



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:

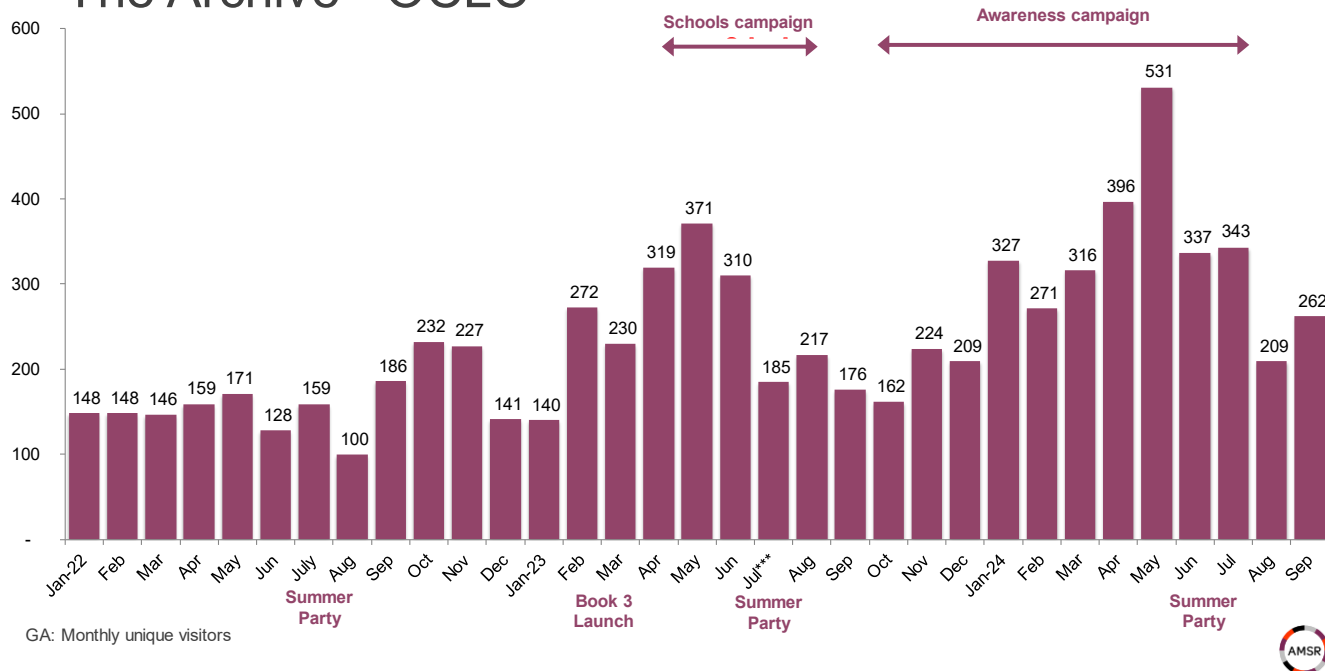
1. To identify and collect as much heritage material as possible.
2. To stimulate the flow of more modern research into the Archive (ideally on an ongoing basis from agencies).
3. To develop greater usage of the Archive.

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 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>