

ARCHIVE OF MARKET AND SOCIAL RESEARCH

England & Wales · Charity number 1166619

Details

Other names AMSR

Status Registered

Legal form CIO

Registered 2016-04-19

Register [View on the Charity Commission register](#)

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Activities

Objects: THE OBJECT OF THE CIO IS TO ADVANCE THE EDUCATION OF THE PUBLIC IN THE FIELDS OF THE HISTORY AND SIGNIFICANCE OF MARKET AND SOCIAL RESEARCH AND THE DEVELOPMENT OF THE MARKET RESEARCH INDUSTRY IN THE UK PRIMARILY THROUGH THE CREATION AND MAINTENANCE OF AN ARCHIVE OF RELEVANT MATERIAL AND ASSOCIATED ACTIVITIES.

Activities: Build and maintain a library of documents relating to the history and development of market and social research for those who wish to gain insight into the evolution of the industry. This will involve the building of a physical archive and an online catalogue.

Classification

- **How:** Provides Services, Provides Advocacy/advice/information
- **What:** Education/training
- **Who:** Other Defined Groups, The General Public/mankind

Geography

- Northern Ireland
- Scotland
- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£50,628	£41,536	-	-
2024-03-31	£46,133	£44,307	-	-
2023-03-31	£24,355	£33,218	-	-
2022-03-31	£47,376	£43,287	-	-
2021-03-31	£80,108	£26,319	-	-

Trustees

Name	Role	Appointed
Patrick Barwise	Chair	2018-10-11
ADAM IVOR CARGILL PHILLIPS MA, FMRS		2016-04-07
Claire Langhamer		2023-09-26
Colin Dacre Patrick McDonald		2023-09-26
IAN SPENCER BRACE		2016-04-07
James Robert Whaley Jr		2024-03-21
Jane Frost		2016-07-21
PETER ALAN BARTRAM MA, FMRS		2016-04-07
PHYLLIS VANGELDER MA, FMRS		2016-04-07
Phyllis Macfarlane		2019-09-14
RAZ KHAN BSC, FMRS		2016-04-07
Richard John Asquith		2024-11-21
SIMON CAMPBELL PATTERSON		2016-04-07
Susan Blyth		2019-09-14

Accounts



The Archive of Market and Social Research

Annual Report 2024-25

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Chairman's Foreword

2024/25 was another excellent year for AMSR. Thanks to our wonderful volunteers, we added over 1,000 items to the Archive, relaunched the website portal, improved our internal processes and web analytics, and made further progress towards accreditation by The National Archives. Once achieved, accreditation will enable us to collaborate with universities in bidding for funding from grant-giving bodies like the ESRC and the National Lottery Heritage Fund.

We continued to build awareness through social media and by attending external events and directly contacting individual academics. Visits to the Archive increased six-fold over the year and we know about academic users in ten different universities, mostly historians but also in politics, cultural studies and public policy. There may well be others we don't know about.

Creating awareness and usage in schools has proved slower, but we are now building relationships with exam boards as a more efficient and scalable way to reach teachers and students than by trying to contact individual schools. To support this new strategy, we commissioned research into sixth form teachers' needs. Our messaging to schools will now be better linked to curricula and better timed through the school year.

Underpinning everything we do, our income grew by almost 10% this year, based on an increase of over 20% in our supporter base and the very generous continuing support of Ovation MR and our other major donors, Ipsos and Kantar Media. We run a tight ship and have built up our reserves to over £100,000, but AMSR would not be sustainable without this donor funding, for which we're hugely grateful.

After ten years leading the organisation, our founding chief executive Adam Phillips passed the reins to Richard Asquith in April 2025. Much of AMSR's success today is thanks to Adam's energy, skill and determination as chief executive over those ten long years. The handover to Richard was seamless and I'm delighted to say that Adam has agreed to continue as a non-executive trustee.

On a sadder note, our first Chairman, Liz Nelson, died on 27th March 2025. It is hard to overstate Liz's contribution both to the market research industry (as co-founder of Kantar forerunner Taylor Nelson and a strong supporter of MRS) and as a founder patron of AMSR.

Shortly before this Annual Report went to press, we received the further sad news of the death of Sir Robert Worcester on 5th September 2025. Bob was a giant of UK market research and opinion polling and another founder patron of AMSR.

Professor Patrick Barwise

20th November 2025

Chief Executive's Introduction

I succeeded Adam Phillips as Chief Executive of AMSR in April 2025. Adam had been CEO for ten years and in that time the organisation has secured and processed a critical mass of material. Adam is to be thanked and congratulated for the energy and skill that he applied to steering AMSR so that it is now firmly established as a unique and valuable research resource.

We now have in excess of 10,000 documents in our collection and we have evidence of growing use of the Archive, especially amongst academics. We have 77 stories drawn from the Archive on the AMSR website, the AMSR hub has links to 80 other websites of relevance to Archive users and we remain immensely grateful to the 55 volunteers who give their time to make the Archive a success.

Prior to taking on this role with AMSR, I worked in market research agencies for nearly 40 years and it's an industry I feel immensely proud to have been a part of. When I became Managing Director of BMRB, the British Market Research Bureau, back in 2005, it felt very significant to be handed an original copy of a research report for Pears Soap from 1925 which is thought to be the first piece of commercial market research in the UK. It was conducted by the research department of the J Walter Thompson Company which later became BMRB. The industry has a rich history that absolutely should be preserved and it's such an elegant idea to take that history and, as AMSR has done, repurpose it for academics, educators, students and researchers.

If we look at the most popular items viewed in the Archive in 2024, we see that the subject matter covers research methodology, media audience research, the history of the research industry, work specifically for one client, British Airways, and trends in social media. I think that the breadth of topics reflects exactly what AMSR was set up to make more widely available.

Back in June 2023, the 3-year vision for AMSR was to become:

...a recognised specialist online archive that is being used by schools, universities and the Research, Data Analytics and Insight sector, as well as journalists and the media, and it should be regarded, both within and outside the Research Sector, as an important specialist educational resource that should be supported.

Considerable progress is being made to achieve this goal, progress that is reported in this annual report for 2024-5. Funding (largely from individuals and corporations connected with the research and insight sector), website and Archive online visitors, social media followers have all grown strongly in the past 12 months. We are especially encouraged by the value seen in the Archive amongst university academics, evidenced in the growing list of positive testimonials.

Richard Asquith

20th November 2025

1 Objectives and activities

1.1 Introduction

The Archive of Market and Social Research (AMSR) was established in 2015 and became a charity in 2016. It is a unique, open-access online Archive of historical UK and international market research documents, designed to preserve a wealth of historical information, celebrate the heritage of the UK Market Research and Insights sector, and make documents freely and easily available to academics, teachers, students, researchers and others around the world. The collection of research reports and other documents is significant and continues to grow, with most items not available from other sources and now accessible online at no cost to the user. The organisation operates with over 50 volunteers and is funded by individual and corporate donations and a small number of corporate sponsorships.

1.2 Purpose

The charitable object of AMSR is to advance education and research in the fields of recent British social history, sociology and political science, and the development of market, social and political research, including data analytics, insight and other relevant sectors. We do this by preserving and providing access to reports and other relevant material and by developing educational resources for teachers, academics, students, researchers and other communities.

AMSR aims to create an archive of national importance that will:

- be freely available online and/or in physical form to all in interested communities, including university academics, schoolteachers, media and business researchers, adult education, U3A, WEA, minority groups and interested members of the public;
- become a central hub for academics and others trying to find out what has been learned from market and social research and data analytics in the past and obtain information and evidence relevant to discussions about the future;
- collect and preserve all relevant reports, data, records, articles, videos, training material and other Archive material to ensure that that these unique records will be accessible in the future;
- build awareness of the contribution of the market and social research sector to society, business and human understanding in the past, present and future, thereby enhancing the reputation and status of this sector.

Where significant gaps exist in what is already being preserved, the AMSR is actively collecting material to fill them.

1.3 Activities

Our activities include:

1. Collecting, preserving, classifying and digitising important research reports and data that is at risk of being lost – our research has shown that most current commercial research is not retained for more than 10 years.

2. Making as much of this material as possible available and searchable via the internet at no cost to the user.
3. Developing links with universities and schools to encourage them to use the material in the Archive for teaching and research purposes.
4. Publicising the Archive and encouraging its use by academics, teachers, students, researchers, journalists and members of the public interested in social history and the information collected by market and social researchers in the course of their work.
5. Providing help for users searching the Archive to find information relating to their interests.
6. Establishing working links with other similar archives and databases at universities and elsewhere.
7. Publishing books based on material from the Archive to demonstrate the role and value of market and social research.
8. Seeking out and building a library of research books, papers and reports relating to the development and conduct of market and social research, including those held by clients.
9. Rescuing and cataloguing the historical records of the bodies involved in the development of the market and social research profession in the UK.
10. Assembling and recording key biographical information about market and social researchers, past and present.
11. Assembling a historical database of professional codes of conduct and practice of relevant bodies that have been involved in activities dealing in information collected from and about members of the public, and collecting important papers and articles concerned with the responsible collection, processing and use of such data.
12. Cataloguing and storing all records in a secure and accessible form.
13. Storing any other records, documents or other media that are relevant to its purpose.

Many of these activities require funding, so a great deal of thought and effort goes into developing sources of financial support for AMSR's work.

1.4 Users of the Archive

The principal users of the Archive are:

- **Primary Users** - Social historians, business historians, university teachers, school-teachers and their pupils, librarians, researchers and archivists.
- **Secondary Users** - Students in a wide range of subjects, research practitioners, business and marketing consultants, policy and think-tank researchers, advertising planners, news media journalists, media companies making social history programmes and members of the general public interested in social history.

2 Achievements and performance

2.1 Overview

During the year we have made steady progress on all fronts. Key achievements included:

- **Over 1,000 items were added** to the online Archive.
- The **catalogue was tidied up**, and significant progress was made improving operational management processes in preparation for our planned application to be accredited by The National Archives.
- The **total number of monthly visits to the Online Archive increased six-fold**, from 319 in March 2024 to 1,989 in March 2025 (Google Analytics).
- AMSR began **experimenting with a closed AI approach** for extracting useful information from the Archive.
- The **portal website was successfully relaunched** with a new, modern look designed to be highly responsive across different devices.
- The **awareness campaign on LinkedIn** targeting the Market Research, Data Analytics, and Insights community resulted in a **73% increase in AMSR account follower numbers** (from 754 in March 2024 to 1,301 in March 2025).
- **Greater effort invested in website analytics** began to yield more data on visitors to both the Portal Website and Online Archive, laying a foundation for future detailed analysis.
- **Attending live events proved highly effective** in increasing wider understanding of AMSR, attracting material contributors, volunteers and university users.
- **Income increased from £41,217 in 2023-24 to £45,072 in 2024-25**, excluding bank interest and Gift Aid, with corporate donors contributing 72% of donations.
- The **supporter database grew by 22%**, reaching 766 entries by March 2025, with a new category of 'personas' added to aid future targeted mailings.
- Our quarterly newsletter was circulated to the supporter database and made available via the AMSR website. We also published a twice-yearly AMSR Update report for our supporters in addition to our annual report.

2.2 2024-25 objectives

As last year, our objectives were:

1. To identify and collect as much heritage material as possible.
2. To stimulate the flow of more modern research into the Archive (ideally on an ongoing basis from agencies).
3. To develop greater usage of the Archive.

2.3 Building the Collection

AMSR continued to expand its collection during 2024-25. Over 1,000 items were added to the online Archive during the financial year, bringing the total number of reports to 10,144 items by 20th February 2025. Progress was made towards uploading the Big Green Door (BGD) collection and the latest Sir Robert Worcester collection.

The content management process was reorganised, ensuring coordination of both paper and digital contributions and systematic tracking of all content through the stages of reviewing, scanning, cataloguing, indexing, and uploading to the OCLC-hosted Archive. Digitisation of volumes increased as we trained more volunteer scanners and used external scanning facilities more extensively.

We have 38 Specialist Collections in the Archive, including unique reports not available elsewhere from the BBC and BBC World Service, MORI British Public Opinion, NOP reports, the Cooper Research and Marketing (CRAM) qualitative research and the Target Group index (TGI) covering more than 50 years of product and media consumption. Both heritage and more modern work continues to be donated as we continue to assemble significant works from the 21st Century.

Perhaps the most interesting donation in 2024/5 was a collection of research materials from 1975–1986 relating to the Greater London Council and particularly the abolition of the GLC. An interesting time for democracy, and our increasing number of Political Science users.

We also focus specifically on building to meet future needs. Media Studies is an important subject at A-Level and Degree level and we have added to our BBC collections with donations from Lawrence Bailey and Roger Gane (significant figures from the field of research in Media and Audience measurement) of various media research reports and technical papers from the 1970s to early 1990s, which tell the story of the great changes in media consumption which occurred over that period.

We have noted an increased interest from Modern British Historians in the growth of post-war consumerism and have added many studies on food and drink consumption including, for example, research on attitudes to drinking and driving commissioned by Guinness in the late 1970s, anticipating the changes in legislation.

An agreement was reached with TGI to use their interactive Choices software, providing data over four years old for stories and case studies to non-commercial users, with full attribution of the source.

2.4 Building usage

We can report that the usership of the Archive has continued to grow. The table below shows total monthly visits to AMSR's portal website and to the Archive itself.

Portal (amsr.org.uk)		March 2024	March 2025
Total Users (Total Visits)	Monthly	503	739
	3 Month Rolling Total	1506	2334
Archive (amsr.contentdm.oclc.org)		March 2024	March 2025
Total Users (Total Visits)	Monthly	319	1989
	3 Month Rolling Total	933	6652

2.4.1 Academics and universities

AMSR continued to expand its relationships and support for academics throughout 2024-25, contributing to the very substantial increase in online Archive visits. Academics widely praised the Archive as an invaluable resource:

- Professor Jane Hamlett of Royal Holloway University of London described it as an "outstanding resource for historians of modern Britain," highlighting its wealth of quantitative and qualitative data. Her research benefited from data on pet ownership and insights into cat food buyers.
- Dr. Ben Clements of Leicester University noted its value for scholars in humanities and social sciences, providing an "important hub for accessing public opinion".
- Dr. Marcus Collins of Loughborough University called it a "treasure trove for any contemporary British historian," drawing upon its survey and polling materials for research on topics from decolonisation to women's rights.
- Professor Bobby Duffy of King's College London stated it's an "incredibly valuable resource" for studying shifts in political and moral attitudes and behaviours over decades.
- Alice Naylor, a PhD student at Portsmouth University, found the material "excellent insight into the consumption practices of British households" for her thesis.
- Alex Langstaff, a PhD student in history at New York University, highlighted it as an "incredible resource" providing "unique vantage points of British social and cultural life," and has started incorporating it into undergraduate teaching.

Individual university academics were contacted and supported to stimulate usage, both through their direct research and through recommendations to undergraduate and post-graduate students. Efforts were also initiated to reach out to university librarians to ensure the Archive is added to available resources.

2.4.2 Schools

AMSR continued to develop its A-Level Schools Project during the period, building on previous pilot work. The Curation & Education Resources Team dedicated efforts to ongoing content curation specifically for A-Level curricula, with a focus on Politics, Sociology and Extended Project Qualifications (EPQs). Completed work included a review of the 2024 UK General Election, analysis of the effect of Opinion Polls over time, public attitudes to capital and corporal punishment, drugs, abortion, and a selection of proposed stories to support and inspire EPQ project work.

Positive feedback was received from some schools, but the response overall from schools was more muted than hoped. It was observed that the content produced might have been too detailed and/or too quantitative. Key learnings from the year indicated that relatively few schools (estimated at only 5%) cover post-war UK history at A-level due to syllabus construction and teachers required more detailed support with lesson planning than initially anticipated. Most pupils tend to rely solely on textbooks unless an original dissertation requiring external research is mandated.

To address these challenges, a qualitative research project with teachers was initiated in February 2025 to gain a deeper understanding of their actual needs and preferred methods of accessing educational resources.

AMSR is also working to develop relationships with examining boards (Cambridge OCR, AQA, Pearson Edexcel) to have the Archive included in recommended resources.

We anticipate that all of this activity will start to bear fruit in 2025-6.

2.5 Publicity and Marketing

The objectives for the year included growing AMSR's understanding among key target groups, generating website traffic, supporting fundraising efforts, and developing processes to measure performance.

2.5.1 Social media and publications

A social media awareness campaign on LinkedIn, targeting the Research and Insights sector, was a continuous effort throughout the year, leading to a 73% increase in Followers (from 754 in March 2024 to 1,301 in March 2025). This demonstrated success in raising informed awareness within the sector. The campaign style was adjusted after six months to be less impersonal and include a greater variety of posts, which was well-received by the target group.

Active content management on X (formerly Twitter) was largely scaled back due to changes in its image, though occasional posts were maintained for journalists and researchers.

Four issues of the quarterly Newsletter and two AMSR Update reports were published, demonstrating strong readership engagement. Readership of the Newsletter is good with more than half of those circulated opening the email and 15%-20% of those circulated reading at least one article.

Additionally, two articles were published in Research Live, and positive media coverage was secured in January 2025 for the appointment of the new Chief Executive who took up the post in April 2025.

2.5.2 Website

The Portal website underwent a successful relaunch, featuring a more modern look which was designed to work well on phones and tablets as well as PCs and Macs.

A change to the cookie statement when the website was relaunched impacted Google Analytics data collection for six months, but this issue was addressed and more detailed data on website performance will now establish a firmer foundation for in-depth analysis of visitors and users. However, obtaining detailed statistics on user types (beyond basic analytics) remained a challenge due to limitations of the ContentDM platform on which we store the Archive.

We relaunched the Hub at the same time as we updated the website. This contains links to 80 relevant sources of market and social research information presented in an easily-accessible way.

2.5.3 Events

Attending events has proven to be a highly effective method for increasing awareness and understanding of AMSR, and for attracting material contributors, volunteers and users.

During the year, AMSR participated in seven external events, an increase from five in the previous financial year. These included:

- MRS Annual Conference
- MRS Story Telling
- MRS B2B Research Conference
- MRS Agency Owners and Leaders Conference
- LSE Library Resources Roadshow
- History Day at London University

These engagements directly contributed to signing up 99 new supporters, a considerable increase from 49 in the prior financial year.

AMSR hosted its Summer Event at King's College London in June 2024, drawing over 80 attendees who participated in speeches and a panel session featuring senior executives from the Market Research and Insights industry and an academic user of the Archive. This event garnered positive feedback and significant publicity within the Insights sector, notably leading to a confirmed legacy donation.

2.6 Supporter development

The primary objective for 2024-25 was to increase income significantly to support AMSR's growth, with a target of increasing income by £8,000 from additional donations (by individuals and companies) and sponsorships of specific projects and events. Secondary objectives included laying the groundwork for less predictable sources like gifts in wills and grants and cultivating large potential donors in the Research and Insights sector.

Income from donors and sponsorships reached £45,072 (excluding bank interest and Gift Aid), representing an increase from £41,200 in 2023, with 72% of donations originating from corporate donors. The Summer Event successfully secured four sponsors who contributed £6,000, including two new supporters.

Existing corporate donors demonstrated continued support, with the two largest corporate donors maintaining or increasing their donations. A new Large Research Agency outreach programme, which involves targeted approaches to C-suite executives using a pitch document developed with input from an existing agency C-suite supporter, was started. This initiative successfully secured one new donor, with ongoing discussions with other agencies. Pitches were delivered to four agencies during the year.

The reasons why corporations donate to AMSR vary from agency to agency, but fundamentally, senior agency executives appreciate the role that AMSR performs supporting education and research by making empirical market and social research data freely available to academics, students and researchers. And in so doing, we are preserving the history of the MR industry and promoting the industry as a career to the next generation of researchers.

In an interview immediately prior to AMSR's June 2024 Summer Event, Kelly Beaver, CEO of Ipsos UK said "There's a huge amount of intrinsic value in the social and market research that has been conducted in this country over decades. AMSR holds a really important role in making sure that this value is realised."

James Endersby, Chief Executive of Opinium and Chairman of the UK Market Research Society said "I support the AMSR because, like museums where you go to see artefacts and like textbooks

where you read about history, this is a vault of what people thought, felt and did in previous years. I think it is incredibly important that we preserve that.”

Since AMSR’s inception, a total of 91 individuals have donated to support the Archive’s work. In 2024-5, donations from individuals exceeded the original budget by approximately £2,000, attributed to a lower-than-anticipated drop-off from existing donors and the successful recruitment of new ones, very largely down to the ongoing personal contact programme by volunteer and Trustee Peter Bartram.

The supporter database continued its growth, increasing by 22% to 766 entries by March 2025. A new classification of 'personas' was added to facilitate targeted mailings. One mailing was conducted to inform potential donors about the option of gifts in wills.

No grant applications were made during the year, although groundwork for future applications progressed. A consultant archivist was engaged to assess accreditation readiness, a step expected to improve future grant eligibility.

2.7 Financial position and reserves

We attracted donations of £47,632, which includes £2,560 of Gift Aid. In addition, we received £2,996 in bank interest taking our total income to £50,628. We made a surplus of £9,092.

Our total operating expenditure was £41,536.

Our reserves are £117,223. We are planning how best to use our reserves to maintain sustainable growth. At the start of the year, we introduced a reserves policy fixing the level of reserves at the equivalent of two years’ operating costs.

Significant items of expenditure are the cost of storage space at the History of Advertising Trust, to which a 24 month notice period applies, and for the website and online Archive. We would need 12 months’ notice to ensure the long-term preservation of the material we have collected if AMSR were to become insolvent.

2.8 Principal sources of funds

The funds in the financial year 2024-5 have been raised from eight companies and 48 individual donors. Gift Aid has been claimed where possible. In addition, we are encouraging supporters to consider leaving a legacy to AMSR.

We thank Ipsos UK for their generous financial support and for providing us with office space for collecting, sorting and scanning material contributed to the Archive, and we thank OvationMR for their very generous financial contribution towards our marketing and fundraising costs.

We are grateful for the logistical support that we receive from industry bodies and companies, notably the MRS, RONIN International and Savanta.

3 Structure, Governance and Management

AMSR is constituted as a charitable incorporated organisation (CIO) and is governed by a trust deed.

The organisation is led by the Executive Committee which consists of the Chairs and Deputy Chairs of the five Lead Committees that run the organisation. The Executive Committee meets monthly and reports to the Board of Trustees. The five committees are:

- Contents
- Marketing
- Governance
- Development
- Finance

Trustees are chosen for the skills and experience they bring to the organisation and are elected for a three-year term by a meeting of the Trustees. Many of our Trustees sit on the Committees. One new Trustee was appointed on 21st November 2024.

- Richard Asquith, independent consultant, former Global CEO Kantar Media Audiences, former Managing Director BMRB International

All Trustees have received training in the responsibilities of charity trustees and an induction pack that includes:

- The constitution of AMSR
- The essential trustee: what you need to know, what you need to do (CC3)
- Charity fundraising: a guide to trustee duties (CC20).
- The Advancement of Education for the Public Benefit (PB3).

AMSR is staffed by over 50 volunteers, together with one paid administrator and one paid website designer who are both employed in a freelance capacity.

4 Reference and administrative details

The Archive of Market and Social Research (also known as The AMSR), registered charity number 1166619.

Principal address: Old Malt House, 21 Watling Lane, Dorchester on Thames, Wallingford, OX10 7JG

4.1 Trustees

Professor Patrick Barwise, Chairman of the AMSR Board Patrick (Paddy) Barwise is Emeritus Professor of Management and Marketing at London Business School which he joined in 1976 after an early career at IBM. He has published widely on management, marketing and media. He is also a former Chairman of Which? He was appointed Vice-Chairman of AMSR in 2018 and became Chairman in February 2020.

Date of appointment as a Trustee 11/10/2018

Adam Phillips

Adam was Chief Executive of AMSR until 31st March 2025. In over 40 years in market research, he has been involved in media measurement, public opinion research, brand development as well as product and pricing research. An MRS Fellow, past Chairman of the MRS, a Council Member at ESOMAR and Chairman of its Professional Standards Committee, he began his career at Unilever and went on to hold senior positions at BMRB, Mass-Observation, Euroquest, Research International and Winona Research in the US. He has been Chair of the Financial Services Consumer Panel and a lay member of the Press Complaints Commission. In 2016 he received the ESOMAR award for Market Research Excellence.

Date of appointment as a Trustee 19/04/16

Richard Asquith

Richard Asquith is Chief Executive of AMSR, a role he has held since 1st April 2025. Prior to this, he held several senior leadership positions during a forty year career as a research supplier. He was Managing Director of BMRB International, CEO of Kantar Media's TGI & Custom division with responsibility for the Global TGI network of syndicated media and marketing studies and Global CEO of Kantar Media Audiences, leading Kantar's specialist division devoted to digital audience measurement across TV, Online and Radio, operating in more than 60 countries.

Richard has been a regular speaker at industry conferences and a member of the International Journal of Market Research editorial advisory board. He was a founder member of the MRS Company Partner Scheme.

Date of appointment as a Trustee 21/11/24

Peter Bartram

Peter Bartram has had a varied career in both research and marketing with NOP, Thomson Newspapers, and the Harris Poll firm in London, New York, and Los Angeles. Back in the UK in 1978, he was a Marketing Director at American Express Europe, MRS Chairman in 1989, and finally President of the City Research Group. With 41 others, he set up the Research Network in 2002, which is still going strong. He recently published a well-reviewed book containing 100 stories from 'The Life in Research,' the proceeds from which are all donated to the AMSR.

A talented artist, Peter has donated several of his works to raise money for the Market Research Benevolent Association as well as AMSR.

Date of appointment as a Trustee 19/04/16

Ian Brace

Ian Brace is the Secretary of AMSR. After more than 40 years as a market researcher, mostly within research agencies, Ian is now retired from full-time work. Originally trained as a statistician, he spent most of his career in project design, analysis and project management before ending up as Director of Research Methods at Kantar TNS UK. He is a Fellow of the MRS, author of many published papers and two books and was Chairman of the industry's charity, the Market Research Benevolent Association (MRBA) from 2004-2024. He was awarded the MRS Gold Medal in 2024.

Date of appointment as a Trustee 19/04/16

Jane Frost CBE

Jane Frost is Vice-Chair of the AMSR and Chief Executive of the Market Research Society (MRS). She has over 30 years of experience at board level in marketing and strategy positions at blue-chip organisations. Jane comes from the 'client' side. She is currently leading radical change at MRS and provides an important link between the industry's association and its Archive.

Date of appointment as a Trustee 20/07/16

Raz Khan

Raz Khan is Treasurer of the AMSR and has been a Trustee since its inception, originally acting as a liaison with the MRS Board on which he served at the time. Raz is Chairman of Cobalt Sky, an operations support company which he has been managing since 1989. He started in MR operations in 1977 and has worked at Pritchard Brown and Taylor, Quantime and AGB. He has served as treasurer to the Market Research Society and the Association for Survey Computing and is a Fellow of the MRS.

Date of appointment as a Trustee 19/04/16

Professor Claire Langhamer

Claire Langhamer is Director of the Institute of Historical Research and Professor of Modern History at the University of London. A social and cultural historian of modern Britain with particular research interests in feeling, experience and everyday life, she has published on children's writing, courtship, happiness, home, emotional politics and women's leisure. Recent publications include *Class of 37* with Hester Barron (2021); *Total War: an Emotional History* edited with Lucy Noakes and Claudia Siebrecht (2020); and *The English in Love. The Intimate Story of an Emotional Revolution* (2013). She is currently writing a book called *Feelings at Work in Modern Britain* for OUP and is also a Trustee of the Mass Observation Archive.

Date of appointment as a Trustee 14/10/23

Phyllis Macfarlane

Phyllis Macfarlane is a lifelong Market Researcher, former Managing Director of GfK NOP and Fellow and past Chair of the Market Research Society (MRS). She was previously Global Training Manager at GfK UK and has spent several years delivering, and expanding the offering of, market research education and training in Africa and Asia. She believes in bringing the global market research community and the non-profit sector together to learn from one another and achieve best results for all – mainly through her role as Treasurer of ESOMAR Foundation. She has won the

MRS Silver Medal in 2008, the MRS Gold Medal in 2021, and in 2018 the European Society for Opinion and Marketing Research Excellence Award.

Date of appointment as a Trustee 14/09/19

Colin McDonald

Colin McDonald spent over 40 years in the research industry, first with Reckitt & Sons, then in agencies BMRB and Communication Research Ltd, finally running his own consultancy. He joined the Market Research Society in 1967, holds the Society's Gold Medal and was elected a Fellow of the Society in 1998. His many papers, articles and books include, with Stephen King, *Sampling the Universe*, commissioned for the Market Research Society's 50th anniversary in 1995. He co-edited the Media Research Group *Guide to Media Research* (1995) and the ESOMAR *Handbook of Market and Opinion Research*, 4th edition (1998), and has edited *Admap* and the *International Journal of Advertising*.

Date of appointment as a Trustee 14/10/23

Simon Patterson

Simon is Founder and CEO of QRI Consulting. He is a Chartered Psychologist (CPsychol), Fellow of the MRS (FMRS) and Board member (former Chair) of the AQR (Association for Qualitative Research). Simon has been an international qualitative researcher for 40 years; He is a highly experienced Moderator, conducting ECG® Workshops, Focus Groups and IDIs in-person and online, and has managed and conducted research in, and travelled to, over 40 countries around the world. He set up QRI (Qualitative Research International) Consulting in 2010 following a successful career at CRAM (Cooper Research & Marketing) International where he was latterly Managing Director, and also a Director of online sister agency QiQ (QualiQuant®) International. He worked with CRAM's founder, the late Peter Cooper, for 30 years. Simon is passionate about Brands and understanding what makes Consumers tick helping to refine brand positioning, enhance customer loyalty, and make successful product launches and relaunches. He has contributed to many brand, marketing, and communication successes around the world during his long career in Market Research.

Simon was a visiting lecturer on Consumer Research & Branding at the Institute for Manufacturing (IfM) at Cambridge University 2010-2020. He has co-authored many papers and presented at ESOMAR, MRS, AQR and QRCA conferences on Consumer Psychology, the Psychology of Branding and Communication, and the History and Development of Qualitative Research. Simon is a Founding Trustee of AMSR and is deeply interested in the history and development of our industry.

Date of appointment as a Trustee 19/04/16

Sue Robson

Sue read Psychology and Physiology (PPP) at Somerville College Oxford and then toyed with the idea of an academic career. Eventually deciding to get a 'proper job' Sue joined BMRB where she gained a solid grounding in all types of market research. Deciding to specialise in qualitative research she then joined MBL and worked with John and Mary Goodyear. She worked at MBL for 10 years, ending up as Managing Director. In 1981 Sue started her own business, The Qualitative Consultancy, TQC, which became one of the foremost qualitative agencies of the 80s and 90s. Sue also ran training courses for the MRS including developing, in 1983, the very first course offering practical hands-on experience of moderating group discussions, which has

become a strong part of the regular offering of MRS courses to young researchers. This led to the book she wrote and co-edited with Angela Foster, a psychotherapist, *Qualitative Research in Action*, published in 1989. Sue was a member of MRS Council from the 1980s and a founder member of AQR, to give qualitative researchers their own strong voice. She was made a Fellow of the MRS in 1998.

After closing TQC in 2002 Sue worked as a consultant until retirement. She now does various volunteer roles; was an MRBA committee member for 10 years and then joined AMSR in 2019, chairing the Marketing Committee until 2023.

Date of appointment as a Trustee 14/09/19

Phyllis Vangelder

Phyllis Vangelder was an Editor in the market research industry for many years, accumulating knowledge and contacts in all aspects of market and social research. She was in charge of publications at The Market Research Society for over 25 years including the *MRS Newsletter* (the forerunner of *Research*), the *Journal of the Market Research Society* (now the *International Journal of Market Research*), *Market Research Abstracts* and *Survey* magazine, as well as being heavily involved in many committees. She has been Editor of *ESOMAR Newsbrief*, *BMRA Bulletin* and *BMRA's MR Business*. Phyllis also co-edited *A Handbook of Market Research Techniques* with Robin Birn and Paul Hague. and with Colin McDonald, the *ESOMAR Handbook of Market and Opinion Research*.

Since 'retirement', she has been involved as a Volunteer with the Archive of Market and Social Research (AMSR) as Trustee and member of several Committees, as well as editing the *AMSR Newsletter*. She was heavily involved in the creation and production of AMSR's three books in the series 'Showcasing the Archive'. editing the first book, *Post-war developments in market research* and co-editing, with Judith Staig, the third book on *Researching the Public*.

She contributes to the Archive's initiatives in reaching out to academics to encourage them to use the Archive in their research.

Phyllis is an Honorary Fellow of The Market Research Society.

Date of appointment as a Trustee 19/04/16

4.2 President

Denise Lievesley is an Honorary Fellow of Green Templeton College, University of Oxford, having been Principal from 2015 until September 2020. Prior to Oxford, she was Executive Dean of the Faculty of Science and Public Policy and Professor of Social Statistics at King's College London. She has been Chief Executive of the English Health and Social Care Information Centre, Director of Statistics at UNESCO, where she founded the Institute for Statistics, and Director (1991-1997) of the UK Data Archive. In March 2024 She published her review of the UK Statistics Authority commissioned by the Cabinet Office as part of the programme of public bodies reviews.

Denise served as President of the Royal Statistical Society (1999 - 2001), and as President of the International Statistical Institute (2007 - 2009) and the International Association for Official Statistics (1995 - 1997).

A Fellow of University College London (her alma mater), she has honorary doctorates from City University and the University of Essex and is a founding Fellow of the Academy of Social Sciences. Her research interests relate broadly to the quality and trust in official data, and the use of data

for research purposes. She was appointed Commander of the Order of the British Empire (CBE) in the Queen's Birthday Honours in June 2014 for services to social science.

5 Declarations

The company has taken advantage of the small companies' exemption in preparing the report above.

The Trustees declare that they have approved the trustees' report (including Directors' report) above.

Signed on behalf of the Charity's Trustees/Directors:

Chairman: Professor Patrick Barwise

20th November 2025

Independent Examiner's Report to the Trustees of The Archive of Market and Social Research

I report to the trustee on my examination of the financial statements of The Archive of Market and Social Research ('the charity') for the year ended 31 March 2025.

Responsibilities and basis of report

As the trustees of the charity you are responsible for the preparation of the financial statements in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's financial statements carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the charity as required by section 130 of the Act; or
2. the financial statements do not accord with those records; or
3. the financial statements do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Alistair Henry Ellis Smith
Independent Examiner
20th November 2025

The Archive of Market and Social Research

Year ended 31 March 2025

Statement of Financial Activities

		2025		2024
		Unrestricted	Total funds	Total funds
	Note	funds	£	£
Income and endowments				
Donations and legacies	4	47,632	47,632	43,790
Investment income	5	2,996	2,996	2,343
Total income		<u>50,628</u>	<u>50,628</u>	<u>46,133</u>
Expenditure				
Expenditure on raising funds:				
Costs of raising donations and legacies	6	16,065	16,065	15,699
Expenditure on charitable activities	7,8	25,471	25,471	28,608
Total expenditure		<u>41,536</u>	<u>41,536</u>	<u>44,307</u>
Net income and net movement in funds		<u>9,092</u>	<u>9,092</u>	<u>1,826</u>
Reconciliation of funds				
Total funds brought forward		108,131	108,131	106,305
Total funds carried forward		<u>117,223</u>	<u>117,223</u>	<u>108,131</u>

The statement of financial activities includes all gains and losses recognised in the year. All income and expenditure derive from continuing activities.

The notes on pages 22 to 25 form part of these financial statements.

Statement of Financial Position

	Note	2025 £	2024 £
Current assets			
Debtors	11	2,093	4,984
Cash at bank and in hand		118,350	106,484
		<u>120,443</u>	<u>111,468</u>
Creditors: amounts falling due within one year	12	3,220	3,337
Net current assets		<u>117,223</u>	<u>108,131</u>
Total assets less current liabilities		<u>117,223</u>	<u>108,131</u>
Net assets		<u>117,223</u>	<u>108,131</u>
Funds of the charity			
Unrestricted funds		117,223	108,131
Total charity funds	13	<u>117,223</u>	<u>108,131</u>

These financial statements were approved by the board of trustees and authorised for issue on 20th November 2025, and are signed on behalf of the board by:

Professor Patrick Barwise, Chairman

Notes to the Financial Statements

1. General information

The charity is a public benefit entity and a registered charity in England and Wales and is unincorporated. The address of the principal office is The Old Malt House, 21 Watling Lane, Dorchester on Thames, Wallingford OX10 7JG.

2. Statement of compliance

These financial statements have been prepared in compliance with FRS 102, 'The Financial Reporting Standard applicable in the UK and the Republic of Ireland', the Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (Charities SORP (FRS 102)) and the Charities Act 2011.

3. Accounting policies

Basis of preparation

The financial statements have been prepared on the historical cost basis, as modified by the revaluation of certain financial assets and liabilities and investment properties measured at fair value through income or expenditure.

The financial statements are prepared in sterling, which is the functional currency of the entity.

Going concern

There are no material uncertainties about the charity's ability to continue.

Fund accounting

Unrestricted funds are available for use at the discretion of the trustees to further any of the charity's purposes.

Designated funds are unrestricted funds earmarked by the trustee for particular future project or commitment.

Restricted funds are subjected to restrictions on their expenditure declared by the donor or through the terms of an appeal, and fall into one of two sub-classes: restricted income funds or endowment funds.

The Archive of Market and Social Research

Notes to the Financial Statements *(continued)*

Year ended 31 March 2025

Incoming resources

All incoming resources are included in the statement of financial activities when entitlement has passed to the charity; it is probable that the economic benefits associated with the transaction will flow to the charity and the amount can be reliably measured. The following specific policies are applied to particular categories of income:

- ② income from donations or grants is recognised when there is evidence of entitlement to the gift, receipt is probable and its amount can be measured reliably.
- ② legacy income is recognised when receipt is probable and entitlement is established.
- ② income from donated goods is measured at the fair value of the goods unless this is impractical to measure reliably, in which case the value is derived from the cost to the donor or the estimated resale value. Donated facilities and services are recognised in the accounts when received if the value can be reliably measured. No amounts are included for the contribution of general volunteers.
- ② income from contracts for the supply of services is recognised with the delivery of the contracted service. This is classified as unrestricted funds unless there is a contractual requirement for it to be spent on a particular purpose and returned if unspent, in which case it may be regarded as restricted.

Resources expended

Expenditure is recognised on an accruals basis as a liability is incurred. Expenditure includes any VAT which cannot be fully recovered, and is classified under headings of the statement of financial activities to which it relates:

- ② expenditure on raising funds includes the costs of all fundraising activities, events, non-charitable trading activities, and the sale of donated goods.
- ② expenditure on charitable activities includes all costs incurred by a charity in undertaking activities that further its charitable aims for the benefit of its beneficiaries, including those support costs and costs relating to the governance of the charity apportioned to charitable activities.
- ② other expenditure includes all expenditure that is neither related to raising funds for the charity nor part of its expenditure on charitable activities.

All costs are allocated to expenditure categories reflecting the use of the resource. Direct costs attributable to a single activity are allocated directly to that activity. Shared costs are apportioned between the activities they contribute to on a reasonable, justifiable and consistent basis.

Financial instruments

A financial asset or a financial liability is recognised only when the entity becomes a party to the contractual provisions of the instrument.

Basic financial instruments are initially recognised at the amount receivable or payable including any related transaction costs.

The Archive of Market and Social Research

Notes to the Financial Statements *(continued)*

Year ended 31 March 2025

4. Donations and legacies

	Unrestricted Funds £	Total Funds 2025 £	Unrestricted Funds £	Total Funds 2024 £
Donations				
Donations and gifts	45,072	45,072	41,217	41,217
Gift Aid	2,560	2,560	2,573	2,573
	<u>47,632</u>	<u>47,632</u>	<u>43,790</u>	<u>43,790</u>

5. Investment income

	Unrestricted Funds £	Total Funds 2025 £	Unrestricted Funds £	Total Funds 2024 £
Other interest receivable	<u>2,996</u>	<u>2,996</u>	<u>2,343</u>	<u>2,343</u>

6. Costs of raising donations and legacies

	Unrestricted Funds £	Total Funds 2025 £	Unrestricted Funds £	Total Funds 2024 £
Costs of raising donations and legacies - Donations	<u>16,065</u>	<u>16,065</u>	<u>15,699</u>	<u>15,699</u>

7. Expenditure on charitable activities by fund type

	Unrestricted Funds £	Total Funds 2025 £	Unrestricted Funds £	Total Funds 2024 £
Expenditure on charitable activities	19,255	19,255	23,216	23,216
Support costs	6,216	6,216	5,392	5,392
	<u>25,471</u>	<u>25,471</u>	<u>28,608</u>	<u>28,608</u>

8. Expenditure on charitable activities by activity type

	Activities undertaken directly £	Support costs £	Total funds 2025 £	Total fund 2024 £
Expenditure on charitable activities	19,255	–	19,255	23,216
Support costs	–	5,615	5,615	4,793
Governance costs	–	601	601	599
	<u>19,255</u>	<u>6,216</u>	<u>25,471</u>	<u>28,608</u>

9. Staff costs

The average head count of employees during the year was Nil (2024: Nil).

The Archive of Market and Social Research

Notes to the Financial Statements *(continued)*

Year ended 31 March 2025

9. Staff costs (continued)

No employee received employee benefits of more than £60,000 during the year (2024: Nil).

10. Trustee remuneration and expenses

No remuneration was paid to Trustees

11. Debtors

	2025	2024
	£	£
Other debtors	<u>2,093</u>	<u>4,984</u>

12. Creditors: amounts falling due within one year

	2025	2024
	£	£
Accruals and deferred income	<u>3,220</u>	<u>3,337</u>

13. Analysis of charitable funds

Unrestricted funds

	At 1 April 2024 £	Income £	Expenditure £	At 31 March 2025 £
Unrestricted funds	108,131	50,628	41,536	117,223
	<u>108,131</u>	<u>50,628</u>	<u>(41,536)</u>	<u>117,223</u>

	At 1 April 2023 £	Income £	Expenditure £	At 31 March 20 24 £
Unrestricted funds	106,305	46,133	(44,307)	108,131
	<u>106,305</u>	<u>46,133</u>	<u>(44,307)</u>	<u>108,131</u>

ARCHIVE OF MARKET AND SOCIAL RESEARCH

England & Wales - Charity number 1166619

Accounts



The Archive of Market and Social Research Annual Report 2023-24

Charity number – 1166619

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Chairman's Foreword

I am delighted to report that AMSR had another very successful year in 2023/24. We moved forward on all fronts, with steady growth in the collection, in unique monthly visitors to both the website and the Archive, in participation in external events and in publishing - our newsletter and another book. We also continued developing our website.

Underpinning this, our income increased significantly, thanks to generous new funding from Ovation MR and continuing support from companies and individuals, including our other two Platinum donors, Ipsos UK and Dr Elizabeth Nelson OBE.

This year, we took our first steps towards accreditation by The National Archives. In due course, this should enable us, in collaboration with a university partner, to apply for grant funding from bodies such as the National Lottery Heritage Fund and the ESRC. We will need to increase our sustainable funding to maintain AMSR as a standalone entity over the long term. That will be challenging, but we are moving in the right direction to achieve it.

Similarly, it will take time to build awareness and usage of the Archive as a teaching and research resource in schools and universities. But there too we are moving in the right direction.

None of this would be possible without the support of our friends and the tireless and cheerful work of our 55 volunteers. On behalf of the Trustees, I would like to thank them all as, together, we build - and, increasingly, promote and exploit - this unique resource.

The Archive is already providing value. But we think its long-term potential is much, much bigger, not only directly in schools and universities, but indirectly too, by increasing the public's understanding and appreciation of the UK's research and insight industry. As more research leaders understand that vision, our hope is that they will see the long-term benefit of the, still embryonic, feedback loop from supporting AMSR, back to helping the industry address crucial long-term issues such as the recruitment and engagement of research staff and respondents, response rates, regulation, and so on.

Patrick Barwise

21 November 2024

Chief Executive's Introduction

This year we have continued with the growth plan that we set out in last year's annual report. Our primary aim this year was to attract more users to the Archive, while maintaining the steady growth of our collections and increasing our income.

As you will read in this report, we have been successful in all three areas. Our income, this year, has increased very significantly. This has allowed us to invest more in raising awareness of AMSR's work through publicity and attending events, improving our website and working with schools.

The number of university academics using the Archive has been steadily growing. Producing evidence of this has been a slow process, because of the time it takes for peer reviewed papers and publications to appear, and this is now beginning to happen. A fifth of visitors to the Archive are based outside the UK, the most important location being the USA.

We launched our third book, *Researching the public: post-war policy, politics and polling*. In it we showcased the excellent social research, polling data and commentary that we have in the Archive. We also held a joint seminar with the Mass Observation Archive entitled, *Exploring the Archives: Researching the Narrative of Happiness and the History of Feeling*. This was held in May 2023 with the objective of demonstrating the synergy which both organisations, through the different perspective of their archives, can bring to information sourcing.

Over the last two years we have been developing a service aimed at students studying modern British history at A-level. Using the AMSR Archive enables students to gain experience of using an archive in their schoolwork before they go to university. The fact that the Archive is online and free makes it easily accessible to school students. This year we trialled an email programme targeted at history teachers in secondary schools in England. Based on what we have learned, we plan to extend this next year. We have also established that there are opportunities in subjects other than history: Politics and Sociology in particular, and also Extended Project Qualifications (EPQs).

Three new Trustees joined the Trustee Board this year; Professor Claire Langhamer, Director of the Institute of Historical Research, Colin McDonald, who leads the digitising and indexing of donated material, and James Whaley, CEO of OvationMR. Sue Robson stood down as Chair of our Marketing Committee and remains a Trustee. I would like to thank Sue for the work she has done to develop and coordinate our communications and publicity activities over the past four years. They have been demonstrably successful.

I would also like to thank all our volunteers and supporters for their help and generosity. Without their commitment, most of the contents of the Archive would have been lost forever. The independent research we commissioned two years ago found that the great majority of market research, that is not in the public domain, is deleted after 7-10 years.

Adam Phillips
21 November 2024

1 Objectives and activities

1.1 Introduction

The Archive of Market and Social Research (AMSR) was established in 2015 and became a charity in 2016. It has assembled a significant collection of more than 9,000 documents and purely digital records that is still growing. Most of these documents are not available from other sources and would have been lost if we had not collected them. The majority are available online at no cost to the user. As the collection has grown the number of users has increased, with a significant proportion coming from outside the UK.

The organisation is almost entirely staffed by around 55 volunteers, and it is entirely funded by individual and corporate donations.

1.2 Purpose

The charitable object of AMSR is to advance education and research in the fields of recent British social history, and the development of market and social research, including data analytics, insight and other relevant sectors. We do this by preserving and providing access to reports and other relevant material and by developing educational resources for teachers, academics, students, researchers and other communities.

AMSR aims to create an archive of national importance that will:

- Make the contents of the archive freely available online and/or in physical form to all in interested communities, including university academics, schoolteachers, media and business researchers, adult education, U3A, WEA, minority groups and interested members of the public.
- Become a central hub for academics and others trying to find out what has been learned from market and social research and data analytics in the past and obtain information and evidence relevant to discussions about the future.
- Collect and preserve all relevant reports, data, records, articles, training material and other archive material, including purely digital material, to ensure that that these unique records will be accessible in the distant future.
- Build awareness of the contribution of the market and social research sector to society, business and human understanding – in the past, present and future – thereby enhancing the reputation and status of this sector.

Where significant gaps exist in what is already being preserved, the AMSR is actively collecting material to fill them.

Academics are using the unique material preserved in the archive. We are developing teaching material for schools that will support teachers of post war UK history and politics. Some of this material is aimed at introducing school students to working with primary source material in an archive. The fact that most of the material in the Archive is freely available online makes it very easy for users to search the Archive.

1.3 Activities

Our activities include:

1. Collecting, preserving and digitising important research reports and data that is at risk of being lost – our research has shown that most current commercial research is not retained for more than 7-10 years.

2. Making as much of the material in the archive as possible available and searchable via the internet at no cost to the user.
3. Developing links with universities and schools to encourage them to use the material in the Archive for teaching and research purposes.
4. Publicising the Archive and encouraging its use by academics, students, journalists and members of the public interested in social history and the information collected by market and social researchers in the course of their work.
5. Providing help for users searching the Archive for information relating to their interests.
6. Establishing working links with other similar archives and databases at universities and elsewhere.
7. Publishing books based on material from the Archive to demonstrate the role and value of market and social research.
8. Seeking out and building a library of research books, papers and reports relating to the development and conduct of market and social research, including those held by clients.
9. Rescuing and cataloguing the historical records of the bodies involved in the development of the market and social research profession in the UK.
10. Assembling and recording key biographical information about market and social researchers, past and present.
11. Assembling a historical database of professional codes of conduct and practice of relevant bodies that have been involved in activities dealing in information collected from and about members of the public, and collecting important papers and articles concerned with the responsible collection, processing and use of such data.
12. Cataloguing and storing all records in a secure and accessible form.
13. Storing any other records, documents or other media that are relevant to its purpose.

2 Achievements and performance

2.1 Summary of main achievements

During the year we have made steady progress on all fronts:

- Income in 2023-24 was £46,133 compared with £24,355 last year.
- Costs were slightly less than budgeted, and we made a small surplus compared with the deficit of £21,000 originally budgeted
- The number of online Archive monthly unique visitors has increased from averages of 90 pm in 2020, to 123 pm in 2021, to 162 pm in 2022, 235 pm in 2023 and 300 in the first 3 months of 2024.
- We published our third book; *Researching the public: post-war policy, politics and polling* in the Summer.
- We are in the process of adding three new collections to the Archive, one from Market Research Development Fund, one on motoring and another from the Big Green Door. The latter involves obtaining permission to make some of the material available online.

- We launched the next stage of a project targeted at secondary schools teaching modern history at A-level. 28 schools have now signed up to receive material from the Archive.
- We are raising awareness of the Archive with visits to the Portal websites stable at a monthly average of around 480 and visits to the Archive steadily rising. This has been extended by using social media where our followers have now doubled in the last year to over 700 on LinkedIn and X (Twitter), and by attending conferences and seminars in the Insights sector and Universities.
- We held a joint webinar in May with the Mass Observation archive which was attended by about 80 people.
- Our quarterly newsletter is available on our website and circulated to a supporter database that now has over 600 members. We also publish a half-yearly AMSR Update report for our supporters in addition to our annual report.

2.1.1 Building the Collection

We have increased our content by 13% to more than 9,000 reports, papers and documents covering a broad range of social issues, markets and research techniques, nearly all of which are available online. In addition, more than 750 books are held in our paper Archive.

We have 38 Specialist Collections including unique reports not available elsewhere from the BBC and BBC World Service, MORI British Public Opinion, NOP reports, the Cooper Research and Marketing (CRAM) qualitative research, and the Target Group index covering more than 50 years of product and media consumption. Both heritage and more modern work continues to be donated as we continue to assemble significant works from the 21st Century.

As we get to know our users better, we learn what sort of content is of the most use and value to them. Modern British Historians are primarily interested in all aspects of 'everyday life' and how it changes. Market and Social research is therefore an ideal source covering, as it does, all aspects of life from food, travel, media, technology, gender, children and families, finance, work and leisure, both qualitatively and quantitatively. Important new additions to our collection this year include several hundred more reports from Alan Hedges and Peter Cooper, from the 1970's and 80's, and more 'modern' work from Kantar Insights, and GWI.

To illustrate how the new content meets the potential needs of our users, and the sheer range of content, some examples of work added during the year are:

1. Of interest for 'gender' studies: demonstrating how attitudes to women have changed over time from them not being seen as part of a market e.g. beer drinking in the early 70's to fully incorporated by the end of that decade. And also for 'Modern Studies' which demonstrate that there are still markets – like the Investment Market (Financial Services) - where women remained under-served even in the 2010's.
2. Studies on home and family life: Conference papers on Food and drink, Attitudes to French Agricultural produce in 1984, (just at the time when French cooking was becoming mainstream), motivations of sweet eating (1968), the latest trends in commerce, media and digital behaviour (2021/22)
3. Studies on the Environment, Pollution and Climate change. Social research into Seat-belt-wearing and Homelessness; How to get Nurses to return to work: How best to pay Benefits payments to save agency staff time; Public dialogue on genome editing in farmed animals (2022).

4. A new curated collection on the Motoring History: a set of reports and papers on the behaviour, attitudes and expenditure on motoring by British motorists primarily based on research undertaken for, or by, the Automobile Association (AA), covering the 1970s and 1980s. including a number of studies, which cover the broader role of the car as a transport mode within society. This unique collection illustrates the period during which car ownership became the norm for most British families, causing massive changes in our way of life.
5. All in addition to new historic papers, research on the conduct of research etc, which are relevant to many academic fields.

2.1.2 Building Usage: Academics

We continue to expand our relationships with Academics and a number have used the Archive for their research during the year: for example a history PhD researcher based at New York University in the US, working on the political, cultural and intellectual history of the social sciences, and sample surveys in particular, another researching the relationship of kitchen design and appliances, to the place of women in Britain.

2.1.3 Building Usage: A-Level Schools Project

Following on from our successful pilot exercise with a class of A-level history students at Notting Hill and Ealing High School in 2021-22, we conducted a large scale email programme targeted at History Teachers in all secondary schools in England with 6th Forms. Using the AMSR Archive enables students to experience using an archive in their schoolwork before they go to university. The benefit for AMSR is that the syllabus is known well in advance, and it is possible to develop teaching support material that can be reused every year with limited modification. The opportunity is to introduce students to using an archive and working with original sources. The fact that the Archive is online and free makes it easily accessible to school students. We have also established that there are opportunities in subjects other than history: Politics and Sociology in particular. The interaction with schools and university students will also help to raise awareness of the scope and value of research undertaken by the Market and Social research sector.

We now have 28 schools signed up to use the Archive for their A-Level Modern British History coursework and dissertations. We have sent these schools our new written Guide to the Archive and followed up with a copy of our latest Book (Researching the public: post-war policy, politics and polling) covered in more detail in Section 2.2.1 below. This book contains a lot of useful material for A-Level Students. We subsequently sent them a video which they can use for teaching, together with a video demonstration of how to search the Archive – using a couple of typical examples. Ipsos UK, kindly made the videos for us, for which we are very grateful.

2.2 Progress against objectives

Our objectives for this year, as in prior years, were:

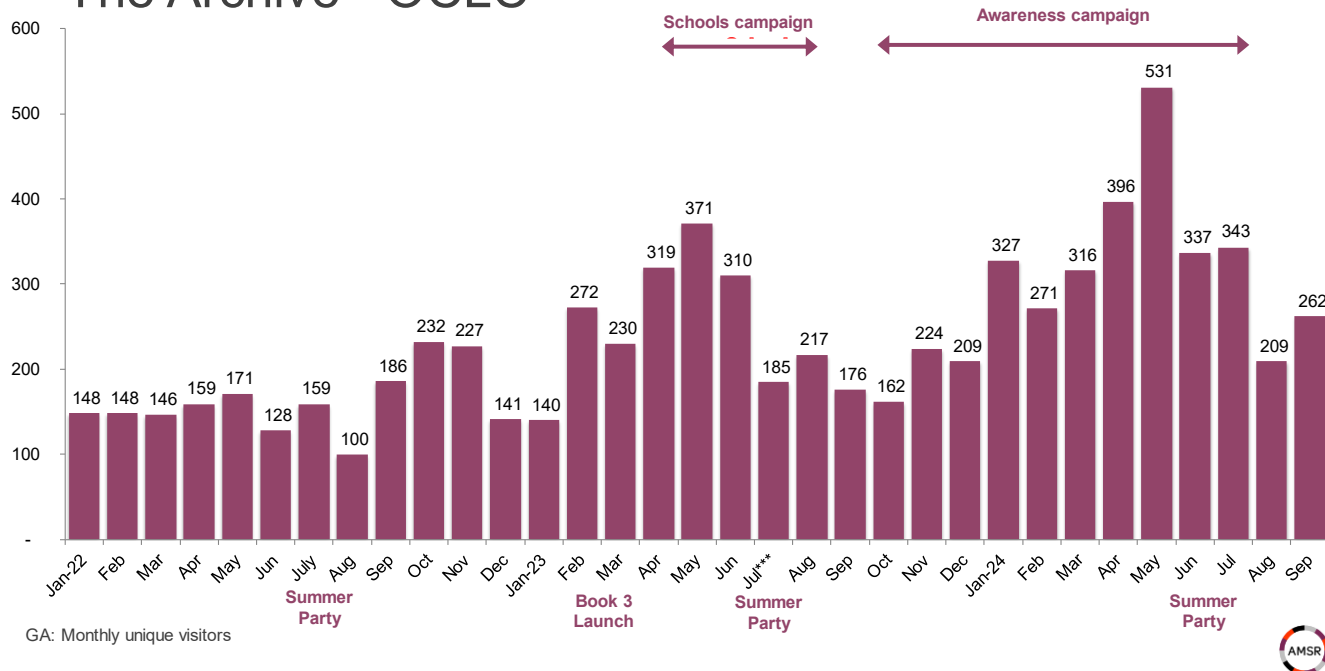
1. To identify and collect as much heritage material as possible.
2. To stimulate the flow of more modern research into the Archive (ideally on an ongoing basis from agencies).
3. To develop greater usage of the Archive.

However, our **priority in 2023-24** was to grow the number of users of all kinds, whilst continuing to develop and grow the content of the archive. We can report that the usership

of the Archive has continued to grow steadily throughout the year, as shown by the graph of monthly unique visitors shown below. The monthly numbers necessarily vary with our own activity and the Academic year, but the growth trend is pleasing.



The Archive - OCLC



2.2.1 Researching the public: post-war policy, politics and polling

Following the successful publication of two books in 2020 and 2021, we published a third book in 2023, with the title: ***Researching the public: post-war policy, politics and polling***, in which we showcased all the excellent social research and polling data and commentary that we have in the Archive. We had in mind the particular target audience of A-and AS Level and Undergraduate Politics students

The Book's content demonstrates that ***research actually matters***. It covers:

- How research was used to understand winter mortality statistics which led directly to the winter fuel allowance.
- How the difficulties of self-reporting were overcome to understand seat belt usage which led to new legislation and advertising which dramatically reduced deaths in road traffic accidents.
- How reliable data on changing sexual behaviours and changing public opinion, eased the way for changes in legislation.
- How the BBC World Service used audience data to build the case for an increased budget for audience research which in turn justified greater investment from the Foreign Office.

Example after example is given of research being instrumental in the development of government policy. And how important it is that research is of high quality and sound execution – representative samples, well thought out and unbiased questions, sensitive and thorough analysis, followed by clear and honest communication. Bad research will lead to

bad legislation. Democracy depends on being able to listen to the public and rely on what they say.

On a wider level the book showed that AMSR is emerging as a vital resource for the study of history, sociology and politics. This is important for education but has a much wider value too; even if we don't believe that history can forecast the future these essays demonstrate that we would be very foolish to ignore it. As Bobby Duffy, Professor of Public Policy King's College London and Director of the Policy Institute, says in his preface: "it's clear that the insights from these studies shaped their times and can still inform us today".

The role of the AMSR in all of this is to protect the past (and the present) for the future. These papers demonstrate how we can access the Archive and use it to illustrate the UK's recent past. They show just what can be done with research".

Book 3 is available, like Books 1 and 2, to download free from the [AMSR website](#). Or it can be obtained either as a separate volume, or as a bundle of three, in return for a donation to the Archive.

2.2.2 Developing Relationships with other Archives

We continued building our relationship with other Archives through a highly successful joint Mass-Observation/AMSR Webinar - *Exploring the Archives: Researching the Narrative of Happiness and the History of Feeling*. This was held on 3 May 2023 with the objective of demonstrating the synergy which both organisations, through their archives, can bring to information sourcing. A panel of Archivists and academic social and cultural researchers, who had used both Archives in their research, including the history of everyday lives and happiness, showcased the work of the two organisations, and gave a fascinating insight into what the Archives contain and the synergy in the way they can be used by researchers.

2.2.3 Publicity

We have a database containing contact details of around 600 individuals who are interested in the Archive. They receive a quarterly Newsletter which is also published on our website. This provides information what has been happening at the archive, new acquisitions, and new services. We also produce a half yearly Update sheet that is targeted at donors and potential donors. This is a single sheet which gives a condensed version of the performance information to be found in our Annual Report, but more up to date.

In the Autumn we launched a social media campaign on LinkedIn that is targeted at individuals working in the Market and Social Research and Insights sector. This is aimed at attracting people to visit the portal website and specific items in the Online Archive and learn more about AMSR. The primary objective is to raise interest and informed awareness among individuals working in the sector who may be persuaded to donate material for the Archive or money and encourage them respond to our attempts to contact them personally. We need their support since they are the principal source of material for the Archive.

So far, this activity has increased our Followers on LinkedIn from around 300 to over 700 with a similar level on X(Twitter). Engagement on LinkedIn is high at around 5%-7%. This is more than double the average across all users of LinkedIn. This campaign also appears to have stimulated visits to the Archive. We intend to continue with social media next year, since the qualitative feedback has been positive.

2.2.4 Events

We have found that attending events is an effective way to promote ourselves to academics, students, contributors of material for the Archive, and donors of money to maintain it. Events also provide content for posts on social media

We held our regular Summer Event for supporters and friends at Bush House, Kings College London on 10 June 2023. More than 80 people attended. Speakers included Professor Jane Hamlett who spoke about her book, *Pet Revolution*, charts the evolution of pet keeping from the early days of taming wild animals to the presence of pets in over half of British households by 1963. Her research included cultural references to pets, appearances of pets in family photos, the effect of pets on the economy, and the AMSR. Also, Kelly Beaver MBE, Chief Executive of Ipsos UK and Ireland, Professor Sir John Curtice who talked about his thoughts on the long view of polling statistics and how sources such as the AMSR provide vital context for understanding current political and social events.

Other events attended were:

- History Day at London University
- OCR History Teachers' Conference
- Undergraduate Fair Oxford University - stand
- MRS Conference – stand and panel speaker
- Two MRS in-person seminars

2.2.5 Development

Our income from donors and sponsors was £43,700, compared with £23,253 last year. Threequarters of our income came from corporate donors and sponsors.

Major corporate donors last year were OvationMR and Ipsos UK and Ireland with Opinium sponsoring Book 3.

Individual donations have once again held up better than might have been expected – 24% of donations and sponsorship income - mainly thanks to Peter Bartram's continued sterling efforts with experienced researchers

A pilot exercise was conducted using LinkedIn to connect with the heads of 12 research and insight companies selected at random. This initiative led to five expressing interest in AMSR and one making a donation.

Ipsos UK and Ireland continue to provide AMSR with office space at their offices in Harrow for collection, sorting and digitising material for the Archive, for which we are very grateful.

The Policy Institute, King's College London again donated the venue for the Summer Event.

The number of entries on the supporter Database has continued to grow – up by 40% from 419 in January 2023 to 601 in January 2024 – and modifications have been made to it to provide more information to assist in targeting.

The number of entries on the supporter Database has continued to grow – up by 40% from 419 in January 2023 to 601 in January 2024 – and modifications have been made to it to provide more information to assist in targeting.

2.3 Financial position and reserves

We attracted donations of £43,790, which includes £2,573 of Gift Aid. In addition, we received £2,343 in bank interest taking our total income to £46,133. We made a small surplus.

Our total operating expenditure was £44,307.

Our reserves are £108,131. We are planning how best to use our reserves to maintain sustainable growth. At the start of the year we introduced a reserves policy fixing the level of reserves at the equivalent of two years' operating costs.

Significant items of expenditure are the cost of storage space at the History of Advertising Trust, to which a 24 month notice period applies, and for the website and online Archive. We would need 12 months' notice to ensure the long term preservation of the material we have collected if AMSR were to become insolvent.

2.4 Principal sources of funds

The funds have been raised from 12 companies and 49 individual donors, and book sales raised a further £425. Gift Aid has been claimed where possible. In addition, we are encouraging supporters to consider leaving a legacy to us.

We thank Ipsos UK for their generous financial support and for providing us with office space for collecting, sorting and scanning material contributed to the Archive, and OvationMR for their very generous financial contribution towards our marketing and fundraising costs.

We are grateful for the logistical support that we receive from industry bodies and companies, notably the MRS, Ronin International and i-View.

3 Structure, Governance and Management

AMSR is constituted as a charitable incorporated organisation (CIO) and is governed by a trust deed.

The organisation is led by the Executive Committee which consists of the Chairs and Deputy Chairs of the five Lead Committees that run the organisation. The Executive Committee meets monthly and reports to the Board of Trustees. The five committees are:

- Contents
- Marketing
- Governance,
- Development, and
- Finance

Trustees are chosen for the skills and experience they bring to the organisation and are elected for a three-year term by a meeting of the Trustees. Many of our trustees sit on the Committees. Three new trustees were appointed on 14 October 2023

- Professor Claire Langhamer, Director of the Institute of Historical Research and Professor of Modern History at the University of London.
- Colin McDonald, Research Consultant, FMRS, MRS Gold Medal
- James Whaley, CEO of global marketing insights agency, OvationMR, located in New York City.

All Trustees have received training in the responsibilities of charity trustees and an induction pack that includes:

- The constitution of AMSR
- The essential trustee: what you need to know, what you need to do (CC3)
- Charity fundraising: a guide to trustee duties (CC20).
- The Advancement of Education for the Public Benefit (PB3).

The Trustees approved a formal reserves policy in March 2024.

AMSR is staffed by 55 volunteers, together with one paid administrator.

4 Reference and administrative details

The Archive of Market and Social Research (also known as The AMSR), registered charity number 1166619.

Principal address: Old Malt House, 21 Watling Lane, Dorchester on Thames, Wallingford, OX10 7JG

4.1 Trustees

Professor Patrick Barwise, Chairman of the AMSR Board Patrick (Paddy) Barwise is Emeritus Professor of Management and Marketing at London Business School which he joined in 1976 after an early career at IBM. He has published widely on management, marketing and media. He is also a former Chairman of Which? He was appointed Vice-Chairman of AMSR in 2018 and became Chairman in early 2020.

Date of appointment as a Trustee 15/02/20

Jane Frost CBE

Jane Frost is Vice Chair of the AMSR and Chief Executive of the Market Research Society (MRS). She has over 30 years of experience at board level in marketing and strategy positions at blue-chip organisations. Jane comes from the 'client' side. She is currently leading radical change at MRS and provides an important link between the industry's association and its archive.

Date of appointment as a Trustee 20/07/16

Adam Phillips

Adam is Chief Executive of the AMSR. In over 40 years in market research, he has been involved in media measurement, public opinion research, brand development as well as product and pricing research. An MRS Fellow, past Chairman of the MRS, a Council Member at ESOMAR and Chairman of its Professional Standards Committee, he began his career at Unilever and went on to hold senior positions at BMRB, Mass-Observation, Euroquest, Research International and Winona Research in the US. He has been Chair of the Financial Services Consumer Panel and a lay member of the Press Complaints Commission. In 2016 he received the ESOMAR award for Market Research Excellence.

Date of appointment as a Trustee 19/04/16

Raz Khan

Raz Khan is treasurer of the AMSR and has been a Trustee since its inception, originally acting as a liaison with the MRS Board on which he served at the time. Raz is Chairman of Cobalt Sky, an operations support company which he has been managing since 1989. He started in MR operations in 1977 and has worked at Pritchard Brown and Taylor, Quantime

and AGB. He has served as treasurer to the Market Research Society and the Association for Survey Computing and is a Fellow of the MRS.

Date of appointment as a Trustee 19/04/16

Peter Bartram

Peter Bartram has had a varied career in both research and marketing with NOP, Thomson Newspapers, and the Harris Poll firm in London, New York, and Los Angeles. Back in the UK in 1978, he was a Marketing Director at American Express Europe, MRS Chairman in 1989, and finally President of the City Research Group. With 41 others, he set up the Research Network in 2002, which is still going strong. He recently published a well-reviewed book containing 100 stories from 'The Life in Research,' the proceeds from which are all donated to the AMSR.

A talented artist, Peter has donated several of his works to raise money for the Market Research Benevolent Association as well as AMSR.

Date of appointment as a Trustee 19/04/16

Ian Brace

Ian Brace is the Secretary of AMSR. After more than 40 years as a market researcher, mostly within research agencies, Ian is now retired from full time work. Originally trained as a statistician, he spent most of his career in project design, analysis and project management before ending up as Director of Research Methods at Kantar TNS UK. He is a Fellow of the MRS, author of many published papers and two books and was Chairman of the industry's charity, the Market Research Benevolent Association (MRBA) from 2004-2024. He was awarded the MRS Gold Medal in 2024.

Date of appointment as a Trustee 19/04/16

Professor Claire Langhamer

Claire Langhamer is Director of the Institute of Historical Research and Professor of Modern History at the University of London. A social and cultural historian of modern Britain with particular research interests in feeling, experience and everyday life, she has published on children's writing, courtship, happiness, home, emotional politics and women's leisure. Recent publications include *Class of 37* with Hester Barron (2021); *Total War: an Emotional History* edited with Lucy Noakes and Claudia Siebrecht (2020); and *The English in Love. The Intimate Story of an Emotional Revolution* (2013). She is currently writing a book called *Feelings at Work in Modern Britain* for OUP and is also a trustee of the Mass Observation Archive.

Date of appointment as a Trustee 14/10/23

Phyllis Macfarlane

Phyllis Macfarlane is a lifelong Market Researcher, former Managing Director of GfK NOP and Fellow and past Chair of the Market Research Society (MRS). She was previously Global Training Manager at GfK UK and has spent several years delivering, and expanding the offering of, market research education and training in Africa and Asia. She believes in bringing the global market research community and the non-profit sector together to learn from one another and achieve best results for all – mainly through her role as Treasurer of ESOMAR Foundation. She has won the MRS Silver Medal in 2008, the MRS Gold Medal in 2021, and in 2018 the European Society for Opinion and Marketing Research Excellence Award.

Date of appointment as a Trustee 14/09/19

Colin McDonald

Colin McDonald spent over 40 years in the research industry, first with Reckitt & Sons, then in agencies BMRB and Communication Research Ltd, finally running his own consultancy. He joined the Market Research Society in 1967, holds the Society's Gold Medal and was elected a Fellow of the Society in 1998. His many papers, articles and books include, with Stephen King, "*Sampling the Universe*", commissioned for the Market Research Society's 50th anniversary in 1995. He co-edited the Media Research Group Guide to Media Research (1995) and the ESOMAR Handbook of Market and Opinion Research, 4th edition (1998), and has edited Admap and the International Journal of Advertising.

Date of appointment as a Trustee 14/10/23

Simon Patterson

Simon is Founder and CEO of QRI Consulting. He is a Chartered Psychologist (CPsychol), Fellow of the MRS (FMRS) and Board member (former Chair) of the AQR (Association for Qualitative Research). Simon has been an international qualitative researcher for 40 years; He is a highly experienced Moderator, conducting ECG® Workshops, Focus Groups and IDIs in-person and online, and has managed and conducted research in, and travelled to, over 40 countries around the world. He set up QRI (Qualitative Research International) Consulting in 2010 following a successful career at CRAM (Cooper Research & Marketing) International where he was latterly Managing Director, and also a Director of online sister agency QiQ (QualiQuant®) International. He worked with CRAM's founder, the late Peter Cooper, for 30 years. Simon is passionate about Brands and understanding what makes Consumers tick helping to refine brand positioning, enhance customer loyalty, and make successful product launches & relaunches. He has contributed to many brand, marketing, and communication successes around the world during his long career in Market Research.

Simon was a visiting lecturer on Consumer Research & Branding at the Institute for Manufacturing (IfM) at Cambridge University 2010-2020. He has co-authored many papers and presented at ESOMAR, MRS, AQR and QRCA conferences on Consumer Psychology, the Psychology of Branding and Communication, and the History and development of Qualitative Research. Simon is a Founding Trustee of AMSR and is deeply interested in the history and development of our industry.

Date of appointment as a Trustee 19/04/16

Sue Robson

Sue read Psychology and Physiology (PPP) at Somerville College Oxford and then toyed with the idea of an academic career. Eventually deciding to get a 'proper job' Sue joined BMRB where she gained a solid grounding in all types of market research. Deciding to specialise in qualitative research she then joined MBL and worked with John and Mary Goodyear. She worked at MBL for 10 years, ending up as Managing Director. In 1981 Sue started her own business, The Qualitative Consultancy, TQC, which became one of the foremost qualitative agencies of the 80s and 90s. Sue also ran training courses for the MRS including developing, in 1983, the very first course offering practical hands-on experience of moderating group discussions, which has become a strong part of the regular offering of MRS courses to young researchers. This led to the book she wrote and co-edited with Angela Foster, a psychotherapist, *Qualitative Research in Action*, published in 1989. Sue

was a member of MRS Council from the 1980s and a founder member of AQR, to give qualitative researchers their own strong voice. She was made a Fellow of the MRS in 1998.

After closing TQC in 2002 Sue worked as a consultant until retirement. She now does various volunteer roles; was an MRBA committee member for 10 years and then joined AMSR in 2019, chairing the Marketing Committee until 2023.

Date of appointment as a Trustee 14/09/19

Phyllis Vangelder

Phyllis Vangelder was an Editor in the market research industry for many years, accumulating knowledge and contacts in all aspects of market and social research. She was in charge of publications at The Market Research Society for over 25 years including the *MRS Newsletter* (the forerunner of *Research*), the *Journal of the Market Research Society* (now the *International Journal of Market Research*), *Market Research Abstracts* and *Survey* magazine, as well as being heavily involved in many committees. She has been Editor of *ESOMAR Newsbrief*, *BMRA Bulletin* and *BMRA's MR Business*. Phyllis also co-edited *A Handbook of Market Research Techniques* with Robin Birn and Paul Hague. and with Colin McDonald, the *ESOMAR Handbook of Market and Opinion Research*.

Since 'retirement', she have been involved as a Volunteer with the Archive of Market and Social Research (AMSR) as Trustee and member of several Committees, as well as editing the *AMSR Newsletter*. She was heavily involved in the creation and production of AMSR's three books in the series 'Showcasing the Archive'. editing the first book, *Post-war developments in market research* and co-editing, with Judith Staig, the third book on *Researching the Public*.

She contributes to the Archive's initiatives in reaching out to academics to encourage them to use the Archive in their research.

Phyllis is an Honorary Fellow of The Market Research Society.

Date of appointment as a Trustee 19/04/16

4.2 President

Denise Lievesley is an Honorary Fellow of Green Templeton College, University of Oxford, having been Principal from 2015 until September 2020. Prior to Oxford, she was Executive Dean of the Faculty of Science and Public Policy and Professor of Social Statistics at King's College London. She has been Chief Executive of the English Health and Social Care Information Centre, Director of Statistics at UNESCO, where she founded the Institute for Statistics, and Director (1991-1997) of the UK Data Archive. In March 2024 She published her review of the UK Statistics Authority commissioned by the Cabinet Office as part of the programme of public bodies reviews.

Denise served as President of the Royal Statistical Society (1999 - 2001), and as President of the International Statistical Institute (2007 - 2009) and the International Association for Official Statistics (1995 - 1997).

A Fellow of University College London (her alma mater), she has honorary doctorates from City University and the University of Essex and is a founding Fellow of the Academy of Social Sciences. Her research interests relate broadly to the quality and trust in official data, and the use of data for research purposes. She was appointed Commander of the Order of the British Empire (CBE) in the Queen's Birthday Honours in June 2014 for services to social science.

5 Declarations

The company has taken advantage of the small companies' exemption in preparing the report above.

The Trustees declare that they have approved the trustees' report (including Directors' report) above.

Signed on behalf of the Charity's Trustees/Directors:

Chairman: Professor Patrick Barwise

21 November 2024

The Archive of Market and Social Research

Year ended 31 March 2024

Independent Examiner's Report to the Trustees of The Archive of Market and Social Research

I report to the trustee on my examination of the financial statements of The Archive of Market and Social Research ('the charity') for the year ended 31 March 2024.

Responsibilities and basis of report

As the trustees of the charity you are responsible for the preparation of the financial statements in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's financial statements carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the charity as required by section 130 of the Act; or
2. the financial statements do not accord with those records; or
3. the financial statements do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Alistair Henry Ellis Smith
Independent Examiner

The Archive of Market and Social Research

Year ended 31 March 2024

Statement of Financial Activities

		2024		2023
	Note	Unrestricted funds £	Total funds £	Total funds £
Income and endowments				
Donations and legacies	4	43,790	43,790	23,253
Investment income	5	2,343	2,343	1,102
Total income		<u>46,133</u>	<u>46,133</u>	<u>24,355</u>
Expenditure				
Expenditure on raising funds:				
Costs of raising donations and legacies	6	15,699	15,699	13,913
Expenditure on charitable activities	7,8	28,608	28,608	19,305
Total expenditure		<u>44,307</u>	<u>44,307</u>	<u>33,218</u>
Net income/(expenditure) and net movement in funds		<u>1,826</u>	<u>1,826</u>	<u>(8,863)</u>
Reconciliation of funds				
Total funds brought forward		106,305	106,305	115,168
Total funds carried forward		<u>108,131</u>	<u>108,131</u>	<u>106,305</u>

The statement of financial activities includes all gains and losses recognised in the year.
All income and expenditure derive from continuing activities.

The notes on pages 20 to 24 form part of these financial statements.

Statement of Financial Position

	Note	2024 £	2023 £
Current assets			
Debtors	11	4,984	5,510
Cash at bank and in hand		106,484	110,369
		<u>111,468</u>	<u>115,879</u>
Creditors: amounts falling due within one year	12	3,337	9,574
Net current assets		<u>108,131</u>	<u>106,305</u>
Total assets less current liabilities		<u>108,131</u>	<u>106,305</u>
Net assets		<u>108,131</u>	<u>106,305</u>
Funds of the charity			
Unrestricted funds		108,131	106,305
Total charity funds	15	<u>108,131</u>	<u>106,305</u>

These financial statements were approved by the board of trustees and authorised for issue on 21 November 2024, and are signed on behalf of the board by:

Professor Patrick Barwise, Chairman

Notes to the Financial Statements

1. General information

The charity is a public benefit entity and a registered charity in England and Wales and is unincorporated. The address of the principal office is .

2. Statement of compliance

These financial statements have been prepared in compliance with FRS 102, 'The Financial Reporting Standard applicable in the UK and the Republic of Ireland', the Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (Charities SORP (FRS 102)) and the Charities Act 2011.

3. Accounting policies

Basis of preparation

The financial statements have been prepared on the historical cost basis, as modified by the revaluation of certain financial assets and liabilities and investment properties measured at fair value through income or expenditure.

The financial statements are prepared in sterling, which is the functional currency of the entity.

Going concern

There are no material uncertainties about the charity's ability to continue.

Fund accounting

Unrestricted funds are available for use at the discretion of the trustees to further any of the charity's purposes.

Designated funds are unrestricted funds earmarked by the trustee for particular future project or commitment.

Restricted funds are subjected to restrictions on their expenditure declared by the donor or through the terms of an appeal, and fall into one of two sub-classes: restricted income funds or endowment funds.

3. Accounting policies *(continued)*

Incoming resources

All incoming resources are included in the statement of financial activities when entitlement has passed to the charity; it is probable that the economic benefits associated with the transaction will flow to the charity and the amount can be reliably measured. The following specific policies are applied to particular categories of income:

- income from donations or grants is recognised when there is evidence of entitlement to the gift, receipt is probable and its amount can be measured reliably.
- legacy income is recognised when receipt is probable and entitlement is established.
- income from donated goods is measured at the fair value of the goods unless this is impractical to measure reliably, in which case the value is derived from the cost to the donor or the estimated resale value. Donated facilities and services are recognised in the accounts when received if the value can be reliably measured. No amounts are included for the contribution of general volunteers.
- income from contracts for the supply of services is recognised with the delivery of the contracted service. This is classified as unrestricted funds unless there is a contractual requirement for it to be spent on a particular purpose and returned if unspent, in which case it may be regarded as restricted.

Resources expended

Expenditure is recognised on an accruals basis as a liability is incurred. Expenditure includes any VAT which cannot be fully recovered, and is classified under headings of the statement of financial activities to which it relates:

- expenditure on raising funds includes the costs of all fundraising activities, events, non-charitable trading activities, and the sale of donated goods.
- expenditure on charitable activities includes all costs incurred by a charity in undertaking activities that further its charitable aims for the benefit of its beneficiaries, including those support costs and costs relating to the governance of the charity apportioned to charitable activities.
- other expenditure includes all expenditure that is neither related to raising funds for the charity nor part of its expenditure on charitable activities.

All costs are allocated to expenditure categories reflecting the use of the resource. Direct costs attributable to a single activity are allocated directly to that activity. Shared costs are apportioned between the activities they contribute to on a reasonable, justifiable and consistent basis.

Financial instruments

A financial asset or a financial liability is recognised only when the entity becomes a party to the contractual provisions of the instrument.

Basic financial instruments are initially recognised at the amount receivable or payable including any related transaction costs.

The Archive of Market and Social Research

Year ended 31 March 2024

4. Donations and legacies

	Unrestricted Funds £	Total Funds 2024 £	Unrestricted Funds £	Total Funds 2023 £
Donations				
Donations and gifts	41,217	41,217	21,474	21,474
Gift Aid	2,573	2,573	1,779	1,779
	<u>43,790</u>	<u>43,790</u>	<u>23,253</u>	<u>23,253</u>

5. Investment income

	Unrestricted Funds £	Total Funds 2024 £	Unrestricted Funds £	Total Funds 2023 £
Other interest receivable	<u>2,343</u>	<u>2,343</u>	<u>1,102</u>	<u>1,102</u>

6. Costs of raising donations and legacies

	Unrestricted Funds £	Total Funds 2024 £	Unrestricted Funds £	Total Funds 2023 £
Costs of raising donations and legacies - Donations	<u>15,699</u>	<u>15,699</u>	<u>13,913</u>	<u>13,913</u>

7. Expenditure on charitable activities by fund type

	Unrestricted Funds £	Total Funds 2024 £	Unrestricted Funds £	Total Funds 2023 £
Expenditure on charitable activities	23,216	23,216	14,463	14,463
Support costs	5,392	5,392	4,842	4,842
	<u>28,608</u>	<u>28,608</u>	<u>19,305</u>	<u>19,305</u>

8. Expenditure on charitable activities by activity type

	Activities undertaken directly £	Support costs £	Total funds 2024 £	Total fund 2023 £
Expenditure on charitable activities	23,216	–	23,216	14,463
Support costs	–	4,793	4,793	4,241
Governance costs	–	599	599	601
	<u>23,216</u>	<u>5,392</u>	<u>28,608</u>	<u>19,305</u>

9. Staff costs

The average head count of employees during the year was Nil (2023: Nil).

The Archive of Market and Social Research

Year ended 31 March 2024

9. Staff costs *(continued)*

No employee received employee benefits of more than £60,000 during the year (2023: Nil).

10. Trustee remuneration and expenses

No remuneration was paid to Trustees.

11. Debtors

	2024	2023
	£	£
Other debtors	4,984	5,510
	<u>4,984</u>	<u>5,510</u>

12. Creditors: amounts falling due within one year

	2024	2023
	£	£
Trade creditors	—	2,974
Accruals and deferred income	3,337	6,600
	<u>3,337</u>	<u>9,574</u>

13. Deferred income

	2024	2023
	£	£
Amount deferred in year	—	6,000
	<u>—</u>	<u>6,000</u>

14. Pensions and other post retirement benefits

The amount recognised in income or expenditure as an expense in relation to defined contribution plans was £Nil (2023: £Nil).

15. Analysis of charitable funds

Unrestricted funds

	At 1 April 2023	Income	Expenditure	At 31 March 2024
	£	£	£	£
Unrestricted funds	106,305	46,133	(44,307)	108,131
	<u>106,305</u>	<u>46,133</u>	<u>(44,307)</u>	<u>108,131</u>

	At 1 April 2022	Income	Expenditure	At 31 March 2023
	£	£	£	£
Unrestricted funds	115,168	24,355	(33,218)	106,305
	<u>115,168</u>	<u>24,355</u>	<u>(33,218)</u>	<u>106,305</u>

Accounts



The Archive of
Market and Social
Research

The Archive of Market and Social Research Annual Report 2022-23

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1. Chairman's Foreword

Thanks to our tireless volunteers, our generous supporters and the individuals and agencies who have donated material to us, 2022-23 has been another good year for the AMSR. The Archive itself grew by almost 25 per cent as we cleared the scanning backlog that had built up during the Covid lockdown. We are also making good progress in building awareness and the number of visitors coming to the portal website and going on to the Archive, although we now need to invest in new software to enable us to know who they all are and to improve our metrics and analytics.

We continue to engage academic historians and schools teaching A-level history. The voices of the past, outside the elite, are often lost, but the Archive offers a direct channel to the broad mass of the British public, brought to life through studies conducted by the UK's very successful market and social research sectors and preserved in the Archive.

Our aim is that, over the long term, the AMSR will become a standard source for anyone studying, teaching or researching modern British social history. It will take time to achieve this, but as we do so, there are also likely to be opportunities in other, related, academic areas such as sociology and politics. One of our academic supporters, leading political polling expert Professor Sir John Curtice (Strathclyde University), has already used material in the Archive to compare and contrast British public opinion towards the EC/EU, by party affiliation, in the run-up to the 1975 and 2016 referendums. He presented this via video at our summer event for supporters in June 2023.

Also part of our mission is to raise awareness and understanding of the history and role of the UK market and social research sector. The initial impulse for setting up the AMSR was to ensure that research reports and other material relevant to this aim were not destroyed. Our first book told the story of how research methodologies evolved up to today's complex combination of traditional methods (surveys, panels and qualitative studies) and newer approaches such as data analytics.¹ During 2022/23, we published a second book, a collection of essays using material in the Archive to explore and illustrate post-war UK social trends.² A third book, on policy and political research, was launched at our June 2023 summer event.³

Since the end of this report year (March 2023), we have strengthened our organisation through three senior appointments: Professor Claire Langhamer, Director of the Institute of Historical Research, and Colin McDonald, who leads the scanning and indexing of donated material, as trustees; and John Haworth, former Chief Financial Officer of Ipsos, as an independent member of the Finance Committee.

As you read the following pages, you will get a sense that there's a lot going on at the AMSR and that we're making good progress - but also that this is a long-term project with huge future potential and that we're still at quite an early stage in exploiting that potential.

Many thanks to everyone who has helped us get to where we are. I hope this report will encourage you to continue as part of this unique project as we build up its momentum and impact.

Patrick Barwise

24 October 2023

¹ Judith Staig, ed., *Post-War Developments in Market Research*, AMSR, 2021.

² Judith Staig, ed., *How We've Changed: Social Trends from Post-War to Present Day and Beyond*, AMSR, 2022.

³ Judith Staig & Phyllis Vangelder, ed., *Researching the Public: Post-War Policy, Politics and Polling*, AMSR, 2023.

2. Chief Executive's Introduction

After 7 years building an Archive of research material, 2022 was the year that the Archive of Market and Social Research (AMSR) reached the size at which we believed we could start seriously promoting it to potential users. At the start of the year we had fully recovered from the impact of Covid and lockdown, and we were able to grow the number of items in the archive by a quarter during the year.

AMSR had been slowly attracting users, as news of what we were doing spread, but this year was the year that we thought we could seriously promote the online Archive to users. Not only was there a large and varied collection of unique material in the Archive, we had also improved our indexing, search facility and support for users, and we were confident that anyone visiting the Archive would be able to find something interesting.

When you read the report, you will see that our promotional activity this year has significantly increased awareness of AMSR. In 2022-23 the number of our social media followers and the average number of monthly visitors to our portal website grew by around a third. The average number of monthly users of the Archive proper grew by 50%. 200 unique users a month visited the Archive website in the first quarter of 2023.

We know that our archive is being used by a number of historians and PhD students, some based outside the UK. Unfortunately, we have no means of recording and identifying them unless they tell us that they have been using the Archive. Finding a way to record and understand our users is now an important problem, and we are going to need to make a significant investment to solve it. Not meeting visitors to the Archive is the disadvantage of providing access to virtually all of our material online. The great advantage of being online for the user is that they don't need to leave their home or office to use the Archive.

This year we successfully piloted a new service for students studying A-level history with Notting Hill and Ealing High School. We are planning to expand this service to more schools in the coming year.

I would like to thank all our volunteers and supporters for their help and generosity. Without their commitment, most of the contents of the Archive would have been lost forever. The independent research we commissioned last year found that the great majority of market research, that is not in the public domain, is deleted after 7-10 years.

Adam Phillips

24 October 2023

3. Objectives and activities

3.1. Purposes

The charitable object of AMSR is to advance education and research in the fields of recent British social history, and the development of market and social research including data analytics, insight and other relevant sectors, by preserving and providing access to reports and other relevant material and developing educational resources for teachers, academics, students and researchers.

AMSR aims to create an archive of national importance that will:

- become a central hub for academics and others trying to find out what has been learned from market and social research and data analytics in the past, and to obtain information and evidence relevant to discussions about the future;
- preserve and provide access to all relevant reports, data, records, articles, training material, books and other material, freely available online and/or in physical form, and
- build awareness of the contribution of the social and market research sector to society, business and human understanding – in the past, present and future – thereby enhancing the reputation and status of this sector.

There is no other organisation or single source in the UK which does this at present. Where significant gaps exist in what is already being preserved, the AMSR is actively collecting material to fill them.

3.2. Activities

The Archive of Market and Social Research is building a library and store of materials and records, both physical and online, relating to market and social research in the UK.

We are collecting and preserving survey results that reflect the changing behaviour, attitudes and opinions of people living in the UK over time. Much of this material is in the form of reports, rather than raw data. Reports give an insight into the attitudes and assumptions of those commissioning and writing the reports, in addition to the findings of the research being reported. We intend this material to support teaching and research in history, sociology, economics and business studies, and to inform journalists and interested members of the public. The collection will increasingly include contemporary records and is intended to be a living and continually updated archive.

We have been developing links with universities, particularly with academics in the field of Social History. At the same time, we are also connecting with schools to support students producing dissertations for their A-level exams.

The Archive also contains documents and records for those wishing to gain insight into the history, achievements, methods and activities of the market and social research industry and profession. No other central archive of this type currently exists.

The AMSR maintains an online searchable archive, accessible over the internet, containing scanned documents of survey results that reflect changing habits and attitudes, for perusal by anyone with an interest in social history, at no cost to the user.

Our activities include:

1. collecting and preserving important research reports and data that is at risk of being lost – our research has shown that most commercial research is not retained for more than 7-10 years;

2. making as much of the material in the archive as possible available and searchable via the internet at no cost to the user;
3. developing links with universities and schools to encourage them to use the material in the Archive for teaching and research purposes;
4. publicising the Archive and encouraging its use by academics, students, journalists and members of the public interested in social history and the information collected by market researchers in the course of their work;
5. providing help for users searching the Archive for information relating to their interests;
6. establishing working links with other similar archives and databases at universities and elsewhere;
7. publishing books based on material from the Archive to demonstrate the role and value of market and social research;
8. seeking out and building a library of research books, papers and reports relating to the development and conduct of market and social research, including those held by clients;
9. rescuing and cataloguing the historical records of the bodies involved in the development of the market and social research profession in the UK;
10. assembling and recording key biographical information about market and social researchers, past and present;
11. assembling a historical database of professional codes of conduct and practice of relevant bodies that have been involved in activities dealing in information collected from and about members of the public; and also collecting important papers and articles concerned with the responsible collection, processing and use of such data;
12. cataloguing and storing all records in a secure and accessible form; and
13. storing any other records, documents or other media that are relevant to its purpose.

4. Achievements and performance

4.1. Summary of main achievements

We now have more than 8,000 reports, papers and documents covering a broad range of social issues, markets and research techniques, nearly all of which are available online. This is an increase of almost 2,000 since last year as the backlog built up during the Covid lockdown has been cleared. In addition, more than 750 books that are held in our paper Archive.

We have 37 Specialist Collections including unique reports not available elsewhere from the BBC and BBC World Service, MORI British Public Opinion, NOP reports, the Cooper Research and Marketing (CRAM) qualitative research, and the Target Group index covering more than 50 years of product and media consumption, In its Modern Collections, the Archive is beginning to assemble significant works from the 21st Century

Important new additions to our collection this year include:

- Several hundred new reports (from the early 80s) into the **CRAM Collection**. Highlights are: several Lucozade Studies; The Effects of Timetable Frequency Changes on Suburban Services of Two London Areas; Babycham Advertising

Development; Projects on a Magazine on the Royal Family, the threat of Own Labels and New Mortgage concept

- A unique Collection of **Vignettes from Humphrey Taylor**. Humphrey Taylor has generously donated to the Archive a lively set of vignettes recalling his uses of research in many encounters with the great and powerful in both the UK and the USA.
- A collection of papers from **Gordon Heald** who ran Gallup Poll from 1979-1994, and some significant items from other individuals.
- Collections of recent research from **Nursery Research and Planning** and **Qa Research**.

And last, but definitely not least – we are very lucky to have 2 **reports from the very first days of Readership Research**. Conducted by Harry Lyall, founder of the London Research and Information Bureau (in 1921) and donated by his nephew.

- Press Circulation Analysed (1928)
- An Analysis of Press Circulations (1934).

We have also added **39 Oral history interviews** to the Archive. These were donated to us by the Research Network. They cover a selection of, mainly senior researchers, who were involved in the development of the market research sector from the 1950's up to recent times. This interesting resource will expand as the Research Network continues to carry out more interviews.

We have been exploring the potential for using the Archive among A-level and EPQ students. Using the AMSR archive enables these students to experience using an archive in their schoolwork before they go to university. The benefit for AMSR is that the syllabus is known well in advance, and it is possible to develop teaching support material that can be reused every year with limited modification. We conducted a successful pilot exercise with a class of A-level history students at Notting Hill and Ealing High School this year. Encouraged by this experience we intend to scale up our work with schools next year. We think that there is an opportunity to introduce students to using an archive and working with original sources. The fact that the Archive is online and free makes it easily accessible to school students. We also think that there are opportunities in subjects other than history. The interaction with schools and university students will also help to raise awareness of the scope and value of research undertaken by the market and social research sector.

Usership of the Archive has continued to grow. We averaged about 202 unique users of the online Archive per month, with the number of users steadily increasing throughout the year. This represents around a 53% increase over the same period last year.

4.2. Progress against objectives

Our objectives for this year were:

1. To identify and collect as much heritage material as possible;
2. To stimulate the flow of more modern research into the Archive (possibly on an ongoing basis from agencies);
3. To develop greater usage of the Archive.

In relation to our first objective, we increased the number of items preserved in the Archive and available online by about a quarter this year with a reasonable amount of material produced in the last 10 years. We are still trying to find the best on way to preserve material where there is no written report, simply a presentation or an interactive dashboard.

We commissioned, Qa Research Ltd to undertake research among research agencies (in relation to the first two objectives), and among marketing academics (to help us with the third). The key learning with regard to Objectives 1 and 2 was that we need to build a relationship with research agencies by asking initially for material that is easy for them to donate – that is, material over which they have full control, such as their own PR material. As a consequence, we are now systematically contacting agencies and recent research is being donated on a regular basis.

With regard to Objective 3, the Qa research revealed that marketing academics are keen to be offered case studies and teaching materials that link research to marketing strategy and action. We have started work on some examples and are planning further research to help us complete these and start to use them. Our relationship with St Mary's University regularly introduces marketing students to the Archive.

We similarly continue to target academics in the field of Modern British History and are working with a number of PhD students. The Archive was cited by several academics, including Professor Jane Hamlett. She generously acknowledged the role of the Archive in her book, *Pet Revolution*.

As mentioned in section 4.1, we have been working with Notting Hill and Ealing High School to develop use of the Archive for A-level dissertations. We conducted a pilot study among sixth form girls who were taking the A-level History exam. In a class of 12, all of them tried using the Archive, and 4 used information from the Archive in the long essay exam paper they were taking. The girls said they found it very helpful to experience using an archive even if they did not use it in their work in the end. Their teacher said that familiarity with AMSR led them to have greater confidence when looking at other archives such as the Churchill Archives and the National Archives

We are now developing relationships with more schools. If this further pilot is successful, we intend to investigate the opportunity for providing guidance for A-level students of Modern British History, Sociology, Psychology and Politics, as well as for the Extended Project Qualification (EPQ) that can be taken alongside A-levels.

Activity to raise awareness of the Archive, both among potential users and among potential contributors of material, as well as potential donors, continues to be another crucial tool for meeting all of these objectives. We publish a quarterly Newsletter and bi-monthly news Updates. As in previous years, awareness of the Archive's content is also promoted by publishing data-based stories on our website and promoting them through social media (using LinkedIn and Twitter). We have, moreover, increased our attendance and speaking appearances at conferences and meetings where there may be potential users. It is difficult and expensive to measure the awareness of AMSR, but we can track the number of unique visitors to the portal website and followers on LinkedIn and Twitter. At the end of 2022 we had 288 followers on LinkedIn, 38% more than the previous year, and 528 followers on Twitter, 25% more than the previous year. We were receiving around 570 unique visitors to the portal website every month. This is an increase of 36% over the same period the previous year.

We ran an extremely successful evening event for our supporters, volunteers and potential supporters at Bush House, Kings College London, in late May. Key speakers were Professor Sir John Curtice, the leading political polling expert, and Kelly Beaver MBE, the Chief Executive of Ipsos UK. This event, which was sponsored by the Policy Institute and OvationMR, undoubtedly helped to raise awareness of AMSR and encourage visits to our websites.

Following the successful publication of two books in 2020 and 2021, work has now commenced on a third book, to be published in mid-2023 with the title *Researching the public: post-war policy, politics and polling*.

4.3. Financial position and reserves

We attracted donations of £23,253, which includes £1,779 of Gift Aid. In addition, we received £1,102 in bank interest taking our total income to £24,355. We managed to exceed our income target.

Our total operating expenditure was £33,218.

Our reserves are £106,305. We are considering how best to use our reserves to maintain sustainable growth.

Although we do not have a formally stated policy on reserves, it has been our practice to ensure that we hold sufficient reserves to cover running costs and significant items of expenditure for the next two years.

Significant items of expenditure are the cost of storage space at the History of Advertising Trust, to which a 24 month notice period applies, and for the website and online Archive. We would need 12 months' notice to ensure the long term preservation of the material we have collected if AMSR were to become insolvent.

4.4. Principal sources of funds

The funds have been raised from 13 companies and 42 individual donors. Gift Aid has been claimed where possible. In addition, we are encouraging other supporters to consider leaving a legacy to us.

We thank Ipsos UK for their generous financial support and for providing us with office space for collecting, sorting and scanning material contributed to the Archive.

We are grateful for the logistical support that we receive from industry bodies and companies, notably the MRS, Ronin International and i-view.

5. Structure Governance and Management

AMSR is constituted as a charitable incorporated organisation (CIO) and is governed by a trust deed.

The organisation is led by the Executive Committee which consists of the Chairs and Vice Chairs of the four key committees that run the organisation. The Executive Committee meets monthly and reports to the Board of Trustees. The four committees are:

- Contents
- Marketing
- Governance, and
- Finance

Trustees are chosen for the skills and experience they bring to the organisation and are elected for a three-year term by a meeting of the Trustees. Many of our trustees sit on the Committees.

All Trustees have received training in the responsibilities of charity trustees and an induction pack that includes:

- The constitution of AMSR
- The essential trustee: what you need to know, what you need to do (CC3)

- Charity fundraising: a guide to trustee duties (CC20).
- The Advancement of Education for the Public Benefit (PB3).

AMSR is staffed by 45 volunteers, together with one paid administrator.

6. Reference and administrative details

The Archive of Market and Social Research (also known as The AMSR), registered charity number 1166619.

Principal address: Old Malt House, 21 Watling Lane, Dorchester on Thames, Wallingford, OX10 7JG

6.1. Trustees

Professor Patrick Barwise, Chairman of the AMSR Board

Patrick (Paddy) Barwise is Emeritus Professor of Management and Marketing at London Business School which he joined in 1976 after an early career at IBM and has published widely on management, marketing and media. He is a former Chairman of Which? He was appointed Vice-Chairman of AMSR in 2018 and became Chairman in early 2020.

Jane Frost CBE

Jane Frost is Vice Chair of the AMSR and Chief Executive of the Market Research Society (MRS). She has over 30 years of experience at board level in marketing and strategy positions at blue-chip organisations. Jane comes from the 'client' side. She is currently leading radical change at MRS and provides an important link between the industry's association and its archive.

Adam Phillips

Adam is Chief Executive of the AMSR. In over 40 years in market research, he has been involved in media measurement, public opinion research, brand development as well as product and pricing research. An MRS Fellow, past Chairman of the MRS, a Council Member at ESOMAR and Chairman of its Professional Standards Committee, he began his career at Unilever and went on to hold senior positions at BMRB, Mass-Observation, Euroquest, Research International and Winona Research in the US. He has been Chair of the Financial Services Consumer Panel and a lay member of the Press Complaints Commission. In 2016 he received the ESOMAR award for Market Research Excellence.

Raz Khan

Raz Khan is treasurer of the AMSR and has been a Trustee since its inception, originally acting as a liaison with the MRS Board. Raz is Chairman of Cobalt Sky, an operations support company which he has been managing since 1989. He started in MR operations in 1977 at Pritchard Brown and Taylor before moving to Quantime in 1982 where he managed the DP and Support department. He joined AGB in 1988 for a brief spell where he was part of the Superpanel team.

Ian Brace

Ian Brace is the Secretary of AMSR. After more than 40 years as a market researcher, mostly within research agencies, Ian is now retired from full time work. Originally trained as a statistician, he spent most of his career in project design, analysis and project management before ending up as Director of Research Methods at Kantar TNS UK. He is a Fellow of the MRS, author of many published papers and two books and is Chairman of the industry's charity, the Market Research Benevolent Association (MRBA)

Peter Bartram

Peter Bartram has had a varied career in both research and marketing with NOP, Thomson Newspapers, and the Harris Poll firm in London, New York, and Los Angeles. Back in the UK in 1978, he was a Marketing Director at American Express Europe, MRS Chairman in 1989, and finally President of the City Research Group. With 41 others, he set up the Research Network in 2002, which is still going strong.

Phyllis Macfarlane

Phyllis Macfarlane is a lifelong Market Researcher, former Managing Director of GfK NOP and immediate past Chair of the Market Research Society (MRS). She was previously Global Training Manager at GfK UK and has spent several years delivering, and expanding the offering of, market research education and training in Africa and Asia. She believes in bringing the global market research community and the non-profit sector together to learn from one another and achieve best results for all – mainly through her role as Treasurer of ESOMAR Foundation. She has won both the MRS Silver Medal in 2008, and in 2018 the European Society for Opinion and Marketing Research Excellence Award.

Simon Patterson

Simon is Chief Executive of QRI Consulting which he founded 10 years ago. An international qualitative researcher: Simon is a Chartered Psychologist, Fellow of the MRS and Board member (and former Chair) of the AQR (Association for Qualitative Research). He moderates ECGs®, Groups and IDIs in-person and online. Formerly Managing Director at CRAM International, he worked with its founder Peter Cooper for 25 years. Simon has written papers and presented at conferences on the Origins of Qualitative Research and the Psychology of Branding and Communication. He has been a visiting lecturer at the Institute for Manufacturing (IfM) at Cambridge University since 2010.

Sue Robson

Sue gained a solid grounding in all types of market research at BMRB, but then joined MBL to focus on qualitative research with John and Mary Goodyear. She worked at MBL for 10 years, ending up as Managing Director. In 1981 Sue started her own business, The Qualitative Consultancy, TQC. Sue also ran training courses for the MRS including developing, in 1983, the very first course offering practical hands-on experience of moderating group discussions. This led to the book she wrote and co-edited with Angela Foster, *Qualitative Research in Action*, published in 1989. She was a member of MRS Council from the 1980s and a founder member of AQR, to give qualitative researchers their own strong voice. She was made a Fellow of the MRS in 1998.

After closing TQC in 2002 Sue worked as a consultant until retirement. She does various volunteer roles and was an MRBA committee member for 10 years and then joined AMSR in 2019, chairing the Marketing Committee.

Phyllis Vangelder

Phyllis was an Editor in the market research industry for many years, accumulating knowledge and contacts in all aspects of market and social research. She was in charge of publications at the Market Research Society for over 25 years including the MRS *Newsletter* (the forerunner of *Research*), the *Journal of the Market Research Society* (now the *International Journal of Market Research*), *Market Research Abstracts* and *Survey magazine*, as well as being heavily involved in many committees. She has been Editor of *ESOMAR Newsbrief*, *ESOMAR Research World*, *BMRA Bulletin* and *BMRA's MR Business*.

Phyllis has also co-edited various Handbooks. Phyllis has edited or co-edited Books in the 'Showcasing the Archive' series.

6.2. President

Denise Lievesley is an Honorary Fellow of Green Templeton College, University of Oxford, having been Principal from 2015 until September 2020. Before coming to Oxford, she was Executive Dean of the Faculty of Science and Public Policy and Professor of Social Statistics at King's College London. She has been Chief Executive of the English Health and Social Care Information Centre, Director of Statistics at UNESCO, where she founded the Institute for Statistics, and Director (1991-1997) of the UK Data Archive.

Denise served as President of the Royal Statistical Society (1999 - 2001), and as President of the International Statistical Institute (2007 - 2009) and the International Association for Official Statistics (1995 - 1997).

A Fellow of University College London (her alma mater), she has honorary doctorates from City University and the University of Essex and is a founding Fellow of the Academy of Social Sciences. Her research interests relate broadly to the quality and trust in official data, and the use of data for research purposes. She was appointed Commander of the Order of the British Empire (CBE) in the Queen's Birthday Honours in June 2014 for services to social science.

7. Declarations

The company has taken advantage of the small companies' exemption in preparing the report above.

The Trustees declare that they have approved the trustees' report (including Directors' report) above.

Signed on behalf of the Charity's Trustees/Directors:

Chairman: Professor Patrick Barwise

2 November 2023

Independent Examiner's Report to the Trustees of The Archive of Market and Social Research

I report to the trustee on my examination of the financial statements of The Archive of Market and Social Research ('the charity') for the year ended 31 March 2023.

Responsibilities and basis of report

As the trustees of the charity you are responsible for the preparation of the financial statements in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's financial statements carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the charity as required by section 130 of the Act; or
2. the financial statements do not accord with those records; or
3. the financial statements do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Alistair Henry Ellis Smith
Independent Examiner

Statement of Financial Activities

		2023		2022
		Unrestricted	Total funds	Total funds
	Note	funds	£	£
Income and endowments				
Donations	4	23,253	23,253	30,859
Legacies	4	-	-	16,245
Investment income	5	1,102	1,102	272
Total income		<u>24,355</u>	<u>24,355</u>	<u>47,376</u>
Expenditure				
Expenditure on raising funds:				
Costs of raising donations and legacies	6	13,913	13,913	11,892
Expenditure on charitable activities	7,8	19,305	19,305	31,395
Total expenditure		<u>33,218</u>	<u>33,218</u>	<u>43,287</u>
Net (expenditure)/income and net movement in funds		<u>(8,863)</u>	<u>(8,863)</u>	<u>4,089</u>
Reconciliation of funds				
Total funds brought forward		115,168	115,168	111,079
Total funds carried forward		<u>106,305</u>	<u>106,305</u>	<u>115,168</u>

The statement of financial activities includes all gains and losses recognised in the year. All income and expenditure derive from continuing activities.

Statement of Financial Position

	Note	2023 £	2022 £
Current assets			
Debtors	11	5,510	2,062
Cash at bank and in hand		110,369	120,483
		<u>115,879</u>	<u>122,545</u>
Creditors: amounts falling due within one year	12	9,574	7,377
Net current assets		<u>106,305</u>	<u>115,168</u>
Total assets less current liabilities		<u>106,305</u>	<u>115,168</u>
Net assets		<u>106,305</u>	<u>115,168</u>
Funds of the charity			
Unrestricted funds		106,305	115,168
Total charity funds	15	<u>106,305</u>	<u>115,168</u>

These financial statements were approved by the board of trustees and authorised for issue on 2 November 2023, and are signed on behalf of the board by:

Professor Patrick Barwise, Chairman

Notes to the Financial Statements

1. General information

The charity is a public benefit entity and a registered charity in England and Wales and is unincorporated. The address of the principal office is .

2. Statement of compliance

These financial statements have been prepared in compliance with FRS 102, 'The Financial Reporting Standard applicable in the UK and the Republic of Ireland', the Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (Charities SORP (FRS 102)) and the Charities Act 2011.

3. Accounting policies

Basis of preparation

The financial statements have been prepared on the historical cost basis, as modified by the revaluation of certain financial assets and liabilities and investment properties measured at fair value through income or expenditure.

The financial statements are prepared in sterling, which is the functional currency of the entity.

Going concern

There are no material uncertainties about the charity's ability to continue.

Fund accounting

Unrestricted funds are available for use at the discretion of the trustees to further any of the charity's purposes.

Designated funds are unrestricted funds earmarked by the trustee for particular future project or commitment.

Restricted funds are subjected to restrictions on their expenditure declared by the donor or through the terms of an appeal, and fall into one of two sub-classes: restricted income funds or endowment funds.

Incoming resources

All incoming resources are included in the statement of financial activities when entitlement has passed to the charity; it is probable that the economic benefits associated with the transaction will flow to the charity and the amount can be reliably measured. The following specific policies are applied to particular categories of income:

- income from donations or grants is recognised when there is evidence of entitlement to the gift, receipt is probable and its amount can be measured reliably.
- legacy income is recognised when receipt is probable and entitlement is established.
- income from donated goods is measured at the fair value of the goods unless this is impractical to measure reliably, in which case the value is derived from the cost to the donor or the estimated resale value. Donated facilities and services are recognised in the accounts when received if the value can be reliably measured. No amounts are included for the contribution of general volunteers.
- income from contracts for the supply of services is recognised with the delivery of the contracted service. This is classified as unrestricted funds unless there is a contractual requirement for it to be spent on a particular purpose and returned if unspent, in which case it may be regarded as restricted.

Resources expended

Expenditure is recognised on an accruals basis as a liability is incurred. Expenditure includes any VAT which cannot be fully recovered, and is classified under headings of the statement of financial activities to which it relates:

- expenditure on raising funds includes the costs of all fundraising activities, events, non-charitable trading activities, and the sale of donated goods.
- expenditure on charitable activities includes all costs incurred by a charity in undertaking activities that further its charitable aims for the benefit of its beneficiaries, including those support costs and costs relating to the governance of the charity apportioned to charitable activities.
- other expenditure includes all expenditure that is neither related to raising funds for the charity nor part of its expenditure on charitable activities.

All costs are allocated to expenditure categories reflecting the use of the resource. Direct costs attributable to a single activity are allocated directly to that activity. Shared costs are apportioned between the activities they contribute to on a reasonable, justifiable and consistent basis.

Financial instruments

A financial asset or a financial liability is recognised only when the charity becomes a party to the contractual provisions of the instrument.

Basic financial instruments are initially recognised at the amount receivable or payable including any related transaction costs.

Current assets and current liabilities are subsequently measured at the cash or other consideration expected to be paid or received and not discounted.

Debt instruments are subsequently measured at amortised cost.

Where investments in shares are publicly traded or their fair value can otherwise be measured reliably, the investment is subsequently measured at fair value with changes in fair value recognised in income and expenditure. All other such investments are subsequently measured at cost less impairment.

Other financial instruments, including derivatives, are initially recognised at fair value, unless payment for an asset is deferred beyond normal business terms or financed at a rate of interest that is not a market rate, in which case the asset is measured at the present value of the future payments discounted at a market rate of interest for a similar debt instrument.

Other financial instruments are subsequently measured at fair value, with any changes recognised in the statement of financial activities, with the exception of hedging instruments in a designated hedging relationship.

Financial assets that are measured at cost or amortised cost are reviewed for objective evidence of impairment at the end of each reporting date. If there is objective evidence of impairment, an impairment loss is recognised under the appropriate heading in the statement of financial activities in which the initial gain was recognised.

For all equity instruments regardless of significance, and other financial assets that are individually significant, these are assessed individually for impairment. Other financial assets are either assessed individually or grouped on the basis of similar credit risk characteristics.

Any reversals of impairment are recognised immediately, to the extent that the reversal does not result in a carrying amount of the financial asset that exceeds what the carrying amount would have been had the impairment not previously been recognised.

Defined contribution plans

Contributions to defined contribution plans are recognised as an expense in the period in which the related service is provided. Prepaid contributions are recognised as an asset to the extent that the prepayment will lead to a reduction in future payments or a cash refund.

When contributions are not expected to be settled wholly within 12 months of the end of the reporting date in which the employees render the related service, the liability is measured on a discounted present value basis. The unwinding of the discount is recognised as an expense in the period in which it arises.

4. Donations and legacies

	Unrestricted Funds £	Total Funds 2023 £	Unrestricted Funds £	Total Funds 2022 £
Donations				
Donations and gifts	21,474	21,474	27,187	27,187
Gift Aid	1,779	1,779	3,672	3,672
Legacies				
Legacies	–	–	16,245	16,245
	<u>23,253</u>	<u>23,253</u>	<u>47,104</u>	<u>47,104</u>

5. Investment income

	Unrestricted Funds £	Total Funds 2023 £	Unrestricted Funds £	Total Funds 2022 £
Other interest receivable	<u>1,102</u>	<u>1,102</u>	<u>272</u>	<u>272</u>

6. Costs of raising donations and legacies

	Unrestricted Funds £	Total Funds 2023 £	Unrestricted Funds £	Total Funds 2022 £
Costs of raising donations and legacies - Donations	<u>13,913</u>	<u>13,913</u>	<u>11,892</u>	<u>11,892</u>

7. Expenditure on charitable activities by fund type

	Unrestricted Funds £	Total Funds 2023 £	Unrestricted Funds £	Total Funds 2022 £
Expenditure on charitable activities	14,463	14,463	26,319	26,319
Support costs	4,842	4,842	5,076	5,076
	<u>19,305</u>	<u>19,305</u>	<u>31,395</u>	<u>31,395</u>

8. Expenditure on charitable activities by activity type

	Activities undertaken directly £	Support costs £	Total funds 2023 £	Total fund 2022 £
Expenditure on charitable activities	14,463	–	14,463	26,319
Support costs	–	4,241	4,241	4,578
Governance costs	–	601	601	498
	<u>14,463</u>	<u>4,842</u>	<u>19,305</u>	<u>31,395</u>

9. Staff costs

The average head count of employees during the year was Nil (2022: Nil).

No employee received employee benefits of more than £60,000 during the year (2022: Nil).

10. Trustee remuneration and expenses

No remuneration was paid to Trustees.

11. Debtors

	2023	2022
	£	£
Other debtors	5,510	2,062

12. Creditors: amounts falling due within one year

	2023	2022
	£	£
Trade creditors	2,974	6,879
Accruals and deferred income	6,600	498
	9,574	7,377

13. Deferred income

	2023	2022
	£	£
Amount deferred in year	6,000	—

14. Pensions and other post retirement benefits

Defined contribution plans

The amount recognised in income or expenditure as an expense in relation to defined contribution plans was £Nil (2022: £nil).

15. Analysis of charitable funds

Unrestricted funds

	At 1 April 2022	Income	Expenditure	At 31 March 2023
	£	£	£	£
General funds	4,089	24,355	(33,218)	(4,774)
Unrestricted funds	<u>111,079</u>	<u>—</u>	<u>—</u>	<u>111,079</u>
	<u>115,168</u>	<u>24,355</u>	<u>(33,218)</u>	<u>106,305</u>

	At 1 April 2021	Income	Expenditure	At 31 March 2022
	£	£	£	£
General funds	—	47,376	(43,287)	4,089
Unrestricted funds	<u>111,079</u>	<u>—</u>	<u>—</u>	<u>111,079</u>
	<u>111,079</u>	<u>47,376</u>	<u>(43,287)</u>	<u>115,168</u>

Accounts



The Archive of Market and Social Research Annual report 2021

Charity number – 1166619

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1 Chairman's foreword

Launched in 2015 and registered as a UK charity in 2016, the Archive of Market and Social Research (AMSR) is now well established as a unique, continually growing, online archive of British market and social research, freely available to all.

The initial priority when we began was simply to preserve the material, at a time when many market research departments and agencies were destroying their old paper files and reports. This essential work to preserve, scan and index paper documents continues.

But the Archive has now reached sufficient scale, and is now sufficiently navigable and searchable, to make it a potential resource for a wide range of people, including many with no knowledge of, or interest in, market research. Although most of the material was collected for commercial purposes or to support other decision-makers (e.g. in local or national government), the Archive contains rich insights into many different aspects of British culture and society over the last 60 years.

We have therefore begun to engage with potential users, starting with modern British social and cultural historians and now, also, an A-level history teacher and her pupils, introducing them to the Archive as a research and teaching resource. We now even have the first example of a peer-reviewed academic paper - about Siamese cats in the home - citing AMSR as a source.¹ We're also exploring the idea of AMSR as a hub with links to other online archives. There's more on these initiatives in the Chief Executive's report and on our website www.amsr.org.uk.

We have a lot of activity and momentum. So this year we've decided to write a slightly fuller Annual Report than the statutory minimum ones we've done in the past for the UK Charity Commission. We hope you find it helpful.

Finally, I'd like to thank all those who have enabled us to get to where we are, especially over the last three difficult years. That includes the leadership team and all the other volunteers working *pro bono* to turn into reality our shared vision of a global, open access, online archive of British market and social research, while prudently stewarding our limited financial resources. And it also includes our many other friends and supporters who have generously donated material and much needed and appreciated financial support. Thanks to your efforts and generosity, the AMSR is going from strength to strength – although there's still plenty to do!

Patrick Barwise
22 November 2022

¹ Jane Hamlett & Rebecca Preston (2022) "'Noisy, despotic, fascinating': Siamese cats and emotional and domestic life in twentieth-century Britain", Cultural and Social History, DOI: [10.1080/14780038.2022.2118075](https://doi.org/10.1080/14780038.2022.2118075).

2 Chief Executive's introduction

We have completed our first 5 years as a charity in good health and on a sound financial footing. We have assembled and preserved a considerable archive of important material, most of which is in the form of printed reports that were in danger of being lost. Nearly all of the content of the Archive is available online at no cost to the user².

We have extended and improved the indexing of the contents of the Archive to make it easier for non-researchers to find what they are looking for. Without a suitable index, it is difficult to locate specific topics in market research records unless the researcher has prior experience of working with market research. Over the next five years we are intending to continue to collect what remains of suitable printed material from the 1960s to 2010 after which most material was created and only published in digital formats. We have begun to collect this purely digital material and are thinking about ways that this can be usefully preserved when there is no equivalent of a traditional paper report.

We have started to promote the Archive as a useful source for historians, other academics and students interested in the recent history of Britain as recorded by market and social researchers. We are intending to establish AMSR as an important teaching aid for undergraduate students and schoolchildren as well as a source for academic researchers, and potentially for marketers interested in the long term evolution of their markets. We will be launching a hub that will help researchers and students to locate market and social research material that is available from other archives and commercial sources.

The last three years has been challenging for AMSR, as for everyone else, because of the impact of the Covid-19 pandemic. It has been difficult to sort and scan donated material because offices were closed for much of the time. Under the circumstances, and thanks to the efforts of our band of committed volunteers and the generosity of our supporters, we have been able to weather the crisis well, with only limited impact on our long term plans.

Adam Phillips
22 November 2022

² <https://www.amsr.org.uk/the-archive/>

3 Objectives and activities

3.1 Purposes

The purpose of the AMSR is to advance education and research in recent British social history, and in the development of Market and Social Research, Data Analytics, Insight and relevant marketing sectors, by preserving and providing access to reports and other relevant material.

All documents will be made readily available online and/or in physical form for those with an interest in post-1945 British social and cultural history, consumer markets, the history of the Market and Social Research sector and research methods.

The charity has due regard to the Charity Commission guidance on public benefit. Our purpose is to advance the education of the public in the development of market research and the role it plays in social history. Our online and physical archives are available to everyone. This constitutes a public benefit as defined in the Charities Act.

3.2 Activities

The Archive of Market and Social Research is building a library and store of materials, both physical and online, relating to market and social research in the UK.

We are collecting and preserving survey results that reflect the changing behaviour, attitudes and opinions of people living in the UK over time. We intend this material to support teaching and research in history, sociology, economics and business studies and to inform journalists and interested members of the public. The collection will increasingly include contemporary records and is intended to be a living and continually updated archive.

We have started developing links with universities, particularly with academics in the field of Social History, to demonstrate what is available to them in the AMSR archive. At the same time, we are also developing links with schools to support students producing dissertations for their A-level exams.

This year we published our second book³. Like the first, this is based on material from the AMSR archive and is designed to promote the unique material available in the Archive and to demonstrate the role and value of market and social research in society.

The Archive also contains documents and records for those wishing to gain insight into the history, achievements, methods and activities of the market and social research industry and profession. No other central archive currently exists.

AMSR maintains an online searchable archive, accessible over the internet, containing scanned documents of survey results that reflect changing habits and attitudes, for perusal by anyone with an interest in social history.

³ How We've Changed; Social Trends from Post War to Present Day and Beyond – The Archive of Market and Social Research 2021 <https://www.amsr.org.uk/publications/>

Our activities include:

1. collecting and preserving important research reports and data that is at risk of being lost;
2. making as much of the material in the archive as possible available and searchable via the internet at no cost to the user;
3. developing links with universities and schools to encourage them to use the material in the archive for teaching and research purposes;
4. publicising the Archive and encouraging its use by academics, students, journalists and members of the public interested in social history and the information collected by market researchers in the course of their work;
5. providing help for users searching the archive for information relating to their interests;
6. establishing working links with other similar archives and databases at universities and elsewhere;
7. publishing books based on material from the archive to demonstrate the role and value of market and social research;
8. seeking out and building a library of research books, papers and reports relating to the development and conduct of market and social research , including those held by clients;
9. rescuing and cataloguing the historical records of the bodies involved in the development of the market and social research profession in the UK;
10. assembling and recording key biographical information about market and social researchers, past and present;
11. assembling a historical database of professional codes of conduct and practice of relevant bodies that have been involved in activities dealing in information collected from and about members of the public; and also collecting important papers and articles concerned with the responsible collection, processing and use of such data;
12. cataloguing and storing all records in a secure and accessible form; and
13. storing any other records, documents or other media that are relevant to its purpose.

4 Achievements and performance

4.1 Summary of main achievements

We have now collected nearly 750 books and 6000 reports and documents

A total of 130,000 pages are freely available in the online digital archive almost half of which were added during 2021 – a remarkable achievement given the restrictions that the Covid lockdown imposed on our office-based activities.

New additions to our collection include:

- A research report from 1963 entitled 'Cinema Going in Greater London: A Study of Attitudes and Culture' plus 3 video interviews on the context of the work – which together offer unique insights into the culture of the time.

- A collection of reports on qualitative research on banking and financial services in the 1990s, which provides interesting insights into the transition from paper-based to electronic banking.
- Market Research Society Annual Conference papers from 1960-1999, providing a comprehensive account of the development of market research in this period.

We have created a new theme-based indexing system and applied it to all the items in the archive (except for the books). This should make it easier for users who are not familiar with market research to grasp the range of material that the archive contains, and to browse within their fields of interest.

We have been able to assist a number of Modern British History academics and PhD students with their research, Marketing undergraduates with their business plans and dissertations, and A-level History students with their coursework dissertations.

We are continuing to build our Heritage collection and have begun to develop 'Modern Collections' that will enable us to preserve more recent market research material. This will ensure that AMSR continues to be relevant in the future by continuing to provide up-to-date material for:

- students in universities and schools,
- future historians, and
- current researchers seeking background information to inform strategic research.

We are undertaking a research project at the moment which will help us understand the extent to which research agencies currently archive their work, and whether they have standard policies and procedures for doing this. We want to understand how AMSR can help them ensure that important work they have carried out is not lost as their companies grow, merge with others or are sold.

We continue to publish a quarterly Newsletter and bi-monthly news Updates and have now published our second book⁴ covering post-war social and cultural history. We are raising awareness of what the archive contains by promoting stories from the archive on our website and through social media (using LinkedIn and Twitter), and by speaking at conferences and meetings where there may be potential users.

4.2 Progress against objectives

Our objectives this year included:

1. increasing the flow of contributions of heritage (paper) material
 - The pandemic meant our Harrow scanning operation remained out of operation, so scanning was done by volunteers at home.
 - We have carried out a thorough quality control process to ensure the accuracy of information in the archive e.g. correcting mis-scans and text.

⁴ How We've Changed; Social Trends from Post War to Present Day and Beyond – The Archive of Market and Social Research 2021 <https://www.amsr.org.uk/publications/>

- We have re-indexed and reloaded the entire archive using a consistent theme-based index scheme to improve searching.
- 2. starting to create 'Modern Collections' (mostly digital material) that will preserve *current* MR history and provide research sources for future social historians and students
 - We have the offer of brand and communications material from Big Green Door covering the period 1995-2018.
 - A generous legacy enabled us to undertake a research project to gauge attitudes of market research companies to providing content for our Modern Collections.
- 3. continuing work to resolve client confidentiality issues – these are still a key barrier for many potential contributors, particularly of qualitative work.
- 4. encouraging and supporting greater utilisation of the archive by continuing to engage with potential users and further developing the Volunteer Query Response Team, who can support users by answering questions about the content of the archive.
- 5. developing a business plan for preserving the MORI Library following a pilot scanning project being undertaken by the British Library.
- 6. further developing the concept of the archive as an online 'hub'.
- 7. continuing to build a strong brand
 - We publish quarterly newsletters and interim updates.
 - We make active use of social media and are consistently gaining Twitter and LinkedIn followers.
 - We generate website stories from archive content and publish these on our website.
 - We published our second book covering post-war social and cultural history, based on research from our archive. This was supported by a launch event at the IPA in November 2021.
 - We have relaunched the Oral Histories on our portal and now have 35 recordings of interviews with current and past leaders in the research industry. We continue to work with the Research Network on expanding this collection.
- 8. pursuing our successful fundraising efforts
 - We exceeded our target donations from individuals and companies.
 - We received sponsorship for our two published books and are now using these as a new funding stream.
 - We generated income from book royalties and sales.

4.3 Financial position and reserves

We attracted donations of £30,859, which includes £3,672 of Gift Aid. We managed to exceed our target despite the ongoing restrictions of the pandemic. In addition, we received a balancing payment of £16,245 from a legacy.

Our total operating expenditure was £43,287 of which £13,686 was a one-off payment for a research project into how research agencies are archiving their research results, and how we need to preserve these. We are considering how best to use the legacy to maintain sustainable growth.

Our reserves are £115,168.

Significant items of expenditure are the cost of storage space at the History of Advertising Trust, to which a 24 month notice period applies, and for the website and online archive. We would need 12 months' notice to ensure the long term preservation of the material we have collected if AMSR were to become insolvent.

4.4 Principal sources of funds

The funds have been raised from nearly 20 companies and some 75 individual donors. Gift Aid has been claimed where possible. In addition, we received the final part of a legacy this year and are encouraging other supporters to consider leaving a legacy to us.

We are grateful for the logistical support that we receive from industry bodies and companies, notably the MRS, Ronin International and I-View.

5 Structure, governance and management

AMSR is constituted as a charitable incorporated organisation (CIO) and is governed by a trust deed.

The organisation is led by the Executive committee which consists of the Chairs and Vice chairs of the four key committees that run the organisation. The Executive Committee meets monthly and reports to the Board of Trustees. The four committees are:

- Contents
- Marketing
- Governance, and
- Finance

Trustees are chosen for the skills and experience they bring to the organisation and are elected for a three-year term by a meeting of the Trustees. Many of our trustees sit on the Committees.

All trustees have received training in the responsibilities of charity trustees and an induction pack that includes:

1. The constitution of AMSR
2. The essential trustee: what you need to know, what you need to do (CC3)
3. Charity fundraising: a guide to trustee duties (CC20).
4. The Advancement of Education for the Public Benefit (PB3).

6 Reference and administrative details

The Archive of Market and Social Research (also known as The AMSR), registered charity number 1166619.

Principal address: Old Malt House, 21 Watling Lane, Dorchester on Thames, Wallingford, OX10 7JG

6.1 Trustees

Professor Patrick Barwise, Chairman of the AMSR Board

Patrick (Paddy) Barwise is Emeritus Professor of Management and Marketing at London Business School which he joined in 1976 after an early career at IBM and has published widely on management, marketing and media. He is a former Chairman of Which? He has been Vice-chairman of AMSR since 2018 and became Chairman in early 2020.

Jane Frost CBE

Jane Frost is Vice Chair of the AMSR and Chief Executive of the Market Research Society (MRS). She has over 30 years of experience at board level in marketing and strategy positions at blue-chip organisations. Jane comes from the 'client' side. She is currently leading radical change at MRS and provides an important link between the industry's association and its archive.

Adam Phillips

Adam is Chief Executive of the AMSR. In over 40 years in market research, he has been involved in media measurement, public opinion research, brand development as well as product and pricing research. An MRS Fellow, past Chairman of the MRS, a Council Member at ESOMAR and Chairman of its Professional Standards Committee, he began his career at Unilever and went on to hold senior positions at BMRB, Mass-Observation, Euroquest, Research International and Winona Research in the US. He has been Chair of the Financial Services Consumer Panel and a lay member of the Press Complaints Commission. In 2016 he received the ESOMAR award for Market Research Excellence.

Raz Khan

Raz Khan is treasurer of the AMSR and has been a Trustee since its inception, originally acting as a liaison with the MRS Board. Raz is Chairman of Cobalt Sky, an operations support company which he has been managing since 1989. He started in MR operations in 1977 at Pritchard Brown and Taylor before moving to Quantime in 1982 where he managed the DP and Support department. He joined AGB in 1988 for a brief spell where he was part of the Superpanel team.

Ian Brace

Ian Brace is the Secretary of AMSR. After more than 40 years as a market researcher, mostly within research agencies, Ian is now retired from full time work. Originally trained as a statistician, he spent most of his career in project design, analysis and project management before ending up as Director of Research Methods at Kantar TNS UK. He is a Fellow of the MRS, author of many published papers and two books and is chairman of the industry's charity, the Market Research Benevolent Association (MRBA)

Peter Bartram

Peter Bartram has had a varied career in both research and marketing with NOP, Thomson Newspapers, and the Harris Poll firm in London, New York, and Los Angeles. Back in the UK in 1978, he was a Marketing Director at American Express Europe, MRS Chairman in 1989, and finally President of the City Research Group. With 41 others, he set up the Research Network in 2002, which is still going strong.

Phyllis Macfarlane

Phyllis Macfarlane is a lifelong Market Researcher, former Managing Director of GfK NOP and immediate past Chair of the Market Research Society (MRS). She was previously Global Training Manager at GfK UK and has spent several years delivering, and expanding the offering of, market research education and training in Africa and Asia. She believes in bringing the global market research community and the non-profit sector together to learn from one another and achieve best results for all – mainly through her role as Treasurer of ESOMAR Foundation. She has won both the MRS Silver Medal in 2008, and in 2018 the European Society for Opinion and Marketing Research Excellence Award.

Simon Patterson

Simon is Chief Executive of QRI Consulting which he founded 10 years ago. An international qualitative researcher: Simon is a Chartered Psychologist, Fellow of the MRS and Board member (and former Chair) of the AQR (Association for Qualitative Research). He moderates ECGs®, Groups and IDIs in-person and online. Formerly Managing Director at CRAM International, he worked with its founder Peter Cooper for 25 years. Simon has written papers and presented at conferences on the Origins of Qualitative Research and the Psychology of Branding and Communication. He has been a visiting lecturer at the Institute for Manufacturing (IfM) at Cambridge University since 2010.

Sue Robson

Sue gained a solid grounding in all types of market research at BMRB, but then joined MBL to focus on qualitative research with John and Mary Goodyear. She worked at MBL for 10 years, ending up as Managing Director. In 1981 Sue started her own business, The Qualitative Consultancy, TQC. Sue also ran training courses for the MRS including developing, in 1983, the very first course offering practical hands-on experience of moderating group discussions. This led to the book she wrote and co-edited with Angela Foster, *Qualitative Research in Action*, published in 1989. She was a member of MRS Council from the 1980s and a founder member of AQR, to give qualitative researchers their own strong voice. She was made a Fellow of the MRS in 1998.

After closing TQC in 2002 Sue worked as a consultant until retirement. She does various volunteer roles and was an MRBA committee member for 10 years and then joined AMSR in 2019, chairing the Marketing Committee.

Phyllis Vangelder

Phyllis was an Editor in the market research industry for many years, accumulating knowledge and contacts in all aspects of market and social research. She was in charge of publications at the Market Research Society for over 25 years including the MRS Newsletter (the forerunner of *Research*), the Journal of the Market Research Society (now the *International Journal of Market Research*), Market Research Abstracts and Survey

magazine, as well as being heavily involved in many committees. She has been Editor of ESOMAR Newsbrief, ESOMAR Research World, BMRA Bulletin and BMRA's MR Business. Phyllis has also co-edited various Handbooks.

Dr Elizabeth Nelson OBE, founding Chair of AMSR (2016-2019), retired as a trustee on 31 March 2022.

Bryan Bates retired as a trustee on 31 March 2021.

6.2 President

Denise Lievesley is an Honorary Fellow of Green Templeton College, University of Oxford, having been Principal from 2015 until September 2020. Before coming to Oxford, she was Executive Dean of the Faculty of Science and Public Policy and Professor of Social Statistics at King's College London. She has been Chief Executive of the English Health and Social Care Information Centre, Director of Statistics at UNESCO, where she founded the Institute for Statistics, and Director (1991-1997) of the UK Data Archive.

Denise served as President of the Royal Statistical Society (1999 - 2001), and as President of the International Statistical Institute (2007 - 2009) and the International Association for Official Statistics (1995 - 1997).

A Fellow of University College London (her alma mater), she has honorary doctorates from City University and the University of Essex and is a founding Fellow of the Academy of Social Sciences. Her research interests relate broadly to the quality and trust in official data, and the use of data for research purposes. She was appointed Commander of the Order of the British Empire (CBE) in the Queen's Birthday Honours in June 2014 for services to social science.

7 Declarations

The company has taken advantage of the small companies' exemption in preparing the report above.

The trustees declare that they have approved the trustees' report (including directors' report) above.

Signed on behalf of the charity's trustees/directors:

Chairman: Professor Patrick Barwise

22 December 2022

Independent Examiner's Report to the Trustees of The Archive of Market and Social Research

Year ended 31 March 2022

I report to the trustee on my examination of the financial statements of The Archive of Market and Social Research ('the charity') for the year ended 31 March 2022.

Responsibilities and basis of report

As the trustee of the charity you are responsible for the preparation of the financial statements in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's financial statements carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the charity as required by section 130 of the Act; or
2. the financial statements do not accord with those records; or
3. the financial statements do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Alistair Henry Ellis Smith FCA
Ferguson Maidment & Co., 167 Fleet Street, London, EC4A 2EA

Independent Examiner

Statement of Financial Activities

Year ended 31 March 2022

		2022		2021
		Unrestricted	Total funds	Total funds
	Note	funds		
		£	£	£
Income and endowments				
Donations	4	30,859	30,859	30,013
Legacies	4	16,245	16,245	49,988
Investment income	5	272	272	107
Total income		<u>47,376</u>	<u>47,376</u>	<u>80,108</u>
Expenditure				
Expenditure on raising funds:				
Costs of raising donations and legacies	6	11,892	11,892	11,917
Expenditure on charitable activities	7,8	31,395	31,395	14,402
Total expenditure		<u>43,287</u>	<u>43,287</u>	<u>26,319</u>
Net income and net movement in funds		<u>4,089</u>	<u>4,089</u>	<u>53,789</u>
Reconciliation of funds				
Total funds brought forward		111,079	111,079	57,290
Total funds carried forward		<u>115,168</u>	<u>115,168</u>	<u>111,079</u>

The statement of financial activities includes all gains and losses recognised in the year. All income and expenditure derive from continuing activities.

Statement of Financial Position

31 March 2022

	Note	2022 £	2021 £
Current assets			
Debtors	11	2,062	3,589
Cash at bank and in hand		120,483	109,914
		<u>122,545</u>	<u>113,503</u>
Creditors: amounts falling due within one year	12	7,377	2,424
Net current assets		<u>115,168</u>	<u>111,079</u>
Total assets less current liabilities		<u>115,168</u>	<u>111,079</u>
Net assets		<u><u>115,168</u></u>	<u><u>111,079</u></u>
Funds of the charity			
Unrestricted funds		115,168	111,079
Total charity funds	14	<u><u>115,168</u></u>	<u><u>111,079</u></u>

These financial statements were approved by the board of trustees and authorised for issue on 21 December 2022, and are signed on behalf of the board by: Raz Khan, Treasurer.

Notes to the Financial Statements

Year ended 31 March 2022

1. General information

The charity is a public benefit entity and a registered charity in England and Wales and is unincorporated. The address of the principal office is .

2. Statement of compliance

These financial statements have been prepared in compliance with FRS 102, 'The Financial Reporting Standard applicable in the UK and the Republic of Ireland', the Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (Charities SORP (FRS 102)) and the Charities Act 2011.

3. Accounting policies

Basis of preparation

The financial statements have been prepared on the historical cost basis, as modified by the revaluation of certain financial assets and liabilities and investment properties measured at fair value through income or expenditure.

The financial statements are prepared in sterling, which is the functional currency of the entity.

Going concern

There are no material uncertainties about the charity's ability to continue.

Fund accounting

Unrestricted funds are available for use at the discretion of the trustees to further any of the charity's purposes.

Designated funds are unrestricted funds earmarked by the trustee for particular future project or commitment.

Restricted funds are subjected to restrictions on their expenditure declared by the donor or through the terms of an appeal, and fall into one of two sub-classes: restricted income funds or endowment funds.

Notes to the Financial Statements

Year ended 31 March 2022

Incoming resources

All incoming resources are included in the statement of financial activities when entitlement has passed to the charity; it is probable that the economic benefits associated with the transaction will flow to the charity and the amount can be reliably measured. The following specific policies are applied to particular categories of income:

- income from donations or grants is recognised when there is evidence of entitlement to the gift, receipt is probable and its amount can be measured reliably.
- legacy income is recognised when receipt is probable and entitlement is established.
- income from donated goods is measured at the fair value of the goods unless this is impractical to measure reliably, in which case the value is derived from the cost to the donor or the estimated resale value. Donated facilities and services are recognised in the accounts when received if the value can be reliably measured. No amounts are included for the contribution of general volunteers.
- income from contracts for the supply of services is recognised with the delivery of the contracted service. This is classified as unrestricted funds unless there is a contractual requirement for it to be spent on a particular purpose and returned if unspent, in which case it may be regarded as restricted.

Resources expended

Expenditure is recognised on an accruals basis as a liability is incurred. Expenditure includes any VAT which cannot be fully recovered, and is classified under headings of the statement of financial activities to which it relates:

- expenditure on raising funds includes the costs of all fundraising activities, events, non-charitable trading activities, and the sale of donated goods.
- expenditure on charitable activities includes all costs incurred by a charity in undertaking activities that further its charitable aims for the benefit of its beneficiaries, including those support costs and costs relating to the governance of the charity apportioned to charitable activities.
- other expenditure includes all expenditure that is neither related to raising funds for the charity nor part of its expenditure on charitable activities.

All costs are allocated to expenditure categories reflecting the use of the resource. Direct costs attributable to a single activity are allocated directly to that activity. Shared costs are apportioned between the activities they contribute to on a reasonable, justifiable and consistent basis.

Financial instruments

A financial asset or a financial liability is recognised only when the charity becomes a party to the contractual provisions of the instrument.

Basic financial instruments are initially recognised at the amount receivable or payable including any related transaction costs.

Notes to the Financial Statements

Year ended 31 March 2022

Current assets and current liabilities are subsequently measured at the cash or other consideration expected to be paid or received and not discounted.

Debt instruments are subsequently measured at amortised cost.

Where investments in shares are publicly traded or their fair value can otherwise be measured reliably, the investment is subsequently measured at fair value with changes in fair value recognised in income and expenditure. All other such investments are subsequently measured at cost less impairment.

Other financial instruments, including derivatives, are initially recognised at fair value, unless payment for an asset is deferred beyond normal business terms or financed at a rate of interest that is not a market rate, in which case the asset is measured at the present value of the future payments discounted at a market rate of interest for a similar debt instrument.

Other financial instruments are subsequently measured at fair value, with any changes recognised in the statement of financial activities, with the exception of hedging instruments in a designated hedging relationship.

Financial assets that are measured at cost or amortised cost are reviewed for objective evidence of impairment at the end of each reporting date. If there is objective evidence of impairment, an impairment loss is recognised under the appropriate heading in the statement of financial activities in which the initial gain was recognised.

For all equity instruments regardless of significance, and other financial assets that are individually significant, these are assessed individually for impairment. Other financial assets are either assessed individually or grouped on the basis of similar credit risk characteristics.

Any reversals of impairment are recognised immediately, to the extent that the reversal does not result in a carrying amount of the financial asset that exceeds what the carrying amount would have been had the impairment not previously been recognised.

Defined contribution plans

Contributions to defined contribution plans are recognised as an expense in the period in which the related service is provided. Prepaid contributions are recognised as an asset to the extent that the prepayment will lead to a reduction in future payments or a cash refund.

When contributions are not expected to be settled wholly within 12 months of the end of the reporting date in which the employees render the related service, the liability is measured on a discounted present value basis. The unwinding of the discount is recognised as an expense in the period in which it arises.

Notes to the Financial Statements
Year ended 31 March 2022

4. Donations and legacies

	Unrestricted Funds £	Total Funds 2022 £	Unrestricted Funds £	Total Funds 2021 £
Donations				
Donations and gifts	27,187	27,187	26,394	26,394
Gift Aid	3,672	3,672	3,619	3,619
Legacies				
Legacies	16,245	16,245	49,988	49,988
	<u>47,104</u>	<u>47,104</u>	<u>80,001</u>	<u>80,001</u>

5. Investment income

	Unrestricted Funds £	Total Funds 2022 £	Unrestricted Funds £	Total Funds 2021 £
Other interest receivable	<u>272</u>	<u>272</u>	<u>107</u>	<u>107</u>

6. Costs of raising donations and legacies

	Unrestricted Funds £	Total Funds 2022 £	Unrestricted Funds £	Total Funds 2021 £
Costs of raising donations and legacies - Donations	<u>11,892</u>	<u>11,892</u>	<u>11,917</u>	<u>11,917</u>

7. Expenditure on charitable activities by fund type

	Unrestricted Funds £	Total Funds 2022 £	Unrestricted Funds £	Total Funds 2021 £
Expenditure on charitable activities	26,319	26,319	9,866	9,866
Support costs	<u>5,076</u>	<u>5,076</u>	<u>4,536</u>	<u>4,536</u>
	<u>31,395</u>	<u>31,395</u>	<u>14,402</u>	<u>14,402</u>

Notes to the Financial Statements
Year ended 31 March 2022

8. Expenditure on charitable activities by activity type

	Activities undertaken directly £	Support costs £	Total funds 2022 £	Total fund 2021 £
Direct Expenditure on charitable activities	26,319	–	26,319	9,866
Administration costs	–	4,578	4,578	4,038
Governance costs	–	498	498	498
	<u>26,319</u>	<u>5,076</u>	<u>31,395</u>	<u>14,402</u>

9 Staff costs

The average head count of employees during the year was Nil (2021: Nil).

No employee received employee benefits of more than £60,000 during the year (2021: Nil).

10. Trustee remuneration and expenses

No remuneration was paid to Trustees

11. Debtors

	2022 £	2021 £
Trade debtors	–	2,400
Other debtors	2,062	1,189
	<u>2,062</u>	<u>3,589</u>

12. Creditors: amounts falling due within one year

	2022 £	2021 £
Trade creditors	6,879	1,926
Accruals and deferred income	498	498
	<u>7,377</u>	<u>2,424</u>

13. Pensions and other post retirement benefits

Defined contribution plans

The amount recognised in income or expenditure as an expense in relation to defined contribution plans was £nil (2021: £nil).

Notes to the Financial Statements
Year ended 31 March 2022

14. Analysis of charitable funds

Unrestricted funds

	At 1 Apr 2021	Income	Expenditure	At 31 Mar 2022
	£	£	£	£
General funds	–	47,376	(43,287)	4,089
Unrestricted funds	<u>111,079</u>	<u>–</u>	<u>–</u>	<u>111,079</u>
	<u>111,079</u>	<u>47,376</u>	<u>(43,287)</u>	<u>115,168</u>

	At 1 Apr 2020	Income	Expenditure	At 31 Mar 2021
	£	£	£	£
General funds	–	80,108	(26,319)	53,789
Unrestricted funds	<u>57,290</u>	<u>–</u>	<u>–</u>	<u>57,290</u>
	<u>57,290</u>	<u>80,108</u>	<u>(26,319)</u>	<u>111,079</u>

Accounts

THE ARCHIVE OF MARKET AND SOCIAL RESEARCH

CHARITY NUMBER - 1166619

FINANCIAL REPORT AND STATEMENTS OF ACCOUNT

FOR THE YEAR ENDED 31 MARCH 2021



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

Trustees' annual report (including Directors' report) for the period

From: 1 April 2020

To: 31 March 2021

Charity name: Archive of Market and Social Research

Charity registration number: 1166619

Company number:

Objectives and activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The purpose of the AMSR is to advance the education of the public in the fields of the history and significance of market and social research and the development of the market research industry in the UK primarily through the creation and maintenance of an archive of relevant material and associated activities.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	The Archive for Market and Social Research is building a library and store of materials, both physical and online relating to market and social research in the UK. The archive is building a collection of survey results which reflect the changing habits and attitudes of the UK population over time. We intend these to be used to support the teaching of history, sociology, economics and business studies as well as informing journalists and interested members of the public. The collection will include contemporary records and is intended to be a living archive that is continually updated. In addition the archive consists of documents and records for those wishing to gain insight into the history, achievements, methods and activities of the market and social research industry and profession. No such single central archive currently exists. The organisation does the following: - maintains an online searchable archive, accessible over the internet, containing scanned documents of survey results that reflect changing habits and attitudes for perusal by anyone with an interest in social history; - rescues and catalogues the historical records of the bodies involved in the development of

		the market and social research profession in the UK; iii. maintains an online searchable archive of documents relating to the history of market and social research and its impact on society; iv. seeks out and builds a database of research books, papers and reports relating to the development and conduct of the market and social research profession and industry, including those held by clients; v. assembles and records key biographical information about market and social researchers, past and present; vi. assembles a historical database of professional codes of conduct and practice of relevant bodies which have been involved in activities which deal in information collected from and about members of the public, and also collects important papers and articles etc. concerned with the responsible collection, processing and use of such data; vii. catalogues and stores all records in a secure and accessible form; viii. establishes working links with other similar archives and databases at universities and elsewhere, and ix. stores any other records, documents or other media that are relevant to its purpose.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The trustees have appointed a governance sub-committee whose purpose is to ensure that trustees are aware of their responsibilities as a charity. The governance committee trains trustees and conducts periodical reviews of performance. We believe that we are operating with due regard to the Commission's public benefit guidance.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	Apart from a paid part-time administrator and web site manager the AMSR is run entirely by volunteers and the trustees thank them for their invaluable contribution and commitment to the organisation.

Other		

Achievements and performance

Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	The charity has now been operating for five years. Despite the restrictions imposed by the COVID-19 pandemic we have continued to operate remotely. We have continued to build the archive and attract users: We have now collected over 750 books and 6400 documents which take up over 35 metres of shelf space at the History of Advertising Trust. Our online archive contains over 130,000 searchable pages which are accessible at no cost to the user. In the last year we have added around 55,000 new pages. New additions to our collection include: • A large collection of global research reports, training material and reminiscences from people who worked in Research International. Now also part of Kantar. • A collection of BBC audience research reports that are not in the BBC archives. • Also, a collection of early Journals and conference papers from the Market Research Society, most of which are not available online from any other source. • Further reports and papers from Peter Cooper and CRAM, his company, doubling the number of qualitative research reports in the CRAM collection available online from 500 to 1100. They cover the years 1970 to 1979. We expect to be able to add more in the future as time passes and we address concerns about commercial sensitivity. Peter Cooper was one of the leading figures in commercial qualitative research from 1969-2009 • Our latest acquisition is a collection of Research News the journal of The Research Society in Australia. We have rationalised our catalogue and are introducing a new index that will make it much easier for users who are not familiar with the contents of our archive to find the information they are seeking. We have a set up small team of people who are able to assist academic researchers who are trying to find out if we have useful material on a topic that they are researching. We continue to publish a quarterly newsletter and bi-monthly news Updates. We are increasing awareness of what the Archive contains by
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		promoting Stories from the Archive on our website and through social media using LinkedIn and Twitter and by speaking at relevant conferences and meetings where there may be potential users.
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	Our objectives this year included: • Raising awareness among key target groups and generating traffic to our website and online archive. – We continued to use social media actively, gaining Twitter and LinkedIn followers. – We continued to add website stories linked to content in the archive. – We engaged with academic social historians to understand their areas of interest and how they might use AMSR – We published a Book to commemorate the 75th anniversary of the founding of the Market Research Society. The book contained essays by key industry figures on aspects of the industry, referencing archive content. – We continue to curate the archive by looking for and publicising historical material that resonates with current events. – Presented at the virtual Market Research Society conference, gaining exposure to hundreds of industry professionals. – Moved our annual supporter event online, publicising our work to supporters and potential supporters. The Event was held in March 2021, with key speakers including our President Denise Lievesley CBE, former Director of the UK Data Archive, Professor Claire Langhamer, Professor of Modern British History at the University of Sussex and Ben Page, Chief Executive of Ipsos MORI. The speakers showcased the importance of preserving recent historical material. The event was attended by c80 people and recordings of the speeches are available on our website • Raising sufficient funds to ensure that our development momentum can be maintained. – We met our target for donations for the year and received a substantial legacy from a trustee's estate. • Search for relevant material for the archive with an emphasis on its usefulness to social and business historians and all other authors, research practitioners and users. – In the last year, we have increased the number of documents in the archive by 30% and the number of pages available online by 70% • Explore opportunities for developing the Archive's use for education and journalism
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		- We have carried out research with St Mary's University in Twickenham to understand areas of potential demand for our services in the academic sector. This work is ongoing. - We have approached several academic historians and have started to provide them with relevant material for their work. We expect that this will stimulate further demand for our services in the future. - We have not yet been successful in attracting journalists and researchers from TV, radio and the press, but we hope that they will come as we expand our social media activity and make potential users aware of the new index for searching topics, rather than relying on word search.
Performance of fundraising activities against objectives set	Para 1.41	We attracted donations of over £30,000, managing to achieve our target despite the pandemic, and retain a surplus of £3,700. In addition, we received a legacy of £50,000 and are considering how best it can be used to maintain sustainable growth.
Investment performance against objectives	Para 1.41	
Other		

Financial review

Review of the charity's financial position at the end of the period	Para 1.21	We received £30,013 in donations and gift aid and spent £26,319 in operating costs. In addition we have received a legacy of £50,000. We hold £111,079 in reserves.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Significant items of expenditure are for storage space at the History of Advertising Trust, for which a 24 month notice period applies, and for the website and online archive. We would need 12 months' notice to ensure the long term preservation of the material we have collected if AMSR were to become insolvent. As stated earlier, we are considering how best to use the legacy to maintain sustainable growth.
Amount of reserves held	Para 1.22	£111,079
Reasons for holding zero reserves	Para 1.22	
Details of fund materially in deficit	Para 1.24	
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	The funds have been raised from both corporate and individual donors, and gift aid has been claimed where possible. In addition, we received a significant legacy and we will be encouraging other supporters to consider leaving a legacy to us.
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, governance and management

Description of charity's trusts:		
Type of governing document: for example, trust deed, memorandum and articles of association etc	Para 1.25	Trust deed
How is the charity constituted? for example limited company, unincorporated association, CIO	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	The founders of the organisation have volunteered to serve as trustees and some sit on the executive committees. Additional trustees have been chosen for the skills they bring to the organisation and are elected for a three year term by a meeting of the trustees.

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	All trustees have received training in the responsibilities of charity trustees and an induction pack that includes the constitution of AMSR, CC3, The Advancement of Education for the Public Benefit and CC20.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	The Charity is governed by the Board of Trustees. Activity is controlled by four key committees; Contents, Marketing, Finance and Governance. The Chair and Vice-chair of each of these committees are also Trustees and sit on an Executive Committee that meets monthly.
Relationship with any related parties	Para 1.51	
Other		

Reference and administrative details

Charity name	The Archive of Market and Social Research
Other name the charity uses	The AMSR
Registered charity number	1166619
Charity's principal address	Old Malt House, 21 Watling Lane, Dorchester on Thames, Wallingford, OX10 7JG

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Prof. Patrick Barwise	Chairman		
2	Ian Brace	Secretary		
3	Adam Phillips	Chief Executive		
4	Raz Khan	Treasurer		
5	Liz Nelson			
6	Phyllis Vangelder			
7	Peter Bartram			
8	Simon Patterson			
9	Jane Frost CBE			
10	Bryan Bates			
11	Phyllis MacFarlane			
12	Susan Blyth			
13				
14				
15				
16				
17				
18				
19				
20				

Corporate trustees – names of the directors at the date the report was approved

Director name	

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)**Names and addresses of advisers (optional information)**

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (optional information)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information

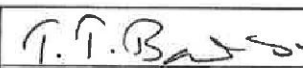
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Declarations

The company has taken advantage of the small companies' exemption in preparing the report above.

The trustees declare that they have approved the trustees' report (including directors' report) above.

Signed on behalf of the charity's trustees/directors

Signature(s)		
Full name(s)	Prof. Patrick Barwise	
Position (for example Secretary, Chair, etc)	Chairman	
Date	20.10.21	



Annual accounts for the period

Period start date

01/04/2020

To

Period end
date

31/03/2021

Section A

Statement of financial activities

Recommended categories by activity	Guidance Notes	Unrestricted funds	Restricted income funds	Endowment funds	Total funds	Prior year funds
		£ F01	£ F02	£ F03	£ F04	£ F05
Incoming resources (Note 3)						
Income and endowments from:						
Donations and legacies	S01	80,001	-	-	80,001	32,666
Charitable activities	S02	-	-	-	-	-
Other trading activities	S03	-	-	-	-	-
Investments	S04	107	-	-	107	276
Separate material item of income	S05	-	-	-	-	-
Other	S06	-	-	-	-	-
Total	S07	80,108	-	-	80,108	32,942
Resources expended (Note 6)						
Expenditure on:						
Raising funds	S08	11,917	-	-	11,917	12,627
Charitable activities	S09	9,866	-	-	9,866	11,537
Separate material item of expense	S10	-	-	-	-	-
Other	S11	4,536	-	-	4,536	4,131
Total	S12	26,319	-	-	26,319	28,295
Net income/(expenditure) before investment gains/(losses)						
Net gains/(losses) on investments	S13	53,789	-	-	53,789	4,647
Net income/(expenditure)	S14	-	-	-	-	-
Extraordinary items	S15	53,789	-	-	53,789	4,647
Transfers between funds	S16	-	-	-	-	-
Other recognised gains/(losses):	S17	-	-	-	-	-
Gains and losses on revaluation of fixed assets for the charity's own use	S18	-	-	-	-	-
Other gains/(losses)	S19	-	-	-	-	-
Net movement in funds	S20	53,789	-	-	53,789	4,647
Reconciliation of funds:						
Total funds brought forward	S21	57,290	-	-	57,290	52,643
Total funds carried forward	S22	111,079	-	-	111,079	57,290

Section B Balance sheet

		Guidance Notes	Unrestricted funds £ F01	Restricted income funds £ F02	Endowment funds £ F03	Total this year £ F04	Total last year £ F05
Fixed assets							
Intangible assets	(Note 15)	B01	-	-	-	-	-
Tangible assets	(Note 14)	B02	-	-	-	-	-
Heritage assets	(Note 16)	B03	-	-	-	-	-
Investments	(Note 17)	B04	-	-	-	-	-
Total fixed assets		B05	-	-	-	-	-
Current assets							
Stocks	(Note 18)	B06	-	-	-	-	-
Debtors	(Note 19)	B07	3,589	-	-	3,589	9,490
Investments	(Note 17.4)	B08	-	-	-	-	-
Cash at bank and in hand (Note 24)		B09	109,914	-	-	109,914	48,298
Total current assets		B10	113,503	-	-	113,503	57,788
Creditors: amounts falling due within one year	(Note 20)	B11	2,424	-	-	2,424	498
Net current assets/(liabilities)		B12	111,079	-	-	111,079	57,290
Total assets less current liabilities		B13	111,079	-	-	111,079	57,290
Creditors: amounts falling due after one year	(Note 20)	B14	-	-	-	-	-
Provisions for liabilities		B15	-	-	-	-	-
Total net assets or liabilities		B16	111,079	-	-	111,079	57,290
Funds of the Charity							
Endowment funds (Note 27)		B17	-	-	-	-	-
Restricted income funds (Note 27)		B18	-	-	-	-	-
Unrestricted funds		B19	111,079	-	-	111,079	57,290
Revaluation reserve		B20	-	-	-	-	-
Total funds		B21	111,079	-	-	111,079	57,290

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval dd/mm/yyyy
	RAE KHAN	1/11/21

Note 1 Basis of preparation

This section should be completed by all charities.

1.1 Basis of accounting

These accounts have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant note(s) to these accounts.

The accounts have been prepared in accordance with:

- * and with* ☒ the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014
- * and with* ☒ the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102)
- * and with the Charities Act 2011.

The charity constitutes a public benefit entity as defined by FRS 102.*

☒

* -Tick as appropriate

1.2 Going concern

If there are material uncertainties related to events or conditions that cast significant doubt on the charity's ability to continue as a going concern, please provide the following details or state "Not applicable", if appropriate:

An explanation as to those factors that support the conclusion that the charity is a going concern;	N/A
Disclosure of any uncertainties that make the going concern assumption doubtful;	N/A
Where accounts are not prepared on a going concern basis, please disclose this fact together with the basis on which the trustees prepared the accounts and the reason why the charity is not regarded as a going concern.	N/A

1.3 Change of accounting policy

The accounts present a true and fair view and the accounting policies adopted are those outlined in note { }.

Yes*	☒	* -Tick as appropriate
No*	☐	

Please disclose:

(i) the nature of the change in accounting policy;	
(ii) the reasons why applying the new accounting policy provides more reliable and more relevant information; and	
(iii) the amount of the adjustment for each line affected in the current period, each prior period presented and the aggregate amount of the adjustment relating to periods before those presented, 3.44 FRS 102 SORP.	

1.4 Changes to accounting estimates

No changes to accounting estimates have occurred in the reporting period (3.46 FRS 102 SORP).

Yes*	☒	* -Tick as appropriate
No*	☐	

Please disclose:

(i) the nature of any changes;	
(ii) the effect of the change on income and expense or assets and liabilities for the current period; and	
(iii) where practicable, the effect of the change in one or more future periods.	

1.5 Material prior year errors

No material prior year error have been identified in the reporting period (3.47 FRS 102 SORP).

Yes*	☒	* -Tick as appropriate
No*	☐	

Please disclose:

(i) the nature of the prior period error;	
(ii) for each prior period presented in the accounts, the amount of the correction for each account line item affected; and	
(iii) the amount of the correction at the beginning of the earliest prior period presented in the accounts.	

Note 2**Accounting policies**

Please complete this note when first reporting under FRS2102. Section 35 of FRS102, requires 3 reconciliations to be presented, if all are applicable.

2.1 RECONCILIATION WITH PREVIOUS GENERALLY ACCEPTED ACCOUNTING PRACTICE

Please provide a description of the nature of each change in accounting policy

Reconciliation of funds per previous GAAP to funds determined under FRS 102

	Start of period £	End of period £
Fund balances as previously stated		
<i>Adjustments:</i>		

Fund balance as restated

Reconciliation of net income/(net expenditure) per previous GAAP to net income/(net expenditure) under FRS 102

	End of £
Net Income/(expenditure) as previously stated	
<i>Adjustments:</i>	

Previous period net Income/(expenditure) as
restated

Note 2 Accounting policies

2.2 INCOME

This standard list of accounting policies has been applied by the charity except for those ticked "No" or "N/a". Where a different or additional policy has been adopted then this is detailed in the box below.

Recognition of income	These are included in the Statement of Financial Activities (SoFA) when: - the charity becomes entitled to the resources; - it is more likely than not that the trustees will receive the resources; and - the monetary value can be measured with sufficient reliability.	<table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☒</td><td>☐</td><td>☐</td></tr> </table>	Yes	No	N/a	☒	☐	☐																								
Yes	No	N/a																														
☒	☐	☐																														
Offsetting	There has been no offsetting of assets and liabilities, or income and expenses, unless required or permitted by the FRS 102 SORP or FRS 102.	<table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☒</td><td>☐</td><td>☐</td></tr> </table>	Yes	No	N/a	☒	☐	☐																								
Yes	No	N/a																														
☒	☐	☐																														
Grants and donations	Grants and donations are only included in the SoFA when the general income recognition criteria are met (5.10 to 5.12 FRS102 SORP).	<table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☒</td><td>☐</td><td>☐</td></tr> </table>	Yes	No	N/a	☒	☐	☐																								
Yes	No	N/a																														
☒	☐	☐																														
Legacies	In the case of performance related grants, income must only be recognised to the extent that the charity has provided the specified goods or services as entitlement to the grant only occurs when the performance related conditions are met (5.16 FRS 102 SORP). Legacies are included in the SOFA when receipt is probable, that is, when there has been grant of probate, the executors have established that there are sufficient assets in the estate and any conditions attached to the legacy are either within the control of the charity or have been met.	<table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☐</td><td>☐</td><td>☒</td></tr> </table>	Yes	No	N/a	☐	☐	☒																								
Yes	No	N/a																														
☐	☐	☒																														
Government grants	The charity has received government grants in the reporting period	<table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☐</td><td>☒</td><td>☐</td></tr> </table>	Yes	No	N/a	☐	☒	☐																								
Yes	No	N/a																														
☐	☒	☐																														
Tax reclaims on donations and gifts	Gift Aid receivable is included in income when there is a valid declaration from the donor. Any Gift Aid amount recovered on a donation is considered to be part of that gift and is treated as an addition to the same fund as the initial donation unless the donor or the terms of the appeal have specified otherwise.	<table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☒</td><td>☐</td><td>☐</td></tr> </table>	Yes	No	N/a	☒	☐	☐																								
Yes	No	N/a																														
☒	☐	☐																														
Contractual income and performance related grants	This is only included in the SoFA once the charity has provided the related goods or services or met the performance related conditions.	<table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☐</td><td>☐</td><td>☒</td></tr> </table>	Yes	No	N/a	☐	☐	☒																								
Yes	No	N/a																														
☐	☐	☒																														
Donated goods	Donated goods are measured at fair value (the amount for which the asset could be exchanged) unless impractical to do so. The cost of any stock of goods donated for distribution to beneficiaries is deemed to be the fair value of those gifts at the time of their receipt and they are recognised on receipt. In the reporting period in which the stocks are distributed, they are recognised as an expense at the carrying amount of the stocks at distribution. Donated goods for resale are measured at fair value on initial recognition, which is the expected proceeds from sale less the expected costs of sale, and recognised in 'Income from other trading activities' with the corresponding stock recognised in the balance sheet. On its sale the value of stock is charged against 'Income from other trading activities' and the proceeds from sale are also recognised as 'Income from other trading activities'. Goods donated for on-going use by the charity are recognised as tangible fixed assets and included in the SoFA as incoming resources when receivable. Gifts in kind for use by the charity are included in the SoFA as income from donations when receivable.	<table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☒</td><td>☐</td><td>☐</td></tr> </table> <table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☐</td><td>☐</td><td>☒</td></tr> </table> <table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☐</td><td>☐</td><td>☒</td></tr> </table> <table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☒</td><td>☐</td><td>☐</td></tr> </table> <table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☐</td><td>☐</td><td>☒</td></tr> </table>	Yes	No	N/a	☒	☐	☐	Yes	No	N/a	☐	☐	☒	Yes	No	N/a	☐	☐	☒	Yes	No	N/a	☒	☐	☐	Yes	No	N/a	☐	☐	☒
Yes	No	N/a																														
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Yes	No	N/a																														
☐	☐	☒																														
Donated services and facilities	Donated services and facilities are included in the SOFA when received at the value of the gift to the charity provided the value of the gift can be measured reliably. Donated services and facilities that are consumed immediately are recognised as income with an equivalent amount recognised as an expense under the appropriate heading in the SOFA.	<table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☐</td><td>☐</td><td>☒</td></tr> </table> <table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☐</td><td>☐</td><td>☒</td></tr> </table>	Yes	No	N/a	☐	☐	☒	Yes	No	N/a	☐	☐	☒																		
Yes	No	N/a																														
☐	☐	☒																														
Yes	No	N/a																														
☐	☐	☒																														
Support costs	The charity has incurred expenditure on support costs.	<table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☐</td><td>☒</td><td>☐</td></tr> </table>	Yes	No	N/a	☐	☒	☐																								
Yes	No	N/a																														
☐	☒	☐																														
Volunteer help	The value of any voluntary help received is not included in the accounts but is described in the trustees' annual report.	<table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☒</td><td>☐</td><td>☐</td></tr> </table>	Yes	No	N/a	☒	☐	☐																								
Yes	No	N/a																														
☒	☐	☐																														
Income from interest, royalties and dividends	This is included in the accounts when receipt is probable and the amount receivable can be measured reliably.	<table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☒</td><td>☐</td><td>☐</td></tr> </table>	Yes	No	N/a	☒	☐	☐																								
Yes	No	N/a																														
☒	☐	☐																														
Income from membership subscriptions	Membership subscriptions received in the nature of a gift are recognised in Donations and Legacies. Membership subscriptions which gives a member the right to buy services or other benefits are recognised as income earned from the provision of goods and services as income from charitable activities.	<table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☐</td><td>☐</td><td>☒</td></tr> </table> <table> <tr> <th>Yes</th><th>No</th><th>N/a</th></tr> <tr> <td>☐</td><td>☐</td><td>☒</td></tr> </table>	Yes	No	N/a	☐	☐	☒	Yes	No	N/a	☐	☐	☒																		
Yes	No	N/a																														
☐	☐	☒																														
Yes	No	N/a																														
☐	☐	☒																														

Settlement of insurance claims	Insurance claims are only included in the SoFA when the general income recognition criteria are met (5.10 to 5.12 FRS102 SORP) and are included as an item of other income in the SoFA.	Yes	No	N/a
		☐	☐	☒
Investment gains and losses	This includes any realised or unrealised gains or losses on the sale of investments and any gain or loss resulting from revaluing investments to market value at the end of the year.	Yes	No	N/a
		☐	☐	☒
2.3 EXPENDITURE AND LIABILITIES				
Liability recognition	Liabilities are recognised where it is more likely than not that there is a legal or constructive obligation committing the charity to pay out resources and the amount of the obligation can be measured with reasonable certainty.	Yes	No	N/a
		☒	☐	☐
Governance and support costs	Support costs have been allocated between governance costs and other support. Governance costs comprise all costs involving public accountability of the charity and its compliance with regulation and good practice.	Yes	No	N/a
		☒	☐	☐
	Support costs include central functions and have been allocated to activity cost categories on a basis consistent with the use of resources, eg allocating property costs by floor areas, or per capita, staff costs by the time spent and other costs by their usage.	Yes	No	N/a
		☐	☐	☒
Grants with performance conditions	Where the charity gives a grant with conditions for its payment being a specific level of service or output to be provided, such grants are only recognised in the SoFA once the recipient of the grant has provided the specified service or output.	Yes	No	N/a
		☐	☐	☒
Grants payable without performance conditions	Where there are no conditions attaching to the grant that enables the donor charity to realistically avoid the commitment, a liability for the full funding obligation must be recognised.	Yes	No	N/a
		☐	☐	☒
Redundancy cost	The charity made no redundancy payments during the reporting period.	Yes	No	N/a
		☒	☐	☐
Deferred income	No material item of deferred income has been included in the accounts.	Yes	No	N/a
		☒	☐	☐
Creditors	The charity has creditors which are measured at settlement amounts less any trade discounts	Yes	No	N/a
		☒	☐	☐
Provisions for liabilities	A liability is measured on recognition at its historical cost and then subsequently measured at the best estimate of the amount required to settle the obligation at the reporting date	Yes	No	N/a
		☐	☐	☒
Basic financial instruments	The charity accounts for basic financial instruments on initial recognition as per paragraph 10.7 FRS102 SORP. Subsequent measurement is as per paragraphs 11.17 to 11.19, FRS102 SORP.	Yes	No	N/a
		☐	☐	☒
2.4 ASSETS				
Tangible fixed assets for use by charity	These are capitalised if they can be used for more than one year, and cost at least 1000	Yes	No	N/a
		☒	☐	☐
	They are valued at cost.			
	The depreciation rates and methods used are disclosed in note 9.2.	Yes	No	N/a
Intangible fixed assets	The charity has intangible fixed assets, that is, non-monetary assets that do not have physical substance but are identifiable and are controlled by the charity through custody or legal rights. The amortisation rates and methods used are disclosed in note 9.5		☒	☐
		Yes	No	N/a
		☐	☐	☒
Heritage assets	The charity has heritage assets, that is, non-monetary assets with historic, artistic, scientific, technological, geophysical or environmental qualities that are held and maintained principally for their contribution to knowledge and culture. The depreciation rates and methods used as disclosed in note 9.6.1.4.	Yes	No	N/a
		☒	☐	☐
	They are valued at cost.	Yes	No	N/a
		☐	☐	☒
Investments	Fixed asset investments in quoted shares, traded bonds and similar investments are valued at initially at cost and subsequently at fair value (their market value) at the year end. The same treatment is applied to unlisted investments unless fair value cannot be measured reliably in which case it is measured at cost less impairment.	Yes	No	N/a
		☐	☐	☒
	Investments held for resale or pending their sale and cash and cash equivalents with a maturity date of less than 1 year are treated as current asset investments	Yes	No	N/a
		☐	☐	☒
Stocks and work in progress	Stocks held for sale as part of non-charitable trade are measured at the lower or cost or net realisable value.	Yes	No	N/a
		☐	☐	☒
	Goods or services provided as part of a charitable activity are measured at net realisable value based on the service potential provided by items of stock.	Yes	No	N/a
		☐	☐	☒
	Work in progress is valued at cost less any foreseeable loss that is likely to occur on the contract.	Yes	No	N/a
		☐	☐	☒
Debtors	Debtors (including trade debtors and loans receivable) are measured on initial recognition at settlement amount after any trade discounts or amount advanced by the charity. Subsequently, they are measured at the cash or other consideration expected to be received.	Yes	No	N/a
		☒	☐	☐

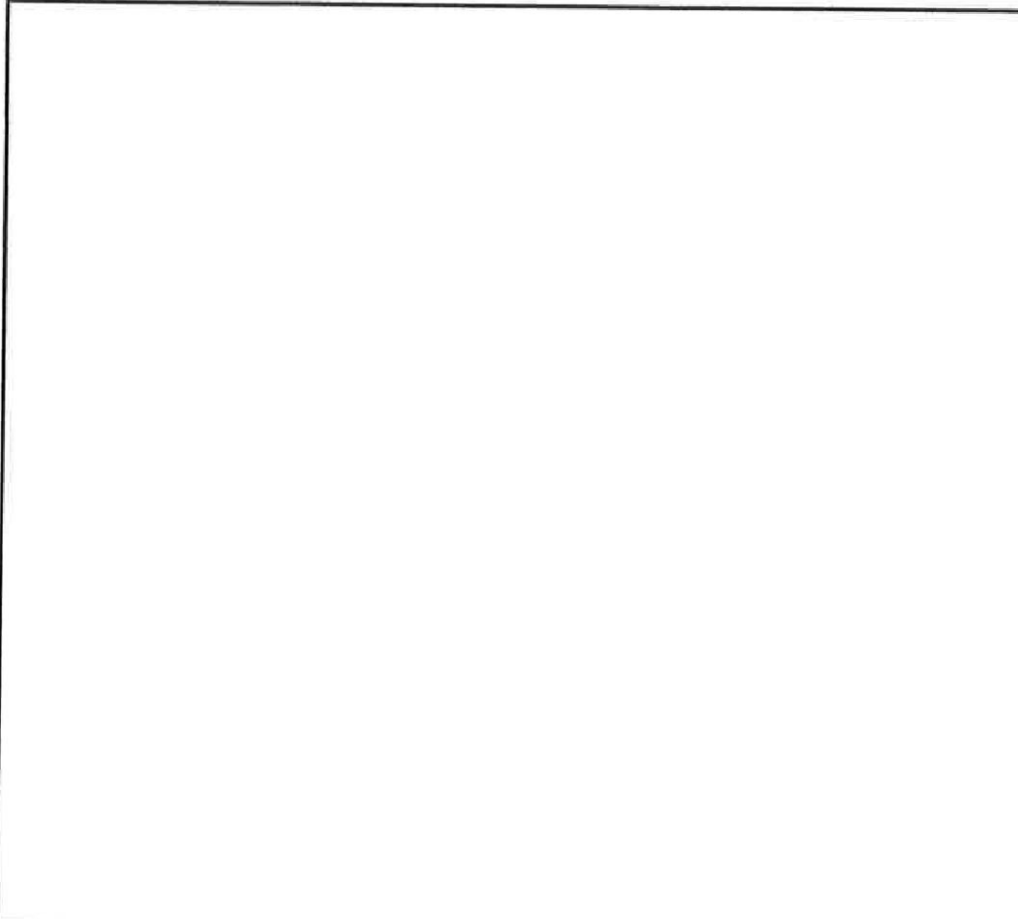
The charity has investments which it holds for resale or pending their sale and cash and cash equivalents with a maturity date less than one year. These include cash on deposit and cash equivalents with a maturity date of less than one year held for investment purposes rather than to meet short term cash commitments as they fall due.

Yes	No	N/a
	✓	

They are valued at fair value except where they qualify as basic financial instruments.

Yes	No	N/a
		✓

**POLICIES ADOPTED
ADDITIONAL TO OR
DIFFERENT FROM
THOSE ABOVE**



Note 3

Analysis of income

Analysis		Unrestricted funds	Restricted income funds	Endowment funds	Total funds	Prior year
					£	£
Donations and legacies:	Donations and gifts	26,394	-	-	26,394	29,176
	Gift Aid	3,619	-	-	3,619	3,490
	Legacies	49,988	-	-	49,988	-
	General grants provided by government/other charities	-	-	-	-	-
	Membership subscriptions and sponsorships which are in substance donations	-	-	-	-	-
	Donated goods, facilities and services	-	-	-	-	-
	Other	-	-	-	-	-
Total		80,001	-	-	80,001	32,666
Charitable activities:		-	-	-	-	-
		-	-	-	-	-
		-	-	-	-	-
	Other	-	-	-	-	-
Total		-	-	-	-	-
Other trading activities:		-	-	-	-	-
		-	-	-	-	-
		-	-	-	-	-
	Other	-	-	-	-	-
Total		-	-	-	-	-
Income from investments:	Interest income	107	-	-	107	276
	Dividend income	-	-	-	-	-
	Rental and leasing income	-	-	-	-	-
	Other	-	-	-	-	-
Total		107	-	-	107	276
Separate material item of income:		-	-	-	-	-
		-	-	-	-	-
		-	-	-	-	-
	Other	-	-	-	-	-
Total		-	-	-	-	-
Other:	Conversion of endowment funds into income	-	-	-	-	-
	Gain on disposal of a tangible fixed asset held for charity's own use	-	-	-	-	-
	Gain on disposal of a programme related investment	-	-	-	-	-
	Royalties from the exploitation of intellectual property rights	-	-	-	-	-
	Other	-	-	-	-	-
	Total	-	-	-	-	-
TOTAL INCOME		80,108	-	-	80,108	32,942

Other information:

All income in the prior year was unrestricted except for:
(please provide description and amounts)

Where any endowment fund is converted into income in the reporting period, please give the reason for the conversion.

Within the income items above the following items are material: (please disclose the nature, amount and any prior year amounts)

Note 4

Analysis of receipts of government grants

	Description	This year £	Last year £
Government grant 1		-	-
Government grant 2		-	-
Government grant 3		-	-
Other		-	-
	Total	-	-

Please provide details of any unfulfilled conditions and other contingencies attaching to grants that have been recognised in income.

Please give details of other forms of government assistance from which the charity has directly benefited.

Note 5

Donated goods, facilities and services

Seconded staff
Use of property
Other

This year £	Last year £
-	-
-	-
-	-
-	-

Please provide details of the accounting policy for the recognition and valuation of donated goods, facilities and services.

Please provide details of any unfulfilled conditions and other contingencies attaching to resources from donated goods and services not recognised in income.

Please give details of other forms of other donated goods and services not recognised in the accounts, eg contribution of unpaid volunteers.

Note 6

Analysis of expenditure

	Analysis	Unrestricted funds	Restricted income funds	Endowment funds	Total funds £	Prior year £
Expenditure on raising funds:	Incurred seeking donations	-	-	-	-	-
	Incurred seeking legacies	-	-	-	-	-
	Incurred seeking grants	-	-	-	-	-
	Operating membership schemes and social lotteries	-	-	-	-	-
	Staging fundraising events	38	-	-	38	1,599
	Fundraising agents	-	-	-	-	-
	Operating charity shops	-	-	-	-	-
	Operating a trading company undertaking non-charitable trading activity	-	-	-	-	-
	Advertising, marketing, direct mail and publicity	11,879	-	-	11,879	11,028
	Start up costs incurred in generating new source of future income	-	-	-	-	-
	Database development costs	-	-	-	-	-
	Other trading activities	-	-	-	-	-
	Investment management costs:	-	-	-	-	-
	Portfolio management costs	-	-	-	-	-
	Cost of obtaining investment advice	-	-	-	-	-
	Investment administration costs	-	-	-	-	-
	Intellectual property licencing costs	-	-	-	-	-
	Rent collection, property repairs and maintenance charges	-	-	-	-	-
		-	-	-	-	-
	Total expenditure on raising funds	11,917	-	-	11,917	12,627
Expenditure on charitable activities	Storage of archive material at History of Advertising Trust	4,878	-	-	4,878	4,183
	Annual fee for OCLC online archive	3,110	-	-	3,110	2,165
	E-book production costs	1,162	-	-	1,162	2,641
	Scanning of collection material	422	-	-	422	-
	Sundry expenses for database management, couriers etc.	294	-	-	294	2,548
	Total expenditure on charitable activities	9,866	-	-	9,866	11,537
Separate material item of expense		-	-	-	-	-
		-	-	-	-	-
		-	-	-	-	-
		-	-	-	-	-
	Total	-	-	-	-	-
Other		-	-	-	-	-
		-	-	-	-	-
		-	-	-	-	-
		-	-	-	-	-
	Total other expenditure	4,535	-	-	4,535	4,131
TOTAL EXPENDITURE		26,319	-	-	26,319	28,295

Other information:

Analysis of expenditure on charitable activities

Activity or programme					
	Activities undertaken directly	Grant funding of activities	Support Costs	Total this year	Total prior year
	£	£	£	£	£
Activity 1					
Activity 2					
Other					
Total					

Prior year expenditure on charitable activities can be analysed as follows:

Within the expenditure items above the following items are material: (please disclose the nature, amount and any prior year amounts)

Note 7 Extraordinary items

Please explain the nature of each extraordinary item occurring in the period.

	Description	This year £	Last year £
Extraordinary item 1		-	-
Extraordinary item 2		-	-
Extraordinary item 3		-	-
Extraordinary item 4		-	-
Total extraordinary items		-	-

Section C
Notes to the accounts
Note 8
Funds received as agent

8.1 Please complete this note if the charity has agreed to administer the funds of another entity as its agent. Note: If a charity is acting as an agent, it should not recognise the income in the Statement of Financial Activities or the Balance Sheet.

Description/name of party	Related party (Yes or No)	Amount received		Amount paid out		Balance held at period end	
		This year	Last year	This year	Last year	This year	Last year
		£	£	£	£	£	£
		-	-	-	-	-	-
		-	-	-	-	-	-
		-	-	-	-	-	-
		-	-	-	-	-	-
		-	-	-	-	-	-
Total		-	-	-	-	-	-

8.2 Where a consortia or similar arrangement exists whereby 2 or more charities co-operate to achieve economies in the purchase of goods or services, please disclose details of any balances outstanding between any participating members.

Description/name of party	Balance held at period end	
	This year	Last year
	£	£
	-	-
	-	-
	-	-
	-	-
	-	-
Total		-

Section C

Notes to the accounts

Note 9 Support Costs

Please complete this note if the charity has analysed its expenses using activity categories and has support costs.

Support cost (examples)	Raising funds	Activity 1	Activity 2	Activity 3	Grand total	Basis of allocation (Describe method)
	£	£	£	£	£	
Governance	-	-		-	-	
	-	-		-	-	
	-	-		-	-	
	-	-		-	-	
Other	-	-		-	-	
Total	-	-		-	-	

Please provide details of the accounting policy adopted for the apportionment of costs between activities and any estimation techniques used to calculate their apportionment.

Section C

Notes to the accounts

Note 10 Details of certain items of expenditure

10.1 Fees for examination of the accounts

Please provide details of the amount paid for any statutory external scrutiny of accounts and other services provided by your independent examiner. If nothing was paid please enter '0' in the appropriate box(es).

Independent examiner's fees

Assurance services other than audit or independent examination

Tax advisory fees

Other fees (for example: financial advice, consultancy, accountancy services) paid to the independent examiner

This year £	Last year £
498	498

Note 11**Paid employees**

Please complete this note if the charity has any employees.

11.1 Staff Costs

Salaries and wages

Social security costs

Pension costs (defined contribution scheme)

Other employee benefits

Total staff costs

This year £	Last year £
-	-
-	-
-	-
-	-

Please provide details of expenditure on staff working for the charity whose contracts are with and are paid by a related party

Please give details of the number of employees whose total employee benefits (excluding employer pension costs) fell within each band of £10,000 from £60,000 upwards. If there are no such transactions, please enter 'true' in the box provided.

No employees received employee benefits (excluding employer pension costs) for the reporting period of more than £60,000

Band	Number of employees
£60,000 to £69,999	
£70,000 to £79,999	
£80,000 to £89,999	
£90,000 to £99,999	
£100,000 to £109,999	

Please provide the total amount paid to key management personnel (includes trustees and senior management) for their services to the charity

11.2 Average head count in the year

The parts of the charity in which the employees work

	This year Number	Last year Number
Fundraising	-	-
Charitable Activities	-	-
Governance	-	-
Other	-	-
Total	-	-

11.3 Ex-gratia payments to employees and others (excluding trustees)

Please complete if an ex-gratia payment is made.

Please explain the nature of the payment

--

Please state the legal authority or reason for making the payment

--

Please state the amount of the payment (or value of any waiver of a right to an asset)

--

11.4 Redundancy payments

Please complete if any redundancy or termination payment is made in the period.

Total amount of payment

--

The nature of the payment (cash, asset etc.)

--

The extent of redundancy funding at the balance sheet date

--

Please state the accounting policy for any redundancy or termination payments

--

Note 12 **Defined contribution pension scheme or defined benefit scheme accounted for as a defined contribution scheme.**

12.1 *Please complete this note if a defined contribution pension scheme is operated.*

Amount of contributions recognised in the SOFA as an expense

Please explain the basis for allocating the liability and expense of defined contribution pension scheme between activities and between restricted and unrestricted funds.

12.2 *Please complete this section where the charity participates in a defined benefit pension plan but is unable to ascertain its share of the underlying assets and liabilities.*

Please confirm that although the scheme is accounted for as a defined contribution plan, it is a defined benefit plan.

Please provide such information as is available about the plan's surplus or deficit and the implications, if any, for the reporting charity

12.3 *Please complete this section where the charity participates in a multi-employer defined benefit pension plan that is accounted for as a defined contribution plan.*

Describe the extent to which the charity can be liable to the plan for other entities' obligations under the terms and conditions of the multi-employer plan

Note 13 Grantmaking

Please complete this note if the charity made any grants or donations which in aggregate form a material part of the charitable activities undertaken.

13.1 Analysis of grants paid (Included in cost of charitable activities)

Analysis	Grants to institutions	Grants to individuals	Support costs	Total
Activity or project 1			£	£
Activity or project 2			-	-
Activity or project 3			-	-
Activity or project 4			-	-
Total	-	-	-	-

Please enter "Nil" if the charity does not identify and/or allocate support costs.

13.2 Grants made to institutions

My charity has made grants to particular institutions that are material in the context of its grantmaking. Details of the institution supported, purpose of the grant and total paid to each institution is available on the charity's web site.

Yes	<i>Please provide details of charity's URL.</i>
No	<i>Provide details below</i>

Names of institution	Purpose	Total amount of grants paid £
		-
		-
		-
		-
		-
		-
		-
		-
		-
		-
Total grants to institutions in reporting period		-
Other unanalysed grants		-
TOTAL GRANTS PAID		-

Note 14 **Tangible fixed assets***Please complete this note if the charity has any tangible fixed assets***14.1 Cost or valuation**

	Freehold land & buildings	Other land & buildings	Plant, machinery and motor vehicles	Fixtures, fittings and equipment	Total
	£	£	£	£	£
At the beginning of the year	-	-	-	333	333
Additions	-	-	-	-	-
Revaluations	-	-	-	-	-
Disposals	-	-	-	-	-
Transfers *	-	-	-	-	-
At end of the year	-	-	-	333	333

14.2 Depreciation and impairments

**Basis	SL or RB	SL or RB	SL or RB	SL	SL	Straight Line ("SL") or Reducing Balance ("RB")
** Rate				33.33%	33.33%	
At beginning of the year	-	-	-	333	333	
Disposals	-	-	-	-	-	
Depreciation	-	-	-	-	-	
Impairment	-	-	-	-	-	
Transfers*	-	-	-	-	-	
At end of the year	-	-	-	333	333	

14.3 Net book value

Net book value at the beginning of the year	-	-	-	-	-
Net book value at the end of the year	-	-	-	-	-

14.4 Impairment

Please provide a description of the events and circumstances that led to the recognition or reversal of an impairment loss.

14.5 Revaluation*If an accounting policy of revaluation is adopted, please provide:**the effective date of the revaluation**the name of independent valuer, if applicable**the methods applied and significant assumptions**the carrying amount that would have been recognised had the assets been carried under the cost model.*

14.6 Other disclosures*(i) Please state the amount of borrowing costs, if any, capitalised in the construction of tangible fixed assets and the capitalisation rate used.**(ii) Please provide the amount of contractual commitments for the acquisition of tangible fixed assets.**(iii) Details of the existence and carrying amounts of property, plant and equipment to which the charity has restricted title or that are pledged as security for liabilities.*

* The "transfers" row is for movements between fixed asset categories.

Note 14

Tangible fixed assets

Please complete this note if the charity has any tangible fixed assets

14.1 Cost or valuation

	Freehold land & buildings	Other land & buildings	Plant, machinery and motor vehicles	Fixtures, fittings and equipment	Total
	£	£	£	£	£
At the beginning of the year	-	-	-	333	333
Additions	-	-	-	-	-
Revaluations	-	-	-	-	-
Disposals	-	-	-	-	-
Transfers *	-	-	-	-	-
At end of the year	-	-	-	333	333

14.2 Depreciation and impairments

**Basis	SL or RB	SL or RB	SL or RB	SL	SL	Straight Line ("SL") or Reducing Balance ("RB")
** Rate				33.33%	33.33%	
At beginning of the year	-	-	-	-	-	-
Disposals	-	-	-	-	-	-
Depreciation	-	-	-	333	333	333
Impairment	-	-	-	-	-	-
Transfers*	-	-	-	-	-	-
At end of the year	-	-	-	333	333	333

14.3 Net book value

Net book value at the beginning of the year	-	-	-	1	1
Net book value at the end of the year	-	-	-	-	-

14.4 Impairment

Please provide a description of the events and circumstances that led to the recognition or reversal of an impairment loss.

--

14.5 Revaluation

If an accounting policy of revaluation is adopted, please provide:

the effective date of the revaluation

the name of independent valuer, if applicable

the methods applied and significant assumptions

the carrying amount that would have been recognised had the assets been carried under the cost model.

14.6 Other disclosures

(i) Please state the amount of borrowing costs, if any, capitalised in the construction of tangible fixed assets and the capitalisation rate used.

(ii) Please provide the amount of contractual commitments for the acquisition of tangible fixed assets.

(iii) Details of the existence and carrying amounts of property, plant and equipment to which the charity has restricted title or that are pledged as security for liabilities.

* The "transfers" row is for movements between fixed asset categories.

** Please indicate the method of depreciation by deleting the method not applicable (SL = straight

Note 15 **Intangible assets***Please complete this note if the charity has any intangible assets***15.1 Cost or valuation**

	Research & development	Patents and trademarks	Other	Total
	£	£	£	£
At beginning of the year	-	-	-	-
Additions	-	-	-	-
Disposals	-	-	-	-
Revaluations	-	-	-	-
Transfers *	-	-	-	-
At end of the year	-	-	-	-

15.2 Amortisation and impairments

**Basis	SL or RB	SL or RB	SL or RB	SL or RB	Straight Line ("SL") or Reducing Balance ("RB")
** Rate					

At beginning of the year	-	-	-	-
Disposals	-	-	-	-
Amortisation	-	-	-	-
Impairment	-	-	-	-
Transfers*	-	-	-	-
At end of year	-	-	-	-

15.3 Net book value

Nat book value at the beginning of the year	-	-	-	-
Net book value at the end of the year	-	-	-	-

15.4 Accounting policy*Please disclose the accounting policy for intangible fixed assets including:*

**Reasons for choosing
amortisation rates**

**Policies for the recognition of any
capital development**

15.5 Impairment

**Please provide a description of the events and
circumstances that led to the recognition or
reversal of an impairment loss.**

--

15.6 Revaluation

If an accounting policy of revaluation is adopted, please provide:

the effective date of the revaluation

the name of independent valuer, if applicable

the methods applied

**the carrying amount that would have been
recognised had the assets been carried under
the cost model.**

15.7 Other disclosures

**(i) If your intangible asset was acquired by way
of grant, provide value on initial recognition and
carrying amount of the asset.**

**(ii) Details of the carrying amounts of any
intangible assets to which the charity has
restricted title or that are pledged as security for
liabilities.**

**(iii) Please provide the amount of contractual
commitments for the acquisition of intangible
assets.**

**(iv) State the amount of research and
development expenditure recognised as
expenditure in the year.**

**(vi) Please detail the headings in the SOFA in
which a charge for amortisation of intangible
assets is included.**

**(vii) For any material intangible assets, please
provide a description, its carrying amount and
any remaining amortisation period.**

* The "transfers" row is for movements between fixed asset categories.

Note 16 Heritage assets*Please complete this note if the charity has heritage assets***16.1 General disclosures for all charities holding heritage assets**

(i) Explain the nature and scale of heritage assets held.

(ii) Explain the policy for the acquisition, preservation, management and disposal of heritage assets.

16.2 Cost or valuation

	Heritage asset 1 £	Heritage asset 2 £	Heritage asset 3 £	Heritage asset 4 £	Total £
At beginning of the year	-	-	-	-	-
Additions	-	-	-	-	-
Disposals	-	-	-	-	-
Revaluations	-	-	-	-	-
Transfers "	-	-	-	-	-
At end of the year	-	-	-	-	-

16.3 Depreciation and impairments

**Basis						Straight Line ("SL") or Reducing Balance
** Rate						

At beginning of the year	-	-	-	-	-
Disposals	-	-	-	-	-
Depreciation	-	-	-	-	-
Impairment	-	-	-	-	-
Transfers*	-	-	-	-	-
At end of year	-	-	-	-	-

16.4 Net book value

Net book value at the beginning of the year	-	-	-	-	-
Net book value at the end of the year	-	-	-	-	-

16.5 Impairment*Please provide a description of the events and circumstances that led to the recognition or reversal of an impairment loss.*

--

16.6 Revaluation*If an accounting policy of revaluation is adopted, please provide:**the effective date of the revaluation**the name of independent valuer, if applicable**qualifications of independent valuer**the methods applied and significant assumptions**any significant limitations on the valuation*

16.7 Analysis of heritage assets by class or group distinguishing those at cost and those at valuation

	At valuation Group A	At cost Group B	Total
	£	£	£
Carrying amount at the beginning of the period	-	-	-
Additions	-	-	-
Disposals	-	-	-
Depreciation/impairment	-	-	-
Revaluation	-	-	-
Carrying amount at the end of period	-	-	-

16.8 Heritage assets (where heritage assets are not recognised on the balance sheet)

(i) Explain the reason why heritage assets have not been recognised on the balance sheet.

(ii) Describe the significance and nature of heritage assets.

(iii) Disclose information that is helpful in assessing the value of heritage assets.

(iv) Explain the reason why it is not practicable to obtain a valuation of heritage assets.

16.9 Five year summary of heritage assets transactions

	2015	2014	2013	2012	2011
	£	£	£	£	£
Purchases					
Group A	-	-	-	-	-
Group B	-	-	-	-	-
Group C	-	-	-	-	-
Other	-	-	-	-	-
Donations					
Group A	-	-	-	-	-
Group B	-	-	-	-	-
Group C	-	-	-	-	-
Other	-	-	-	-	-
Total additions	-	-	-	-	-
Charge for impairment					
Group A	-	-	-	-	-
Group B	-	-	-	-	-
Group C	-	-	-	-	-
Other	-	-	-	-	-
Total charge for impairment	-	-	-	-	-
Disposals					
Group A - carrying amount	-	-	-	-	-
Group B - carrying amount	-	-	-	-	-
Group C	-	-	-	-	-
Other	-	-	-	-	-
Total disposals	-	-	-	-	-

Note 17 Investment assets

Please complete this note if the charity has any investment assets.

17.1 Fixed assets investments (please provide for each class of investment)

	Cash & cash equivalents	Listed investments	Investment properties	Social investments	Other	Total
Carrying (fair) value at beginning of period	-	-	-	-	-	-
Add: additions to investments during period*	-	-	-	-	-	-
Less: disposals at carrying value	-	-	-	-	-	-
Less: impairments	-	-	-	-	-	-
Add: Reversal of impairments	-	-	-	-	-	-
Add/(deduct): transfer in/(out) in the period	-	-	-	-	-	-
Add/(deduct): net gain/(loss) on revaluation	-	-	-	-	-	-
Carrying (fair) value at end of year	-	-	-	-	-	-

*Please specify additions resulting from acquisitions through business combinations, if any.

Please note that Fair Value in this context is the amount for which an asset could be exchanged between knowledgeable and willing parties in an arm's length transaction. For traded securities, the fair value is the value of the security quoted on the London Stock Exchange Daily Official List or equivalent. For other assets where there is no market price on a traded market, it is the trustees' or valuers' best estimate of fair value.

17.2 Please provide a breakdown of investments shown above agreeing with the balance sheet row B04 differentiating between those held at fair value and those held at cost less impairment.

Analysis of investments

Cash or cash equivalents

Listed investments

Investment properties

Social investments

Other investments

Total

Grand total (Fair value at year end+Cost less impairment)

Fair value at year end	Cost less Impairment
£	£
-	-
-	-
-	-
-	-
-	-
-	-
-	-
-	-

17.3 If your charity holds investment properties, please complete the following note:

(i) Explain the methods and significant assumptions in determining the fair value of investment property held by the charity

(ii) Name or independent valuer, if applicable, and relevant qualifications

(iii) Provide details of any restrictions on the ability to realise investment property or on the remittance of income or disposal proceeds

(iv) Explain any contractual obligations for the purchase, construction or development of investment property or for repairs, maintenance or enhancements

17.4 Please provide a breakdown of current asset investments, if applicable, agreeing with the balance sheet.

Analysis of current asset investments

This year	Last year
£	£
-	-
-	-
-	-
-	-
-	-
-	-

Cash or cash equivalents
Listed investments
Investment properties
Social investments
Other investments
Total

17.5 Guarantees

Please provide details and amount of any guarantee made to or on behalf of a third party

Name of the entity or entities benefitting from those guarantees

Please explain how the guarantee furthers the charity's aims

17.6 Concessionary loans

Amount of concessionary loans made (Multiple loans made may be disclosed in aggregate provided that such aggregation does not obscure significant information).

Description	This year £	Last year £
Total		

Amount of concessionary loans received (Multiple loans received may be disclosed in aggregate provided that such aggregation does not obscure significant information).

Description	This year £	Last year £
Total		

Terms and conditions eg interest rate, security provided

Value of any concessionary loans which have been committed but not taken up at the reporting date

Amounts payable within 1 year

Amounts payable after more than 1 year

Amounts receivable within 1 year

Amounts receivable after more than 1 year

17.7 Additional information

Please provide information about the significance of investments to the charity's financial position or performance eg. terms and conditions of loans or the use of hedging to manage financial risk.

For all investments measured at fair value, the basis for determining the value, including any assumptions applied when using a valuation technique.

Where a charity has provided financial assets as a form of security, the carrying amount of the financial asset pledged as security and the terms and conditions relating to its pledge.

Note 18

Stocks

Please complete this note if the charity holds any stock items

18.1 Please state the carrying amount of stock and work in progress analysed between activities.

	Stock		Donated goods		Work in progress
	For distribution	For resale	For distribution	For resale	
	£	£	£	£	£
Charitable activities:					
<i>Opening</i>	-	-	-	-	-
<i>Added in period</i>	-	-	-	-	-
<i>Expensed in period</i>	-	-	-	-	-
<i>Impaired</i>	-	-	-	-	-
<i>Closing</i>	-	-	-	-	-
Other trading activities:					
<i>Opening</i>	-	-	-	-	-
<i>Added in period</i>	-	-	-	-	-
<i>Expensed in period</i>	-	-	-	-	-
<i>Impaired</i>	-	-	-	-	-
<i>Closing</i>	-	-	-	-	-
Other:					
<i>Opening</i>	-	-	-	-	-
<i>Added in period</i>	-	-	-	-	-
<i>Expensed in period</i>	-	-	-	-	-
<i>Impaired</i>	-	-	-	-	-
<i>Closing</i>	-	-	-	-	-
Total this year	-	-	-	-	-
Total previous year	-	-	-	-	-

18.2 Please specify the carrying amount of any stocks pledged as security for liabilities

--

Section C
Notes to the accounts
(cont)
Note 19 Debtors and prepayments

Please complete this note if the charity has any debtors or prepayments.

19.1 Analysis of debtors
Trade debtors
Prepayments and accrued income
Other debtors - Gift aid
Total

This year	Last year
£	£
-	-
2,400	6,000
-	-
1,189	3,490
3,589	9,490

Please complete 19.2 where a material debtor is recoverable more than a year after the reporting date.

19.2 Analysis of debtors recoverable in more than 1 year (included in debtors above)
Trade debtors
Prepayments and accrued income
Other debtors
Total

This year	Last year
£	£
-	-
-	-
-	-
-	-
-	-

Section C**Notes to the accounts****(cont)****Note 20 Creditors and accruals***Please complete this note if the charity has any creditors or accruals.***20.1 Analysis of creditors**

	Amounts falling due within one year		Amounts falling due after more than one year	
	This year £	Last year £	This year £	Last year £
Accruals for grants payable	-	-	-	-
Bank loans and overdrafts	-	-	-	-
Trade creditors	1,926	604	-	-
Payments received on account for contracts or performance-related grants	-	-	-	-
Accruals and deferred income	498	498	-	-
Taxation and social security	-	-	-	-
Other creditors	-	-	-	-
Total	2,424	498	-	-

20.2 Deferred income*Please complete this note if the charity has deferred income.**Please explain the reasons why income is deferred.*

--

Movement in deferred income account

Balance at the start of the reporting period

Amounts added in current period

Amounts released to income from previous periods

Balance at the end of the reporting period

This year £	Last year £
-	-
-	-
-	-
-	-

Note 21 Provisions for liabilities and charges

Please complete this note if you have included in charity expenditure any provisions. A provision is made when the charity has a liability of uncertain timing or amount.

21.1 Please provide:

- a brief description of any obligations on the balance sheet and the expected amount and timing of resulting payments;
- an indication of the uncertainties about the amount or timing of those outflows; and
- the amount of any expected reimbursement, stating the amount of any asset that has been recognised for that expected reimbursement.

21.2 Movements in recognised provisions and funding commitment during the period

Balance at the start of the reporting period
 Amounts added in current period
 Amounts charged against the provision in the current period
 Unused amounts reversed during the period
 Balance at the end of the reporting period

This year £	Last year £
-	-
-	-
-	-
-	-
-	-

21.3 For any funding commitment that is not recognised as a liability or provision, provide details of commitment made, the time frame of that commitment, any performance-related conditions and details of how the commitment will be funded (with contracts for capital expenditure separately identified).

--

21.4 Where unrestricted funds have been designated to a fund commitment, please disclose the nature of any amounts designated and the likely timing of that expenditure.

--

Note 22 Other disclosures for debtors, creditors and other basic financial instruments

22.1 Please provide information about the significance of financial instruments (eg. debtors, creditors, investments etc) to the charity's financial position or performance, for example, the terms and conditions of loans or the use of hedging to manage financial risk.

22.2 If the charity has provided financial assets as a form of security, the carrying amount of the financial assets pledged as security and the terms and conditions related to its pledge should be given here.

Note 23 Contingent liabilities and contingent assets**23.1 Contingent liabilities**

Where the charity has contingent liabilities, please complete the following section unless the possibility of their existence is remote.

Description of item including its legal nature. Please describe any security provided in connection to the liability.	Estimate of financial effect

23.2 Contingent assets

Where the charity has contingent assets, please complete the following section when their existence is probable

Description of item	Estimate of financial effect

23.4 Other disclosures for contingent assets and/or liabilities

Please provide the following information where practicable:

Explain any uncertainties relating to the amount or timing of settlement; and the possibility of any reimbursement

Where it is not practical to make one or more of these disclosures, please state this fact

Note 24 **Cash at bank and in hand**

Short term cash investments (less than 3 months maturity date)
Short term deposits
Cash at bank and on hand
Other
Total

This year £	Last year £
-	-
-	-
109,914	48,298
-	-
109,914	48,298

Note 25 Fair value of assets and liabilities

25.1 Please provide details of the charity's exposure to credit risk (the risk of incurring a loss due to a debtor not paying what is owed) , liquidity risk (the risk of not being able to meet short term financial demands) and market risk (the risk that the value of an investment will fall due to changes in the market) arising from financial instruments to which the charity is exposed at the end of the reporting period and explain how the charity manages those risks.

None

25.2 Please give details of the amount of change in the fair value of basic financial instruments (debtors, creditors, investments (see section 11, FRS 102 SORP)) measured at fair value through the SoFA that is attributable to changes in credit risk.

None

Note 26**Events after the end of the reporting period**

Please complete this note events (not requiring adjustment to the accounts) have occurred after the end of the reporting period but before the accounts are authorised which relate to conditions that arose after the end of the reporting period.

Please provide details of the nature of the event

--

Provide an estimate of the financial effect of the event or a statement that such an estimate cannot be made

--

Section C

Notes to the accounts

(cont)

Note 27

Charity funds

27.1 Details of material funds held and movements during the CURRENT reporting period

Please give details of the movements of material individual funds in the reporting period together with a balancing figure for 'Other funds'. The 'Total funds' figure below should reconcile to 'Total funds' in the balance sheet.

* Key: PE - permanent endowment funds; EE - expendable endowment funds; R - restricted income funds, including special trusts, of the charity; and U - unrestricted funds

Fund names	Type PE, EE R or UR *	Purpose and Restrictions	Fund balances brought forward £	Income £	Expenditure £	Transfers £	Gains and losses £	Fund balances carried forward £
General fund	UR	To provide operating funds	57,290	80,108	-	26,319	-	111,079
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
Other funds	N/a	N/a	-	-	-	-	-	-
Total Funds			57,290	80,108	-	26,319	-	111,079

Section C **Notes to the accounts** (cont)

Note 27 **Charity funds (cont)**

27.2 Details of material funds held and movements during the PREVIOUS reporting period

Please give details of the movements of material individual funds in the reporting period together with a balancing figure for 'Other funds'. The 'Total funds' figure below should reconcile to 'Total funds' in the balance sheet.

* Key: PE - permanent endowment funds; EE - expendable endowment funds; R - restricted income funds, including special trusts, of the charity; and U - unrestricted funds

Fund names	Type PE, EE R or UR *	Purpose and Restrictions	Fund balances brought forward £	Income £	Expenditure £	Transfers £	Gains and losses £	Fund balances carried forward £
General fund	UR	To provide operating funds	52,643	32,942	28,295	-	-	57,290
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
			-	-	-	-	-	-
Other funds	N/a	N/a	52,643	32,942	28,295	-	-	57,290
Total Funds			52,643	32,942	28,295	-	-	57,290

Note 27

Charity funds (cont)

27.3 Transfers between funds

	Reason for transfer and where endowment is converted to income, legal power for its conversion	Amount
Between unrestricted and restricted funds		
Between endowment and restricted funds		
Between endowment and unrestricted funds		

27.4 Designated funds

Planned use	Purpose of the designation	Amount

Note 28 Transactions with trustees and related parties

If the charity has any transactions with related parties (other than the trustee expenses explained in guidance notes) details of such transactions should be provided in this note. If there are no transactions to report, please enter "True" in the box or "False" if there are transactions to report.

28.1 Trustee remuneration and benefits

None of the trustees have been paid any remuneration or received any other benefits from an employment with their charity or a related entity (True or False)

TRUE

In the period the charity has paid trustees remuneration and benefits. Please give the amount of, and legal authority for, any remuneration or other benefits paid to a trustee by the charity or any institution or company connected with it.

Name of trustee	Legal authority (eg order, governing document)	Amounts paid or benefit value			
		This year			
		Remuneration	Pension contribution	Redundancy (including loss of office)/ex gratia	Other
		£	£		£

Please give details of why remuneration or other employment benefits were paid.

Where an ex gratia payment has been made to a trustee, provide an explanation of the nature of the payment.

28.2 Trustees' expenses

If the charity has paid trustees expenses for fulfilling their duties, details of such transactions should be provided in this note. If there are no transactions to report, please enter "True" in the box below. If there are transactions to report, please enter "False".

No trustee expenses have been incurred (True or False)

TRUE

Type of expenses reimbursed	This year	Last year
	£	£
Travel		
Subsistence		
Accommodation		
Other (please specify):		
TOTAL		

Please provide the number of trustees reimbursed for expenses or who had expenses paid by the charity

28.3 Transaction(s) with related parties

Please give details of any transaction undertaken by (or on behalf of) the charity in which a related party has a material interest, including where funds have been held as agent for related parties. If there are no such transactions, please enter 'true' in the box provided.

There have been no related party transactions in the reporting period (True or False)

TRUE

Name of the trustee or related party	Relationship to charity	Description of the transaction(s)	Amount	Balance at period end	Provision for bad debts at period end	Amounts written off during reporting period
			£	£	£	£

In relation to the transactions above, please provide the terms and conditions, including any security and the nature of any payment (consideration) to be provided in settlement.

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For any related party, please provide details of any guarantees given or received.

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Note 29**Additional Disclosures**

The following are significant matters which are not covered in other notes and need to be included to provide a proper understanding of the accounts. If there is insufficient room here, please add a separate sheet.

Independent examiner's report on the accounts



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity name

THE ARCHIVE OF MARKET AND SOCIAL RESEARCH

**On accounts for the year
ended**

31 MARCH 2021

**Charity no
(if any)**

1166619

Set out on pages

1 - 42

(remember to include the page numbers of additional sheets)

**Respective
responsibilities of
trustees and examiner**

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 ("the Charities Act") and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

**Basis of independent
examiner's statement**

My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

**Independent
examiner's statement**

- In connection with my examination, no matter has come to my attention
1. which gives me reasonable cause to believe that in, any material respect, the requirements:
 - to keep accounting records in accordance with section 130 of the Charities Act; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act have not been met; or
 2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed:

Alistair Henry Ellis Smith

Date:

01/11/2021

Name:

ALISTAIR HENRY ELLIS SMITH FCA

**Relevant professional
qualification(s) or body**

INSTITUTE OF CHARTERED ACCOUNTANTS FOR ENGLAND AND WALES

(if any):

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Address:

FERGUSON & MAIDMENT & CO

167 FLEET STREET
LONDON

EC4A 2EA

Section B

Disclosure

Only complete if the examiner needs to highlight material problems. (E.g. accounting records have not been kept in accordance with s132 of the Charities' Act 2011 and those accounts do not comply with the requirements of the 2008 Regulations setting out the form and content of charity accounts; any material expenditure or action which appears not to be in accordance with the trusts of the charity; any failure to be provided with information and explanations by any past or present trustee, officer or employee; and any material consistency between the accounts and the trustees' annual report.)