
Annex B – Sporting Competition

State of the Game

1. Purpose, Scope and Approach

Statutory context

The Act places a general duty on the IFR, so far as reasonably practicable, to exercise its functions in a way that is compatible with the purpose of the Act and advances one or more of its statutory objectives.

In doing so, the IFR must have regard to the desirability of exercising those functions in a way that avoids any (a) effects on the sporting competitiveness of any regulated club against another regulated club, and (b) adverse effects on the competitiveness of regulated clubs against other clubs.¹

This general duty creates a need to understand how sporting competition currently operates and how it has changed over time.²

The purpose of the analysis in this annex is therefore to provide evidence on different dimensions of sporting competition. It should not be interpreted as setting out the IFR's approach to complying with its statutory duties relating to competitiveness, nor as identifying a preferred or optimal level of sporting competition. References to differences or changes in sporting competition are descriptive and do not imply that particular outcomes are desirable or undesirable.

Analytical approach

The analysis is primarily descriptive. It shows observed trends in sporting competition over time and, where possible, compares outcomes in English football with those in other major European leagues. It does not seek to identify the causes of the observed trends.

There is no universally agreed definition or single measure of sporting competition. Different measures capture different aspects of how competition operates. This analysis therefore considers three dimensions of sporting competition to provide a broader evidence base for understanding how sporting competition has changed over time:

- **competitive balance**, which considers how evenly sporting performance and success are distributed between clubs;
- **competitive intensity**, which considers how closely contested particular sporting outcomes are within a season; and
- **dynamism of the pyramid**, which considers the extent to which clubs move between different levels of English football over time.

These dimensions are related but each answers a different question about the nature of sporting competition. Considering the dimensions together therefore provides a broader picture of sporting competition than any individual measure in isolation.

¹ Section 7 of the Act.

² We use the term 'sporting competition' to refer to 'sporting competitiveness'.

Data

The analysis draws on publicly available league table and match-level data. Final league table data for the top five English divisions were collected from publicly available information published by the Premier League, English Football League (EFL) and National League.³ These datasets include points, games played, final league positions, European qualification, and promotion and relegation outcomes. Equivalent publicly available data for other major European leagues were collected from FBref and are used, where appropriate, to provide international comparisons.⁴

Match-level data were collected from FBref⁵ and used where the analysis required information on results within individual seasons, including to assess when key sporting outcomes were determined.

The underlying data were then cleaned and combined, with calculations and analysis undertaken by the IFR to produce sporting competition indicators in this annex. Evidence and submissions provided by industry stakeholders have also been considered alongside the quantitative analysis and, where relevant, are presented and sourced in this annex. Further detail on individual measures, definitions and any adjustments to the underlying data is provided alongside the relevant analysis.

Structure of the annex

The annex is structured as follows:

- **Section 2** examines **competitive balance**, including trends in the distribution of league points in English football, comparisons with other major European leagues, and the distribution of Premier League titles and European qualification across clubs;
- **Section 3** examines **competitive intensity**, including points gaps around the Premier League title, Champions League qualification and relegation thresholds, and how late in the season these outcomes are determined, including comparisons with other major European leagues; and
- **Section 4** examines **dynamism of the English football pyramid**, including the range of clubs that have competed across the top five leagues and the extent to which clubs have moved between leagues over time.

The draft State of the Game Report provides further information on sporting competition (pages 53-54) and the impact of distribution arrangements on sporting competition (pages 149-157) and is therefore not repeated in this annex.

³ Publicly available league table data published by the [Premier League](#), [English Football League \(EFL\)](#) and the [National League](#).

⁴ IFR analysis of publicly available league table and match-level data published by [FBref](#), the football statistics database operated by Sports Reference

⁵ [FBref](#), a football statistics database operated by Sports Reference. The underlying match outcomes used in this analysis are publicly observable and were subject to IFR data cleaning and validation before use. FBref provides historical match, team and competition data across domestic and international football competitions.

2. Competitive Balance

Competitive balance considers how evenly sporting performance and success are distributed across clubs. For example, a league in which clubs finish on relatively similar points totals would be more competitively balanced than one in which a small number of clubs finish well ahead of the rest. Where competitive balance is higher, sporting success is more widely distributed. Where it is lower, sporting success is more concentrated, with a smaller number of clubs accounting for a greater share of points, trophies and other sporting outcomes such as European qualification.

Whilst there is no single measure of competitive balance, the concept has a longstanding basis in sports economics literature.⁶ This analysis therefore considers two aspects of competitive balance and, where possible, compares outcomes with other major European leagues:

- **Performance within seasons:** how evenly sporting performance is distributed across clubs in a given season.
- **Success across seasons:** the extent to which sporting outcomes, such as league titles and European qualification, are achieved by different clubs over time.

Performance within seasons

The distribution of league points provides a measure of differences in sporting performance between clubs within a season. Where points are more evenly distributed, clubs are closer in terms of their observed league performance. Greater concentration of points indicates greater separation between clubs.

We assess this primarily using the Herfindahl Index of Competitive Balance (HICB), which measures the spread of league points across clubs as an indicator of competitive balance.⁷ If every club finished with the same number of points, the HICB would equal 100, representing perfect balance. As the distribution of points becomes more uneven, the HICB increases in value, indicating lower competitive balance. By accounting for the number of clubs competing in each league, the HICB provides a consistent basis for comparing competitive balance across seasons and competitions.

Chart B.1 shows that competitive balance in the Premier League has declined over the period shown, although there is variation between individual seasons. The Premier League also generally records lower levels of competitive balance than the other divisions shown.⁸

Competitive balance in the Championship and League Two has remained relatively stable over the period, while League One has shown some evidence of lower competitive balance in more recent seasons.

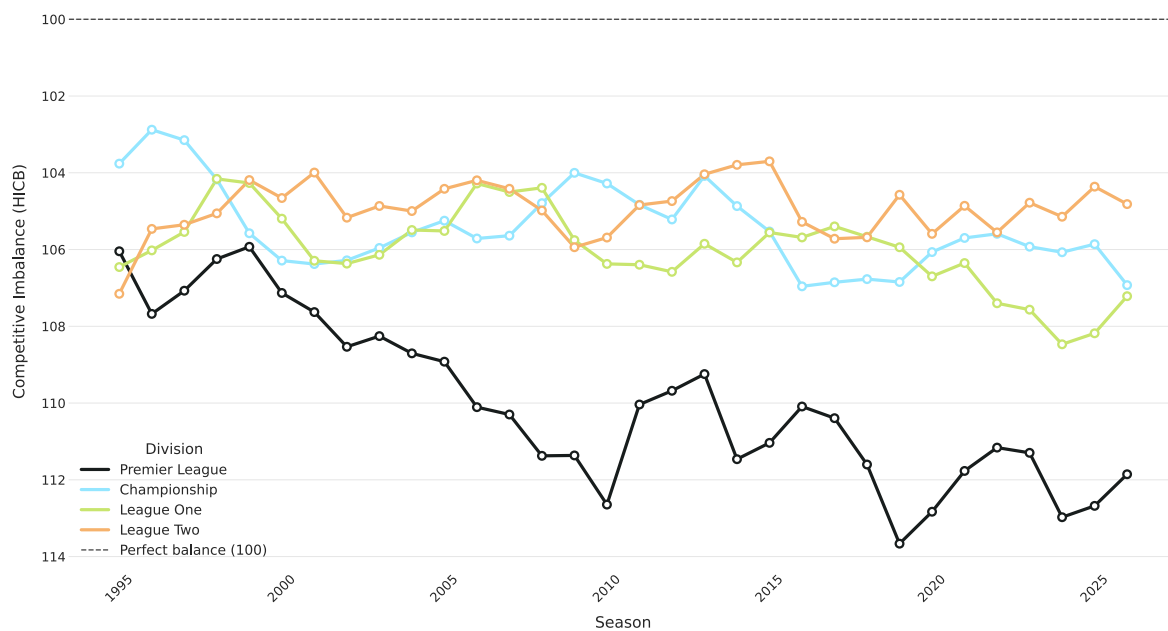
⁶ Szymanski, S. and Késenne, S. (2004), 'Competitive Balance and Gate Revenue Sharing in Team Sports', *The Journal of Industrial Economics*, 52(1), pp. 165–177.

⁷ The HICB is calculated as $HICB = \frac{\sum_{i=1}^N s_i^2}{1/N} \times 100$, where s_i is club i 's points per game (PPG) as a share of the sum of PPG across all clubs in the division and N is the number of clubs in the division. A value of 100 represents perfect competitive balance, with higher values indicating greater concentration of points and therefore lower competitive balance.

⁸ The HICB results have also been compared with the Gini coefficient, which is an alternative method to measure the distribution of points within leagues. This produces consistent results.

Competitive balance has declined in the Premier League and, more recently, in League One, while remaining broadly stable in the Championship and League Two.

Chart B.1: Competitive balance in English Football, HICB measure, 3-year rolling average, football seasons 1995/2026



Source: Publicly available league table data published by the [Premier League](#) and the [English Football League \(EFL\)](#)

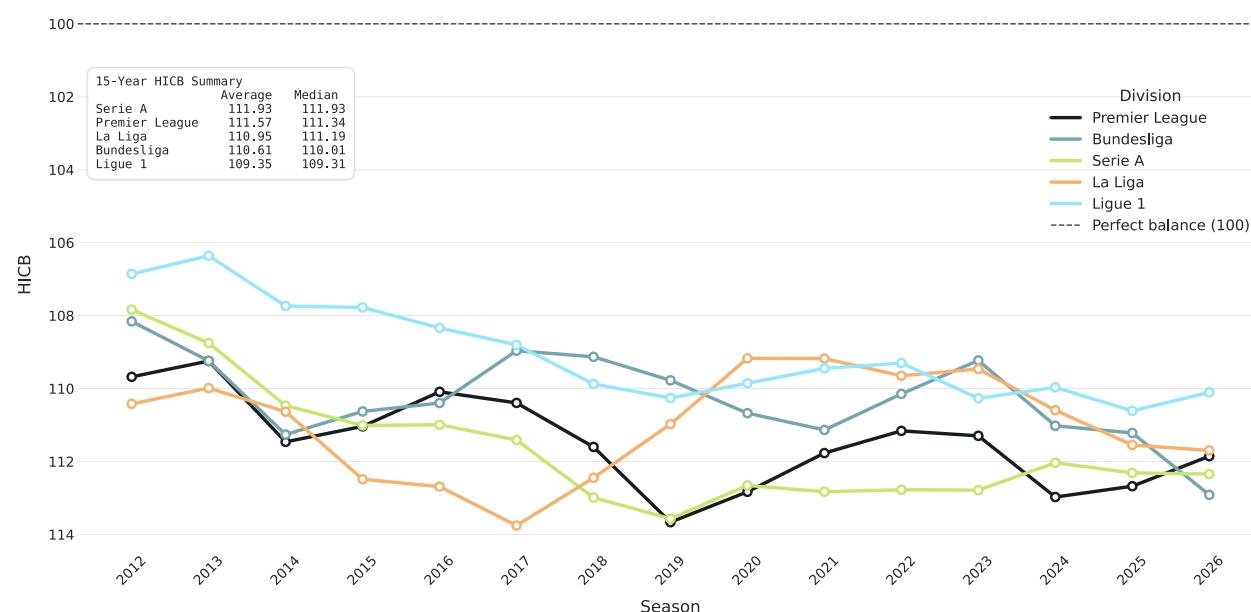
Note: Competitive balance is measured using the Herfindahl Index of Competitive Balance (HICB), which measures the concentration of league points across clubs within each division. The axis is inverted to aid interpretation, with values further from the perfect balance line indicating lower competitive balance, and values closer to the perfect balance line indicating higher competitive balance. A three-year rolling average is presented to reduce the influence of season-to-season variation and make the underlying trend in competitive balance easier to identify.

Chart B.2 shows that competitive balance has generally declined across Europe's major top divisions over the period shown, from 2011/12 to 2025/26. Over the last 15 seasons, average HICB indicates that the Premier League has been less competitively balanced than the Bundesliga (Germany), La Liga (Spain) and Ligue 1 (France), but more balanced than Serie A (Italy).

Nevertheless, the differences between the five leagues are relatively modest. Overall, the trends indicate that the decline in competitive balance observed in the Premier League appears to reflect a wider pattern across Europe's major top divisions, rather than being an exclusively English development.

Competitive balance has generally declined across Europe's major top divisions.

Chart B.2: Competitive balance across Europe's top divisions, HICB measure, 3-year rolling average, football seasons 2011/12 to 2025/2026



Source: Publicly available league table data from [FBref](#)

Note: Competitive balance is measured using the Herfindahl Index of Competitive Balance (HICB), which measures the concentration of league points across clubs within each division. The axis is inverted to aid interpretation, with values further from the perfect balance line indicating lower competitive balance, and values closer to the perfect balance line indicating higher competitive balance. A three-year rolling average is presented to reduce the influence of season-to-season variation and make the underlying trend in competitive balance easier to identify. The 15-year summary statistics are calculated using annual HICB values, rather than the three-year rolling averages. European divisions shown are Premier League (England), Bundesliga (Germany), La Liga (Spain), Ligue 1 (France) and Serie A (Italy).

The HICB provides a useful measure of overall competitive balance by showing how league points are distributed across clubs. However, as a league-wide measure, it does not capture every aspect of competitive balance. For example, a small number of clubs could be separated from the rest of the league while the remaining clubs are relatively evenly matched. The HICB is therefore considered alongside other measures to provide a broader picture of how sporting performance and success are distributed across clubs.

Distribution of success across seasons

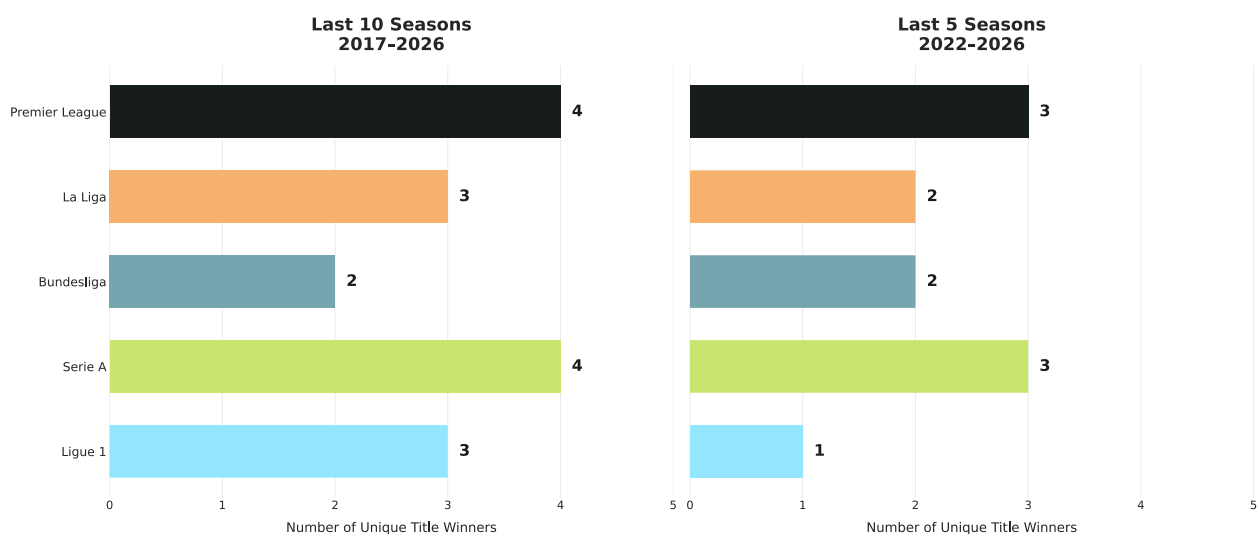
Measures based on the distribution of league points capture differences in performance within individual seasons, but do not show how sporting success is distributed across clubs over time. We

therefore complement the HICB analysis by considering whether key sporting outcomes are concentrated among a small number of clubs or achieved by a wider range of clubs over time. These outcomes include league titles and European qualification.⁹ This analysis focuses on the Premier League, where the distribution of success over time can be assessed more consistently. In lower divisions, successful clubs are promoted and to a higher league, which affects the distribution of success across seasons.

Chart B.3 shows that the Premier League has had a relatively broad range of title winners compared with other major European leagues. Over the last 10 seasons, four different clubs won the Premier League title, the joint-highest number alongside Serie A. Over the last five seasons, the Premier League and Serie A again recorded the highest number of title winners, with three each. Overall, the Premier League has been towards the upper end of Europe's major top divisions on this measure, although the differences between leagues are relatively modest.

Over the last 10 seasons, the Premier League has had a relatively broad range of title winners compared with other with other major European leagues.

Chart B.3: Unique title winners across Europe's top five major leagues, over the last 10 and 5 seasons



Source: Publicly available league table data from [FBref](#)

Note: The chart shows the number of unique clubs that won each domestic league at least once over the period shown. Each club is counted once regardless of the number of titles won during the period. The 10-season measure covers 2016/17 to 2025/26, while the 5-seasons measure covers 2021/22 to 2025/26. A higher number indicates that leagues titles have been distributed across a greater number of clubs.

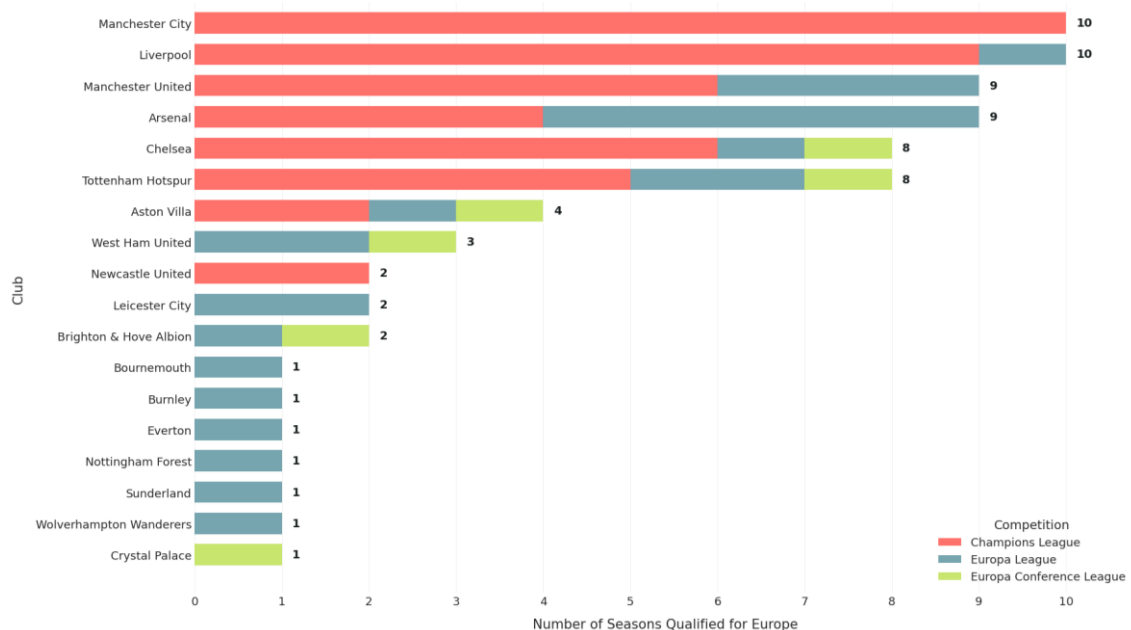
⁹ The analysis focuses on the Premier League because promotion from lower divisions affects the observed distribution of success over time, as successful clubs leave the competition. The Premier League has no equivalent upward promotion mechanism and is also the only English domestic league from which clubs can qualify for European competition through their league position, providing a more consistent basis for assessing the distribution of success over time.

The distribution of titles among these winners also varies across leagues. Manchester City won six of the 10 Premier League titles, compared with nine for Bayern Munich in the Bundesliga and eight for Paris Saint-Germain (PSG) in Ligue 1, while the most frequent winners in La Liga and Serie A won five and four titles respectively. This shows that the number of different title winners does not, on its own, capture how evenly titles are distributed across clubs over time.

European qualification provides a further indication of how sporting success is distributed across clubs over time. Chart B.4 shows how European qualification has been distributed across Premier League clubs over the last 10 seasons, including the number of seasons in which each club qualified and the competition for which they qualified. It shows that Champions League qualification has been concentrated among the big six, which accounted for around 90% of Champions League qualification places over the period.¹⁰

Champions League places have largely gone to the 'Big Six', but other Premier League clubs have qualified for European football.

Chart B.4: English teams that have qualified for European Competitions, Last 10 seasons (2016/17 season to 2025/26 season)



Source: Publicly available league table data published by the [Premier League](#)

Note: The chart shows the number of seasons in which each Premier League club secured qualification for European competition between 2016/17 and 2025/26, split between the Champions League, Europa League and Europa Conference League. Qualification is attributed to the season in which it was secured, not the season in which the club subsequently competed in Europe. For example, Leicester City competed in the Champions League in 2016/17 after qualifying in 2015/16, so this is not counted as a 2016/17 Champions League qualification. Clubs can qualify through any route, including league position, domestic cup performance or European competition outcomes. The Europa Conference League was introduced in 2021/22.

¹⁰ The 'big six' refers to six Premier League clubs. Arsenal, Chelsea, Liverpool, Manchester City, Manchester United and Tottenham Hotspur.

3. Competitive intensity

Competitive intensity examines how closely contested outcomes are within a season, and the extent to which key league positions remain uncertain over time.

While competitive balance considers the distribution of performance across a league, it does not necessarily capture how closely contested specific league outcomes are, such as the title, Champions League qualification or relegation. For example, overall points may become more unevenly distributed while competition around a particular league outcome remains close.

Greater competitive intensity may be reflected in outcomes being determined by narrower margins or remaining unresolved until later in the season. In contrast, wider margins or earlier resolution of outcomes may indicate lower competitive intensity.

This analysis focuses on three Premier League outcomes: the title race, Champions League qualification and relegation. Competitive intensity in the lower divisions is considered elsewhere in the draft State of the Game Report, including through analysis of the performance of promoted and relegated clubs. Direct comparison with the lower divisions is also less straightforward because promotion is a key sporting outcome in the EFL and, due to the play-off system, is not determined solely by final league position. Competitive intensity is assessed across two measures:

- **Closeness:** the points gap between clubs competing around a relevant league outcome at the end of the season
- **Timing:** how late in the season the relevant outcome is determined

Closeness of outcomes

Table B.1 compares the average points gaps at the title, Champions League qualification and relegation thresholds across the Premier League and other major European leagues over the last 10 seasons. Smaller gaps indicate more closely contested outcomes and therefore greater competitive intensity.

Table B.1 shows that the Premier League is broadly comparable with other major European leagues around the title and Champions League qualification thresholds. The average title gap in the Premier League, across the last 10 seasons, was 8.2 points, similar to La Liga (8.0) and Serie A (8.1), and smaller than in the Bundesliga (11.8) and Ligue 1 (10.0). For Champions League qualification, the Premier League average gap of 4.3 points was broadly similar to most of the other European leagues considered, with the exception of a wider average gap in La Liga.

For relegation, the Premier League recorded an average gap of 4.9 points between the lowest-placed surviving club and the highest-placed relegated club, the largest among the five leagues considered. This shows that, based on final points gaps, relegation has been less closely contested in the Premier League than its major European comparators over the last 10 seasons.

Table B.1: Average points gap at key league outcomes across major European leagues: title, Champions League qualification and relegation, last 10 seasons

Outcome	Premier League	La Liga	Bundesliga	Serie A	Ligue 1
Title	8.2	8.0	11.8	8.1	10.0
Champions League qualification	4.3	6.9	4.1	4.4	3.4
Relegation	4.9	3.3	3.4	2.7	3.2

Source: Publicly available league table data from [FBref](#)

Note: Figures show the average points difference at three key league outcomes. Title is measured as the points gap between the 1st and 2nd place. European qualification is measured as the gap between the lowest-placed club qualifying for the UEFA Champions League and the highest-placed club that missed out. Relegation is measured as the gap between the lowest-placed surviving club and the highest-placed relegated club. A larger figure indicates a wider points gap at the relevant threshold.

Timing of Resolution

The final points gap shows how close an outcome was at the end of the season, but it does not show how long the outcome remained in contention. An outcome could be decided several games before the end of the season but subsequently finish with a relatively narrow points gap. Looking only at the final margin could therefore overstate how closely contested that outcome was during the season.

Timing of resolution provides a complementary measure by showing how long uncertainty around an outcome was maintained. An outcome decided on the final game week remained in contention for longer than one decided with several games remaining, even where the eventual points margins are similar. We therefore consider both closeness and timing to provide a fuller picture of competitive intensity.

Evidence submitted by the Premier League, based on analysis undertaken by Twenty First Group,¹¹ compared the timing of key outcomes across Europe's five major leagues over the 10 seasons to 2024/25. It found that:

- **Title:** three of the 10 Premier League title races were decided on the final game week, with a further three decided within two games of the end of the season. Only La Liga showed a similar pattern, with title races generally decided earlier in other major European leagues.

¹¹ Premier League submission to IFR State of the Game Report, 'Premier League and Championship Competition Analysis: A benchmark analysis of quality, competitive balance and mobility', prepared by Twenty First Group.

- **Champions League qualification:** the race for Champions League places went to the final game week in eight of the 10 seasons, more frequently than in the other major European leagues considered.
- **Relegation:** the final relegation place was typically decided within the final three game weeks across all five major European leagues, with relatively little difference between leagues on this measure.

This shows that key Premier League outcomes have generally been decided late compared with other major European leagues over the last 10 seasons, particularly Champions League qualification and title races, while relegation is around the European average.

4. Dynamism of the Pyramid

Dynamism considers the extent to which clubs can move through the football pyramid over time. Promotion and relegation provide the mechanism through which clubs can move up or down the pyramid based on sporting performance. This section examines how that mobility is reflected in practice. It considers:

- **Breadth:** The breadth of clubs that have participated in each tier
- **Access and Mobility:** The rate at which different clubs access each tier over time and the extent to which clubs currently competing have moved across the pyramid since 1992/93

Breadth

Chart B.5 shows the number of unique clubs that have competed in each of the top five divisions of English football. It shows that since 1992/93¹²:

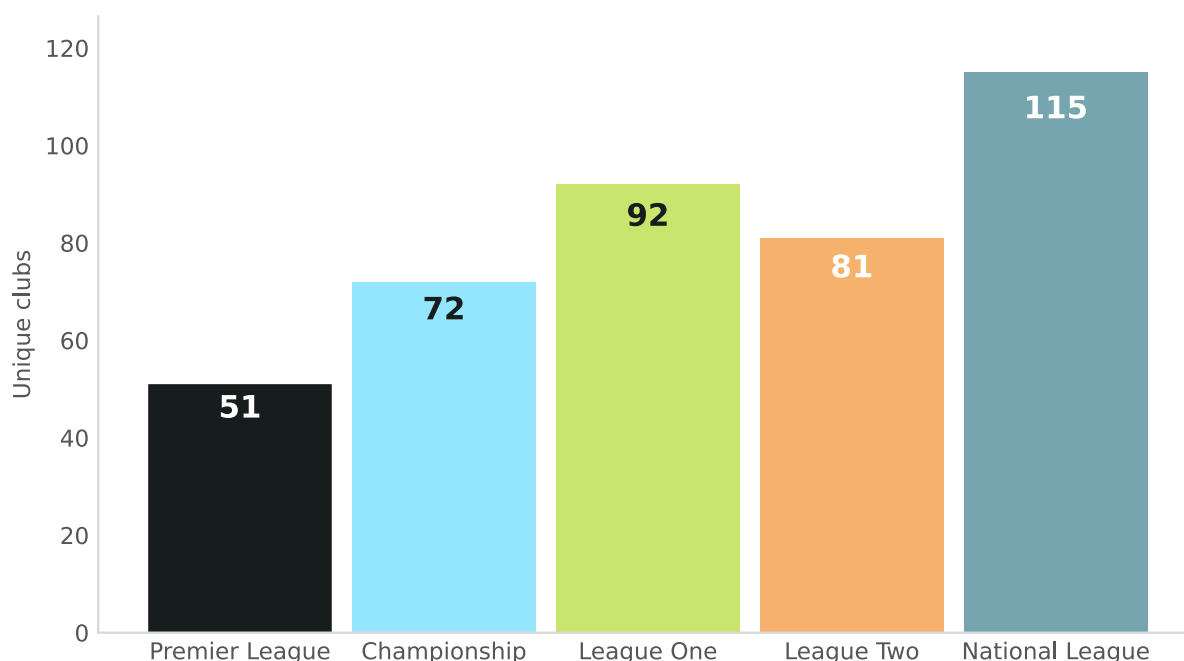
- 51 different clubs have played in the Premier League
- 72 in the Championship
- 92 in League One
- 81 in League Two
- 115 in the National League

Overall, Chart B.5 illustrates the wide range of clubs that have competed at different levels of the top five leagues. The number of unique clubs generally increases further down the football pyramid, reflecting greater turnover at lower levels. However, League Two stands out, with fewer unique clubs than both League One and the National League. This may partly reflect the structural characteristics of promotion and relegation between League Two and the National League.

¹² Publicly available league table data published by the [Premier League](#), [English Football League \(EFL\)](#) and the [National League](#).

A wide range of clubs have competed across the top five English leagues since 1992/93.

Chart B.5: How many different clubs have reached each level of the top five English leagues over time, since 1992/93



Source: Publicly available league table data published by the [Premier League](#), [English Football League \(EFL\)](#) and the [National League](#)

Note: The chart shows the number of unique clubs that have competed in each division at least once since 1992/93. Each club is counted once within each division, irrespective of the number of seasons spent in that division. A club may therefore be counted across multiple divisions where it has moved between leagues over the period. The chart uses the current league names for consistency. League names and competition structures have changed over the period shown; divisions are classified according to their corresponding tier of the English football pyramid (first tier, second tier, third tier, fourth tier and fifth tier).

Access and Mobility

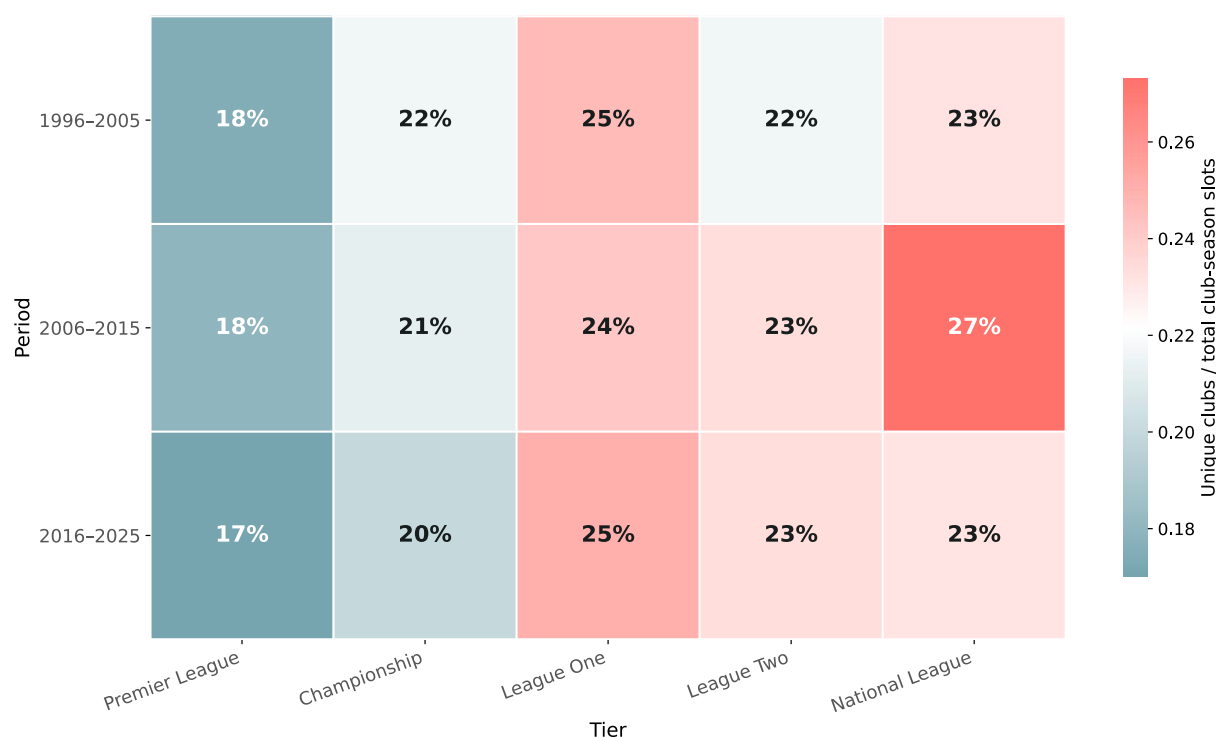
Another way of assessing the dynamism of the football pyramid is to consider how many different clubs have competed at each tier over time. Chart B.6 shows the number of unique clubs to have competed in each tier relative to the number of club-season places available. For example, if a 20-club league is observed over 10 seasons, there are 200 club-season places available. If 40 different clubs occupy those places over the period, this produces a value of 20%. The range of possible values is constrained by promotion and relegation arrangements. For example, where three clubs can enter the league each season, a maximum of 47 different clubs could compete over a 10-season period, equivalent to 23.5% of the 200 club-season places. The measure should therefore be interpreted relative to these structural constraints. This provides a measure of how

open different levels of the pyramid have been to clubs moving into them over time. Higher values indicate that a wide range of clubs have accessed that tier.

Comparing this measure over time shows whether access to each tier has changed. An increase over time indicates that a wider range of clubs have accessed the tier relative to the number of places available, while a decrease indicates that those places have been occupied by a more consistent group of clubs. Chart B.6 shows that access to each league has remained broadly stable over the three decades from 1996/97 to 2025/26.

The rate at which different clubs have accessed each league has remained broadly stable over time for most leagues

Chart B.6: Normalised breadth of access by tier and decade since 1992/93



Source: Publicly available league table data published by the [Premier League](#), [English Football League \(EFL\)](#) and the [National League](#)

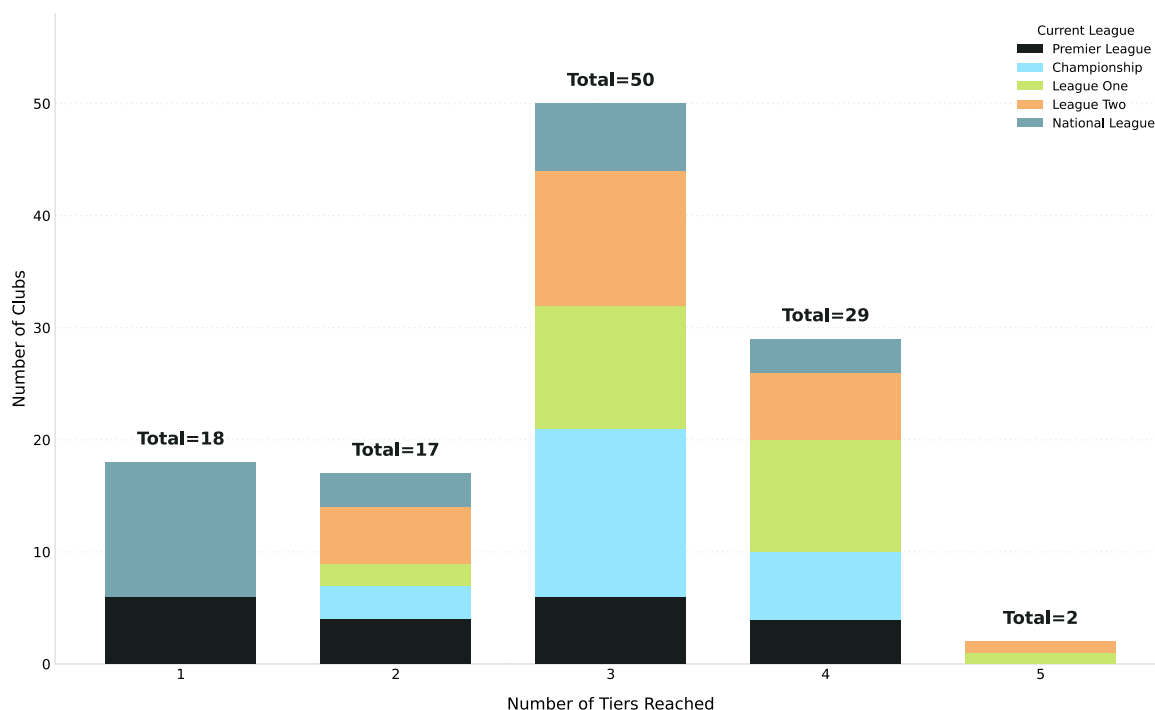
Note: Figures show the number of unique clubs competing in each tier during each ten-season period as a percentage of the total club-season places available in that tier. Higher values indicate a greater number of different clubs accessed the tier relative to the number of available places. Values are normalised to account for differences in league size and the number of club-season places across leagues and periods.

To provide a broader measure of mobility through the football pyramid, the analysis considers the number of different leagues in which each club currently competing in the top five leagues in 2025/26 has competed since 1992/93. Chart B.7 shows that:

- Movement between leagues has been common.
- Competing across three different leagues is the most common experience, with 50 current clubs having competed at three levels since 1992/93. Competing across four different leagues is the second most common experience.
- This mobility extends to clubs currently at the top of the pyramid, with some current Premier League clubs having competed across as many as four different leagues since 1992/93.

Most current clubs have competed across multiple leagues of the English football pyramid.

Chart B.7: Number of different top five leagues in which current 2025/26 clubs have competed in since 1992/93



Source: Publicly available league table data published by the [Premier League](#), [English Football League \(EFL\)](#) and the [National League](#)

Note: Figures show the number of different leagues in which clubs competing in the Premier League, Championship, League One, League Two and National League in 2025/26 have appeared since 1992/93. The measure is based on observed participation across these five leagues only and does not capture periods spent below the National League. Clubs are grouped by their current 2025/26 league.

Overview

This annex has considered sporting competition across three related dimensions: competitive balance, competitive intensity and the dynamism of the football pyramid. It has drawn on a range of measures, including the distribution of league points and sporting success across clubs, the closeness and timing of key league outcomes, and the extent to which clubs access and move between different levels of the English football pyramid. Where possible, the analysis has also compared outcomes in English football with those in other major European leagues.

There is no single measure that provides a definitive assessment of sporting competition. The measures considered in this annex capture different aspects of sporting competition.