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Esports Talent Scouting Market Forecasts to 2032 – Global Analysis By Components (Software, Services, and Hardware & Peripherals), Talent Type, Game Genre, Platform, Deployment Mode, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Esports Talent Scouting Market is accounted for $80.60 million in 2025 and is expected to reach $363.31 million by 2032 growing at a CAGR of 24.0% during the forecast period. Esports talent scouting refers to the structured practice of discovering, assessing, and selecting promising gamers in the competitive gaming industry. This process focuses on gameplay proficiency, tactical awareness, teamwork, and long-term potential. Scouts rely on performance data, direct observation, and trials to measure abilities. The ultimate goal is to link rising players with esports teams, leagues, or sponsors, enabling competitive advantage and nurturing sustainable growth of future professional esports athletes.

According to FICCI-EY (2024), India hosted over 275 large-scale esports tournaments in 2024, up from 190 in 2023.

Market Dynamics:

Driver:

Increasing investment from sponsors and brands

As esports viewership surges globally, sponsors and consumer brands are ramping up their investments in talent development and scouting infrastructure. These partnerships are fueling the creation of structured leagues, training academies, and analytics

platforms to identify emerging players. Brands are leveraging esports to connect with younger, digitally native audiences, amplifying their visibility through team sponsorships and event branding. The rise of influencer-driven marketing and content monetization has further incentivized investment in scouting ecosystems. Enhanced funding is enabling the deployment of advanced scouting software, AI-based performance analysis, and global talent pipelines. This influx of capital is accelerating the professionalization of esports scouting and expanding its commercial viability.

Restraint:

Lack of standardized evaluation criteria

Metrics vary widely across game genres, regions, and platforms, making cross-comparison difficult. Many scouting agencies rely on proprietary algorithms or subjective assessments, which can lead to bias and missed opportunities. The absence of universal standards hinders collaboration between teams, publishers, and training institutions. This fragmentation also complicates talent mobility and contract negotiations, slowing down player progression. Without standardized criteria, the credibility and scalability of esports scouting remain limited.

Opportunity:

Integration of advanced performance tracking technologies

Cutting-edge technologies such as AI-driven analytics, biometric sensors, and real-time gameplay monitoring are revolutionizing esports talent scouting. These tools enable granular tracking of player reflexes, decision-making, and strategic adaptability across competitive formats. Cloud-based dashboards and machine learning models are helping scouts identify high-potential players earlier and more accurately. Integration with streaming platforms and game APIs allows for seamless data collection and visualization. As esports becomes more data-centric, these innovations offer a competitive edge to teams and agencies investing in tech-forward scouting systems. The convergence of performance tracking and predictive analytics is unlocking new dimensions of talent evaluation.

Threat:

High competition among scouting agencies

The esports scouting is becoming increasingly saturated, with numerous agencies vying for access to top-tier talent. This intense competition is driving aggressive recruitment tactics and inflated player valuations. Smaller agencies often struggle to retain prospects due to limited resources and brand visibility. The rise of publisher-backed leagues and in-house scouting programs is further squeezing independent operators. Market fragmentation and overlapping services are leading to inefficiencies and diluted differentiation. As competition escalates, only agencies with strong tech capabilities and strategic partnerships are likely to sustain long-term relevance.

Covid-19 Impact

The pandemic disrupted live tournaments and in-person scouting events, forcing a pivot to virtual evaluations and remote training. Travel restrictions and lockdowns delayed talent on boarding and reduced exposure for emerging players. However, the shift to online platforms accelerated the adoption of digital scouting tools and cloud-based performance analytics. Agencies invested in scalable, remote-friendly scouting infrastructure to adapt to the new normal. Post-pandemic, these digital-first models are expected to remain central to the industry's evolution.

The software segment is expected to be the largest during the forecast period

The software segment is expected to account for the largest market share during the forecast period, due to its role in streamlining data collection, analysis, and player profiling. Scouting platforms offer customizable dashboards, automated ranking systems, and integration with game APIs for real-time insights. These tools enable scouts to evaluate players across multiple metrics, including reaction time, accuracy, and strategic behavior. Software solutions also support collaboration between teams, coaches, and analysts, enhancing decision-making. As esports expands globally, scalable and multilingual software platforms are becoming essential. The demand for centralized, data-rich scouting systems is driving the segment’s leadership.

The cloud-based platforms segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the cloud-based platforms segment is predicted to witness the highest growth rate, driven by their flexibility, scalability, and remote accessibility. These solutions allow scouts to monitor players across geographies without physical presence, reducing operational costs. Real-time data syncing and collaborative features make cloud platforms ideal for multi-team scouting operations. Integration with mobile devices and streaming services enhances usability and reach. As esports becomes increasingly decentralized, cloud platforms offer a future-proof infrastructure for talent discovery. Their ability to support global scouting networks and dynamic data environments is fueling rapid adoption.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share supported by its massive gamer base and thriving esports culture. Countries like China, South Korea, and India are investing heavily in esports academies, tournaments, and digital infrastructure. Mobile gaming dominates the region, lowering entry barriers and expanding the talent pool. Government initiatives and private investments are fostering structured scouting ecosystems and training programs. The popularity of streaming platforms and localized content is further amplifying regional engagement. With a robust pipeline of emerging players, Asia Pacific remains the epicenter of esports talent development.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, driven by its mature esports ecosystem and emphasis on data-driven scouting. The region boasts advanced infrastructure, including AI-powered analytics platforms, dedicated training facilities, and collegiate esports programs. Publisher-backed leagues and franchised teams are investing in proprietary scouting systems and performance labs. Trends like biometric tracking, mental health profiling, and cognitive skill assessments are gaining traction. The integration of esports with mainstream sports analytics is elevating scouting standards.

Key players in the market

Some of the key players profiled in the Esports Talent Scouting Market include ESL FACEIT Group, Team SoloMid (TSM), Riot Games, NODWIN Gaming, Activision Blizzard, G2 Esports, Tencent, Krafton, Valve Corporation, 100 Thieves, Electronic Arts (EA), FaZe Clan, Garena, Team Liquid, and NetEase.

Key Developments:

In August 2025, Nodwin Gaming acquires Sony's stake in e-sports event Championship Evo. Nodwin Gaming acquired a majority stake in the Evolution Championship Series

(Evo), expanding its presence in the global fighting games e-sports market. Sony Interactive Entertainment (SIE) sold its stake in Evo to Nodwin Gaming for an undisclosed amount.

In May 2025, LoL and VALORANT Esports Partnering with Coinbase. Bringing on Coinbase as an official partner of VALORANT and LoL Esports global events, becoming the exclusive cryptocurrency exchange and a blockchain technology partner starting with VCT Masters Toronto

Components Covered:

- Software
- Services
- Hardware & Peripherals

Talent Types Covered:

- Players
- Coaches & Analysts
- Streamers
- Support Staff

Game Genres Covered:

- MOBAs
- FPS
- Battle Royale
- Sports

Mobile esports

Platforms Covered:

PC & Console

Mobile

Streaming platforms

Social Media

Deployment Modes Covered:

Cloud-based platforms

Hybrid solutions

On-premises

End Users Covered:

Professional Esports Teams & Orgs

Talent Agencies & Management Firms

Tournament Organizers & Event Hosts

Educational Institutions & Collegiate Programs

Brands & Sponsors

Amateur

Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India
  - Australia
  - New Zealand
  - South Korea
  - Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

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customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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