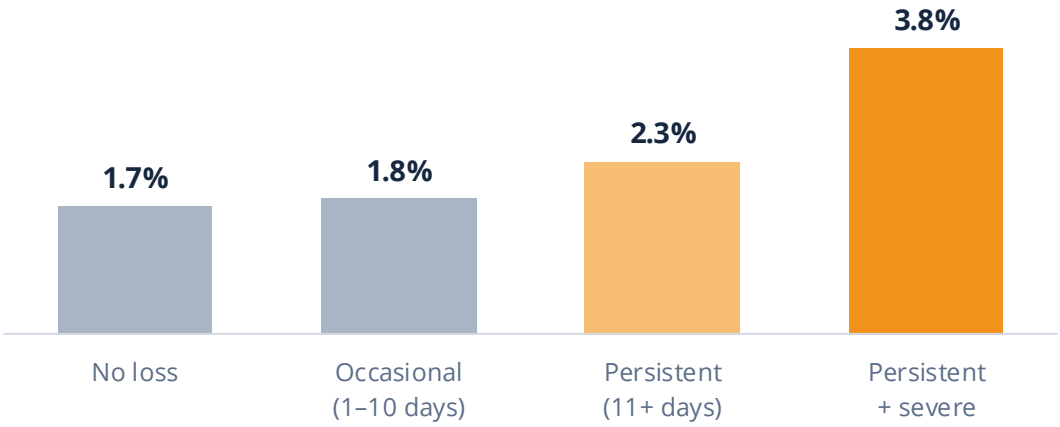
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Vantage: tangible results

A bad day doesn't drive churn. A bad month does.

Monthly churn rises with persistent data loss

Up 36% with persistent loss; more than double with severe loss



26%

fewer truck rolls

Tier 2/3 operator, upgraded communities

37–43%

fewer truck rolls & service requests

Tier 1 operator running OV PNM continuously

Source: OpenVault analysis of 200,000+ accounts at a single operator. Results will vary by operator with plant condition, network technology, and local competition.

Conclusion

Four key takeaways impacting subscribers' quality of experience

Upstream growth keeps accelerating

Even as providers open more return path via mid- and high-split upgrades, subscribers continue to put pressure on the upstream, The 3Q rate of growth increased for the fourth straight year to 23.7% and the ratio of downstream:upstream usage tightened to 10.7:1.

Total usage up nearly 5x since 2016

Steady downstream growth of 7.3% helped average total usage to 695.6 GB per month, up 8.6% YoY and nearly 5x the 141 GB average total consumption recorded in 3Q 2016.

Fiber's upstream premium holds

Fiber subscribers average 97.6 GB of upstream usage, 64.4% more than DOCSIS. Moreover, fiber subscribers are more than twice as likely as DOCSIS subscribers – 28.6% vs. 12.4% – to send 100 GB of data upstream per month.

The upper extremes are growing fastest

The 5 TB+ share grew 60.0% YoY and could reach 1.7% of subscribers by 2031. The continued accelerating growth at the high ends of upstream and total usage indicate increasing need for providers to take the steps necessary to eliminate network issues and manage congestion.

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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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Unlocking the potential of broadband

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