



The Ski Club of Great Britain

- Squeezing out the future

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The Ski Club of Great Britain – Squeezing-out the future

Introduction

The Ski Club of Great Britain (Ski Club) is a private not-for-profit limited company which has set into its constitution, the following objectives:

- The promotion of participation in skiing, snowboarding and all other forms of snowsport
 - The organisation of skiing and snowboarding activities for its members
 - To further technical snowsport skills and promote safety awareness
 - The publication of information and journalism on skiing, snowboarding and other forms of snowsport
- (Ski Club of GB 2001)

In 2012, the Ski Club had over 30,000 members, over 95% of them living in England, Wales and Scotland. Unlike countries with significant high mountain ranges, the countries of the United Kingdom of Great Britain (UK) have a very limited number of skiing opportunities, mainly on artificial outdoor slopes or indoor real snow centres, with only 5 small ski stations in northern Scotland and a handful of private clubs in the north of England. As a consequence, most UK snowsports enthusiasts have to take a holiday to indulge their passion, travelling to mountain ranges in other countries, usually to the Alpine countries, but also to Scandinavia, North America and Eastern Europe. The Ski Club has been helping British snowsports enthusiasts to do just this for over a century.

Ski Club History

The Ski Club was founded in 1903. Early twentieth century British skiers played a significant role in developing skiing as a snowsport. In the 1920s, skiing became a fashionable winter activity for wealthy British tourists who travelled mainly to Switzerland where the mountain railways enabled them to indulge their interest in downhill skiing. The Ski Club was central to the development of the rules of competitive ski racing and in the early 1930s the Ski Club arranged the first downhill skiing world championships. In 1936 the sport was incorporated into the Winter Olympics. In the 1960s, and 1970s winter snowsports holidays reached a wider audience thanks to the development of mass-market skiing resorts in Austria, France, Italy, Andorra, Bulgaria, Romania and what was Yugoslavia. The sport also grew in popularity in North America in the same era. In the 1980s and

1990s the newer sport of snowboarding became popular, especially among young adults as an alternative to downhill skiing, which was perceived to be rather too mass-market and regimented.

As participation in snowsports grew in the 1960s and 1970s, the Ski Club broadened its appeal by providing representatives in the new mass-market alpine resorts as well as the more exclusive Swiss destinations popular since the 1920s. The Ski Club representatives organised skiing and evening activities in resorts for skiers taking packaged, one week, winter holidays. The Ski Club also started to offer its own holiday packages specifically designed for families and groups of older skiers. In the 1990s the Ski Club broadened its specialist holiday offering with the creation of a subsidiary organisation, Ski Club Winter Arrangements Ltd, which now trades as *Ski Club Freshtracks*; a provider of advanced skiing, tuition-based or high-intensity skiing holidays. The other major 1990s development was the Ski Club website (<http://www.skiclub.co.uk/>) and its associated information service, which has become the main provider of snow reports, skiing and snowsport news in the UK and beyond. In 2006, an online TV channel (*Ski Club TV*) was created. In 2013 a *Go Ski Go Board* campaign was launched by Snowsport England aiming to attract new participants to snowsports. The Ski Club are supporting the initiative.

Current trends in the UK snowsports industry¹

The UK snowsports industry has been in decline since its peak in the mid-2000s. Box 1 indicates the extent of the decline, with total snowsport travel numbers down by over 20% in the last 5 years. Holiday expenditure has been squeezed in many households during the recession. As a result, winter holidays (often a second holiday, not the main family summer holiday) have been sacrificed by middle income families and young adults in their 20s and early 30s. The decline in the mass-market means that snowsports are in danger of once again becoming a pursuit of the more affluent as they were until the mid-1970s.

These broad percentages mask a range of more nuanced trends. Spike Marketing's *SkiBase* 2012 survey shows that whilst family and first time snowsport holiday numbers are well down, more detailed analysis demonstrates that older skiers, in particular those in the age bracket 45 – 64 are taking regular skiing holidays as before. More surprisingly, the average spend on snowsport holidays has risen during the five year period (2007-12) by nearly 10% to a mean average of £729

¹ Unless otherwise stated, figures are from the Ski Club's 2012 Snowsports Analysis

per person, although the median spend is lower than this at £500 (Spike Marketing 2012) demonstrating the skewing effect of the super-premium sector of the industry. It seems that those enthusiasts who are already committed skiers and snowboarders continue to prioritise their winter snow holidays. So, although a significant number of customers have been squeezed out of the market, the average spend of the older and more wealthy customers remaining in the market has been increasing.

Box 1: UK Snowsport Market 2007-12 (000s of snowsport tourists)						
	2007-08	2008-09	2009-10	2010-11	2011-12	5 yr % change
Independent travellers	316	274	224	204	201	-36%
Tour operator customers	1037	998	896	868	855	-18%
Total travellers	1353	1272	1120	1072	1056	-22%

Source: Ski Club 2012a

Other related demographic trends are: the slow decline in the total number of female snowsport participants; the missing twentysomethings and a gradual decline in snowboarding. Females represented 43% of the total snowsport participants in 2012. Women skiers and boarders are most numerous in their mid-late 20s and again in the mid-late 40s. In the older age categories, women tend to drift away from snowsports more quickly than men so that in the over 60s age group, the male/female split is 73% to 27% (Spike Marketing 2012). It seems that the decline in family snowsport breaks may have impacted more on females than the male skiers and boarders. Unlike women, many men continue to participate in snowsports through their 30s, replacing family ski trips with trips made with groups of friends. Perhaps as a result, in 2012 there were as many tourists travelling with friends (20.6% of trips) as there are with family units (21.1%).

School age and student snowsport participants (21 and under) make up only around 15% of the UK market. Young people have traditionally been introduced to snowsports either by their family, or perhaps via a school or university ski trip. Rising costs and legal issues associated with organising school trips has led to the on-going decline in the number of alpine trips organised by UK schools. As previously mentioned, the number of family snowsports holidays has fallen during the recession too, so children were much less likely to ski in 2013 than they were 10 years previously. Whilst university ski trips remain popular, it is generally understood that complete beginners are less likely to take part than those students who have already mastered the basics of skiing and/or snowboarding. Only in Scotland, where there is a strong tradition of school skiing, especially in

towns and cities like Aberdeen, Perth and Dundee, close to the ski stations, has the proportion of young skiers remained relatively healthy.

In the Alpine countries and North America, groups of young people will often drive, catch a train or a bus to the mountains for a day or a weekend. The experience for young UK snowsport enthusiasts is very different. Apart from in Scotland, it is not so easy to arrange spontaneous or short notice mountain adventures. To keep costs down, planning ahead and paying in advance is essential; this is not easy for many under 21s. To cater for British student age snowsport enthusiasts a number of specialist tour operators offer student ski clubs the option of budget price holidays in the off-peak parts of the season when they can book-up self catering complexes in larger resorts and charter a fleet of coaches to transport students to the mountains. Generally, free places and other incentives are offered to the student organisers with the aim of persuading as many students as possible to book the trip. As a result, student ski trips can comprise several hundred students (for example Durham University Ski Club took 1,500 students on its trip to Alpe d'Huez in France, in 2013). Generally, there is little interaction between student groups and snowsport tourists. For the most part this suits all concerned.

As well as the lack of under 21s, the smaller numbers of people in their 20s participating in snowsports is worrying for the industry (Spike Marketing 2012). These are the group who, once hooked, would graduate to taking their own families on trips in their 30s and early 40s and become regular, even frequent skiers in their late 40s and 50s. People who have not tried skiing by the time they reach their 30s are more likely to decide against snowsports because of concerns about the cost. In their 40s, worries about fitness, and less interest in activity holidays in general will mean they are less likely to try a snowsports holiday, so it is important to get the twenties age group into the snowsports habit before it is too late.

Participation in snowboarding grew significantly in the 1990s so that snowboarders made up around 20% of the UK snowsport participants in the mid 2000s. Since then there has been a slow but steady decline so that in the 2011/12 season only 15% of snowsports participants were snowboarders. Two specific reasons for this decline are the reduced number of young people participating in snowsports in general and new technology in the ski industry, making new styles of skis more attractive to a wider range of participants. A more general, less easy to quantify,

reason is the impact of fashion. The alternative snowboard culture and lifestyle which had been tied to such trends as grunge music in the late 1980s and early 1990s became less attractive to participants when snowboarding became an accepted mainstream activity in the 2000s. At the same time Freeskiing² has become much more popular in the 2000s. As a consequence it is difficult to determine the extent to which the decline in snowboarding numbers results from fashion, fewer young adults taking snowsports holidays and to what extent boarders have become freeskiers. It is probably a mix of all these factors.

Small and medium sized UK snowsports companies offering package holidays (travel and accommodation) or those offering accommodation to British snowsport enthusiasts face intense competition to maintain their share in a declining market. The latter benefited from the increased availability of flights with low-cost airline operators in the 2000s but the number of flights is now decreasing as the airlines companies reduce their capacity and this may make life increasingly difficult for some small operators. Box 1 identified a 36% decrease in independent travellers who would normally self-drive or take a low-cost flight to their accommodation. The larger operators that have survived the recession have done so by making a series of acquisitions, thus reducing the amount of direct competition. The mass-market providers have been consolidating into ever bigger groupings, in particular the TUI group, Hotelplan UK and Thomas Cook Group. In 2012-13 there were the first signs that this trend might be beginning to reverse when Monarch Holdings Ltd, a UK independent travel group, expanded its snowsport offering.

Despite concerns about climate change, the snowsports industry has not yet suffered any significant loss of capacity owing to lack of snow. Good and bad snow years have come and gone and resorts have for the most part continued to operate as normal. Most European resorts insure themselves against a lack of snow by installing artificial snow-making facilities. Lower level resorts, those below 1800 meters, tend to offer a shorter season than high level resorts which can offer significant skiing and boarding opportunities over 2000 meters. In the longer term, there is likely to be an increasing trend to concentrate British tour operator activities in higher altitude resorts, but at the moment this is not a significant focus of industry activity, rather a low level issue, that is not going to go away but does not seem to require immediate action.

² Freeskiing emphasises acrobatic jumps and tricks in specially designed snow parks. The freeskiing disciplines of Slopestyle and Ski Halfpipe make their first appearance at the Sochi Winter Olympics in 2014.

Summarising the main trends; the UK snowsports industry has suffered a sustained decline in participants, with the first signs in 2013 that the decline may be coming to an end. Regular snowsport enthusiasts (those who ski or board at least once per year every year) are the mainstay of the industry, tour operators are therefore targeting these regular skiers or snowboarders rather than trying to attract new or casual participants. There is intense competition as each organisation aims to retain or take a larger slice of what has been a declining market. The big UK operators like Crystal (part of the TUI group) now dominate the industry and have been able to maintain their profit margins by cutting costs and reducing capacity. The average age of UK snowsport participants is increasing. Generally they are from wealthy households concentrated in the south-east of England. School and family ski holidays continue to suffer a serious decline, a trend that the industry is acutely aware of.

Ski Club trends

Whilst Ski Club income from subscriptions (54% of total income) remains healthy, this has been achieved by a gradual increase in the cost of member subscriptions. Other sources of income from sponsorship and website advertising are variable and difficult to rely on, so the financial position of the Ski Club is delicate, with a constant battle to keep costs within a very tight overall budget. The Ski Club owns the freehold on property conservatively valued at £2 million and aims to hold approximately £500,000 in cash as part of its prudent approach to its financial affairs (Ski Club 2012b). The year ending April 2012 saw a 4% decline in income and a 0.5% cut in costs leading to a small but manageable £100,000 deficit at year end (see Appendix 1 for a financial summary).

In 2012, overall membership numbers continued a slow decline, down by 8% over the previous three years, with the biggest declines in family membership, students, and young adults. Membership among older adults and over 65s has grown over the same period so that in 2012-13 nearly 49% of members were 45 or older. Geographically, 44% of members are concentrated in the south-east of England, with only 5% in Scotland and 10.5% in Wales. The distribution of members closely reflects income distribution across the UK as a whole with the most affluent communities located in South East, in and around London.

Marketing profiles commissioned by the Ski Club show that the majority of members belong to six ACORN groups³ *Wealthy Executives, Affluent Greys, Flourishing Families, Prosperous Professionals, Educated Urbanites and Secure Families* (see box 2 for details). However, as can be seen from the percentage figures in box 2, there are widely different degrees of representation among these groups. Specifically, there is an over representation of Ski Club members among several of the wealthiest groups and significant under representation among families, ethnic minorities, singles, less wealthy households and inner city populations. Marketing analysis undertaken for the Ski Club singled out the *Starting Out* group for particular attention. These are young professionals in their 20s and early 30s in their first career jobs including young couples with children below school age. Ideally, the Ski Club should offer services and activities that are sufficiently attractive to this group in order to improve its longer term membership income.

Box 2. Ski Club of Great Britain Membership - ACORN group representation		
A classification of residential neighbourhoods (UK only)		Representation Ski Club v UK average, % age difference for each Acorn group
1.a	Wealthy Executives	23% +
1.b	Affluent Greys	7% +
1.c	Flourishing Families	0.9% +
2.d	Prosperous Professionals	5.6% +
2.e	Educated Urbanites	9.1% +
2.f	Aspiring Singles	- 2.3%
3.g	Starting Out	1.2% +
3.h	Secure Families	-8.4%
3.i	Settled Suburbia	-4.3%
3.j	Prudent Pensioners	0.1%+
4.k	Asian Communities	-1.3%
4.l	Post Industrial Families	-3.7%
4.m	Blue Collar Rootes	-7.1%
5.n	Struggling Families	-12.7%
5.o	Burdened Singles	-4.2%
5.p	High Rise Hardship	-1.6%
5.q	Inner City Adversity	-1.5%

Note: Where the percentage difference from the UK average is + or - 1% then Ski Club members broadly reflect the proportion in the ACORN group within the UK population (e.g. 3j Prudent Pensioners). The figures do not reflect gross numbers in each category.

Source: Ski Club internal document

³ A classification of residential neighbourhoods (ACORN) is a geodemographic system developed by the CACI Ltd a UK subsidiary of an international marketing group (<http://www.caci.co.uk>) For more details on Acorn Groups see: <http://www.businessballs.com/freespecialresources/acorn-demographics-2010.pdf>

In many respects the relative prosperity of the Ski Club membership is an asset to the club (for example helping it attract sponsorship from luxury products) but it also presents a potential problem. Because Ski Club members are disproportionately wealthy male skiers from the south-east of England aged 45-60, younger people, women, snowboarders, people from the Midlands, North of England, Wales, Scotland and Northern Ireland may perceive that the club to be *not for the likes of us*. Working hard to avoid alienating the current membership, the Ski Club does realise that it has to find a way to reach out to different groups within UK society, particularly young adults. The Ski Club constitution states that it will promote participation in snowsports, not just make it easier and cheaper for those who already take part. One way the Ski Club is trying to expand and promote skiing to a wider group of potential snowsport participants is by supporting and promoting Snowsport England's *Go Ski Go Board* campaign which offers subsidised skiing and boarding lessons and slope time at 16 artificial and real snow indoor slopes around England. If newcomers can learn to ski or board in the UK it is hoped they will be more likely to travel abroad and become regular snowsport participants. The Ski Club is also introducing a new reduced price beginner tier membership in 2013-14 to coincide with the *Go Ski Go Board* campaign.

Ski Club activities

Ski Club publicity material emphasises services to members in three key areas:

Plan - it aims to help them plan their snowsport activities by offering information and advice.

Ski with The Club - it offers the opportunity to ski with the club, by offering a leader service, the opportunity to take part in an organised *Ski Club Freshtracks* holiday or to meet other members at events

Save - it offers members and opportunity to save money through members' discounts. Discounts are available on: winter and some other holidays and associated travel costs; snowsport equipment and other sporting goods and accessories.

The Ski Club website, multi-media operations and database of members are a significant Ski Club asset. Skiclub.co.uk had nearly 2 million unique users in 2012 and nearly 500,000 visits to the snow report pages. The Ski Club produces branded snow reports which appear in most of the UK daily newspapers at least once per week and provides the snow reports for a weekly BBC TV Snowsports weather programme in the winter season. The Ski Club also produces a range of print publications

including the 5 editions per year magazine, *Ski+Board* sent free to Ski Club members. Ski Club members are a useful demographic target for certain categories of goods, not just snowsport related, so the database of members is of interest to a range of organisations. For example, Land Rover was the main advertiser and sponsor of the Ski Club website for the three years ending in July 2013 (Land Rover, perceiving that Ski Club members and website users were good prospects). The Ski Club aims to build on the potential of this type of cross-selling in future.

The Ski Club Leader service is provided in 35 resorts mainly in Europe but also in the US and Canada. To enable this service to function, the resorts provide the Ski Club with free accommodation for a Ski Club Leader for the winter season in the expectation that the presence of the Ski Club Leader will make the resort a more attractive destination. The Leader service helps skiers and snowboarders make the most of their time in the mountains by linking people with approximately the same level of ability, showing them around the mountains, helping them find the best conditions, locating appropriate locations to stop for food and drink and hosting daily early evening social hours. With over 200 Leaders operating in 7 countries in two continents, the operational difficulties of keeping the service going, overcoming travel disruption, illness, injury and bad weather should not be underestimated.

The *Ski Club Freshtracks* programme of specialist holidays takes Ski Club members to a wide range of alpine and North American destinations although around half the trips are to large French resorts (see box 3). In the year the year ending 30th April 2012 it made a gross profit of just over £300,000. Ski Club members are protected from the financial risks associated with running a package holiday company via the separate company structure, while *Ski Club Freshtracks* customers are protected from potential insolvency through membership of the tour operators' protection scheme.

Box 3 Freshtracks Holiday Categories	
Holiday Categories	Specific Target Groups
On Piste – Instruction and guiding	All members plus singles, older members and families
Weekend breaks – 3/4 day breaks	All members, women, singles
Off-Piste – Instruction and guiding	All members plus singles, older members and families
Ski Touring – Guided expeditions	All members
Heli Skiing – Premium experience trips	All members
Peak Experience	Over 50s members

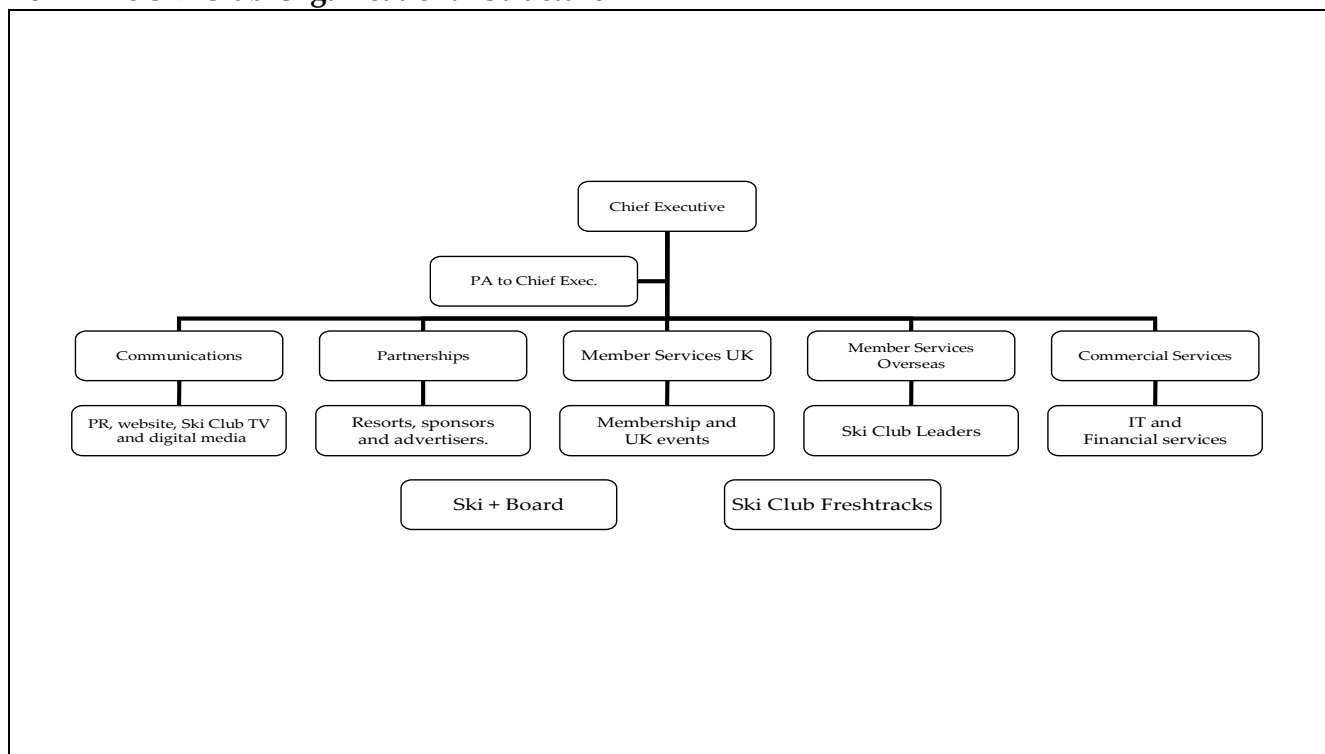
The savings offered to members via member discounts are particularly attractive; they can lead to considerable savings on the cost of a family holiday. A standard 5% and up to 20% reduction on a holiday booking or a similar discount on a new pair of skis or a snowboard can more than cover the cost of an annual membership fee. Discounts are all the year round and include travel extras such as hotel and airport parking, car rental; lifestyle extras such as casual and other sporting apparel (e.g. surfing brands) as well as snowsports holidays and equipment.

The Ski Club insurance policy is a popular and highly recommended scheme which provides insurance cover for more serious skiers, who are more likely to venture off-piste away from the main runs. Standard packages are available to non-members, however the premium packages required for ski-touring and off-piste adventures are only available to members.

Inside the organisation

The Ski Club club house and offices are located in Wimbledon Village, a prosperous suburb of south-west London, famous for the annual international tennis tournament. Around 30 staff were directly employed by the Ski Club in 2012, staff and IT costs representing 36% of total costs in 2012, while the building and premises account for a further 6%.

Box 4 The Ski Club Organisational Structure



The Chairman and elected council are the strategy and decision making body for the Ski Club. The Chair and council are elected by the members and together they appoint a Chief Executive and senior managers to run the organisation on behalf of the members. The current Chief Executive was appointed in 2012. On appointment he set about an internal review and strengthened some functions to reflect the changing circumstances of the club. More emphasis was placed on communications, partnerships and affiliations. This reflects the importance of collaborations (for example all of the 35 resorts where Ski Club Leaders receive free accommodation are classed as partners), commercial sponsorship of Ski Club activities and the central role of the internet site and mobile communications technology as a link between the Ski Club and its members and other stakeholders. Box 4 depicts the management structure of the Club in summer 2013.

Risk management and legal issues

The Ski Club needs to plan for, overcome or work around a number of legal issues not so far identified in the case study. The Ski Club Leader service is run by volunteers rather than qualified instructors and/or mountain guides. As such, members have in the past treated Ski Club Leaders very much like a friend who knows their way around. Unfortunately accidents and injuries do happen in snowsports, sometimes they are serious. An increasingly litigious population may look for compensation for loss of earnings resulting from such accidents and injuries, one potential target for claims being the Ski Club Leader. Claims have been made by injured parties that they were taken on a dangerous descent or one that was inappropriate to their level of skill or ability. The Chairman, in the 2012 Annual Report, identifies the need to mitigate and manage legal risk as the single biggest issue impacting on the ability of Ski Club to continue its activities (Ski Club 2012b).

Related to this issue of risk; in February 2013 a French court banned UK tour operators from providing a hosting service for their clients in French resorts (Planet Ski 15/02/13). Some tour operators provide a representative who will escort clients around the resort as an extra service, however the court ruled that it was against French law because, even though these hosts are not offering instruction, they are acting as paid but not qualified guides, so undermining the ski instructors' profession. The French court awarded damages to French Ski School instructors in the resort of Meribel for loss of earnings. Currently no hosting services are available in France (the main destination for UK snowsports participants). The Ski Club Leaders were not directly affected

by the ruling because they are unpaid volunteers but there is a potential for a knock-on impact. Ski Club Leaders could get caught up in future disputes if any qualified French instructors were to argue that Ski Club Leaders are paid in kind and should be included in the ruling, or if the ban continues, Ski Club Leaders could be inundated by extra clients causing capacity problems in the large French resorts which seem to be at the centre of the dispute.

Conclusion

Whilst the Ski Club does not face the same battle that the tour operators have to survive in a declining market, the Ski Club does face a number of challenges related to the business environment, which it needs to negotiate if it is to fulfil its constitutional aims and maintain its long term sustainability, not least the need to reverse the declining number of members.

In addition, it has to offer relevant and up to date multi-media technology services to members; provide the UK's most popular snowsport website to attract income from sponsors and advertisers; provide high quality holidays; a consistent Ski Club Leader service; meaningful discounts and keep expenditure in line with a finite and limited income stream. Finally it has to negotiate the constant difficulties of international operations within different judicial systems, time zones and cultures.

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FINANCIAL SUMMARY

Below is a summary of the main sources of Club income and expenditure (all figures in £s)

	Year ended April 30 2012	Year ended April 30 2011	Year ended April 30 2010
Net income			
Subscriptions	1,123,450	1,117,841	1,136,250
Advertising & sponsorship	452,070	485,613	425,704
Information & New Media income	69,953	92,284	117,312
Ski+board and clubhouse sales	18,547	11,793	12,893
Ski Club Freshtracks gross profit	321,910	315,137	304,580
Merchandise & commission	35,812	52,075	45,924
Rent	69,591	105,020	88,078
Interest	16,619	21,038	8,773
	2,107,952	2,200,801	2,139,514
Cost of member services			
Snowsports information			
Information & New Media costs	227,678	249,726	260,227
Ski Club TV	37,858	41,160	36,153
Ski+board production costs	242,202	232,558	212,221
Snow experience			
Ski Club Freshtracks costs	220,639	221,347	203,213
Resort operations	230,043	263,451	220,801
	958,420	1,008,242	932,615
Support costs			
Marketing & Club Events	223,563	257,938	242,510
Member communications	83,368	93,484	102,043
Administration, Membership, IT & Strategic exps.	789,532	728,817	604,430
Premises & fixed assets	139,373	115,806	132,178
	1,235,836	1,196,045	1,081,161
TOTAL COSTS	2,194,256	2,204,287	2,013,776
Net (deficit)/surplus before tax	-86,304	-3,486	125,738
Taxation	-13,711	-16,551	-4,719
Net (deficit)/surplus after tax	-100,015	-20,037	121,019

Items under 'Net Income' are shown after deducting the direct costs of receiving that income.

All non-attributable overheads are included under 'Support'

Source: Ski Club of Great Britain Annual Report and Accounts 2012