Provocation paper

Culture as Growth Infrastructure

Embedding cultural value in the UK's economic strategy

By Amy Tarr and Michelle Calame
Creative UK

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Foreword

Caroline Norbury. OBE

Culture is one of the UK's most effective engines of growth. Yet despite creating value over decades – across a vast swathe of both economic and social metrics - it is not accepted as a growth indicator by the established economic orthodoxy. This provocation aims to change that.

Culture creates lasting value, supports innovation, improves wellbeing and strengthens the identity of places. It contributes directly to productivity and indirectly to the conditions that make people and businesses choose to stay, build and invest. Recognising the value of culture via a set of consistent, coherent, translatable economic metrics is fundamental to galvanising the growth our country needs.

Cultural and heritage investment is capital investment; delivering fiscal, social and civic returns that compound over time. Across every region, evidence shows that culture attracts talent, drives regeneration and raises confidence in local economies. Each pound spent generates measurable gains in productivity, health and tax revenue: proof that culture is a driver of growth, not a drain on it.

Culture's strength lies in its stickiness. It anchors people and investment, creating spillover benefits that ripple across education, health, tourism and skills. These effects are cumulative: culture attracts capital, capital sustains culture and both strengthen the resilience of place.

Much of the groundwork is already in place. *The Culture and Heritage Capital (CHC) Framework* gives us a credible method for valuing cultural and social outcomes and the networks that connect local authorities, funders and creative businesses already exist. The next step is coherence, bringing these elements together with a clear public commitment and a joined-up civil service.

If the Treasury is both the nation's accountant and its growth arm, culture must be one of its recognised indices. The Department for Culture, Media and Sport, with its reach across creative industries, heritage, digital innovation and community life has the remit to make this happen. Aligning departments around shared outcomes would deliver lasting value for the economy and for society.

This is a moment for collective endeavour. The frameworks, data and delivery capacity are there; what's needed is conscious alignment and public leadership. When government, investors and the cultural sector move in step together, culture can play its full part in the UK's growth story.

Culture already delivers what government seeks to achieve: sustainable growth, healthy communities and a confident national story. The task now is to recognise it as such; openly, coherently and with communal intent.

Executive summary

The UK's cultural sector contributes around £38.2bn in Gross Value Added (GVA), comparable to agriculture, energy supply or telecommunications,[1] yet it receives considerably less recognition in the frameworks that guide public investment. Cultural assets drive innovation, productivity and local regeneration but its contribution is often treated as discretionary, rather than integral to national growth.

The Culture and Heritage Capital (CHC) framework, developed by the Department for Culture Media & Sport (DCMS) and aligned with the Treasury's Green Book, establishes a consistent and credible approach to measuring cultural and social value, allowing cultural projects to be assessed within the same models used for other forms of public investment. When applied systematically, the CHC can ensure that culture is treated as an investable component of the UK's growth strategy.

This paper draws on qualitative evidence gathered in July 2025, during Creative UK's national *Culture as Growth Infrastructure* evidence session. We heard from academics and over thirty sector leaders, who presented evidence that cultural investment already delivers strong returns, yet a significant proportion of cultural finance remains short-term and grant-based, limiting its capacity to attract additional capital and to scale.

Following the national evidence session, Creative UK co-chaired a roundtable with the British Business Bank (BBB) in October 2025, attended by nearly 30 leaders from across the cultural sector. Findings from academic research, alongside sector insights presented during our evidence session and the Creative UK/BBB roundtable demonstrate that clearer recognition in appraisal systems of how culture contributes to prevention, productivity and local growth would strengthen the case for better targeted, longer-term investment.

Together, these forums confirmed that culture already meets the criteria typically applied to infrastructure but remains under-represented in investment channels and national growth finance because its value is not consistently captured within Treasury appraisal norms.

The Government's recently published *Modern Industrial Strategy*,[2] identifies the creative industries as one of eight priority growth sectors, strengthening the case for treating culture as a strategic investment class – but to fund *culture as growth infrastructure*, the UK needs financing models that mobilise public, private and philanthropic capital together, guided by CHC evidence. That begins with a clear and national picture of the UK's cultural assets and requires consistent evaluation standards so that investment decisions are based on comparable evidence.

Recent fiscal and local growth strategies further strengthen the case for treating culture as growth infrastructure, as the Government seeks to catalyse place-based regeneration and blended finance. Budget 2025 reforms the business rates system, introducing lower permanent multipliers for retail, hospitality and leisure properties and a high-value multiplier for properties with rateable values above £500,000 to help 'rebalance the burden' and protect high streets.[3] Recent fiscal decisions strengthen this case. A new Local Growth Fund will target specific mayoral English city regions in the North and Midlands, alongside a statutory duty on those authorities to develop Local Growth Plans.[4] The Fund is designed around three interconnected themes: infrastructure investment, business support and skills development and is explicitly intended to operate within a wider capital stack that includes institutional and private finance.

The absence of a national cultural baseline, inconsistent appraisal norms and eligibility constraints within public finance mechanisms all contribute to under-investment. Correcting this requires a phased pathway: embedding CHC in Treasury practice, mapping cultural infrastructure, improving financing criteria and connecting philanthropic, commercial and public capital behind shared outcomes.

The proposals that follow set out practical steps for HM Treasury, DCMS, regional and local government and funders and investors. Together, they would allow cultural infrastructure to be appraised, financed and grown on equal terms with other assets that contribute to long-term UK prosperity.

Summary of proposals

1. **Embed CHC guidance**
   HM Treasury should embed the CHC as Supplementary Guidance to the Green Book, supported by worked examples and Civil Service training materials.

2. **National cultural infrastructure mapping audit**
   Establish a national dataset mapping the location, use and condition of cultural assets to identify where investment is most needed and track change over time.

3. **Strengthening uptake of the CHC Framework**
   Fund a practical implementation programme so local authorities, arm's-length bodies and funders can apply CHC consistently in appraisals and evaluations.

4. **R&D tax relief guidance**
   HMRC and DSIT should publish clear examples showing how cultural organisations and creative innovation can qualify for existing R&D tax relief and complements creative-sector tax incentives.

5. **Culture and preventative health**
   Develop a pilot model across a number of Integrated Care Systems to embed cultural partners in health delivery and measure value for money using CHC methods.

6. **Create a national philanthropy register**
   Develop a public register of investable cultural projects to record gifts, pledges and outcomes, improving transparency and measurement of co-funding.

7. **Mobilise investment through the British Business Bank**
   Ensure the British Business Bank's Growth Guarantee Scheme's eligibility criteria reflects the financial structures of cultural organisations so they can access appropriate debt finance.

8. **Financing cultural infrastructure through the National Wealth Fund**
   Explore how CHC evidence could inform the National Wealth Fund's appraisal processes, to demonstrate where cultural components enhance productivity and local growth.

9. **Establish a Cultural Infrastructure Commission**
   Once a national baseline and CHC guidance are in place, establish a short-term advisory body to forecast demand, assess risks and advise on long-term cultural investment priorities.

Section 01: Introduction

The UK Government announced a new *Modern Industrial Strategy* in June 2025, focused on rebalancing growth and revitalising local and regional economies; ambitions to be delivered in tight fiscal parameters.[5] In this context, the question of how we define and invest in infrastructure is increasingly important. While traditional infrastructure assets such as transport, energy and housing continue to receive large-scale capital allocations, some of the most high-performing, under-leveraged and widely distributed assets are culturally rooted.

Cultural infrastructure, encompassing physical assets such as theatres, libraries, galleries, archives, festivals and digital cultural infrastructure, as well as tangible (heritage attractions, streetscapes) and intangible heritage (including traditions, practices, civic customs, story-telling and folklore), already contributes significantly to the UK economy.[6] It generates jobs, boosts wellbeing, drives innovation and exports - and can act as a magnet for private investment.

This paper follows a national evidence session on *Culture as Growth Infrastructure* hosted by Creative UK in July 2025 and attended by experts from across academia and over 30 leaders from the cultural sector.[7] The session made an emphatic case: culture delivers against HM Treasury priorities and could be included in infrastructure frameworks and modelling methodologies. *The Culture and Heritage Capital (CHC) framework*, first introduced by DCMS in 2021 and updated in 2024, provides a formal mechanism for valuing culture and heritage that aligns with the Green Book. Applying CHC consistently across funder evaluation tools and cultural organisations would not only improve how cultural projects are valued but would also provide credible evidence to unlock new finance.

In October 2025, Creative UK co-hosted a further roundtable with the BBB attended by leaders from across the cultural sector to examine access to finance barriers and potential alignment with the BBB's investment priorities and cultural organisations' needs. We heard repeatedly that although cultural assets drive growth, wellbeing and innovation, they are still undervalued and remain largely absent from policy frameworks that shape investment - a gap illustrated by the Government's *Entrepreneurship in the UK* prospectus, published after the 2025 Autumn Budget; and by the Social Impact Investment Advisory Group (SIIAG) report that underpins the new Office for the Impact Economy.[8] *Entrepreneurship in the UK* sets out a vision for founders, innovation-driven start ups and high growth clusters - but its examples focus almost exclusively on science, technology, life science and deep tech fields. The SIIAG report recommendations, which underpin the creation of a new Office for the Impact Economy, sets out missions for social impact investment - but arts and culture were explicitly omitted so cultural infrastructure and the spillover effects of cultural experiences are not referenced.[9] When culture is not reflected in the strategic documents that define growth, investment readiness and public value, it risks being excluded from the tools and institutions through which resources flow.

To see where culture matters, it is necessary to examine the wider conditions it shapes for well being, productivity and local stability - rather than focusing only on the immediate outputs of participation. The following sections explore these dynamics through real evidence, demonstrating how cultural activity generates value that is material, long-term and relevant to national growth and prevention objectives.

Section 02: Health and wellbeing: from public good to fiscal effeciency

There are immediate and monetisable benefits of cultural participation that lie in public health. Years of peer-reviewed research, reinforced by longitudinal studies from institutions, show a powerful correlation between cultural engagement and improved mental and physical health outcomes.[10]

Evidence of causality and scale

During our evidence session, we heard from Professor Daisy Fancourt, who has undertaken longitudinal studies across more than a dozen internationally recognised cohort studies with nationally representative data, including the English Longitudinal Study of Ageing, with comparable findings in cohorts in Japan and the US. This body of work offers evidence of causality: individuals who regularly take part in cultural activities are up to 50% less likely to develop clinical depression than those who do not.[11] This is not an artefact of income, education or baseline health; the effect remains statistically robust even when controlling for these variables.

"Individuals who regularly take part in cultural activities are up to 50% less likely to develop clinical depression than those who do not."

Quantifying wellbeing returns

A 2024 report for the Centre for Mental Health estimated that mental ill health costs England around £300 billion annually, far exceeding a single disease or service budget.[12] Given the scale of demand that mental health conditions place on public services, it is critical to understand the potential preventative value of cultural participation. DCMS-commissioned research, which is part of the Culture and Heritage Capital Programme, translates these wellbeing benefits into measurable financial value that can inform government investment decisions. Using QALY (Quality-Adjusted Life Year) and WELLBY (Wellbeing-Adjusted Life Year) models, both fully accepted under Treasury appraisal guidance, the annualised benefit of regular cultural engagement is estimated at £929 per person per year.

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Case Study 01

Project Rejuvenate

Project Rejuvenate explored how heritage and archaeology could improve wellbeing and re-engagement for young people facing exclusion or involvement with the justice system. Delivered in 2023 by Historic England with Wessex Archaeology and Isle Heritage CIC, two pilots took place in Wiltshire and Kent.

Each programme used archaeology as a practical and creative tool for rebuilding confidence. In Wiltshire, pupils with poor attendance took part in a twelve-week excavation project linked to local history, combining fieldwork with creative interpretation and journalling. In Kent, young people under Youth Justice supervision joined an eight-week voluntary reparation programme learning site investigation, photography, and conservation techniques.

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The approach embedded trauma-aware practice and drew on self-determination theory, focusing on autonomy, competence and belonging. Evaluation showed meaningful results: participants reported increased self-esteem, teamwork and communication skills, while teachers noted improved concentration and attendance (rising from 85.5% to 89.8% across the school cohort). Youth Justice officers recorded lower re-offending risk scores and improved engagement with education or training.

At relatively small cost (around £800 per participant) the pilots achieved gains that align directly with public service priorities in education, health and justice. The programme now has a codified delivery model ready for replication by Integrated Care Systems or Youth Justice Services in partnership with local cultural providers.

Project Rejuvenate offers practical evidence that small, place-based cultural investments can generate wellbeing and social outcomes with long-term fiscal value, exactly the kind of cross-departmental return modelled in the Culture and Heritage Capital framework.

Research from Historic England estimates the average annual individual benefit of living amongst cultural heritage to be £515, with a collective WELLBY value of £29 billion across England.[13] These benefits are primarily measured as wellbeing (WELLBY/QALY) gains and reduced utilisation risk. While there is emerging disease-incidence evidence for specific cohorts (e.g. older adults), robust, cashable NHS savings at scale have not yet been established, but there is credible evidence of the preventative value of culture and its potential to relieve pressure on services.

In Treasury terms, this reframes culture as an upstream, preventative investment that can reduce demand on acute services and improve population wellbeing. It also delivers social value through existing structures (local libraries, community arts programmes, festivals, museums), without requiring entirely new delivery mechanisms. But despite growing evidence that cultural and arts-related opportunities contribute positively to health and wellbeing, embedding these systematically into health strategies remains inconsistent.

Integrating culture within health systems

Recent research shows that social prescribing mechanisms are being used to connect people with cultural, heritage, nature, arts and digital opportunities as part of holistic approaches to wellbeing.[14] Yet qualitative studies highlight barriers to fuller integration, including gaps in provision, lack of shared definitions, accessibility issues for marginalised groups and concerns over sustainability and equity.

In England, Integrated Care Systems (ICSs) bring together NHS bodies, local authorities and voluntary partners to plan population health at place level, with Integrated Care Boards (ICBs) acting as the statutory commissioners of services within each system. Although social prescribing is part of policy frameworks and investment has been made in link-worker models and local partnerships, experts at the evidence session underscored that there is not yet strong evidence that all ICBs have formal pathways to commission cultural organisations. During our evidence session, we heard that this results in patchy practice: some areas are developing local approaches, while others remain without a coherent strategy or sufficient resources.

With relatively modest adjustments to Integrated Care System commissioning frameworks, supported by DCMS, Department for Health and Social Care (DHSC) and HM Treasury, cultural organisations could be integrated into local care ecosystems. That would allow government to tap into an existing network of delivery partners with demonstrated impact, low cost of activation and high return profiles.

"Cultural organisations could be integrated into local care ecosystems ... with demonstrated impact. low cost of activation and high return profiles."

Section 03: Productivity and spillovers

While the health returns are compelling, culture's impact on economic productivity is equally significant and arguably better documented. According to DCMS provisional estimates, outputs per hour working in the cultural sector reached £43 in 2023, broadly in line with the UK average and ahead of several other service-based industries.[15]

We heard from Irfaan Boodhoo, Managing Economist at the Centre for Economic and Business Research (Cebr), that when Treasury-compatible modelling is applied (tracks not only the direct jobs and output generated by cultural organisations but also the wider economic activity they stimulate), a fuller view of the sector's impact emerges.

Evidence of economic multipliers

According to Cebr's report for Arts Council England, *Spillover Impacts of Publicly Funded Arts and Culture* (2025), National Portfolio Organisations (NPOs) generated £1.35 billion in GVA in 2023 and supported nearly 28,000 jobs, delivering an estimated £3.12 in GVA for every £1 of public investment.[16] Whilst this ratio should be interpreted as indicative, rather than exact contribution (as outcomes vary depending on local context and complementary investment), this demonstrates that publicly funded cultural organisations generate material value at scale.[17]

Furthermore, Cebr's analysis for Historic England of the tourism spillover estimated heritage-related visitor spend at £28 billion in 2023.[18] Combined, this evidence shows public funding stimulates private and foreign investment, drives innovation, strengthens regional clusters and develops talent pipelines. These wider spillover effects are not always captured by cost–benefit models, yet they significantly enhance productivity and long-term growth.

These effects translate into fiscal, as well as economic, returns. The Cebr report estimates that in 2022, the UK's arts and culture sector paid £4.9 billion in taxes, compared with £442 million in NPO funding.[19] The figures are a valuable scale comparison, rather than a direct causal attribution (the tax estimate is UK-wide, whilst the £442 million relates to Arts Council England's NPO grants in England in 2022). Nevertheless, the ratio (more than ten times as much in tax revenues as in direct grants) demonstrates that, far from being a net cost, public investment in culture generates significant contributions to the Exchequer, whilst underpinning long-term growth drivers such as exports, entrepreneurship and skills.

The UK Government has mobilised one-off packages in other sectors when long-term returns are judged strategically important, from decarbonisation in steel to zero-emission vehicle technology in automotive.[20] Culture is not in competition with these priorities; rather, it belongs in the same category of future-facing investments that build productivity and national advantage.

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Culture as a local economic catalyst

At the local level, these national spillover impacts are visible in how cultural assets shape economic activity. High streets with heritage interest and venues such as festivals, theatres and museums anchor visitor economies, stimulate high street footfall and sustain surrounding businesses in hospitality, retail and transport. Across towns and cities outside of the strongest growth corridors, cultural infrastructure often represents a core source of place-based economic and social capital, providing jobs and skills pathways and help create the kind of local identity that attracts residents, workers and investors. Historic buildings, for example, offer flexible, distinctive, and characterful workspaces that attract investment, businesses and skilled workers to local areas.

As a measure of this pull factor, nearly 26% of creative firms are located in the 2% of the country designated as conservation areas.[21] This concentration reflects the magnetic effect of culturally distinctive environments, where heritage, events and creative activity reinforce one another. Case studies cited in the Cebr spillover analysis include the Manchester International Festival, which generated £39.2 million in local benefit in 2023, and the Liverpool Biennial, which delivered £24.3 million that same year.[22] Amion's evaluation of Historic England's High Street Heritage Action Zones programme showed benefits valued at over £245 million shared across 66 economically deprived places.[23]

"High streets with heritage interest and venues such as festivals, theatres and museums anchor visitor economies, stimulate high street footfall and sustain surrounding businesses"

Sticky growth and place resilience

This evidence demonstrates that productivity in culture is not simply about outputs per worker or hour. It is also about how public investment creates the conditions for wider economic activity. What is clear from multiple data sources and research reports is that cultural activity and institutions create 'sticky-ness' in our towns, cities and rural areas. It creates a 'pull' that benefits many other parts of local economies, encouraging not just tourist traffic, but a reason for other businesses to locate nearby. This represents a strong value proposition for HM Treasury, as it assess where investment most effectively drives growth and resilience.

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Case Study 02

Southampton Model

Culture-led regeneration and intentional investment

The Southampton Model is a culture-led, place-based investment initiative developed by Southampton Forward and Southampton City Council. It positions culture as a central driver of the city's growth and wellbeing strategies, embedding cultural infrastructure within wider economic, health and regeneration priorities.

Emerging from the city's UK City of Culture bid and the creation of the Southampton Renaissance Board, the model is underpinned by stakeholder and community consultation, a Joint Cultural Needs Assessment and a live Theory of Change co-developed with the city's universities. These tools informed prioritisation of two flagship regeneration projects – the reimagining of a historic high street and the completion of Southampton's Cultural Quarter – alongside an emerging city-wide Public Art Strategy.

Through its partnership with the DCMS-sponsored Impact Investing Institute, Southampton has explored how impact investors, developers and philanthropists can participate in culture-led regeneration. This national pilot tested approaches to place-based impact investing, identifying shared objectives and frameworks for blended finance that could align to economic, social, cultural and environmental outcomes.

The Southampton Renaissance Board, chaired by the Vice-Chancellor of the University of Southampton, provides strategic governance across the city's regeneration plans, bringing together civic, political, business and cultural partners to coordinate investment opportunities. Parallel initiatives, including work with Business in the Community and the development of the Southampton Pound, strengthen the local wealth-building and social value dimensions of this approach.

The model also examines how mechanisms such as the Community Infrastructure Levy (CIL) and Section 106 contributions can be used to support cultural infrastructure as part of wider development frameworks. By linking cultural investment to housing, health and environmental priorities and growth and prosperity outcomes, Southampton seeks to demonstrate a practical route to embedding culture within mainstream place-based policy and finance decisions.

Case Study 03

The Piece Hall – Halifax

The Piece Hall's transformation shows what happens when heritage is treated as hard economic infrastructure rather than a discretionary cultural asset. Reopened in 2017 after a £19 million restoration led by Calderdale Council, the National Lottery Heritage Fund and ERDF, the eighteenth-century cloth hall has become the anchor of Halifax's renewal story.

Before restoration, the town centre faced familiar challenges, declining retail, vacant units and weak footfall. Today, The Piece Hall attracts more than 1.2 million visitors each year, in a borough of just 90,000 residents. The project evaluation found that annual operations generate £5.30 of local economic output for every £1 spent, with around 60% of visitors spending elsewhere in the town on the same trip. Retail data from the adjacent Woolshops district shows a million extra shoppers in the first two years, sustaining a 10% increase in footfall against regional trends.

Cultural use has also generated commercial confidence. Since reopening, over 50 independent businesses, including galleries, cafés, and small creative studios, have taken space on site, supporting more than 500 local jobs. Major live events and outdoor performances have drawn national audiences and repositioned Halifax as a northern cultural destination.

The Piece Hall demonstrates that heritage-led investment delivers long-term productivity returns and measurable place-based spillovers. The evaluation framework used Green Book-compliant methods, tracking additionality, land-value uplift and business formation, providing a template for future CHC-aligned appraisal.

The Piece Hall makes the case for culture as catalytic infrastructure, stimulating economic activity, reinforcing civic identity and crowding in private investment long after capital funding ends.

Section 04: Innovation and R&D in the cultural sector

Cultural institutions as hubs for innovation

Across the cultural sector, organisations are driving productivity, rethinking how they engage audiences and create work, often developing new methods, tools and practices in the process. Government strategy recognises these cultural institutions as innovation assets: the Sector Plan refers to the UK's 'world-renowned museums and archives' as part of the national base for innovation and highlights public R&D programmes that include live performance infrastructure and cluster support that enables organisations to prototype and adopt new methods.[24] HMRC is expected to publish clarified R&D tax guidance confirming that where a project seeks an advance in science or technology, arts activities that directly contribute to resolving scientific or technological uncertainty can qualify for relief, removing ambiguity that has deterred cultural organisations from treating legitimate innovation as R&D.[25]

Recognising elements of cultural practice as R&D within appraisal and tax guidance strengthens the case that cultural organisations are part of the UK's innovation infrastructure; testbeds where methods are designed, prototyped and evaluated before diffusion to partners, audiences and markets. Recent research for the National Theatre, undertaken with partners across the wider ecosystem, maps how research, development and innovation already operate across the performing arts.[26] The paper identifies five overlapping forms of innovation – artistic, technical, audience-engagement, organisational and research-led – that align closely with the Government's definition of R&D as 'the creation and application of new knowledge to improve the world'. It shows that activity within theatres already advances innovation across priority policy areas, from AI and digital adoption to sustainability, skills development and data-driven audience insight. Yet the research also highlights that take-up of R&D tax relief is vanishingly low within the sector, largely because the scheme remains narrowly interpreted around science and technology and provides few examples relevant to cultural practice. The researchers recommend that government clarifies and aligns R&D tax relief with existing creative sector incentives, ensuring that Theatre Tax Relief and R&D tax relief complement rather than duplicate each other. It also calls on HMRC to publish sector-specific guidance and case studies illustrating how cultural R&D can qualify under existing rules. Implementing these recommendations would both widen access to fiscal incentives and reinforce the UK's position that cultural institutions are integral to its national innovation system: places where new knowledge is generated, tested, and diffused across disciplines, industries and audiences.

"Recognising elements of cultural practice as R&D within appraisal and tax guidance strengthens the case that cultural organisations are part of the UK's innovation infrastructure."

Case Study 04

The Serpentine

Creative R&D and Public-Interest Innovation

The Serpentine's Arts Technologies programme reframes cultural institutions as research infrastructure. Through its Choral Data Trust Experiment (2024–25), the gallery worked with fifteen UK choirs and over 300 contributors to create a collective AI dataset for vocal sound. The project introduced two new roles – a data steward and a trusted intermediary – to ensure performers could control how their data was used, setting new standards for consent and attribution.

Rather than a conventional art commission, this was a research exercise into governance: testing how cultural organisations can shape the ethics of data and AI development. The work has since informed practical guidance on collective licensing and data trust models for creative content, developed in partnership with legal scholars and digital rights experts - perhaps one of the most contentious issues currently facing the cultural and creative industries.

The Serpentine's project meets every element of the Treasury's R&D definition: it was novel, systematic, uncertain in outcome, and designed to generate transferable knowledge. By embedding public participation in the design process, it also demonstrated how the cultural sector can contribute to responsible technology adoption - an area of increasing interest for both DCMS and DSIT and of immense significance to UK citizens.

The Serpentine case study evidences a form of 'creative R&D' that delivers public value and innovation infrastructure, proving that cultural research can and should be treated within the same policy frameworks as science and technology.

Current gaps in recognition and appraisal

Despite delivering clear and measurable returns, culture remains largely disconnected from the UK's infrastructure planning and appraisal architecture for reasons that appear to be structural and methodological. Two central barriers persist, with the first being definitional.

Structural barriers to inclusion

Unlike transport, digital, or energy assets, cultural infrastructure is not currently included in the Treasury or Office for National Statistics' classifications of infrastructure.[27] As a result, cultural assets are almost entirely excluded from long-term capital investment plans; and this exclusion can have downstream consequences for local and regional growth strategies. Yet the conceptual case for culture as infrastructure is increasingly well-founded.

During the evidence session, several expert witnesses, including Dr Dimitrios Panayotopoulos-Tsiros, explained that culture meets the technical characteristics:

- Cultural assets are accessible (often free at point of use).
- They are non-rivalrous (one person's use does not diminish another's).
- They enable a wide spectrum of economic, educational, health and civic outcomes.

Theatres, libraries, museums, historic streetscapes, digital archives and festivals all meet these criteria. Yet because they sit outside existing asset categories, their visibility is low. Critically, no national audit exists to map their presence, condition or usage. This can create policy blind spots. During the evidence session, we heard that areas of cultural deprivation, characterised by low provision of cultural services, minimal access to venues or a lack of creative programming, often overlap with other forms of disadvantage: poor health outcomes, limited educational attainment, low civic trust. But without a baseline map of cultural infrastructure, these patterns go undiagnosed and unaddressed.

Technical barriers in appraisal

The second barrier is largely technical: much of the evidence on cultural value is not currently formatted in a way that can be used in government appraisal models. Although a rich evidence base exists, from peer-reviewed academic studies to major programme evaluations, this material is not always expressed using the vocabulary of cost–benefit analysis (CBA), benefit–cost ratios (BCRs), counterfactuals, or monetised impact flows. We heard from experts that this mirrors wider constraints in fiscal appraisal, where preventative programmes are not often incorporated because they do not meet exacting evidential thresholds.

Mazzucato's recent work on the public value of arts and culture shows that conventional Gross Domestic Product (GDP) and CBA approaches undercount culture's role in influencing the composition and direction of growth.[28] By applying a mission-oriented framing, she argues that culture can be understood as generating dynamic spillovers and long-term public value that current appraisals overlook. Recognising this strengthens the case for formal inclusion of culture within investment frameworks.

Strengthening the Culture and Heritage Capital Framework

The Culture and Heritage Capital Programme (CHC), led by DCMS, has developed draft guidance that aligns cultural valuation with HMT Green Book methods. The CHC Framework follows a systems approach, whereby stocks of assets provide flows of services, which produce benefits to society that can be monetised. This can be used to help articulate the economic, social and cultural impact of creative, cultural and heritage interventions. DCMS has set out this approach in *Embedding a Culture and Heritage Capital Approach*.[29] Witnesses argued that this work needs to be amplified and should be formally endorsed by HM Treasury. Without this, cultural proposals risk being dismissed as intangible or non-strategic, even where evidence shows strong economic returns.

Growing demand for preventative public spending reflects a broader shift in government priorities towards long-term cost efficiency and population wellbeing. The NHS is under sustained pressure. So too is the DWP, particularly in managing the rising cost of retirement age and in-work mental health support. Formal adoption would also support more targeted investment in preventative interventions, especially those that reduce demand on public services and improve outcomes at lower cost.

Cultural participation fits this preventative brief but must be modelled consistently within appraisal frameworks. Green Book-aligned evaluation at scale would enable commissioners, including ICBs, to recognise and invest in proven, cost-effective cultural interventions.

Section 05: Culture as a national and regional growth driver

The devolution of economic powers and the development of Local Growth Plans have placed culture into strategies for prosperity, wellbeing and regeneration. This marks an evolution rather than a departure from the planning frameworks already in place: England's *National Planning Policy Framework* (December 2024) continues to require local plans to promote cultural wellbeing, the devolved nations have embedded within their respective parallel frameworks: Scotland's *National Performance Framework* (NPF) 4 (adopted 2023), Wales's *Planning Policy Wales* (Edition 12 2024), and Northern Ireland's *Strategic Planning Policy Statement* (SPPS, 2015; updated 2024). These instruments differ in structure but each positions culture within sustainable placemaking and community infrastructure.

In Scotland, the updated *Culture Strategy for Scotland 2025* situates culture within the *National Performance Framework* and introduces indicators on cultural wellbeing and place quality. In Wales, *Priorities for Culture* positions heritage and the creative industries as central to regeneration and aligns them with the Well-being of Future Generations Act indicators. In Northern Ireland, the Heritage, Culture and Creativity Programme Purpose and Framework references the CHC, reflecting convergence with UK-wide valuation methods. Collectively these strategies show a consistent movement towards embedding culture within mainstream measures of growth and wellbeing.

In England, this direction is reflected through the most recent Local Growth Plans and pan-regional collaboration. One Creative North (2025) set out a unified northern agenda on finance, research, skills and data, calling for a common measurement framework for cultural value; and Greater Manchester and West Yorkshire have already confirmed plans to trial CHC-aligned evaluation in regeneration programmes.

The West Midlands Growth Plan 2025 will use devolved budgets to stabilise venues and attract co-investment, while South Yorkshire's Local Growth Plan 2025–2035 integrates culture within its *Thriving Places* mission. In the Tees Valley, the *Ten-Year Growth Plan* 2025 and *Investment Zone Prospectus* designate digital and creative industries as a long-term cluster with £160 million of committed funding. These approaches show how cultural infrastructure anchors local identity, draws private investment and drives regional resilience.

The 2025 Budget and Local Growth Fund policy statements take this a step further by putting Local Growth Plans on a statutory footing and backing them with a consolidated, long-term funding pot for 11 Mayoral Strategic Authorities in the North and Midlands.[30] These plans must now set out coherent strategies across three themes: infrastructure investment, business support and skills development. The Local Growth Fund logic model explicitly anticipates that grants will sit within a wider capital stack, helping to unlock institutional and private finance alongside other public and philanthropic sources. This is precisely the space where cultural infrastructure and creative clusters already operate; as mixed-model institutions combining public investment, earned income and private capital.

At present, the Local Growth Fund guidance does not spell out culture as a named priority, despite the fund's aims to regenerate commercial centres, strengthen clusters and expand labour market reach. Building in an explicit expectation that Local Growth Plans should map, protect and grow cultural infrastructure, using CHC, national cultural mapping would ensure that cultural assets are treated as investable components of local growth strategies. It would also give MSAs a clearer mandate to use Local Growth Fund, business rates retention zones and National Wealth Fund support to stabilise venues, repurpose heritage buildings for creative use and develop cultural-led destinations that make places 'sticky' for residents, workers and investors.

"The devolution of economic powers and the development of Local Growth Plans have placed culture into strategies for prosperity. wellbeing and regeneration"

Towards a National Cultural Infrastructure Map

What is missing is the connective tissue; a coherent national picture and a shared evaluation standard. London offers an established model to draw upon; the Greater London Authority's Cultural Infrastructure Map (live since 2019) integrates geospatial, economic and planning data to monitor cultural assets and track change in floorspace through the *London Plan Annual Monitoring Report*. It demonstrates how mapping can inform planning, protect cultural clusters and support investment decisions. Extending this approach nationwide would allow national and devolved governments to see where cultural access and opportunity are uneven, how assets are changing over time and where targeted investment would have the greatest growth impact.

Although culture is appearing more frequently within local and regional planning documents, the evidence base remains fragmented and difficult to interpret at a national level, making it harder to develop a full picture of where cultural infrastructure is changing, strengthening or at risk. Labour's Manifesto for the creative industries committed to developing a Cultural Infrastructure Map to identify existing arts and cultural institutions, strengthen local networks and highlight areas of under-provision.

The development of a single dataset connecting regional, devolved and national systems would make it possible to apply CHC methods consistently across the UK, so that appraisals of cultural projects use the same standards as transport or housing. Visible progress on scope, governance and publication is now essential to unlock the Map's potential as an investment tool.

"What is missing is the connective tissue: a coherent national picture and a shared evaluation standard."

Consistent valuation and data alignment

Alongside this, consistent valuation standards are the next step. The ONS *Measures of National Well-being Framework* (updated 2025) provides outcome indicators that track wellbeing at population level; the Local Government Association's *Outcomes Framework for Culture and Sport (2024)* offers councils a menu of indicators to demonstrate social impact. Both are complementary but distinct from CHC: they capture what changes as a result of cultural investment, while CHC provides the methodology for valuing how much those changes are worth in Green Book terms. Integrating these datasets within a national map would create a more comprehensive chain of evidence than is captured currently, allowing investment decisions to be made on consistent, comparable data.

Section 06: Crowding in private and philanthropic investment

Culture is already mobilising private capital through strategic public investment, though arguably not at sufficient scale to match its potential. Case studies discussed at the roundtable illustrated how public investment can de-risk projects and attract commercial co-funding:

- SXSW UK Pavilion, which attracted commercial sponsorship and export deals;
- National Theatre's capital campaign, which leveraged philanthropic donations several times its public grant; and
- Creative cluster investments in Liverpool and Manchester, where public funds de-risked commercial real estate and content production ventures.

Access to growth capital

Following the 2025 Spending Review, the BBB was mandated - through its Growth Guarantee Scheme (GGS) and new £4bn Industrial Strategy Growth Capital allocation - to crowd in private investment to priority growth sectors, including the creative industries. However, evidence from Creative UK's October 2025 roundtable indicated that cultural and heritage organisations often remain ineligible or unsuitable for these facilities. The GGS requires at least 50 per cent of income to derive from trading activity, a threshold that excludes most mixed-model organisations whose revenues combine earned, grant and philanthropic income. Participants noted that these diversified income streams, which in practice can stabilise operations, are classified as non-commercial under current criteria. In addition, the small average loan sizes and limited collateral typical of cultural organisations mean that many cannot meet accredited lenders' risk requirements even when guarantees are available.

These constraints result in a systemic under-representation of cultural organisations in public guarantee and growth-capital portfolios, despite their contribution to local regeneration, employment and social outcomes. The issue is not only one of eligibility but also of how value and risk are defined within public-backed finance. Conventional lending frameworks prioritise cashflow and collateral, while cultural investments generate blended returns that are not consistently captured in appraisal or monitoring.

The NWF has been tasked by HM Treasury with driving investment in the UK's priority growth sectors, with a focus on clean energy, advanced manufacturing, digital technologies and transport. Although its Statement of Strategic Priorities commits it to supporting delivery of the wider Industrial Strategy, it does not yet have an explicit route for cultural infrastructure.[32] Cultural assets that deliver measurable productivity and regeneration impacts therefore sit outside its current pipeline, despite alignment with the Fund's regional-growth mission.

The creation of the Office for the Impact Economy, announced in autumn 2025, is intended to provide exactly the kind of strategic hub that can connect public funding, philanthropic capital and private investment behind national priorities. Its design principles were shaped, in part, by the Social Impact Advisory Group (SIIAG) report, which explicitly excluded culture and the arts from its mapping. This omission creates a risk that impact economy structures will reinforce existing blind spots, overlooking cultural assets that deliver the kind of preventative, place-based and inclusive growth outcomes that the impact economy is able to support.

"Guarantee schemes and national funds are structured around commercial growth assumptions, while culture's blended public-good and economic value remains under-recognised in investment appraisal."

Integrating philanthropic capital

Alongside these public financing mechanisms, Creative UK has previously called for a practical way to mobilise philanthropic capital alongside public investment, including a structured philanthropy register to transparently present investable cultural projects and track leverage across sources.[33] There is currently no national, live pipeline of cultural projects that donors and impactinvestors can search, compare and track by outcome. The Charity Commission's Register of Charities lists organisations rather than projects and open-data initiatives, such as 360Giving, GrantNav and UKGrantmaking record grants already awarded by funders that choose to publish – but not a forward pipeline of opportunities.[34]

A national philanthropy register

A national register would provide a single, trusted source of information on projects seeking philanthropic finance. Designed as a neutral platform, it could connect cultural organisations with prospective supports in a transparent way. The register would require proportionate governance and expert input from funders and regulators but, properly designed, could lead to measurable co-investment opportunities, alongside giving public funders a clearer picture of how philanthropic support evolves over time. This visibility would help government and investors identify where private giving already complements public funding and where new partnerships could most effectively drive growth.

"A national register would provide a single. trusted source of information on projects seeking philanthropic finance."

Section 07: Implementation: A phased pathway to data, appraisal and investment

This paper does not claim to be the final word. It reflects the culmination of our evidence session and roundtable discussion, alongside secondary research. The proposals set out below are intended as a starting point for deeper exploration with HM Treasury, DCMS, Ministry of Housing, Communities and Local Government (MHCLG), the devolved governments, Mayoral Combined Authorities (MCAs) and local authorities. Further work will be needed to test delivery models, strengthen the evidence base and ensure that approaches are co-developed with cultural organisations, investors and policy makers.

Embed CHC guidance:

The Culture & Heritage Capital (CHC) programme at DCMS has advanced methods for valuing culture in line with Treasury practice, but as of 2025 these remain technical guidance rather than part of the Green Book. DCMS and HM Treasury could co-publish CHC as formal Supplementary Guidance to the Green Book, supported by worked case studies and Civil Service Learning materials, so cultural value can be included in business cases on equal terms with other investments.

The methods could then be piloted in a small number of live business cases, covering, for example, cultural infrastructure, creative health or heritage capital projects, under Treasury oversight to generate value-for-money assessments that can be benchmarked against existing approaches. Once piloting is complete, DCMS and HMT could jointly issue CHC as Supplementary Guidance, following the model used for wellbeing to ensure that cultural valuation becomes part of the standard appraisal toolkit across government.

National cultural infrastructure mapping audit:

Despite decades of public and philanthropic investment, there is currently no nationally agreed dataset that identifies the location, density, usage, or condition of cultural infrastructure across the UK. This gap makes it difficult to assess need, identify under-served communities, or understand how cultural access correlates with economic or health outcomes. This audit would align with Labour's manifesto commitment to introduce a new Cultural Infrastructure Map, designed to highlight areas of low cultural provision.[36]

In addition, a longer-term ambition of the Culture and Heritage Capital Programme is to develop a Culture and Heritage Capital Account, whereby (alongside monetary accounts) the extent and condition of creative, cultural and heritage assets will be assessed. These will demonstrate the annual flows of benefits from the stock of CHC assets, providing a clearer picture of their value to the economy and society, helping to fill this evidence gap. Much of the underlying data exists already, albeit in fragmented forms. The challenge is to stitch it together into a national baseline.

Embed culture in Local Growth Plans and Local Growth Fund guidance: this guidance should make clear that cultural infrastructure is an eligible priority for Local Growth Fund investments. Referencing the CHC and the National Cultural Infrastructure Map, this guidance would encourage MSAs to use Local Growth Funds, business rates retention zones and the National Wealth Fund's regional project accelerator to stabilise and grow cultural assets as part of wider productivity strategies.

Strengthening uptake of the CHC Framework:

Even with a Green Book validated CHC framework, uptake is not guaranteed. To address this, DCMS should fund a practical capacity-building and implementation programme to help local authorities, ALBs and cultural funders to apply CHC consistently in project appraisal and evaluation. This should include clear, shared guidance on when and how CHC should be used, supported by training for analysts and project teams, thereby moving CHC from being a tested framework to a routinely applied decision tool.

R&D tax relief guidance:

HMRC and DSIT should implement the commitment made in the 2025 Creative Industries Sector Plan by publishing clarified R&D tax relief guidance that explicitly shows how creative innovation can meet existing R&D thresholds for scientific or technological uncertainty.[37] HMRC should publish sector-specific examples to ensure clarity for creative R&D. In line with recommendations from the National Theatre's Research on RD&I in Theatre (2025), HMRC should also issue sector-specific examples that demonstrate how cultural R&D qualifies under existing rules and how it complements, rather than duplicates, creative-sector incentives such as Theatre Tax Relief.

Culture and preventative health:

One area where this methodology could be applied at scale is health commissioning. Several Integrated Care Systems (ICSs) should be invited to participate in culture–health pilots, modelled on Greater Manchester, where cultural partners are already embedded in ICB strategies delivering social prescribing and mental health programmes. Extending this model to further would allow NHS England and DHSC to test delivery, measure savings and establish new funding pathways.

Create a national philanthropy register:

A national philanthropy register would provide a transparent way for cultural organisations to present investable projects and record pledges and gifts (with optional donor anonymity), using shared taxonomy (such as capital, programmes, creative health, heritage, R&D) and standardised outcomes tags. A register of this sort would strengthen transparency and measurement, supports place-based priorities, and help Treasury see philanthropic co-funding and leverage in a consistent way across cultural programmes.

Mobilising investment through the British Business Bank:

Sector insights from the Creative UK and British Business Bank roundtable highlighted that the valuation model used within the Growth Guarantee Scheme (GGS) can create an unintended incentive for organisations that combine commercial, grant and philanthropic income. Under current practice, we heard that grant and philanthropic revenue are treated as non-commercial, which can reduce an applicant's assessed creditworthiness even where such income provides stability and mitigates risk.

The valuation model should therefore be reviewed to ensure it accurately reflects the stabilising effect of blended income and does not disadvantage cultural and heritage organisations delivering proven economic and social outcomes.

Reviewing the valuation model to address unintended consequences, supported where appropriate by CHC evidence, would extend the reach of national growth finance into a demonstrably productive but underserved part of the economy.

Financing cultural infrastructure through the National Wealth Fund:

The NWF's purpose is to deploy public capital into assets that deliver long-term economic returns across its four priority areas: clean energy, advanced manufacturing, digital technologies and transport. Cultural infrastructure does not constitute a discrete investment category within this mandate. However, cultural assets often play an enabling role in place-based investment, supporting workforce attraction, regeneration, local economic resilience and the wider conditions for growth.

Incorporating CHC evidence would enable the NWF to recognise and measure this wider public value where cultural components form part of, or directly contribute to, investable propositions within its priority sectors. CHC metrics would provide a transparent and consistent means of evidencing productivity, wellbeing and place-based impacts alongside financial returns.

The NWF, HM Treasury and DCMS could jointly examine opportunities within the existing investment pipeline where CHC-aligned appraisal might add value. Using CHC evidence would ensure that, where cultural elements demonstrably enable priority-sector investments, their wider economic and fiscal contribution can be assessed on a consistent basis, without altering the Fund's core mandate.

Establish a Cultural Infrastructure Commission:

Once a national baseline of cultural assets is in place and Culture & Heritage Capital methods are embedded in Green Book appraisal, government could establish a Cultural Infrastructure Commission. This would be a time-limited, non-statutory advisory mechanism, modelled loosely on the approach taken by the National Infrastructure Commission, tasked with forecasting long-term demand, identifying resilience risks (such as climate adaptation, digital capacity and skills gaps), and providing independent scrutiny of cultural investment priorities. By sequencing this after core reforms are bedded in, the Commission would add value without duplication, giving Treasury and departments a trusted forum for strategic oversight, whilst ensuring culture remains visible in long-term growth planning.

Section 08: Conclusion

Culture already functions as growth infrastructure: it anchors local identity, drives productivity, reduces demand on health and welfare systems and attracts investment. Yet because it is rarely captured in national baselines or consistently appraised against Treasury standards, its value is not sufficiently visible when it comes to decisions about where capital flows. The result is a persistent underinvestment in assets that demonstrably generate economic and social returns.

This paper sets out a pragmatic pathway to correct that imbalance. Together, these steps offer ways to recognise culture as a cost-effective lever of growth and prevention. For DCMS and the CHC team, it provides the route to embed their technical work in core government processes; and for the cultural sector, it creates the conditions for investment to flow on equal terms with other infrastructure.

As fiscal appraisal frameworks continue to tighten what counts as growth-enhancing, the cultural sector can adapt by providing robust datasets, counterfactual evidence and consistent reporting, which would allow cultural infrastructure to become more visible within fiscal modelling.

Over time, greater consistency in data, valuation and evaluation should make cultural impacts easier to compare and integrate, supporting longer-range planning. As this evidence base matures, cultural infrastructure can be considered alongside other assets are a core contributor to growth, prevention and place resilience.

"Culture already functions as growth infrastructure: it anchors local identity. drives productivity. reduces demand on health and welfare systems and attracts investment."

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