SensorTower

Indie and new IP break out, without denting AAA

New PlayStation, Steam and Xbox launches selling 500k+ paid units in their first 30 days: 2025 vs 2026 cohorts.
Sensor Tower Video Game Insights, October 2026.

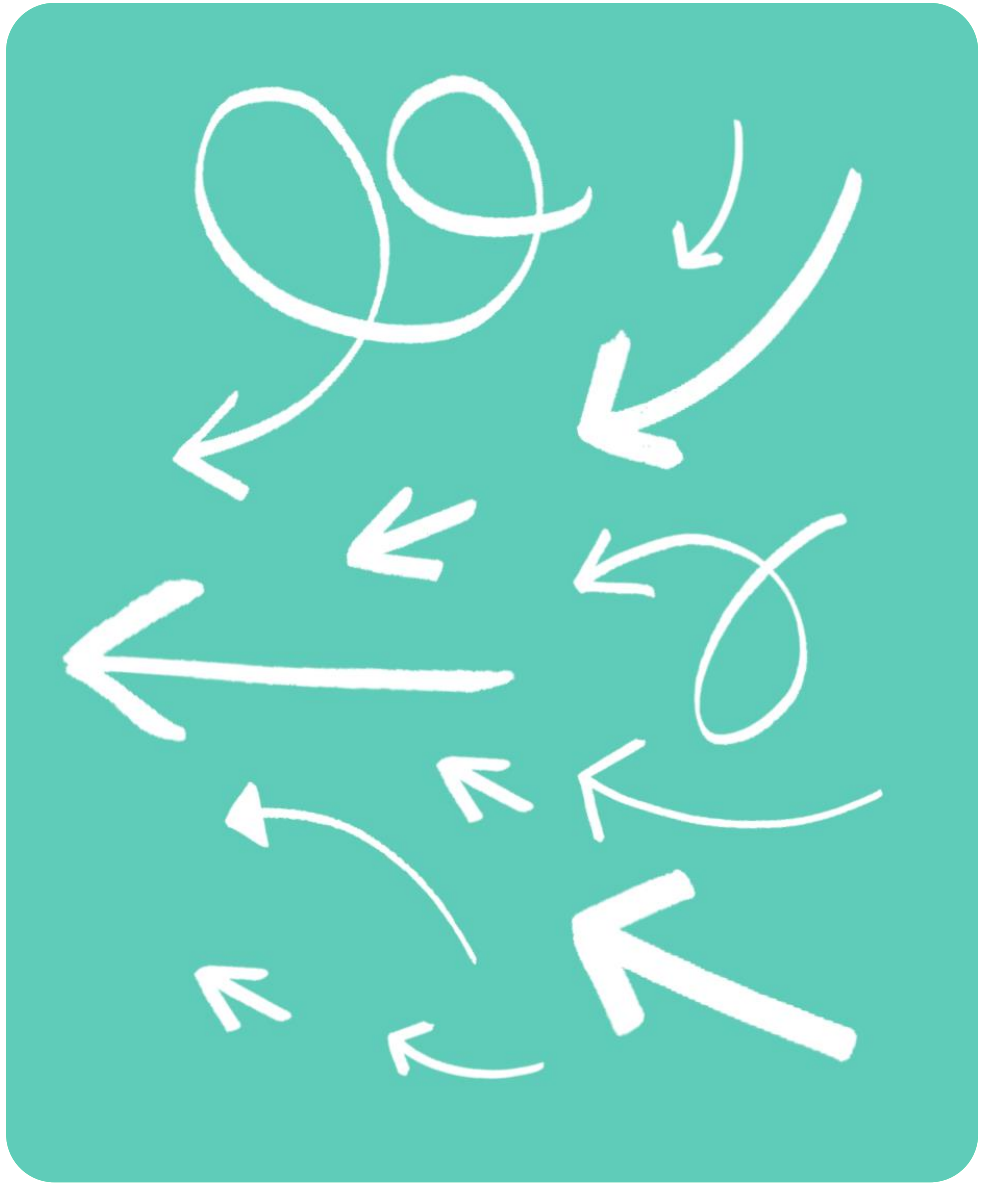
Key takeaways
2025 vs 2026 cohorts, first 30 days

- **More hits.** 76 launches sold 500k+ paid units in their first 30 days in the 2026 cohort, up from 55. Together they sold 182.4m paid units in month 1, up 51%.

- **Indie drove the growth.** Indie hits rose from 13 to 33, or 43% of all hits (24% in 2025). Indie month-1 paid units more than doubled. Growth was led by "friendslop" breakouts, alongside a wider wave of other indie new IP and sequels.

- **New series and new IP broke through.** The first games in new series made up 53% of hits, up from 38% (40 vs 21). 35 hits were new IP, and indie studios made 27 of them.

- **AAA held steady.** AAA hits edged up from 27 to 28 and still take nearly half of month-1 paid units. Licensed IP stayed at 20% of hits.



Hits = launches selling 500k+ paid units on PlayStation, Steam and Xbox in their first 30 days. Cohorts run September to August.

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Indie drove the growth in hits by publisher class

Indie hits more than doubled, from 13 to 33.

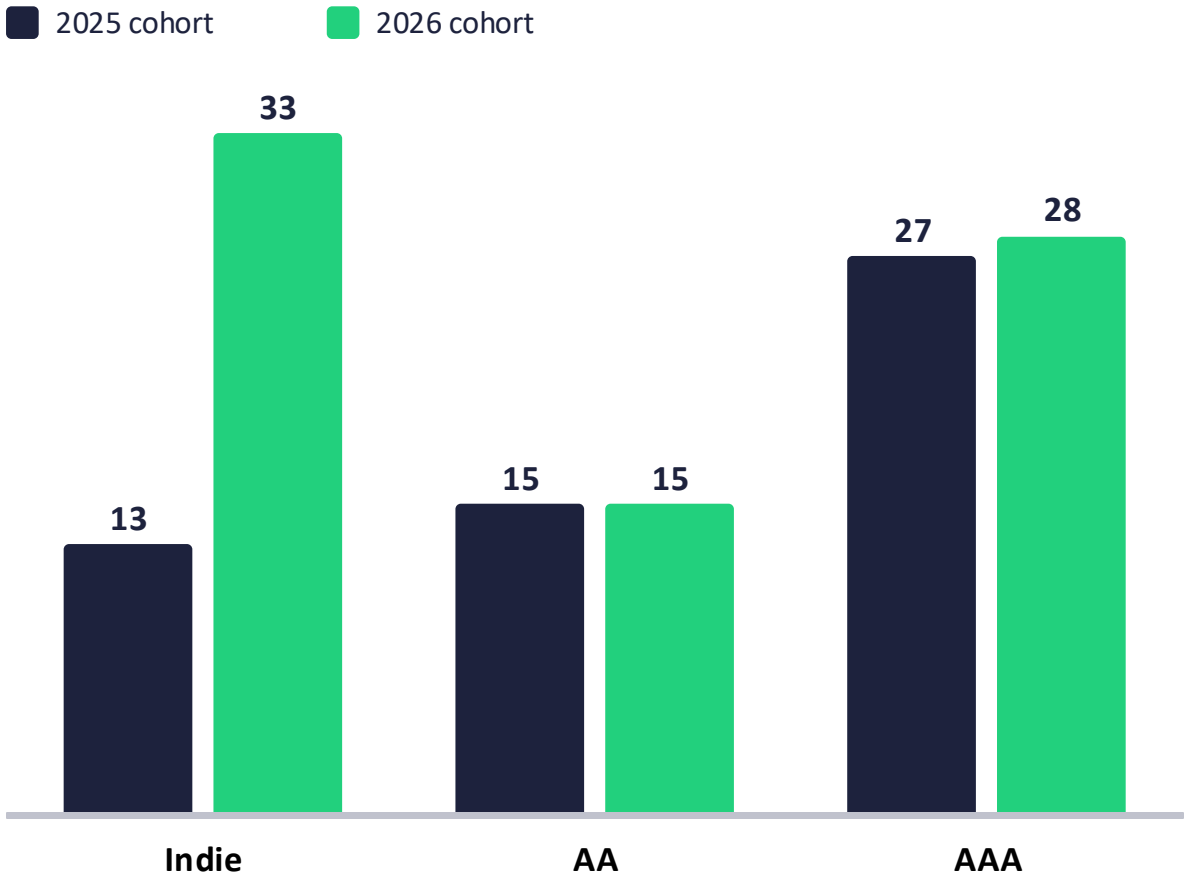
AAA edged up from 27 to 28 and AA held at 15.

24% → 43%

Indie share of 500k+ hits, 2025 vs 2026 cohort

Launches with 500k+ paid units in their first 30 days

Number of games by publisher class, 2025 vs 2026 cohort



Source: Sensor Tower Video Game Insights.

Paid units on PlayStation, Steam and Xbox in each game's first 30 days.

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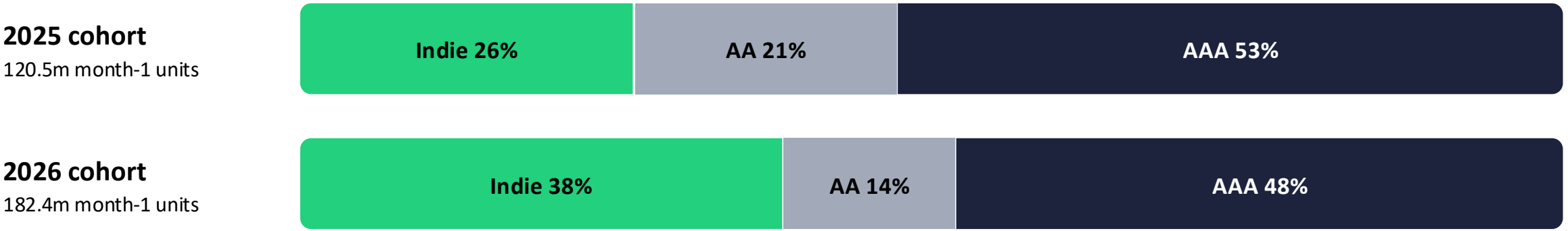
Indie grew its share of sales too

Share of month-1 paid units sold by 500k+ hits, by publisher class



Source: Sensor Tower Video Game Insights. Paid units on PlayStation, Steam and Xbox in each game's first 30 days.

Indie

Month-1 paid units more than doubled to 69.9m (+119%), led by MECCHA CHAMELEON (13.3m), How to Fish (7.9m) and Slay the Spire 2 (5.9m).

AA

Steady at 15 hits, with month-1 paid units flat at 24.8m, led by Crimson Desert (5.4m) and Subnautica 2 (5.2m).

AAA

Still nearly half of month-1 paid units: 87.8m (+38%), led by Battlefield 6 (15.3m), EA SPORTS FC 26 (8.3m) and ARC Raiders (8.2m).

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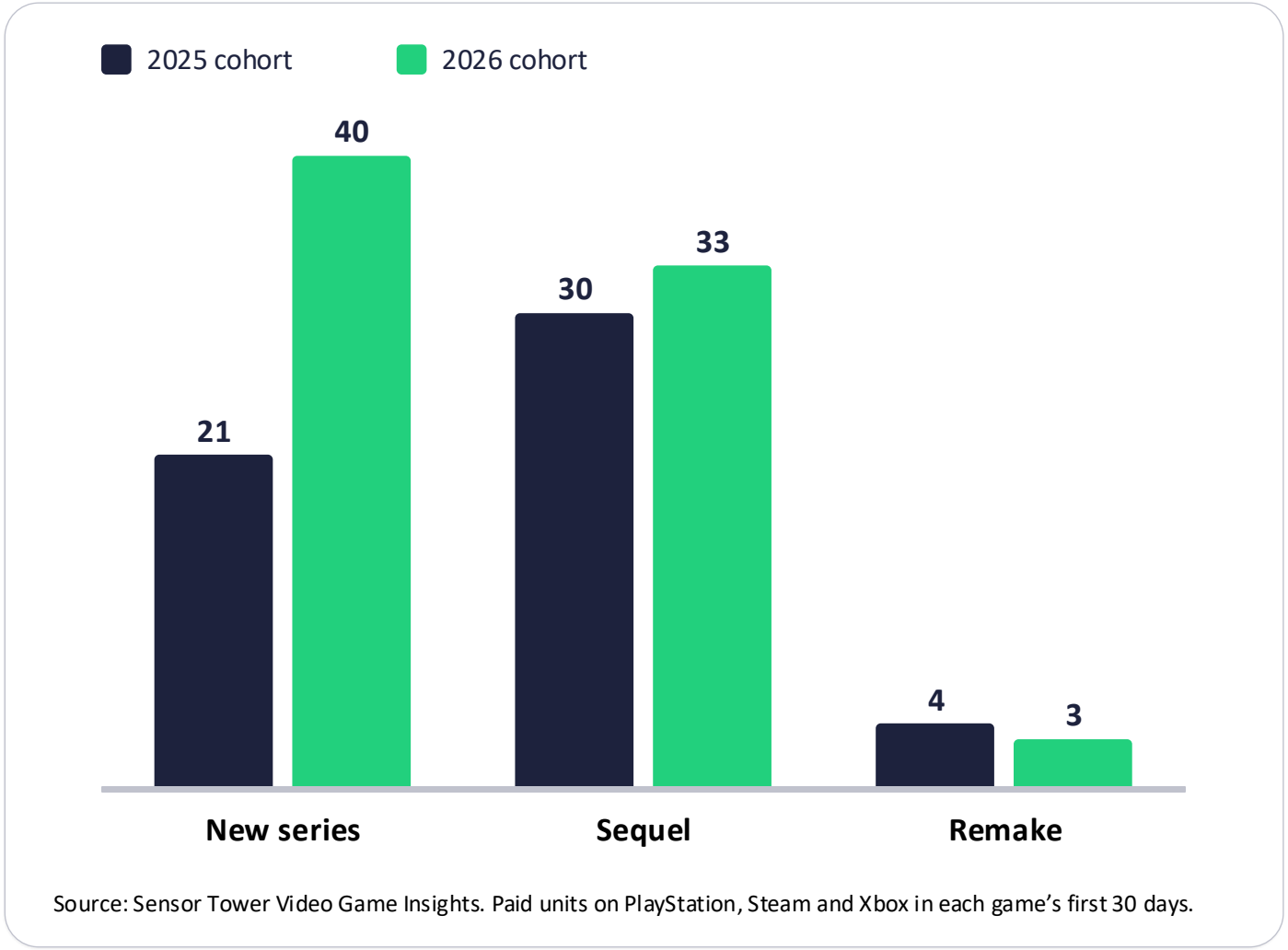
New series made up half the hits
new series vs sequels and remakes

The first games in new series went from 21 to 40 hits, while sequels, franchise entries, remakes and remasters held roughly flat (34 → 36). Sequels still sell more per game: 55% of 2026 month-1 paid units.

38% → 53%

Share of 500k+ hits that start a new series

Launches with 500k+ paid units in their first 30 days
Number of games by game type, 2025 vs 2026 cohort



Source: Sensor Tower Video Game Insights. Paid units on PlayStation, Steam and Xbox in each game's first 30 days.

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New IP nearly doubled original vs licensed IP

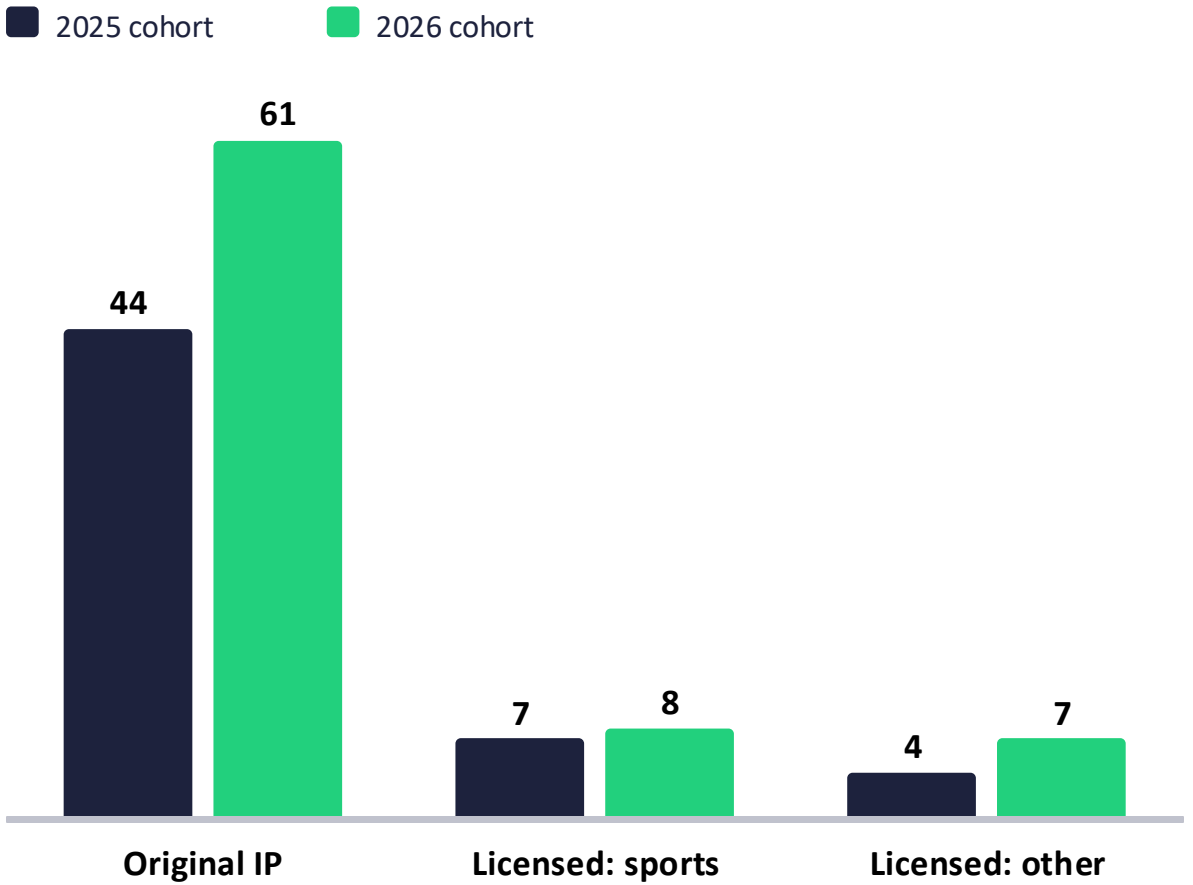
Licensed IP (sports leagues, film, TV, comics, toys) held at 20% of hits, 11 → 15 games. New IP (a new series on original IP) went from 19 to 35, and indie studios made 27 of them.

19 → 35

Hits that are new IP, 2025 vs 2026 cohort

Launches with 500k+ paid units in their first 30 days

Number of games by IP origin, 2025 vs 2026 cohort



Source: Sensor Tower Video Game Insights.
Paid units on PlayStation, Steam and Xbox in each game's first 30 days.

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What happened
Small studios and new IP drove the growth

20 of 21

extra hits came from indie studios

Hits rose from 55 to 76. AA held at 15 and AAA added one (27 → 28).

21 → 40

new series among the hits

Sequels, remakes and remasters held roughly flat (34 → 36).

19 → 35

hits that are new IP

Indie studios made 27 of the 35. Licensed IP stayed at 20% of hits.

26% → 38%

indie share of month-1 paid units

AAA still sells nearly half (48%) of month-1 units, and its sales grew too.

The extra hits came almost entirely from small studios launching new IP. AAA didn't shrink; it simply stopped being where the growth was.

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Friendslop made the biggest indie hits
but most of the extra indie hits were other new IP and sequels

Friendslop

Cheap online co-op and party games built to play with friends, mostly $10 or less. All new IP.

5 → 9

hits, 2025 vs 2026 cohort

19.2m → 32.3m

month-1 paid units

Examples: MECCHA CHAMELEON, How to Fish, RV There Yet?, Gamble With Your Friends, Shift At Midnight

Other indie new IP

Mostly single-player new IP: roguelikes, extraction games, sims and story games.

7 → 18

hits, 2025 vs 2026 cohort

11.2m → 22.9m

month-1 paid units

Examples: Escape from Duckov, Big Walk, Dispatch, Megabonk, Mewgenics

Indie sequels

Follow-ups from established indie studios, several of them long-awaited.

1 → 6

hits, 2025 vs 2026 cohort

1.4m → 14.7m

month-1 paid units

Examples: Slay the Spire 2, Hollow Knight: Silksong, Vampire Crawlers

Source: Sensor Tower Video Game Insights.
Paid units on PlayStation, Steam and Xbox in each game's first 30 days. 2025 cohort = Sep 2024 – Aug 2025; 2026 cohort = Sep 2025 – Aug 2026.

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The 2026 cohort's biggest launches

Top 5 by month-1 paid units, by publisher class

Indie

MECCHA CHAMELEON	**13.3m**
How to Fish	**7.9m**
Slay the Spire 2	**5.9m**
Hollow Knight: Silksong	**5.2m**
Escape from Duckov	**4.0m**

3 of 5 are new IP

AA

Crimson Desert	**5.4m**
Subnautica 2	**5.2m**
007 First Light	**4.0m**
Dying Light: The Beast	**2.5m**
REANIMAL	**1.2m**

2 of 5 are new IP

AAA

Battlefield 6	**15.3m**
EA SPORTS FC 26	**8.3m**
ARC Raiders	**8.2m**
Resident Evil Requiem	**7.6m**
Forza Horizon 6	**5.5m**

1 of 5 is new IP

Source: Sensor Tower Video Game Insights. Paid units on PlayStation, Steam and Xbox in each game's first 30 days. 2026 cohort = games launched September 2025 – August 2026.

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Appendix: how we measured it
Two launch cohorts, one bar for a hit

Two cohorts

2025 cohort: games first released September 2024 – August 2025.
2026 cohort: September 2025 – August 2026.
Each is named after the year it ends.

One bar for a hit

500,000+ **paid** units on PlayStation, Steam and Xbox in a game's **first 30 days**. The same window for every game keeps the cohorts like for like. Free-to-play and subscription players are not counted.

131 hits

55 hits in the 2025 cohort and 76 in the 2026 cohort, each tagged by publisher class (indie, AA, AAA), game type (new series or sequel) and IP origin (original or licensed).

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Appendix: notes on the data
What to keep in mind

First 30 days

Every figure counts paid units in a game's first 30 days, so older and newer launches compare like for like. Games that build slowly after launch count less.

Platforms

PlayStation, Steam and Xbox only. Switch and Switch 2, Epic and other PC stores, and mobile are not included.

Call of Duty

Recent Call of Duty games sit under one shared app, so Black Ops 6 and Black Ops 7 can't be measured per game and are excluded.

Free-to-play

Games without a purchase price have no paid units, so free-to-play hits such as Marvel Rivals and Where Winds Meet drop out.

Classifications

Publisher class, game type and IP origin were reviewed game by game. Borderline calls are judgement: ARC Raiders is AAA, while Clair Obscur, REMATCH and budget-priced games from big publishers are AA.

Launch dates

A game's cohort is set by its first sale on any platform. PC ports of older console games and re-releases are excluded.

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Appendix: how we classified each game

131 launches with 500k+ paid units in their first 30 days

Class

AAA: major publishers (EA, Activision, Ubisoft, Take-Two, Microsoft, Sony, Warner Bros., Capcom, Square Enix, Bandai Namco, SEGA, Konami, Koei Tecmo, Nexon) and studios they own.

AA: mid-size publishers, larger self-publishing studios, and smaller, budget-priced games from major publishers.

Indie: small studios, self-published or on an indie label.

Type

New series: the first game in a series, not a sequel, franchise entry or remake. It can use licensed IP, as 007 First Light does.

Sequel: sequels, annual entries, spin-offs and other franchise entries.

Remake: remakes, remasters and compilations.

IP origin

Original: IP owned by the developer or publisher. Public-domain material counts as original. A new series on original IP is **new IP**.

Lic. sports: licensed leagues, clubs and players, such as EA SPORTS FC and NBA 2K.

Lic. other: licensed film, TV, comics, toys and other brands, such as Star Wars, Marvel and LEGO.

55 games in the 2025 cohort and 76 in the 2026 cohort, listed A–Z on the next slides.
Publishers and the reason for each manual change are in the Classification sheet of the workbook.

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Appendix: game classifications
2025 cohort, A–Z (1 of 3)

Game	Class	Type	IP origin
A Game About Digging A Hole	Indie	New series	Original
Assassin's Creed Shadows	AAA	Sequel	Original
ASTRO BOT	AAA	Sequel	Original
Broken Arrow	Indie	New series	Original
Clair Obscur: Expedition 33	AA	New series	Original
DEATH STRANDING 2: ON THE BEACH	AAA	Sequel	Original
DELTARUNE	Indie	Sequel	Original
DOOM: The Dark Ages	AAA	Sequel	Original
Dragon Age: The Veilguard	AAA	Sequel	Original

Game	Class	Type	IP origin
DRAGON BALL: Sparking! ZERO	AAA	Sequel	Lic. other
Dune: Awakening	AA	New series	Lic. other
DYNASTY WARRIORS: ORIGINS	AAA	Sequel	Original
EA SPORTS College Football 26	AAA	Sequel	Lic. sports
EA SPORTS FC 25	AAA	Sequel	Lic. sports
EA SPORTS Madden NFL 26	AAA	Sequel	Lic. sports
ELDEN RING NIGHTREIGN	AAA	Sequel	Original
FANTASY LIFE i: The Girl Who Steals Time	AA	Sequel	Original
Farming Simulator 25	AA	Sequel	Original

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Appendix: game classifications
2025 cohort, A–Z (2 of 3)

Game	Class	Type	IP origin
Frostpunk 2	AA	Sequel	Original
Gears of War: Reloaded	AAA	Remake	Original
Grounded 2	AAA	Sequel	Original
Harry Potter: Quidditch Champions	AAA	New series	Lic. other
inZOI	AA	New series	Original
Killing Floor 3	AA	Sequel	Original
Kingdom Come: Deliverance II	AA	Sequel	Original
Liar's Bar	Indie	New series	Original
Mafia: The Old Country	AAA	Sequel	Original

Game	Class	Type	IP origin
Mage Arena	Indie	New series	Original
METAL GEAR SOLID Δ: SNAKE EATER	AAA	Remake	Original
Metaphor: ReFantazio	AAA	New series	Original
MiSide	Indie	New series	Original
MLB The Show 25	AAA	Sequel	Lic. sports
Monster Hunter Wilds	AAA	Sequel	Original
NBA 2K25	AAA	Sequel	Lic. sports
Path of Exile 2	AA	Sequel	Original
PEAK	Indie	New series	Original
PGA TOUR 2K25	AAA	Sequel	Lic. sports

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Appendix: game classifications
2025 cohort, A–Z (3 of 3)

Game	Class	Type	IP origin
R.E.P.O.	Indie	New series	Original
REMATCH	AA	New series	Original
RoadCraft	AA	New series	Original
RuneScape: Dragonwilds	AA	Sequel	Original
S.T.A.L.K.E.R. 2: Heart of Chornobyl	AA	Sequel	Original
Schedule I	Indie	New series	Original
Sid Meier's Civilization VII	AAA	Sequel	Original
SILENT HILL 2	AAA	Remake	Original
Split Fiction	AAA	New series	Original

Game	Class	Type	IP origin
Sultan's Game	Indie	New series	Original
TCG Card Shop Simulator	Indie	New series	Original
The Elder Scrolls IV: Oblivion Remastered	AAA	Remake	Original
The First Berserker: Khazan	AAA	Sequel	Original
Warhammer 40,000: Space Marine 2	AA	Sequel	Lic. other
WEBFISHING	Indie	New series	Original
WUCHANG: Fallen Feathers	AA	New series	Original
WWE 2K25	AAA	Sequel	Lic. sports
情感反诈模拟器	Indie	New series	Original

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Appendix: game classifications
2026 cohort, A–Z (1 of 3)

Game	Class	Type	IP origin
007 First Light	AA	New series	Lic. other
ARC Raiders	AAA	New series	Original
Assassin's Creed Black Flag Resynced	AAA	Remake	Original
BALL x PIT	Indie	New series	Original
Battlefield 6	AAA	Sequel	Original
Beast of Reincarnation	AA	New series	Original
BidKing	Indie	New series	Original
Big Walk	Indie	New series	Original
Borderlands 4	AAA	Sequel	Original
CloverPit	Indie	New series	Original
Crimson Desert Enhanced	AA	New series	Original
Digimon Story Time Stranger	AAA	Sequel	Original
Dispatch	Indie	New series	Original

Game	Class	Type	IP origin
Dying Light: The Beast	AA	Sequel	Original
EA SPORTS College Football 27	AAA	Sequel	Lic. sports
EA SPORTS FC 26	AAA	Sequel	Lic. sports
EA SPORTS Madden NFL 27	AAA	Sequel	Lic. sports
Escape from Duckov	Indie	New series	Original
Europa Universalis V	AA	Sequel	Original
Everything is Crab	Indie	New series	Original
Far Far West	Indie	New series	Original
Football Manager 26	AAA	Sequel	Lic. sports
Forza Horizon 6	AAA	Sequel	Original
Gamble With Your Friends	Indie	New series	Original
Ghost of Yōtei	AAA	Sequel	Original
Gothic 1 Remake	AA	Remake	Original

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Appendix: game classifications
2026 cohort, A–Z (2 of 3)

Game	Class	Type	IP origin
Halo: Campaign Evolved	AAA	Remake	Original
Hell Let Loose: Vietnam	AA	Sequel	Original
Heroes of Might and Magic: Olden Era	Indie	Sequel	Lic. other
High On Life 2	AA	Sequel	Original
Hollow Knight: Silksong	Indie	Sequel	Original
How to Fish	Indie	New series	Original
Invincible VS	AA	New series	Lic. other
IRON NEST: Heavy Turret Simulator	Indie	New series	Original
John Carpenter's Toxic Commando	AA	New series	Lic. other
LEGO Batman: Legacy of the Dark Knight	AAA	Sequel	Lic. other
Little Nightmares III	AA	Sequel	Original

Game	Class	Type	IP origin
Machine Party	Indie	New series	Original
Marathon	AAA	Sequel	Original
MARVEL Tōkon: Fighting Souls	AAA	New series	Lic. other
MECCHA CHAMELEON	Indie	New series	Original
Megabonk	Indie	New series	Original
Mewgenics	Indie	New series	Original
Mistfall Hunter	Indie	New series	Original
MLB The Show 26	AAA	Sequel	Lic. sports
MONSTER HUNTER STORIES 3: TWISTED REFLECTION	AAA	Sequel	Original
Mortal Shell II	Indie	Sequel	Original
MOUSE: P.I. For Hire	Indie	New series	Original
NBA 2K26	AAA	Sequel	Lic. sports
Nioh 3	AAA	Sequel	Original

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Appendix: game classifications
2026 cohort, A–Z (3 of 3)

Game	Class	Type	IP origin
PRAGMATA	AAA	New series	Original
Quarantine Zone: The Last Check	Indie	New series	Original
Raccoin: Coin Pusher Roguelike	Indie	New series	Original
REANIMAL	AA	New series	Original
Resident Evil Requiem	AAA	Sequel	Original
Road to Empress Ⅱ	Indie	Sequel	Original
RV There Yet?	Indie	New series	Original
s&box	AA	New series	Original
SAROS	AAA	New series	Original
Scritchy Scratchy	Indie	New series	Original
Shape of Dreams	Indie	New series	Original
Shift At Midnight	Indie	New series	Original

Game	Class	Type	IP origin
SILENT HILL f	AAA	Sequel	Original
Slay the Spire 2	Indie	Sequel	Original
Sonic Racing: CrossWorlds	AAA	Sequel	Original
STAR WARS Zero Company	AAA	New series	Lic. other
StarRupture	Indie	New series	Original
Subnautica 2	AA	Sequel	Original
Super Battle Golf	Indie	New series	Original
The Mound: Omen of Cthulhu	AA	New series	Original
The Outer Worlds 2	AAA	Sequel	Original
UFC 6	AAA	Sequel	Lic. sports
Vampire Crawlers	Indie	Sequel	Original
Windrose	Indie	New series	Original
WWE 2K26	AAA	Sequel	Lic. sports
YAPYAP	Indie	New series	Original

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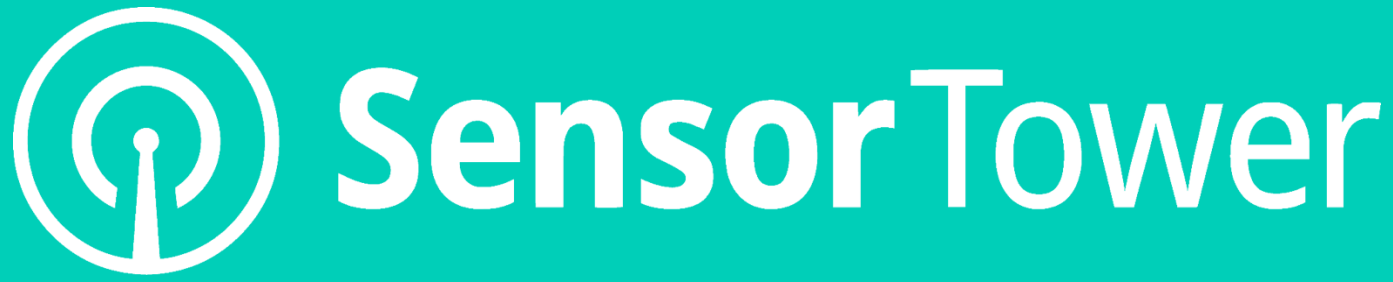
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