The Long Game

From launched to lasting — what the next decade of academic esports requires

A Strategic Report From

NEXT GEN ESPORTS
LEADERSHIP LAB

Powered By SHI PUBLIC SECTOR intel

ESPORTS
TRADE ASSOCIATION

Table of **Contents**

FOREWORD

A decade ago, the question facing academic esports was whether the model could work. The answer is in. The infrastructure exists — and a different question has taken its place.

More than 680 collegiate programs operate across North America. Roughly 5,000 high schools support esports. Programs distributed more than $51 million in scholarships last year, and three quarters of programs now offer some form of scholarship at all.

The 2024–2025 academic year also produced a different statistic. For the first time on record, the total number of collegiate esports programs in North America decreased. Twenty-two institutions, roughly 2.8 percent of the field, ended their programs. The two most-cited reasons in the surrounding data — institutional financial pressure, and the departure of the university leader who originally championed the program — describe a problem the field has not yet learned how to solve.

That problem is the subject of this report.

On April 29, 2026, forty-seven administrators, faculty, coaches, students, and industry professionals gathered in Fort Worth for a working session organized around a single premise: the work of launching academic esports programs is largely complete, and the work of making those programs last has barely begun. The convening was the second annual Next Gen Esports Leadership Lab, powered by SHI and Intel and convened by the Esports Trade Association.

Last year's lab, captured in The Great Disconnect, diagnosed the gap between educational programs and industry needs. This year's session moved the conversation forward. Assuming a program has been built, what does it take to ensure it survives leadership transitions, budget cycles, conference reorganizations, and the ordinary turbulence of institutional life?

The three findings in this report are the field's first collective attempt to answer that question. They are connected. Each describes a different face of the same underlying condition: programs that have succeeded in launching have not yet succeeded in institutionalizing.

This report names that condition, presents the evidence for it, and lays out what the field's collective experience suggests will close the gap.

680+

collegiate programs operating across **North America**

$51M

distributed **in scholarships** in a single academic year

22

institutions ended their programs — the **first recorded decline**

EXECUTIVE SUMMARY

Three findings from the convening warrant the attention of every program director, senior administrator, and industry partner working in this space.

01

FINDING ONE

STABILITY IS NOT THE SAME AS SUSTAINABILITY.

Most programs feel stable. Forty-three percent of the room reported being secure heading into the next budget cycle; another thirty-five percent reported cautious stability. But when participants described what their stability rested on, the answers converged on a small number of fragile inputs: a single supportive administrator, a particular configuration of institutional priorities, a roster of games students happen to want this year. The field has built programs on borrowed foundations, and the conditions underneath those foundations are changing.

02

FINDING TWO

THE INDUSTRY RELATIONSHIP IS BROKEN ON BOTH SIDES, IN SYMMETRICAL WAYS.

Programs and industry have spent years talking past each other. Programs report they cannot find the time, the right contacts, or clarity about what industry actually wants. Industry reports its constraints are bandwidth, institutional bureaucracy, and inconsistent program follow-through — and that programs are pitching what they think industry wants to hear instead of what industry actually needs. Nearly three quarters of the reported program-side gap sits upstream of any conversation about value.

ESPORTS TRADE ASSOCIATION

03

FINDING THREE

PROGRAMS ARE ONE DEPARTURE FROM BEING CUT.

When asked what happens to their program if they leave their role tomorrow, only twenty-one percent of participants said the program continues without missing a beat. Sixty-four percent said it struggles but survives. Fourteen percent said it probably folds. The result aligns with the external trends data: when programs close, the second most common reason is the departure of the university leader who championed the program. The field has been built on individual heroism. That model worked for the launch phase. It is failing the lasting phase.

22%
say the program continues without missing a beat

64%
say it struggles but survives — someone picks it up

14%
say it probably folds — held together by one or two people

WHY THE FINDINGS CONNECT

Each finding describes the same underlying condition from a different angle. Programs rest on borrowed stability because the work of institutionalizing them has not been completed. Industry partnerships fail to deepen because both sides are operating on assumptions the other has not validated. Programs are vulnerable to single-point departures because the case for them lives in one person's head rather than in the institution's understanding of itself.

The four principles in Section Five describe the field's collective best thinking on closing the gap. The direct address to industry in Section Six names the work the other side of the table has to do.

SECTION ONE

THE STATE OF THE FIELD

01

The infrastructure question has been answered. Academic esports has spent a decade proving the model works — and arrived at a different question entirely.

THE INFRASTRUCTURE IS HERE.

Academic esports has spent the last decade in motion. The infrastructure question — would institutions take this seriously, would students engage, would the programs find traction inside the broader life of the university — has been answered. The infrastructure is here.

680+
collegiate programs operating across **North America**

92%
of supporting institutions have **invested in a facility**

$190M
estimated historic spend on **facility buildouts**

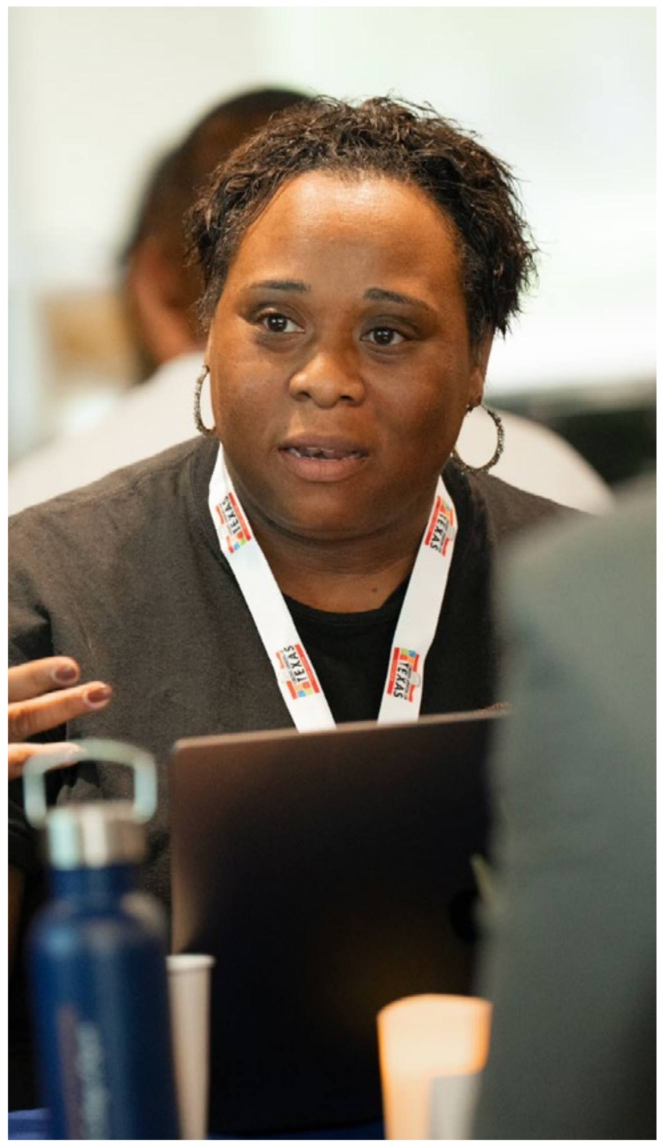
75%
of programs **offer scholarship access** of some kind

Recent external data on the scholastic esports ecosystem makes the scale concrete. More than 680 collegiate programs operate across North America. Roughly 92 percent of supporting institutions have invested in an esports facility. The estimated historic spend on initial facility buildouts now exceeds $190 million. Scholarship distribution in the 2024–2025 academic year exceeded $51 million across the field. Three quarters of programs offer scholarship access of some kind.

The same data records something else. The 2024–2025 year was the first on record in which the total number of collegiate esports programs in North America decreased. Twenty-two institutions ended their programs. The field is no longer in a phase of hyper-growth. It is in a phase of differentiation — some programs investing more deeply than ever before, others quietly winding down.

The two most-cited reasons for program closure in the surrounding data are not a referendum on whether esports works. They are a referendum on whether programs were built to last. Institutional financial pressure tops the list, predictably. The second reason is the one this report takes up: the departure of the university leadership figure who had originally championed the program. When the champion left, the case for the program left with them.

The convening was structured around the question that finding implies. If the launch phase is over, what does the lasting phase require?



ESPORTS TRADE ASSOCIATION

SECTION TWO

STABILITY AND WHAT IT DEPENDS ON

02

The infrastructure question has been answered. Academic esports has spent a decade proving the model works — and arrived at a different question entirely.

LIVE POLL

How secure is your program heading into the next budget cycle?

RESPONSE	SHARE OF ROOM
Secure — institutional support and stable funding	43%
Cautious — okay for now, not confident about next year	35%
Vulnerable — one decision away from significant cuts	13%
I don't know — and that itself is the problem	9%

Seventy-eight percent of participants rated their program either secure or cautiously stable for the next budget cycle. This is consistent with the external picture - new programs continue to open, scholarship spending continues to rise, and most public coverage of the field concerns launches rather than closures.

The discussion did not focus on whether programs would survive the coming year. Most expect to. It focused on what that stability depends on, and whether those conditions will hold. The distinction matters more than it first appears. A field can post strong aggregate numbers - more programs, more scholarships, more facilities - while the individual programs inside it grow more fragile, because growth and durability are not the same property and are not built the same way.

Programs attribute their sustainability to student involvement

Asked to name the strongest pattern from their discussion of sustainability, three of the six tables independently submitted the same answer — student involvement. Not funding, facilities, or administrative support. When a mixed group of administrators, faculty, and students identified what keeps a program alive, the recurring answer was the size and engagement of the student base.

This reframes how sustainability is usually discussed. The common framing treats sustainability as a function of resources from above — budget allocations, leadership approval, conference requirements. Participants described it as a function of participation from below. A program with a large, engaged student community is harder to cut, because cutting it removes a visible benefit from students the institution is working to recruit and retain. A program built around a small competitive roster is easier to cut, because few people outside the program are affected.

It is worth asking why a field full of capable people would so consistently invest in the layer that protects them least. The likely answer is that the field measures the wrong thing. Almost every external signal of a program's status — national rankings, varsity designation, scholarship totals, conference standing — describes the competitive layer. None describe the breadth of the student base. Programs defend what the field tells them counts, and the field has told them that competition counts. The room's finding is, in effect, that the scoreboard and the foundation are two different things, and that most programs have been maintaining the scoreboard.

Most programs cannot measure that involvement

The same discussion identified why this has not yet protected most programs: the involvement is real, but the evidence is not captured. Programs know their spaces are well used. Few can report how many unique students participate in a given semester, how participants' retention compares to the institutional average, or how participation relates to the enrollment and persistence metrics the institution tracks. Student involvement is the asset most programs rely on, and most cannot quantify it.

This is the most addressable problem the field has. Most sustainability challenges require building something that does not yet exist — new revenue, new partnerships, new institutional relationships. This one does not. The participation is already happening; the only missing step is measurement. A program that begins counting unique visitors, tracking participant retention against institutional baselines, and reporting both on the institution's own terms can convert an asset it already holds into evidence it can use, without adding a single student. Few investments in program durability cost so little.

Program stability can change without warning

How quickly conditions can shift was illustrated by one participant's account. Within a single public university system, the same state law governing certain gaming platforms was interpreted differently by different campuses' legal counsel. The result was that popular competitive titles were unplayable on state-owned equipment at some institutions and available at others in the same system. The programs had not changed and the law had not changed — a single legal interpretation had changed, and the affected programs lost part of their competitive offering. A student participant noted the consequence: when a program cannot offer the titles students want to play, those students transfer to programs that can.

This exposure is not unusual. *League of Legends*, the most widely supported scholastic title five years ago, has fallen to fifth by number of supporting institutions, partly because a licensing change made it harder for K-12 leagues to operate.

Programs that built their identity around a specific title carried that title's volatility, in a field where the leading titles change over five-year periods.

Competitive performance is a weak basis for institutional support

A structural issue sits beneath the volatility of any single title. Traditional college sports operate within an established pipeline: youth and high school programs feed colleges, and colleges feed professional and Olympic levels, with the university in a central position. Esports does not have a comparable pipeline, and where one is developing, the university is not consistently part of it. Top players are identified online and can earn directly, without collegiate participation.

This produces an uncomfortable conclusion the field has been slow to state. The most common justification for an academic esports program — that it develops competitive talent for the next level — is built on the one function the next level least needs a university to perform. The professional tier does not rely on colleges to find or develop its players. A program that stakes its institutional case on competitive talent development has therefore chosen the weakest available ground, and the field's prestige hierarchy, which rewards competitive results above all else, steadily encourages programs onto exactly that ground. The programs that internalize this and shift their stated purpose toward what the university actually values are not lowering their ambitions. They are choosing a defensible position over an impressive one.

The most secure programs had diversified in two ways

Participants whose programs were furthest along on sustainability described two differences from the rest.

The first was financial. The most secure programs had moved beyond a single institutional budget line to a mix of sources: institutional funding, scholarships, grants, facility revenue, summer camps, conference programming, and industry partnerships. No single budget decision could end them. External data is consistent with this: the programs most likely to survive a difficult budget cycle are those that have diversified beyond tuition-driven revenue into facility income, camps, academic integration, and grant-funded work.

The second concerned how the program defined itself. One participant described gaming spaces that drew tens of thousands of student visits per semester on a campus of roughly twenty-two thousand students. The relevant point was not the figure, but what it allowed the program to demonstrate. A program presented as a varsity activity for thirty players is one item in an administrator's budget. A program presented as infrastructure used by a significant share of the student body is a larger and more difficult item to remove. The activity is the same in both cases. The difference is whether the program measures itself in terms the institution recognizes.

Esports faces the skepticism college athletics once faced

The longest-tenured directors placed these issues in a longer context. The skepticism academic esports encounters now — whether it is legitimate, whether it belongs, why it is funded — resembles the skepticism traditional athletics encountered in universities during the 1970s and 1980s, before athletics became an accepted part of institutional identity. The transition from contested to accepted required demonstrated institutional value, sustained over time and across enough of the institution that the program became something the university assumed rather than debated.

The comparison should be read as both reassurance and instruction. Reassurance, because it shows the current skepticism is a normal stage rather than a verdict. Instruction, because athletics did not resolve that skepticism by winning more games. It resolved it by becoming inseparable from enrollment, alumni engagement, community identity, and institutional brand — by making itself part of what the university was for. Esports is the most recent activity moving through that transition, and on this evidence the programs most likely to complete it are not those that win most often, but those that have made themselves valuable to the institution rather than to the sport, and can document that value. Section Five describes what that work involves.

ESPORTS TRADE ASSOCIATION

SECTION THREE

THE INDUSTRY ASYMMETRY

03

The field's industry problem is overwhelmingly a problem of starting, not closing — and programs and industry describe it as mirror images of each other.

LIVE POLL

Where's the biggest gap in your industry relationships right now?

RESPONSE	SHARE OF ROOM
We don't have time to build them	27%
We don't know who to talk to	23%
We're not sure what industry actually wants	23%
We can't get past initial conversations	15%
We get partnerships, but they don't last	12%

This was the most actionable finding of the convening, because the data made it possible to locate the problem precisely. The poll did not describe a single gap. It described five, and they fall into two groups. The first three responses — no time, no contacts, no clarity about what industry wants —total seventy-three percent and all sit before any partnership conversation has begun. The last two — stalled conversations and partnerships that fade — total twenty-seven percent and describe failures after contact. The field's industry problem is overwhelmingly a problem of starting, not of closing.

Programs cannot tell whether they are succeeding

The pre-event survey sharpened the point. On a five-point scale measuring confidence across dimensions of sustainability, the lowest-rated item was meaningful, active industry relationships — but the average was 3.0, the exact center of the scale, not a low score. Programs did not report that they were failing at industry relationships. They reported that they could not tell. That uncertainty is its own finding. A program can measure competitive results, enrollment, and budget against a clear standard. It has no comparable standard for whether its industry engagement is good, average, or poor, because the field has never defined what adequate industry engagement looks like. Programs are operating without a benchmark, which means most cannot distinguish a relationship worth investing in from one worth abandoning.

The Industry describes the same failure from the other side

Asked about their own constraints, industry participants and survey respondents named bandwidth, the bureaucratic complexity of working with institutions, and inconsistent program follow-through. They were not skeptical of academic esports and were not unclear on its value. They were limited by their own scale — too many programs to evaluate, too few staff to manage them, and too many partnerships that opened well and then stalled after the first activation.

Set the two sides side by side and they describe one failure from opposite ends. Programs say they lack the time to build relationships; the industry says it lacks the time to manage them. Programs say they cannot tell what industry wants; industry says programs do not follow through on what was already agreed. Programs say they cannot demonstrate return on investment — industry says return on investment was never the obstacle — reliability was. Each side has concluded that its own constraint is the binding one, and each has built a settled explanation in which the other side is the reason nothing advances. The asymmetry is not that the two sides disagree. It is that they have stopped describing the same problem in language the other would recognize.

How Poorly The Current Model Is Working

75%

of esports initiatives are **unsuccessful** at raising third-party funds

$14,726

average cash sponsorship reported by collegiate programs

$2,000

median sponsorship — most that get partnerships get transactional ones

What the industry wants is not what the field rewards

The survey produced an unusually direct answer to a question programs routinely guess at: what does the industry actually look for in the graduates these programs produce? Respondents named professional communication and workplace readiness first, followed by business acumen, data analysis, leadership and team management, and industry-specific knowledge. No industry respondent named technical gaming skill. None named broadcast production in isolation. None named competitive accomplishment.

This is the Section Two problem reappearing on the industry side. The capabilities industry will pay attention to are precisely the capabilities the field's prestige hierarchy does not reward. A program optimizing for competitive results is building the thing that earns rankings and the thing that industry has explicitly said it does not need, at the same time, with the same resources. The partnership currency programs are short of is not better outreach or a stronger pitch deck. It is graduates who can communicate, manage projects, read data, and operate professionally — outcomes that come from the workforce-preparation side of a program, not the competitive side. Programs that produce those graduates have something the industry wants before any conversation starts. Programs that produce only strong competitors are, from industry's stated perspective, producing the wrong product well.

The transactional model has already failed

The external economics show this is not a model underperforming at the margins. More than three quarters of esports initiatives are unable to raise funds from third parties at all. Among programs that do secure cash sponsorship, the average is $14,726 and the median is $2,000 — a figure low enough to confirm that the typical sponsorship is a one-time logo placement, not a relationship. Most programs are not getting partnerships. Most of those that are getting them are getting transactions.

The conclusion the field has been reluctant to draw is that the sponsorship model itself is the problem, not its execution. Programs competing for brand-on-a-backdrop sponsorships are competing for a small, shrinking, and inherently transactional pool of money that was never going to fund a program's future, no matter how well they pitched it. The $2,000 median is not a sign that programs should pitch harder. It is a sign that they are pursuing the wrong kind of money.

Working partnerships share a different structure

The partnerships participants described as durable looked nothing like sponsorships. They were collaborations in which both sides contributed and both sides received. They frequently began at zero dollars — a project that gave students real professional work, such as a broadcast operation, an event activation, or an internship cohort, and gave the industry partner a concrete deliverable in return. They expanded only after both sides had demonstrated they could execute. And they touched the program in several ways across the year rather than appearing once at a single event.

The most-cited cause of partnership collapse was the same on both sides: turnover. When a program's point of contact changed every few months, momentum was lost. When the industry partner's point of contact changed, the same loss occurred in reverse. Durable partnerships depended on a stable relationship between specific people over multiple years — which is also why they could not be created quickly or in volume.

That points to a conclusion that runs against most programs' instinct. A program that feels it has too few industry relationships will naturally try to acquire more. The evidence suggests the opposite response. Because durable partnerships are built slowly, between people, and deepen only with demonstrated reliability, the realistic path is fewer relationships pursued more seriously — one or two partners whose goals genuinely align with the program's, developed over years. A portfolio of one-time sponsorships has to be rebuilt every cycle and protects the program from nothing. Two real partnerships compound. The scarcity programs feel is real, but the answer to it is not more partners. It is better ones, and the patience to build them.

The other half of this relationship is the industry's to repair, and the specific changes the industry can make are the subject of Section Six.

SECTION FOUR

THE SUCCESSION GAP

04

The field's industry problem is overwhelmingly a problem of starting, not closing — and programs and industry describe it as mirror images of each other.

LIVE POLL

If you left your role tomorrow, what happens to your program?

RESPONSE	SHARE OF ROOM
It continues without missing a beat — the systems are in place	22%
It struggles but survives — someone picks it up eventually	64%
It probably folds — it's held together by one or two people	14%
I genuinely don't know	0%

This poll produced the most revealing number of the day, and it was the zero. Every other question in the session drew at least a few "I don't know" responses. This one drew none. When asked what would happen to their program if they left tomorrow, every participant had a definite answer. The field does not have a blind spot about its own fragility. It has a clear-eyed view of it, and has been operating with that view for some time.

The field knows it is fragile

Only twenty-two percent of participants said their program would continue without disruption if they left. Fourteen percent said it would probably fold. The remaining sixty-four percent — the clear majority — said it would struggle but survive.

That middle answer deserves more scrutiny than it usually gets, because its reassuring phrasing conceals the actual finding. "Struggles but survives" is not a description of a stable program. It is a description of a program that would enter a period of decline on the departure of one person, and might recover if someone capable happened to step in. The word carrying the weight is "eventually." These are not programs that would continue. They are programs that would be interrupted, weakened, and left dependent on the institution caring enough to find a replacement before the gap became permanent. Read honestly, roughly four in five programs in the room reported that their continued health is tied to a specific individual remaining in a specific role.

This is a known risk the field has chosen to carry

The external data confirms this is not a perception problem. When collegiate programs close, the second most-cited cause — after institutional financial pressure — is the departure of the leadership figure who originally championed the program. The succession gap is not a hypothetical. It is the documented second-leading cause of program failure in the field.

What makes this finding distinct from the rest of the report is that it is not a discovery. The room did not need to be persuaded that single-person dependence is dangerous; the unanimous, immediate poll response shows they already knew. This is a risk the field understands and has nonetheless decided to live with, year after year, because addressing it competes with the daily work of running the program and always loses. The succession gap persists not because it is hidden but because it is never urgent until the moment it becomes terminal.

Individual heroism is a stage, not a flaw

It is worth being precise about what the problem is and is not, because the people who built these programs are often the people the warning seems to indict. Nearly every academic esports program began as one person's mission — a founding director who personally held the relationships, the institutional knowledge, the credibility with leadership, and the operational continuity. That concentration was not a mistake. It is how ambitious things get built, in any field. A program that did not start with someone willing to carry it alone would not exist to be discussed.

The failure is not founding a program on one person's effort. The failure is never transitioning out of that arrangement. Individual heroism is the correct model for the launch phase and a liability for the lasting phase, and the work of sustainability is in large part the work of converting a founder's program into an institution's program before the founder leaves. Most programs in the room had completed the first phase and not yet begun the second.

The room's answer was community

When participants were asked what it takes for a program to be embedded rather than tolerated, the answer arrived from five of the six tables at once, in nearly identical terms. Working independently, they converged on the same word — community — and on the same mechanism around it: building support broadly across campus, translating the program's value into terms administrators and partners recognize, and doing both consistently enough that the program becomes part of the institution's understanding of itself. No table named competition. None named funding. The shared answer was that a program survives by embedding itself in the community and the institution, deliberately, over time.

That this answer emerged separately and simultaneously from most of the room matters, because it means the path forward is not the report's assertion but the field's own conclusion. The corrective to single-person dependence is distribution: spreading the case for the program across enough people, offices, and community that no single departure can end it. A program backed by one person is one resignation away from closure. A program backed by many is institutional.

This is the throughline connecting all three findings. The single supportive administrator in Section Two, the single industry point of contact in Section Three, and the single indispensable director here are the same vulnerability in different forms — a program's existence concentrated in one node, exposed the moment that node moves. Sustainability, across all three, is the work of widening the base until no single point can bring the whole thing down. What that looks like in practice is the subject of the next section.

ESPORTS TRADE ASSOCIATION

SECTION FIVE

FOUR PRINCIPLES FOR LASTING

05

The first three findings name the problem. This section names the work — four practices the room returned to across every round, and what each one requires.

What the Work Actually Involves

The three findings point to one conclusion: programs last when they are valuable to the institution and that value is visible, distributed, and built before it is needed. Across three rounds, the room returned to four practices that produce that outcome. None is novel to anyone who has run a program for long. What the convening added was agreement — a cross-section of administrators, faculty, students, and industry arriving at the same four ideas — and specificity about what each one requires in practice. The practices compound. A program that adopts them in its first year and a program that adopts them in its fifth are not in the same position, because the returns accumulate with time, and the work is least urgent at exactly the moment it is most effective to begin.

PRINCIPLE
01

Build for engagement, not for trophies

A program justified by competition results rises and falls with its competitive standing. When a roster ages out, a title's scene shifts, or a conference reorganizes, the basis for the program's claim on institutional resources weakens with it. A program justified by what it contributes to the institution — students reached, retention supported, community built, workforce outcomes produced — does not carry that exposure, because its case does not depend on last season's results.

In practice this means measuring and reporting the full population the program touches, not the roster it fields. A program with thirty varsity competitors has thirty students. A program whose space draws tens of thousands of visits a semester has an institutional argument built into its door count — but only if it counts. The work is to document everyone the program reaches: competitive players, club members, drop-in users, event attendees, and students whose retention or engagement correlates with involvement. It also means anchoring the program's identity in its own campus and region rather than in national affiliations that can change without notice. The value that protects a program is the value local to it — the students on its own campus, the community around it — not its standing in a national structure it does not control.

PRINCIPLE
02

Distribute the case across many people

This is the direct answer to the succession gap, and the practice the room named most consistently. A program whose support is concentrated in one administrator is one resignation away from crisis. The work of durability is building enough advocates, in enough parts of the institution, that no single departure can end the program — and ensuring that on any ordinary day, several people across the institution can explain in their own terms why the program matters.

Concretely: identify the offices whose own metrics intersect with the program — typically admissions, retention services, career development, student affairs, and one or two academic departments — and build a standing relationship with each. A brief meeting once a semester, bringing data each office can use in its own reporting, is enough. The purpose is not to ask for anything. It is to ensure that when a budget decision is made in a room the director is not in, the program already has advocates there who have their own reasons to defend it. A handful of these relationships, sustained over a few years, is the difference between a program that depends on one champion and a program an institution would have to actively choose to dismantle.

PRINCIPLE
03

Translate value into the institution's own language

Administrators act on what they measure. A program that reports its impact in the terms the institution already tracks — enrollment, retention, completion, post-graduation outcomes, workforce alignment — is legible in a budget conversation. A program that reports only in esports terms remains invisible to the people deciding its future, even when they are favorably disposed.

The practice is to stop presenting competition results to people who do not measure success in wins, and to start presenting the institution's own metrics: persistence rates among participants against the institutional baseline, enrollment yield among gaming-interested applicants, completion rates, employment outcomes in adjacent fields. Which metric matters depends on the institution — recruitment at a small private college, retention at a large public university, workforce alignment at a land-grant institution — so the first step is knowing which number one's own leadership manages against, and then generating evidence in that number through the program's everyday activity. Delivered on the institution's reporting calendar rather than the program's, this is what moves a program from something the institution tolerates to something it understands as an investment.

PRINCIPLE
04

Build relationships before you need them

The relationships that hold under pressure are the ones established before the pressure arrives. This applies to senior leadership, to cross-campus allies, and to industry partners alike. A program that first approaches a dean, a partner, or a potential advocate at the moment it needs something is negotiating from the weakest possible position. A program that has kept those relationships warm over time is having a different conversation entirely.

The practice costs little: a short, regular check-in with each key stakeholder that carries no ask — an update on the program, a question about their work, an offer of help where interests overlap. The same discipline applies to the industry relationships described in Section Three, where durable partnerships were the ones built slowly, between specific people, and deepened only after both sides had demonstrated they could deliver. Relationships built this way compound; relationships built under duress rarely survive the thing that prompted them. This is the least urgent of the four practices on any given day, which is precisely why it is the one most often neglected until it is too late to start.

ESPORTS TRADE ASSOCIATION

SECTION SIX

A DIRECT WORD TO THE INDUSTRY

06

The current model is failing the industry as much as it is failing the programs. Three shifts would change what is possible — and industry is the side that has to make them.

Every finding so far has been addressed to programs, because programs are doing most of the work the field needs done. But the relationship described in Section Three has two sides, and only one of them has been asked to change. This section is addressed to the industry organizations engaging with academic esports — the ones in the room, and the broader set beyond it. The Esports Trade Association represents both sides of this relationship, which is why it can say plainly to each what the other will not: the current model is failing industry as much as it is failing programs, and for a reason the industry is better positioned to fix.

That reason is a category error. Most industry engagement with academic esports has been structured as marketing — brand exposure, logo placement, a presence in front of a young audience. Measured as marketing, the spending makes sense only at small scale, which is exactly what the economics show: a median cash sponsorship of $2,000, and more than three-quarters of programs unable to raise outside funds at all. But marketing was never where the value was. Asked what they actually need from these programs, industry respondents named workforce: professional communication, business acumen, data analysis, project management, people who understand the industry. Academic esports is not a marketing channel that happens to involve students. It is a workforce pipeline that industry has been paying for as if it were advertising — and pricing accordingly. The shallow partnerships and the small dollars are not a failure of program salesmanship. They are what happens when a pipeline is mistaken for a billboard.

Three shifts follow from correcting that error. None is free; each asks the industry to engage more deliberately than the marketing frame ever required. The case for all three is the same: the marketing frame has reached its ceiling, and the workforce frame has not been tried at scale.

01

Fund it like a pipeline, not an ad buy

A logo on a backdrop is priced like a logo on a backdrop, and that is how the field arrived at a $2,000 median. A workforce pipeline is worth something entirely different, and is funded differently — not in one-time activations spread thin across many programs, but in sustained investment in a few. This is the same conclusion programs reached from their side of the table, and it should be read as the deliberate meeting point it is: programs were advised to stop chasing many shallow sponsorships and build one or two real partnerships, and the industry should do the same in reverse. The durable arrangements the room described began small, often at no cost, with a concrete project that gave students real work and gave the partner a real deliverable, and grew only after both sides had proven they could execute. Organizations that have made this shift report better returns from fewer relationships. The $2,000 median is not a number programs can pitch their way out of. It is a number the industry can choose to stop offering.

02

Evaluate for durability, not charisma

If the value is a pipeline, the right partner is the one still standing in three years — and that is rarely the one with the best pitch. The strongest programs tend to have quiet infrastructure: support across several departments, documented outcomes, the capacity to deliver past a single enthusiastic director. The charismatic founder with a polished deck is easier to notice and likelier to disappear. Reading for institutional depth instead of individual energy is also what allows a partner to work at institutional speed, because the programs worth having are embedded in institutions with budget cycles, approval chains, and procurement rules they cannot bypass. Treating that slowness as a disqualifier selects for the fast-moving, single-person operations this report identifies as the least durable. Patience is not a concession here. It is the filter that finds the partners worth building on — the same partner profile the asymmetry in Section Three was asking programs to become.

03

Tell programs what you want, and tell them when you pass

The category error persists partly because the industry has never corrected it out loud. Programs are guessing at industry's priorities because industry has not stated them, and nearly a quarter of programs said as much. The fix is cheap. Publish what a partnership-ready program looks like and name the graduate capabilities that actually matter, so programs spend their limited time building what earns a partnership instead of guessing at it. And when a program does not fit, say so — a brief reply that names the reason teaches the program something it can act on, where silence teaches it nothing. Multiplied across the field, that silence is a large part of why programs cannot tell what the industry wants. The cheapest available improvement to the entire relationship is the industry communicating clearly: what it is looking for, and why a given program is or is not it.

The relationship is not failing for lack of value on either side. It is failing because it has been structured as the wrong kind of relationship. The industry is the side better positioned to change that, and the field is ready for it.

ESPORTS TRADE ASSOCIATION

APPENDIX

METHODOLOGY & DATA

An invitation-only working session of forty-seven participants across five stakeholder groups, structured around three rounds of facilitated cross-stakeholder conversation.

How the convening was structured

The Next Gen Esports Leadership Lab is an annual invitation-only working session convened by the Esports Trade Association. The 2026 edition, held on April 29 in Fort Worth, brought together forty-seven participants across five stakeholder groups: industry professionals, collegiate academic faculty and administration, collegiate esports coaches and program directors, student leaders, and K–12 esports leadership.

Participants were seated at six tables of roughly eight, with each table built to balance the five stakeholder groups so that every conversation included voices from at least three of them. No two participants from the same institution or organization sat at the same table. Between rounds, half the tables rotated, ensuring that every participant moved through multiple cross-stakeholder combinations over the course of the session and that insights were carried across tables as the day progressed. The session ran two and a half hours and was organized around three rounds of facilitated conversation, each anchored by a question the field has not fully resolved. Between rounds, live Mentimeter polling captured the room's collective response in real time.

Each round followed the same structure. A short framing from the facilitator. Twenty-two minutes of table conversation. A short text submission from each table to capture the strongest pattern the table had identified. A verbal shareback from each table to add the texture data could not capture. Then a brief synthesis from the facilitator before moving on. The format was designed to maximize honest cross-stakeholder dialogue and to surface patterns visible to the room as they emerged.

The three round questions

ROUND **01**	What does sustainability actually depend on, and what is your program's stability built on?
ROUND **02**	Where is the biggest gap in your industry relationships right now, and what makes a partnership work?
ROUND **03**	What does it take for a program to be embedded rather than tolerated, and what happens if you leave your role tomorrow?

Participant Composition

STAKEHOLDER GROUP	PARTICIPANTS
Industry professionals	14
Collegiate academic faculty & **administration**	9
Collegiate esports coaches & **program directors**	11
Student leaders	9
K–12 esports leadership	4
Total	47

3.78

mean confidence that the program would survive a leadership change (**5-pt scale**)

3.00

mean confidence in meaningful, active industry relationships — **the lowest-rated dimension**

Pre-event survey

Registered participants completed a pre-event survey in the weeks before the convening. The survey was used to inform the session design and is not generalizable to the field as a whole, but the patterns it surfaced were consistent enough across role categories to be worth noting.

On a five-point scale measuring confidence in their program's sustainability, the highest-rated dimension was "my program would survive a leadership change at my institution" (mean 3.78). The lowest-rated dimension was "my program has meaningful, active industry relationships" (mean 3.00). The gap between the two is smaller than it might seem — neither rating is strongly positive — but the direction is consistent with the convening's findings.

Securing long-term funding and demonstrating program ROI were the two most-cited top three challenges. Senior administration and academic faculty tied as the hardest stakeholders to demonstrate value to. Board members or trustees followed at five. No respondent named students themselves as a difficult stakeholder.

Industry respondents, when asked about barriers to deeper engagement with academic programs, named bandwidth, institutional bureaucracy, and inconsistent institutional commitment as the most common obstacles. None named unclear ROI or insufficient program value. When asked what skills they most often find missing in graduates entering the workforce, the same group named professional communication and workplace readiness, business acumen, data analysis, leadership and team management, and industry-specific knowledge.

External data sources

The contextual data on field-level program counts, facility investment, scholarship distribution, and program closures is drawn from the *Esports Foundry Trends in Scholastic Esports Report* (*Volume 5, 2024–2025*). The trends report's documentation of program closure causes — institutional financial pressure and the departure of championing leadership — provides external validation for the borrowed-stability and succession-gap findings surfaced by the convening. ESTA acknowledges Esports Foundry's contribution to public data in this space.

Acknowledgements

The Long Game was made possible by the support of SHI and Intel whose investment in scholastic and collegiate esports leadership made the convening possible. The Esports Trade Association is grateful to Reece Hartle and the SHI team for their partnership in convening this work and in supporting the field's continued development. Intel served as the technology partner for the convening, continuing a long-running commitment to the academic esports community.

Most of all, this report is the product of the participants who chose to spend a Wednesday afternoon in an honest, structured conversation about the future of their field. The principles, findings, and recommendations recorded here are theirs.

The Esports Trade Association promotes, protects, and advances the broader interests of the esports community.

We provide forward-thinking professional development programs, networking opportunities, relevant industry research, and valuable tools and resources to the membership. Our association focuses on promoting business expertise and sustainable growth of the esports industry by growing the number of participants, sponsors, products, and services, procuring industry research, and executing industry events.

Intel (Nasdaq: INTC) designs and manufactures advanced semiconductors that connect and power the modern world. Every day, our engineers create new technologies that enhance and shape the future of computing to enable new possibilities for every customer we serve. Learn more at intel.com.

SHI International Corp. is a $16 billion transformational technology solutions provider serving the needs of more than 15,000 corporate, enterprise, public sector and academic customer organizations around the world. It helps companies achieve business goals through the use of technologies ranging from software licensing and end user computing devices to innovative cloud and edge solutions. With over 7,000 employees worldwide, SHI is the largest Minority and Woman Owned Business Enterprise (MWBE) in the U.S.

207 E. Ohio St. #430
Chicago, IL 60611 USA
www.esportsta.org

ESPORTS
TRADE ASSOCIATION