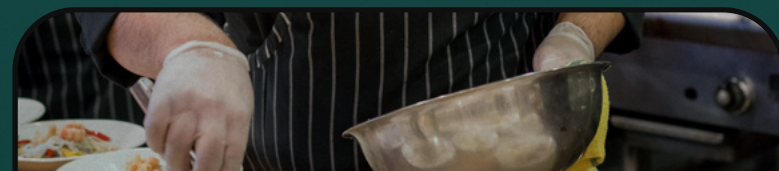
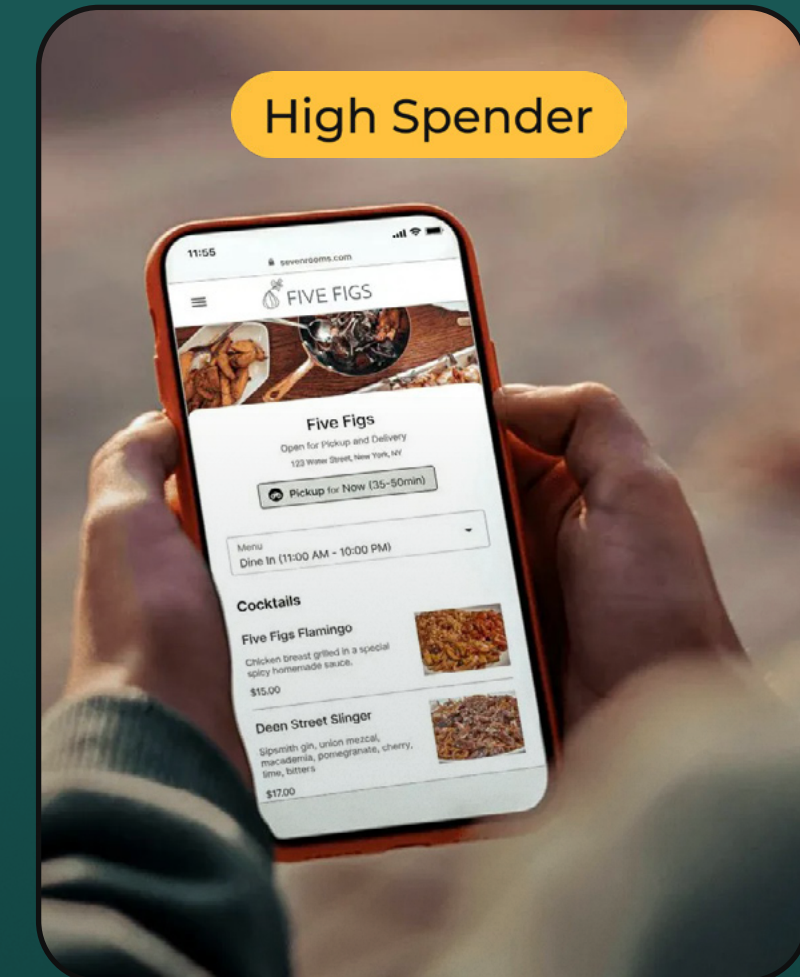


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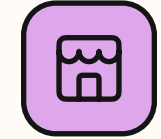
# Restaurant Trends and Diner Expectations

An inside look at how restaurants are delivering better guest experiences in the age of AI and automation.

2024 Australia Annual Report



# What's ahead in the report



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## INTRODUCTION

# Restaurants are the ‘third place’ people crave

Over the past few years, consumer habits and routines in Australia have shifted due to the social, economic and technological environment.

After slowing quite significantly due to inflation, the [Australian economy is beginning to see an upturn](#), with household spending up 1.6% in Q4 2023. Despite lingering inflation concerns and a desire to save in certain areas, Aussies are back to enjoying [third places](#) – “somewhere a person spends time that is not their home (their first place) or their work (second place).”

To paint a full picture of the hospitality scene in 2024, we gathered insights from 250 operators and 1,000+ consumers across the country and looked at product analytics from over 2,000 SevenRooms customers in Australia.

We found that when restaurants really get to know their customers while offering great experiences and value, people will prioritise them over their competitors. Read on for detailed findings and actionable insights to grow your business.



## DINER EXPECTATIONS

# What matters most to diners today

Across generations and cities, consumers share a few key expectations when they dine out — they're looking for **convenience**, **personalisation** and **value** from brands they trust. And when they're happy with the service, communication and meal or drink experience — they're more than just happy customers (who are willing to pay more), but brand ambassadors.

After a massive adjustment to remote work and then a readjustment back to the workplace, today, **48% of Australian employers** require employees to be in-office 3-5 days per week, and **53% of employees** work on a hybrid schedule. People are excited to be back in the world, taking a proper lunch break or staying out after work for cocktails.

Let's walk through the trends we're seeing among Aussie consumers and the opportunities for hospitality businesses.



☆ The trend

## Gen Z consumers are fueling the restaurant revival

Younger generations in Australia are dining out more often, making restaurants part of their weekly routine.

Gen Z dines out the most, with more than a quarter (26%) **dining out more than five times per month** and another 41% saying they **dine out 3-4 times per month**.

Gen X and Baby Boomers are overwhelmingly eating at home as 66% of this group only **eat out 1-2 times per month**.

### How often do you dine out each month, on average?

● 1-2 times ● 3-4 times ● More than 5 times

Gen Z



Millennials



Gen X and Baby Boomers



SevenRooms U.S. Consumer Survey, 2024



💡 The opportunity

## Cater to your specific audience's dining habits

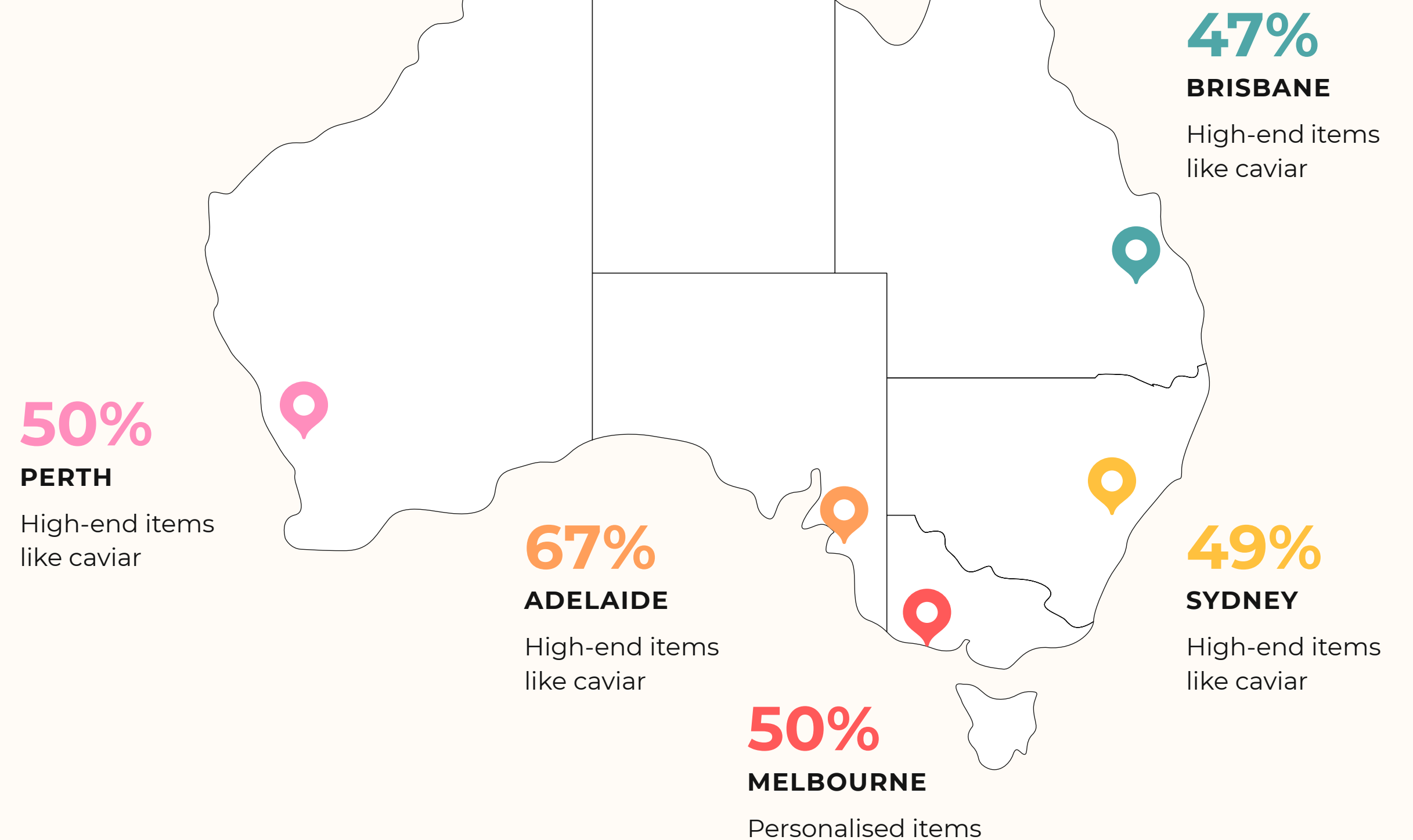
Analyse [booking data](#) over time and by generation to understand when and how different audiences prefer to dine with you. Track guest dining and visit frequency to identify "[champion diners](#)", then, adjust your marketing and promotional strategy accordingly to [improve brand loyalty](#) among this crowd.

☆ The trend

# Consumers are willing to spend up for elevated dining experiences

Most Aussies say they are willing to **spend up to \$97 per person** for a meal out. Yet, when eating out at restaurants, diners in cities with higher costs of living (e.g. Sydney, Brisbane and Melbourne) are willing to dish out more for elevated experiences – like caviar and truffles, or personalised menu items.

Dining upgrades consumers are willing to spend above market price on by city



## Technology tip

Leverage a [restaurant CRM](#) to better understand your guests' preferences and plan out targeted marketing campaigns to boost average spend per guest.

**Liam Crawford**  
Friday Regular

Champion VIP July Birthday

Friends & Family Peanut Allergy Big Spender

| TOTAL SPEND | # OF ORDERS | VISITS | REVIEWS |
|-------------|-------------|--------|---------|
| \$3,109     | 13          | 21     | ★★★★★   |

LAST VISIT  
Five Figs Soho \$208.00

|     |                 |         |
|-----|-----------------|---------|
| (3) | Garden Salad    | \$1700  |
| (1) | Chicken Picatta | \$31.00 |
| (3) | Broiled Snapper | \$4200  |

💡 The opportunity

## Update your food and drinks based on your market's preferences

Evaluate your menu and [product mix](#) (PMIX) to determine if you're offering items consumers are willing to pay more for. Analyse your prices and the market preference in your city and rethink pricing for specialty items and experiences where you can.



☆ The trend

## The weekend now extends to Monday

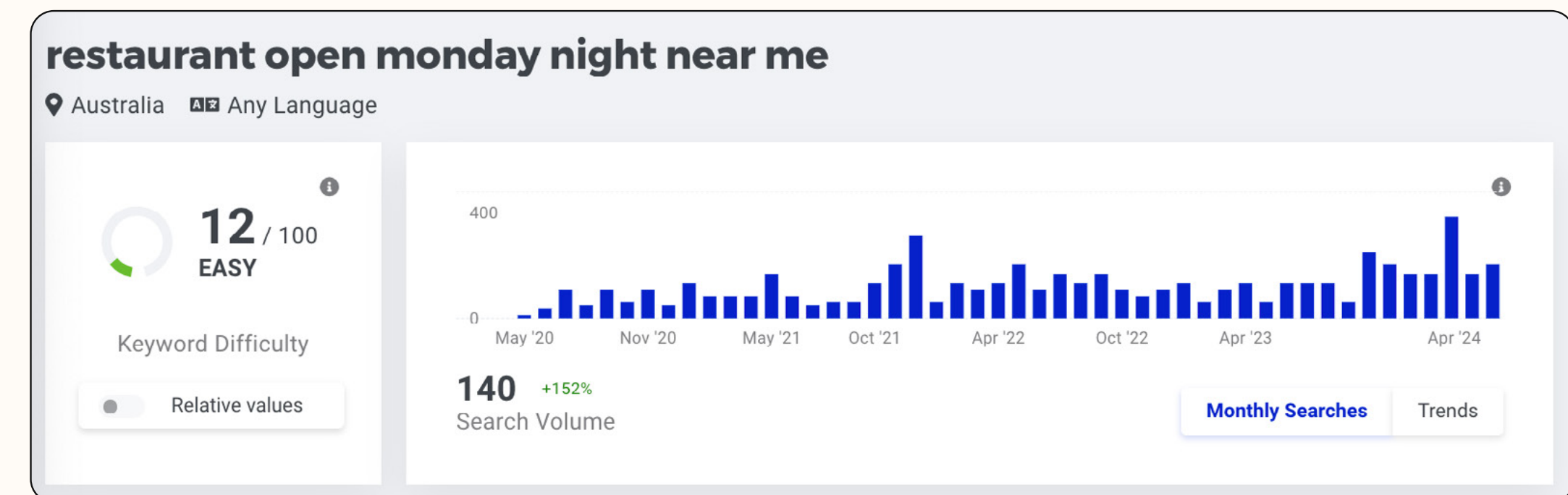
To our surprise, one of the most popular days for restaurant reservations is Monday. With the rise of [remote and hybrid work](#), many employees are no longer bound by the traditional work week, and are seeking out 'third places' to spend their time.

Year-over-year searches for **“restaurants open Monday night near me” are up 152%.**

💡 The opportunity

## Make Mondays mundane no more

If you're not open on Mondays, consider it. Use historical booking data to decide when you're most likely to be busy. With [SevenRooms](#), you can use the built-in [Search Demand report](#) where you can see how much search volume there is for reservations on certain days and times.



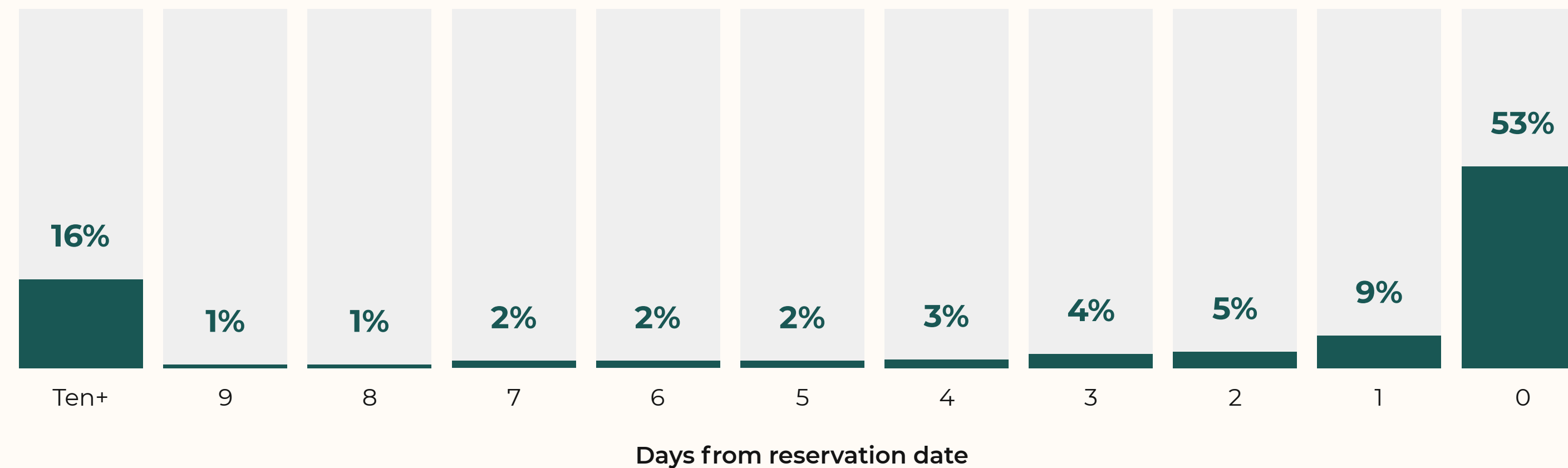
Source: KWFinder

☆ The trend

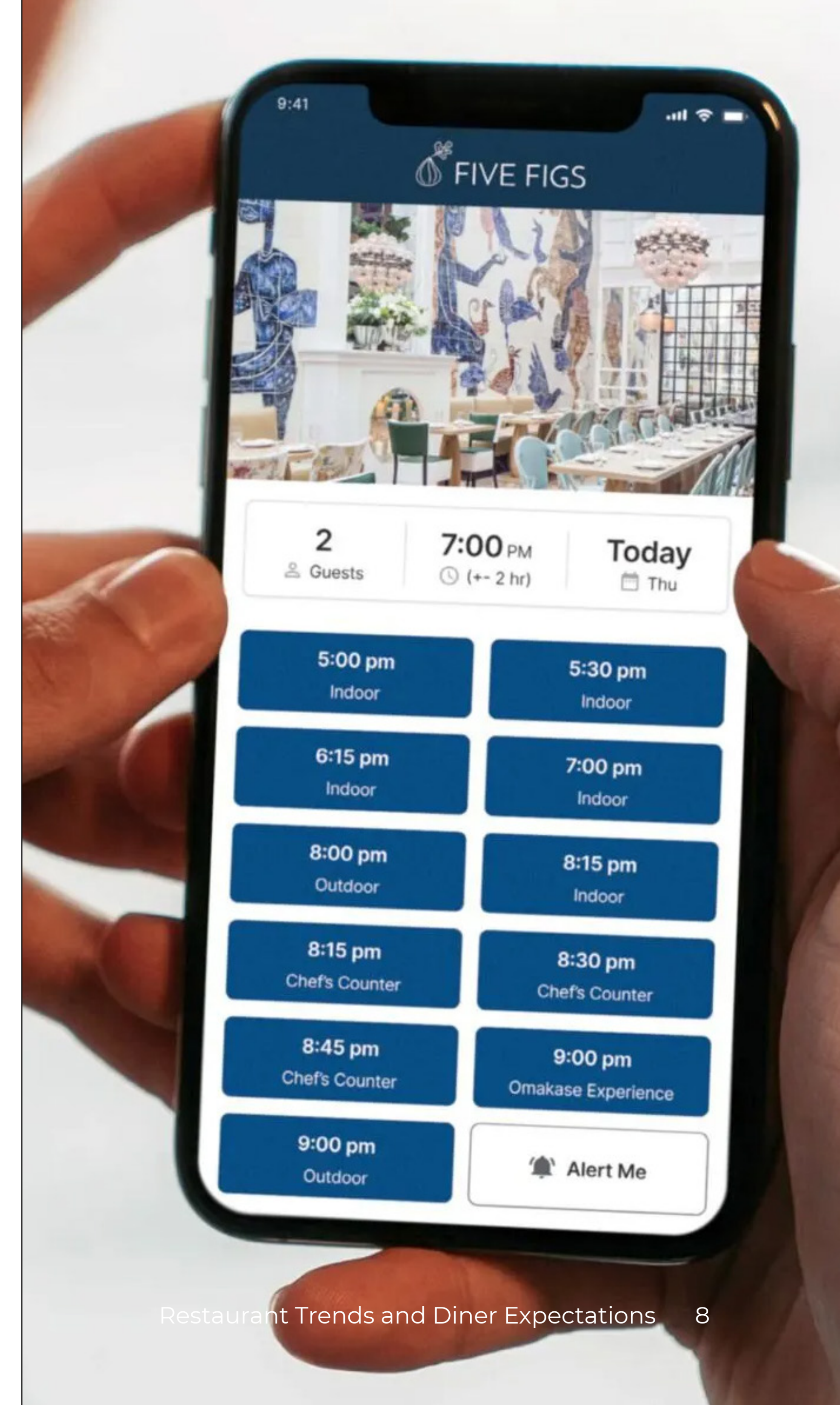
# More than half of reservations are booked day-of

People have figured out that booking same-day is often the best way to get a reservation. **(53%) of SevenRooms reservations in Australia are made day-of**, with the second-most popular time to book at 10+ days from the requested date (16%). Most people are either dining spontaneously or making important plans well in advance.

How far in advance do guests typically book reservations?



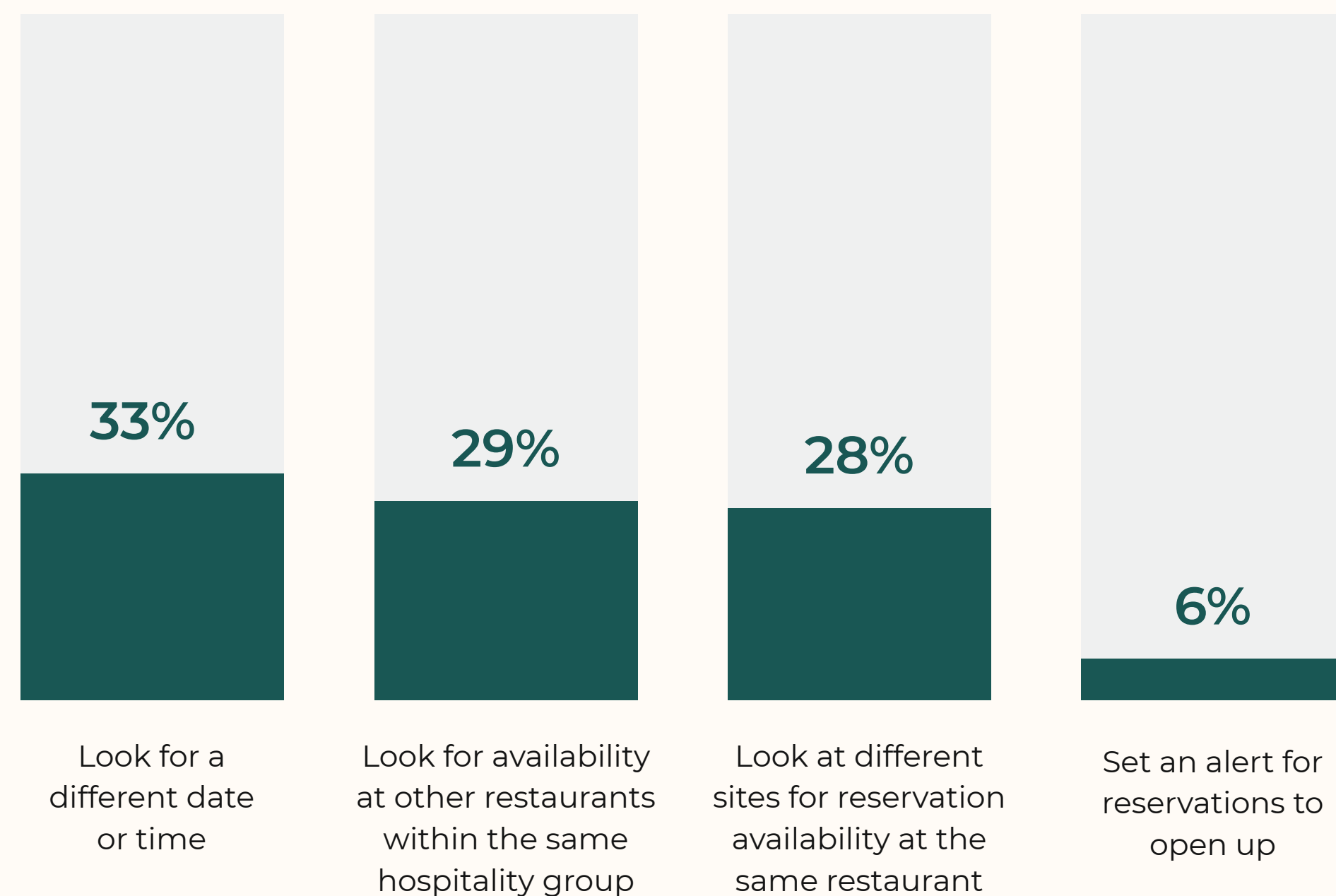
SevenRooms Platform Data, 2024



# Consumers have a strong intent to dine with their favourite brands

Guests will go to great lengths to book with their favourite brands — proving it's not just about eating out, but being in preferred 'third places'. **Gen Zers** are most likely to look for a different date or time (50%) vs. going somewhere new.

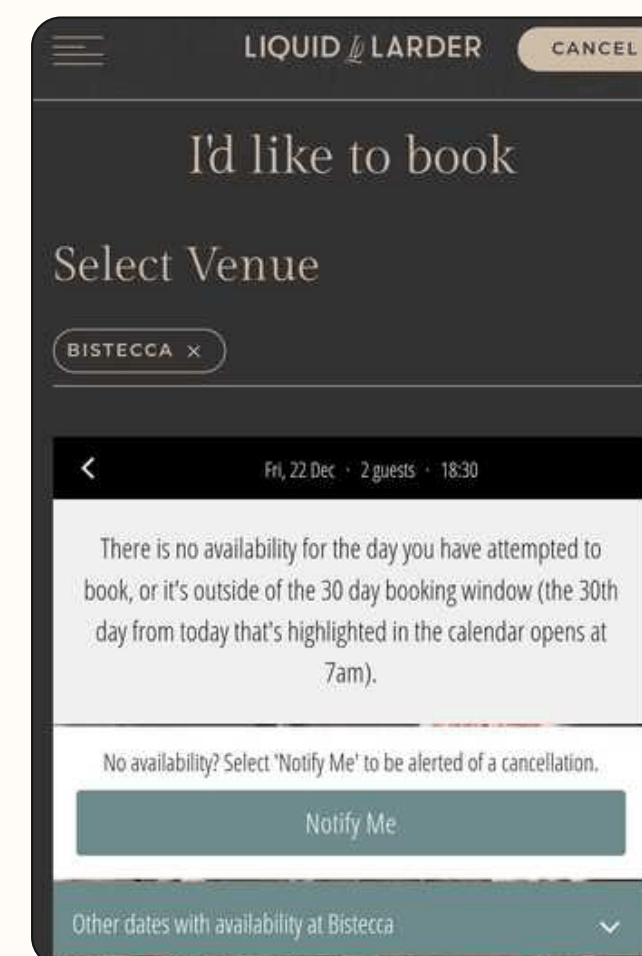
## If guests can't get a reservation, here's what they do:



## The opportunity

# Streamline reservation management for a full house every shift

Make sure you have an easy way to book unfilled inventory using [reservation tools with real-time availability notifications](#) to capture last-minute requests. Also, [cross-promote sister properties](#) directly on your reservation page so guests can make reservations without leaving your site.



"As soon as a table cancellation occurs, we're able to fill it without overloading the reservations team with queries. If we didn't have Priority Alerts, we would probably get hundreds of emails every morning with table requests."



**Kim McDiarmid**  
Partner,  
Liquid & Larder

See how Liquid & Larder drove almost 1,000 reservations and 2,500+ covers across their venues with SevenRooms.

[Read the story](#) ↗

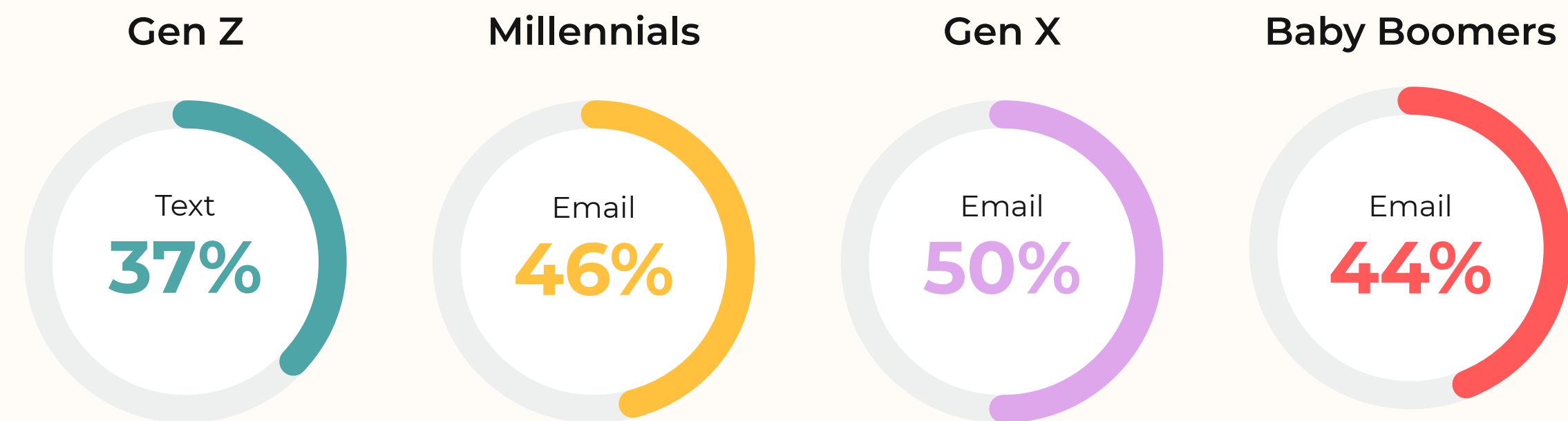
☆ The trend

## Guests want a taste of what's coming

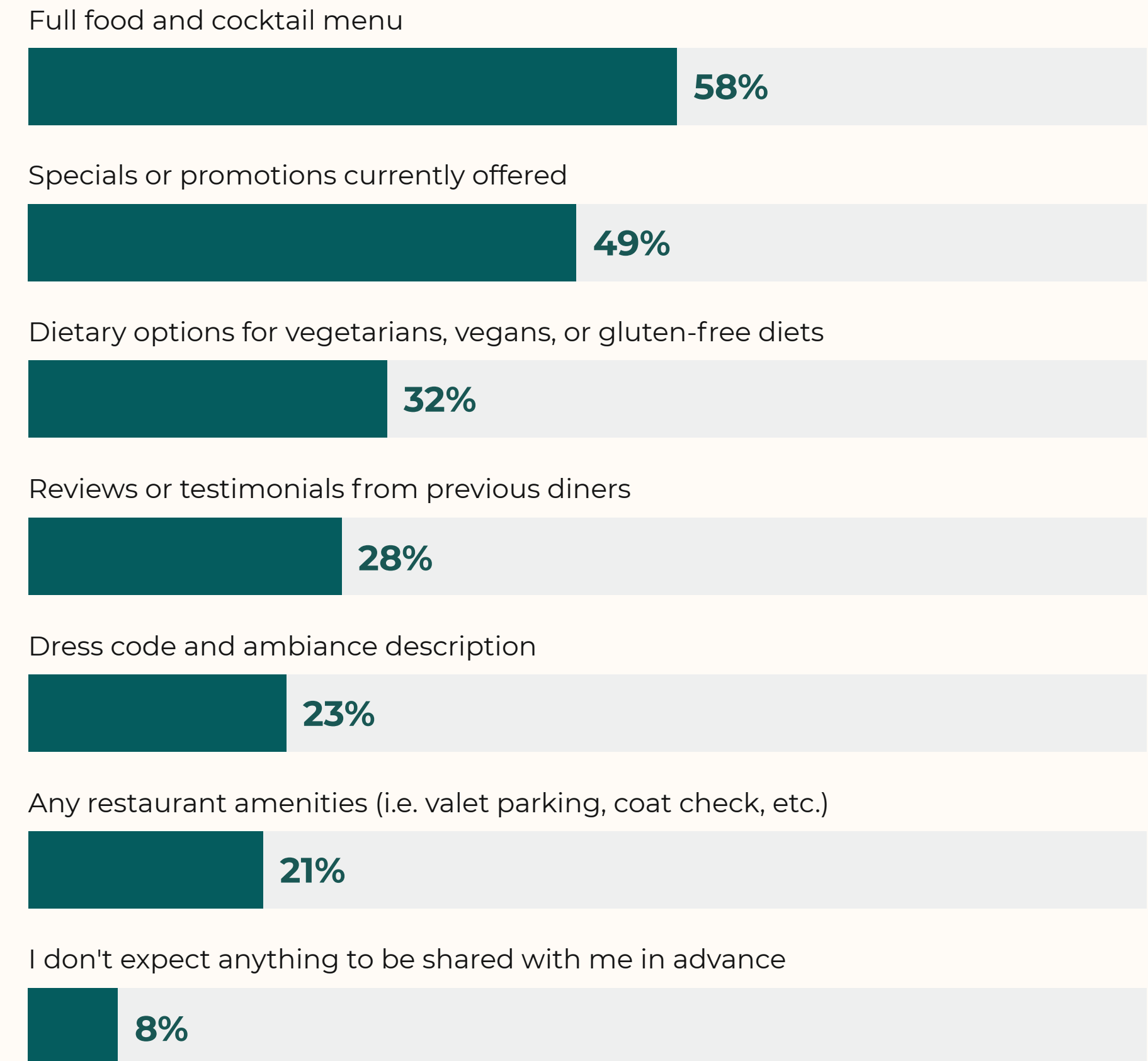
For consumers, it's just as important to know what specials and offers are available ahead of dining, as being able to easily find the restaurants' food and cocktail menus. Name a better workday distraction than browsing the restaurant menu for later... we'll wait...

The majority of diners like hearing about restaurant promotions and offers via email but text is popular among Gen Z.

### Check out the preferred restaurant communication channels by generation



### What, if any, information do you wish was shared ahead of time that would make your dining experience at a restaurant more enjoyable?

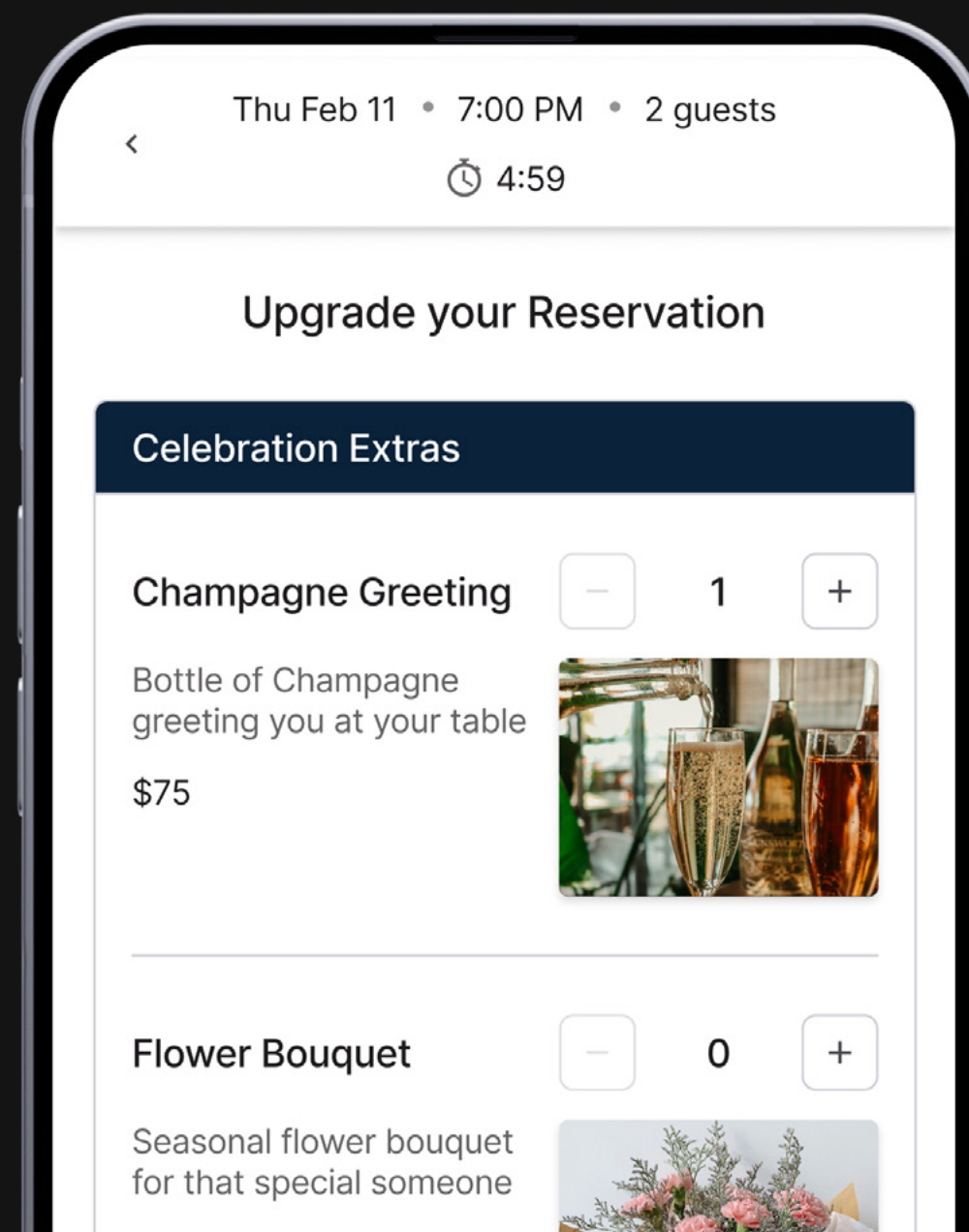


SevenRooms Consumer Trends Survey, 2024

📍 The opportunity

## Think before you dish out marketing offers

Choose your [restaurant marketing tools](#), communication channels and content based on your target demographic and the specific offers you're sharing. Highlight specials [during the reservation process](#) and ahead of guests' arrivals via email and text to keep guests engaged and drive more sales. You may also want to ramp up your text messaging strategy to cater to emerging preferences among younger Aussie consumers.



☆ The trend

## Tailored vibes bring guests back

When thinking about what drives people to return to restaurants and choose them as a 'third place', elements that help restaurants stand out and attract new customers vary by gender and generation.

Younger consumers are more influenced by the ease of walking into restaurants than older generations, along with personalised surprises like birthday or anniversary gifts. Men are 73% more likely than women to care about building a rapport and 50% more likely to care about being known by name with restaurant staff. Women, on the other hand, are 20% more likely to care about the quality of the food and drink, and are slightly more influenced by the atmosphere and ambiance, personalised in-service surprises and the ease of walking in than men.

### Influential factors for returning to restaurants by generation

Gen Z

**37%**

consider the ease of walking in and getting a spot.

Millennials

**52%**

care about atmosphere and ambiance.

Gen X

**27%**

are influenced by the ease of making a reservation.

Baby Boomers

**25%**

are influenced by the ease of making a reservation.



💡 The opportunity

## Get to know your unique demo

Given the **average repeat visit rate for restaurants is 21%**, there are ample opportunities for operators to hone in on areas consumers care about to improve this number. [Capture guest data](#) to better understand your guests' preferences, and provide the same quality and ambiance in every experience.

# The strategies making restaurant profits rise

In Australia, there was a **26% year-over-year increase in reservations** comparing Q1 2023 and Q1 2024 — and the future looks promising for restaurants. The Australian restaurant industry is predicted to be valued at AUD\$150B by 2029. Australian consumers have reduced their overall spending in the past few years, but as of 2024, spending on recreation and culture is up 5.6%. Guests are prepared to book meals out and have set aside the funds to enjoy leisure activities.

This year, to reach their goals of increasing revenue, reducing operating costs, training staff and improving margins, operators plan to rethink their tech stack and explore new locations. They're relying heavily on social media as their main marketing expense and trying to appeal to diners and establish VIP relationships with those who will become loyal, lifetime customers.



# Operators are dropping a pin where it's hot

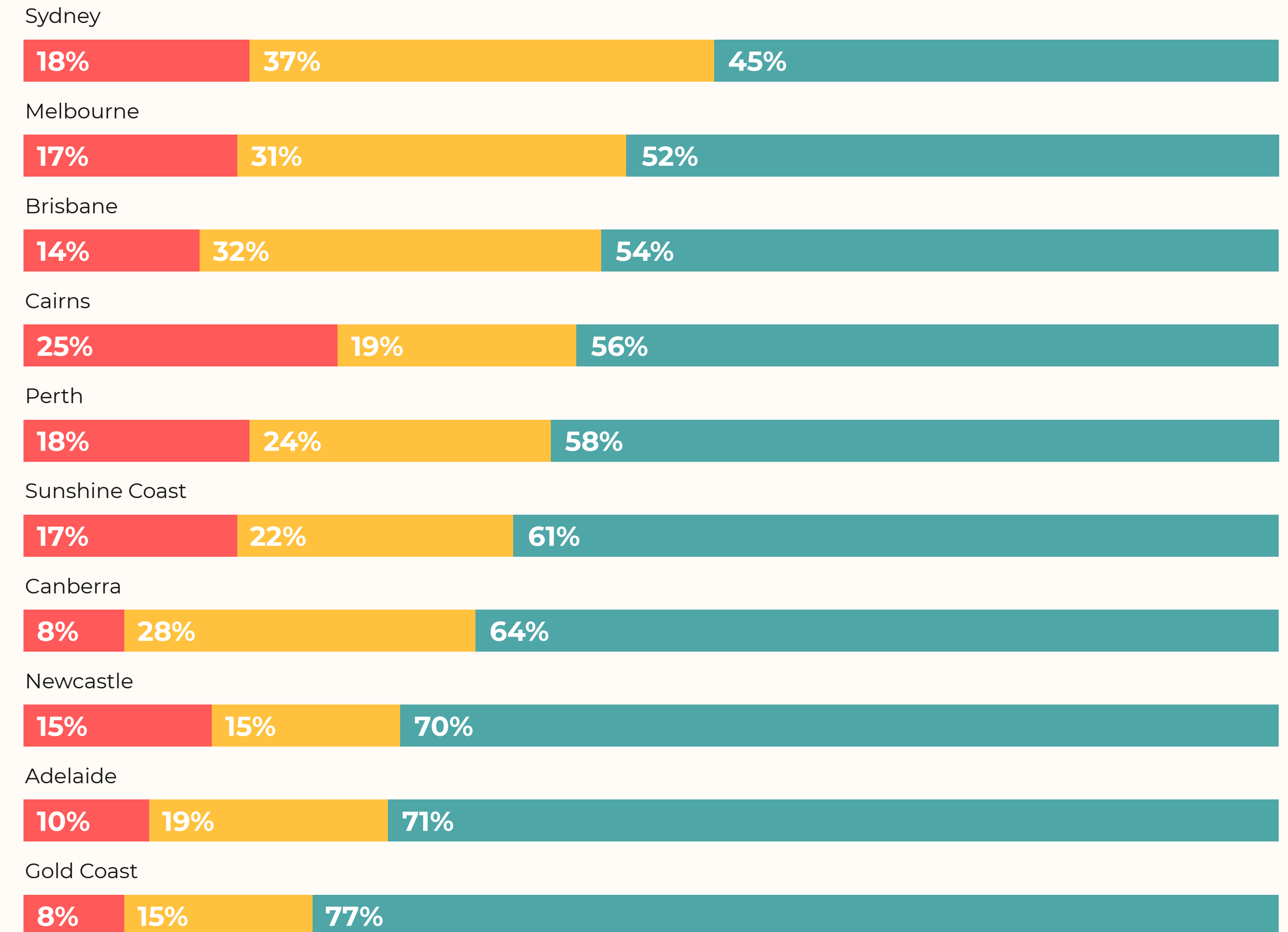
Operators' main goals for 2024 are to **increase revenue** and **reduce operating costs**. When seeking out new regions and revenue opportunities, guest dining preferences help provide a blueprint for growth.

More than 40% of diners in **Sydney, Melbourne, Brisbane, Cairns and Perth** eat out weekly or more. And 25% of diners in Cairns dine out more than 5 times per month.

Considering expansion? Read on to learn more consumer trends and find out where the fastest-growing areas are for restaurant-goers and foodies.

## On average, how often, if at all, do you dine out each month?

● 1-2 times a month ● 3-4 times a month ● More than 5 times a month



# Restaurants need to prep for the spontaneous diner

Our customers see an average of **23% of their business from walk-ins**. The experience economy is booming and diners are interested in trying new places while they're out and about. **37% of Gen Zers, 31% of Millennials** and **33% of Gen Xers** say ease of walking in is the top reason they decide to return to restaurants multiple times.

In a [2023 SevenRooms survey](#), one in five diners self-identified as a “spontaneous diner” and were influenced by the mood, sounds, smells and ambiance of hospitality venues. These diners were also most likely to be walk-ins who dine out frequently.

To capitalise on the desire for more flexible dining, operators should consider leaving a portion of their book open to accommodate walk-ins, which can lead to more turns and covers.



# Loyalty is the best policy, but it's not one-size-fits-all

People want to feel like they're getting value by sticking with certain restaurants or brands, and most restaurants we surveyed have [loyalty programs](#). But when it comes to the benefits offered in loyalty programs, each generation has different interests. With **83% of Australian restaurants** offering loyalty programs, there is an opportunity to curate experiences for diners that help you stand out.

Operators need to invest in guest retention programs designed for their specific audience – [loyalty isn't one-size-fits-all](#). Here's what diners want from their loyalty programs:



**35%**

of Gen Zers care about exclusive events and experiences.



**57%**

of Millennials are interested in free menu items.



**17%**

of Gen Xers want access to last-minute reservations.



**58%**

of Boomers want discounts.

# VIP experiences continue to be a priority

Gen Zers and Millennials are more willing to share their information in exchange for VIP experiences. And big spenders and frequent diners are most likely to join a rewards program for special perks.

**29% of big spenders** – diners who would spend \$98-184 per person on an average night – and consumers who **dine out 7-8 times per month** are the most likely to join a rewards program for **specialty seating** and **early access to reservations**.



# Experiential dining that sells

Today's consumers are looking for deeper connections. They're making up for years of isolation and are ready to splurge when embracing new places and experiences. Our platform data showed that **reservations with prepayments for events or experiences spend >35% more** than those without a pre-booking. And SevenRooms restaurants in **Australia sold more than DOUBLE** the amount of upgrades and experiences than the United States and United Kingdom.

## SevenRooms operators cashed in on upgrades in 2023

**1.5M+**

upgrades and experiences sold

**\$22M+**

revenue generated from upgrades

**\$34K+**

average revenue per venue from upgrades

### Top SevenRooms upgrades by volume

- 1 Day-Specific Promos (Wing Wednesday, Taco Tuesday)
- 2 Prix Fixe Lunch
- 3 Bottomless Brunch / Lunch

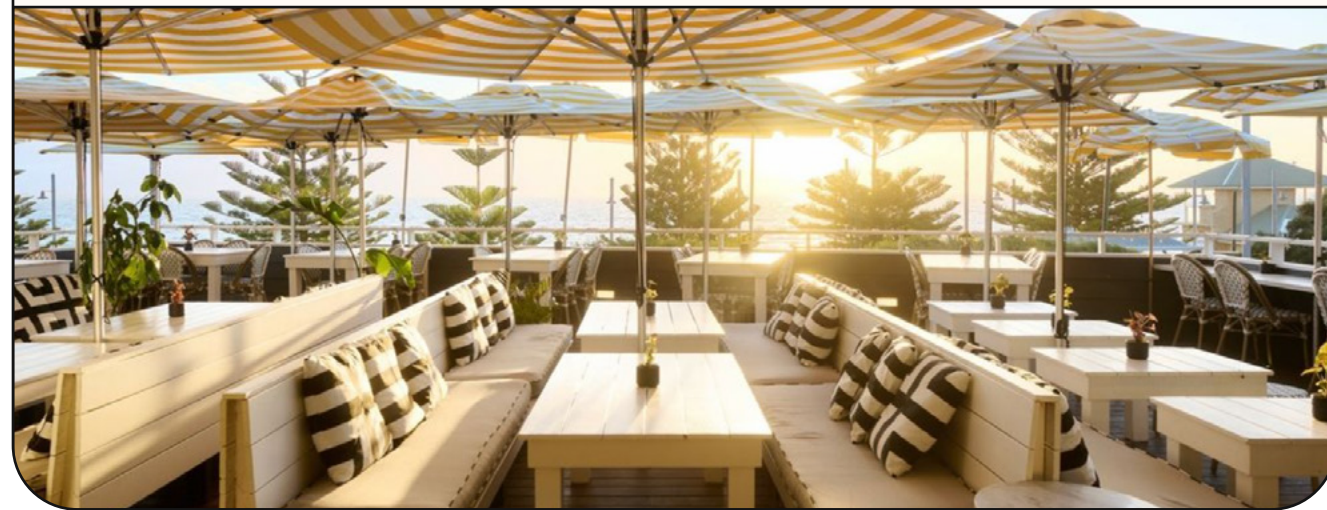
### Top SevenRooms upgrades by revenue

- 1 Bottomless Brunch / Lunch
- 2 Afternoon Tea
- 3 Tasting Menu
- 4 Bottle of Champagne / Wine



# Examples of creative upgrades:

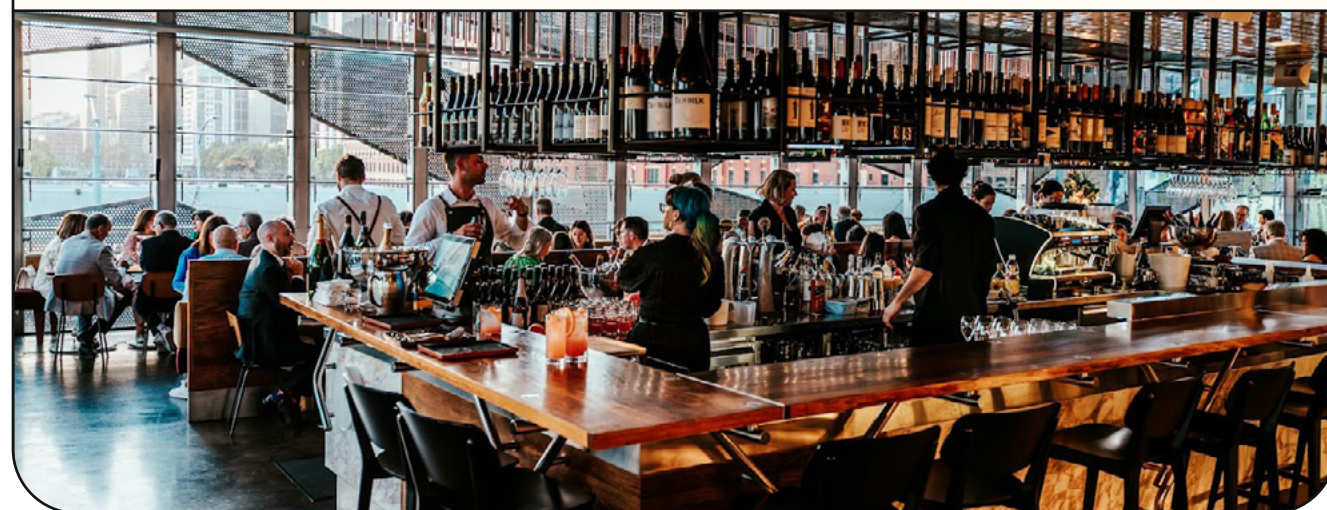
**The Shorehouse**  
**Upgrade: Birthday Dessert**  
Perth



**Rare Hare**  
**Upgrade: Premium Wine Tasting**  
Melbourne



**Taxi Kitchen**  
**Upgrade: Taxi Kitchen Feast**  
Melbourne



**North Bondi Fish**  
**Upgrade: Glass of Veuve Clicquot Brut**  
Sydney



"The upgrade sale on Veuve Clicquot [at North Bondi Fish] is through the roof. It's just amazing. We know that's what the clientele wants and drinks. The ability to just have it there and add that bottle to an experience has been really, really strong."



**Robert Squillacioti**  
Chief Marketing Officer, Solotel

See how data consolidation skyrocketed Solotel's revenue across 26 venues.

[Read the story ↗](#)

# What's simmering in restaurant marketing

The biggest themes in restaurant marketing among our audience and from the data are that:

- ✓ **Authenticity and personalisation reign supreme.**
- ✓ **People want connections within their communities.**
- ✓ **Timely, targeted messages across diners' preferred channels are keeping restaurants top of mind.**

The data shows that most people prefer hearing about promotions, events and offers via email and text, but each audience is different. If your business has a younger audience, you may lean towards more text-based marketing and social media. With an older crowd, you may want to prioritise email marketing.

Consumers also prefer a mix of channels for certain types of messages — for example, they may prefer email for longer content and storytelling pieces, but texts for last-minute reservation availability, and social for building ongoing relationships. Consider your [multichannel marketing strategy](#) and how you'll share different types of content.

No matter what channels you invest in, take a well-rounded approach and use tools that let you track the outcomes of every marketing campaign and channel.

Let's review the top restaurant marketing channels, benchmarks and strategies with data to illustrate their impact.



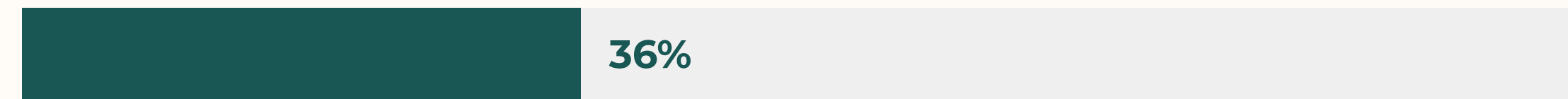
# Social media is the amuse-bouche of restaurant discovery

This year, the top social media goals for operators are **driving bookings or online orders (64%)** and **increasing brand awareness (22%)**.

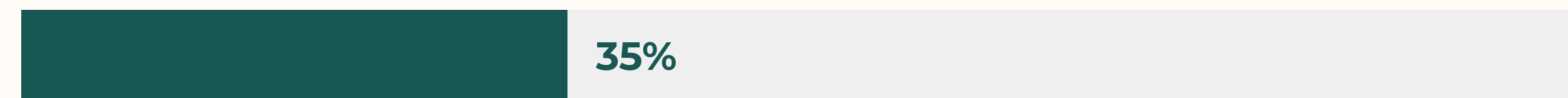
With the data showing that influencer marketing is no longer as effective as organic social media (and promoting that same content through paid advertisements), operators are turning to organic, personality-driven content.

## What, if any, type of social media content drives the most bookings to your restaurant or venue?

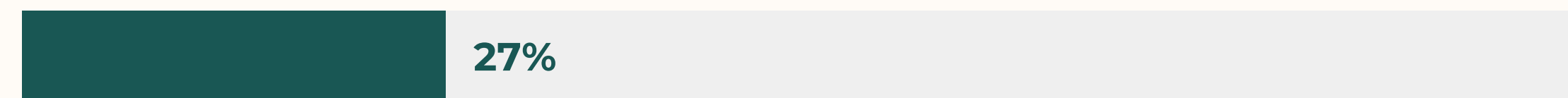
Organic posts



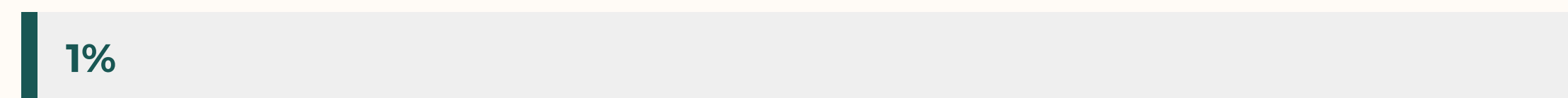
Paid advertisements



Influencers (paid or user-generated content)



I am unsure/ this is not tracked



SevenRooms Consumer Trends Survey, 2024



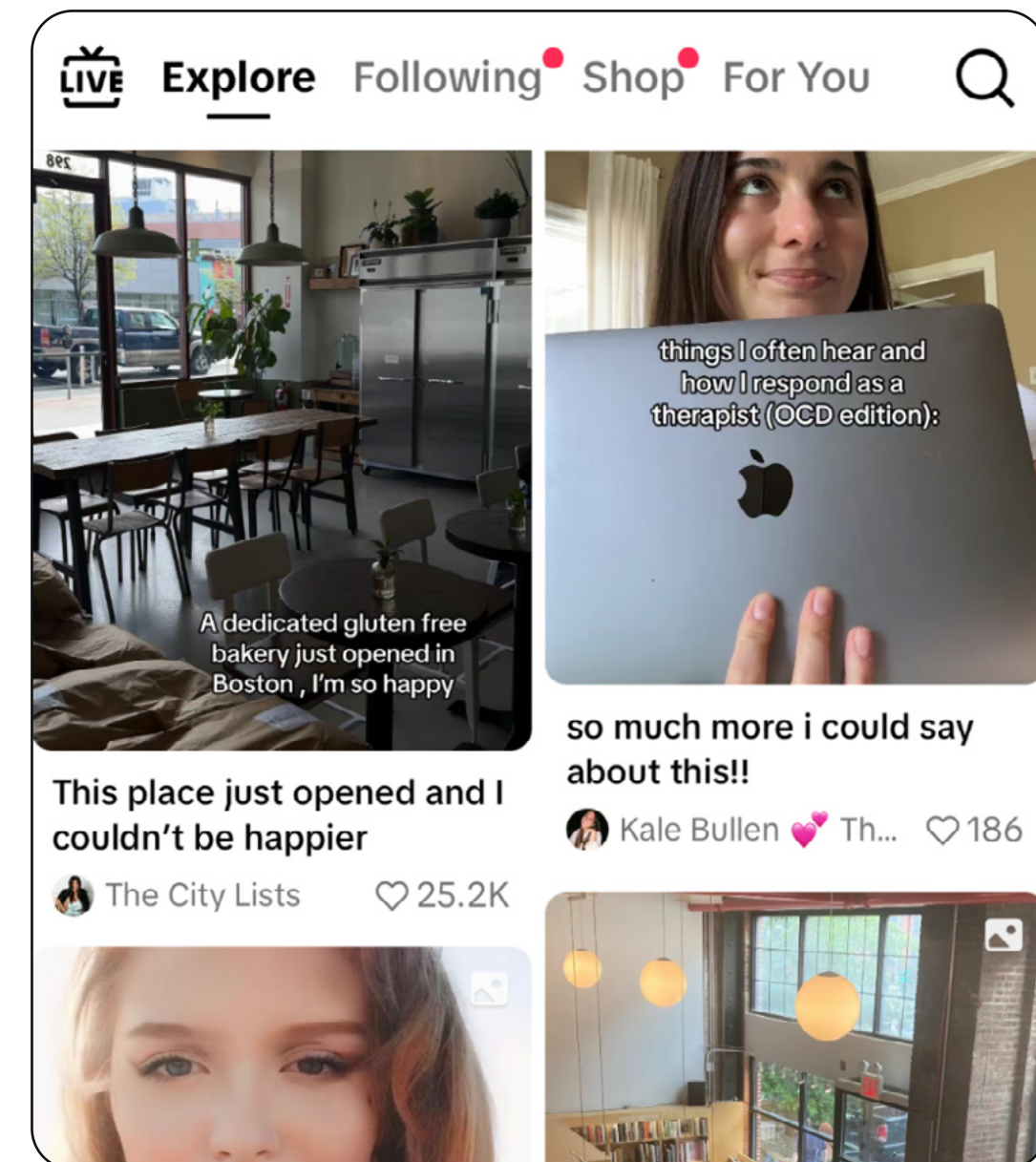
# Over half of Australians (56%) say their restaurant choice is influenced by social media, while "best of" lists influence Gen Z and Millennials.

Below are the top influences for each generation on where they dine out.

## Gen Z

### 37%

are influenced by posts from restaurants they follow that **highlight their personality.**



## Millennials

### 34%

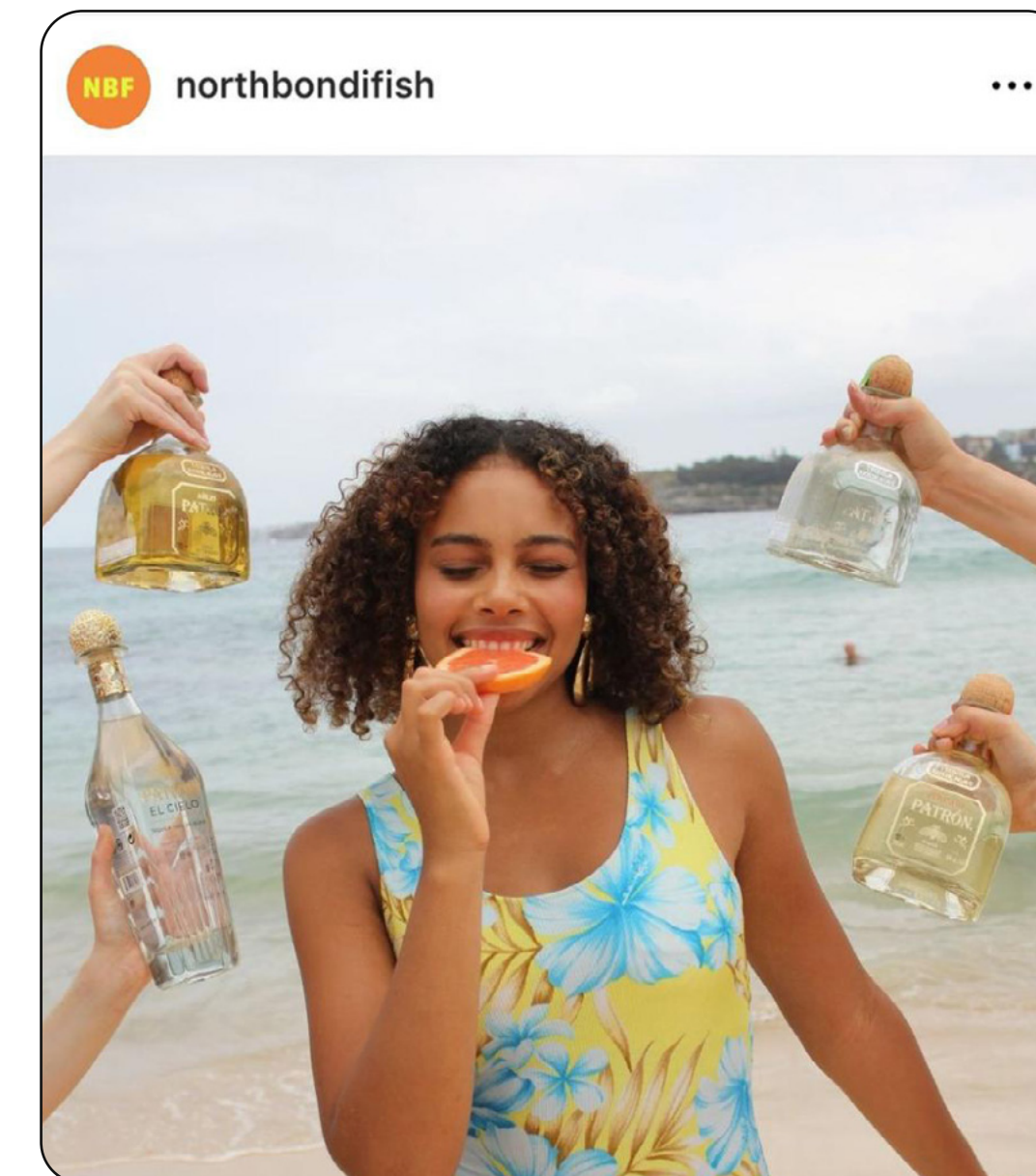
are influenced by posts from restaurants they follow that **highlight the menu.**



## Gen X

### 20%

are influenced by posts from restaurants they follow that **highlight their personality.**



## Baby Boomers

### 16%

are influenced by posts from restaurants they follow that **showcase the menu.**



## Go organic... on social

Drive bookings with organic [social media posts](#) and authentic user-generated content (UGC) that can be reshared to your channels.

**86% of operators spend most of their marketing budget on social media.** They need a well-rounded approach to reach both existing audiences and new customers with content that promotes their restaurant as the 'third place' they've been searching for – whether that's through a cozy ambiance, a killer vibe or a delicious food and drink menu.

Remember — diners love to share online when they're delighted by a unique dish or a table with a view. Give them something to talk about!

"We have a strong focus on community engagement on social. We find people who have attended our past events through handle tags or geotags, and engage with them from the venue account to provide that personalised experience — a direct 'thank you' from the restaurant."



**Joanna Steuart**

Director of Marketing and Partnerships, Applejack Hospitality



Booked On

Booked On

# To win at restaurant email marketing, the more targeted, the better

The standard [email open rate in the APAC region](#) is around 22.4%, but **SevenRooms customers see an average of 36.6%**. We found that the smaller our customers' [email list](#) sizes, the better they convert and the more revenue they bring in. When you get to know your audience and show them that you understand them, they respond.

With Millennials, Gen X and Boomers preferring email marketing for restaurant promotions, there's real value in using this channel to build customer relationships. From February 2024 - May 2024, SevenRooms' Australian customers using [Email Marketing](#) have generated over AUD\$5M and 155K+ covers with messages to 33.5M consumers.

## Restaurant email benchmarks

**+23%**

Targeted email sends see 23% higher open rates.\*

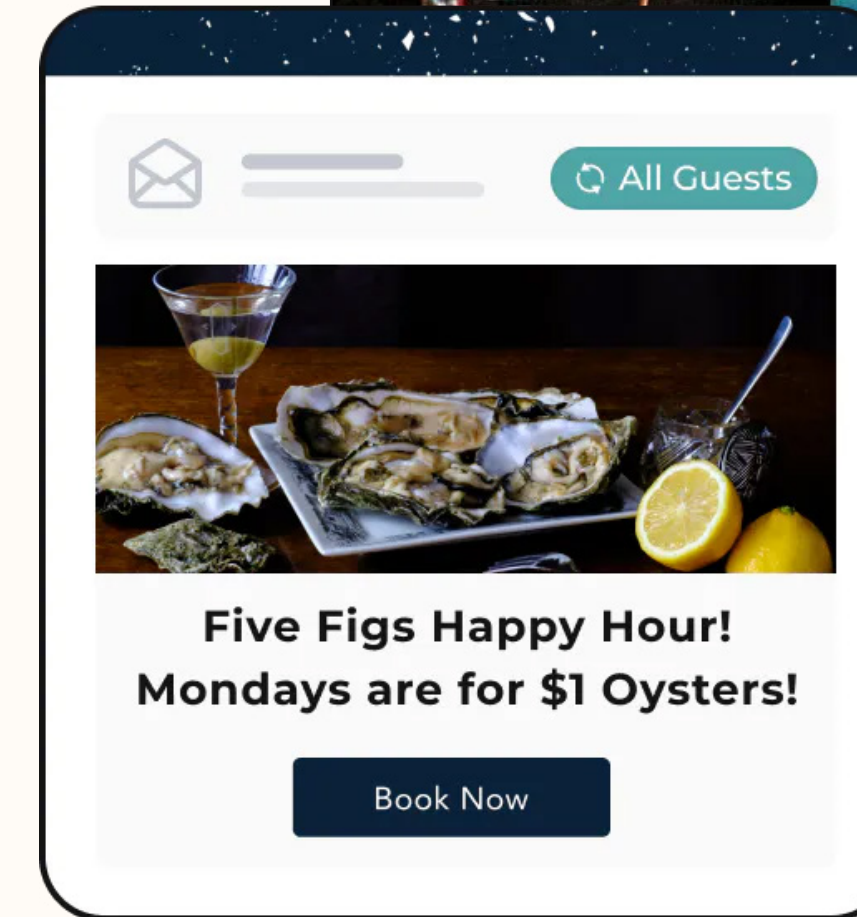
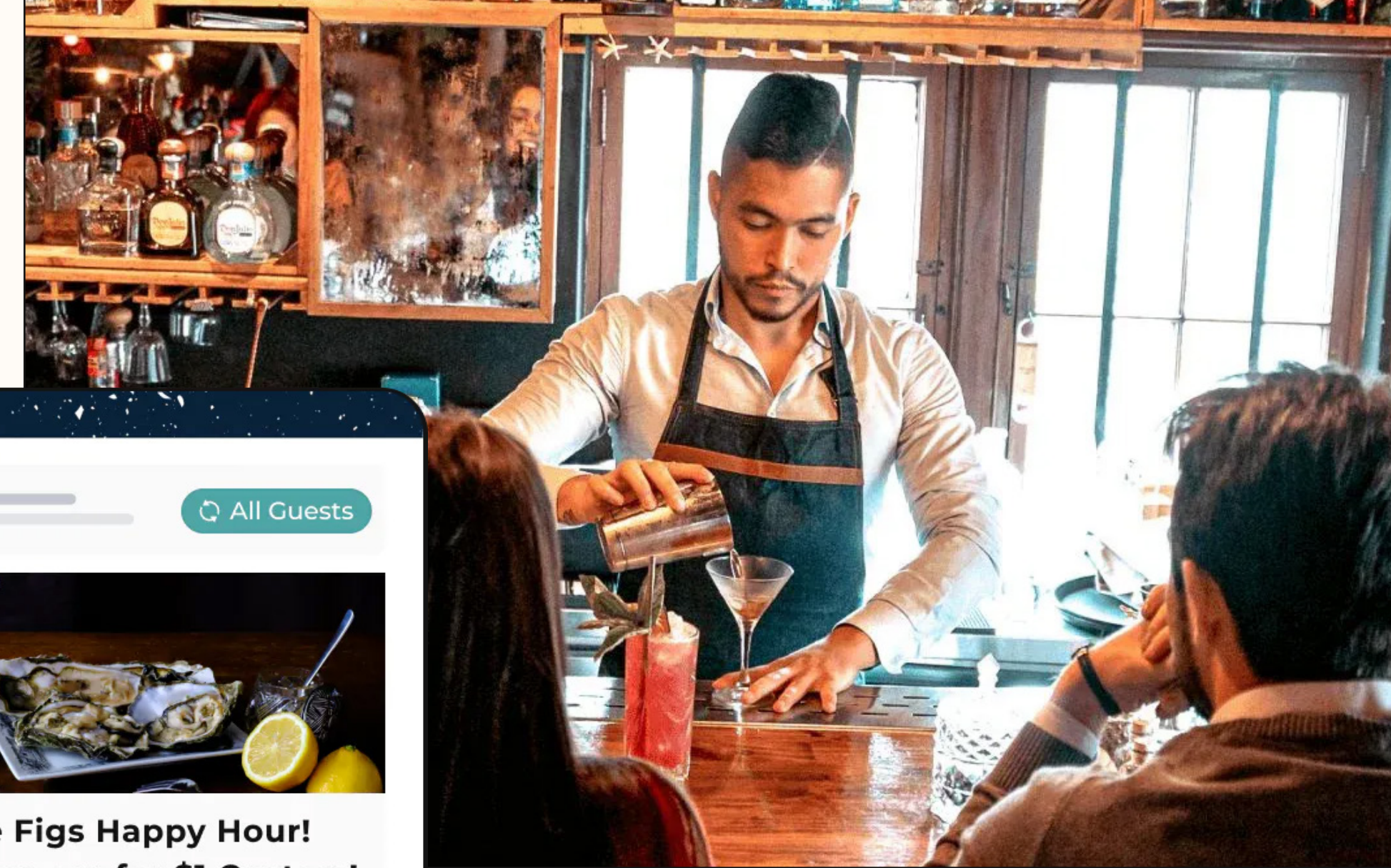
**2X**

Targeted emails generate 2X more revenue per email.\*

**+28%**

Targeted emails see 28% higher click-to-open rates.\*

\*Statistics were based on a large sample of SevenRooms U.S. customers analysed in 2023.



“We’ve found success in tailoring our [email] offers and messaging to match individual preferences and behaviours such as birthday perks, exclusive discounts to repeat customers, etc. We’ve seen increased engagement and conversion rates.”



**June Hew**

Marketing Manager,  
The Proper Concepts Collective

# Restaurant text marketing is blowing up

Text marketing is a fairly new concept in restaurants, but it's growing rapidly — by 2029, the [Australia SMS advertising market](#) is predicted to be worth over AUD \$20M.

Texting can be a powerful tool when used strategically.

**94%**

The [average open rate](#) of text message marketing.

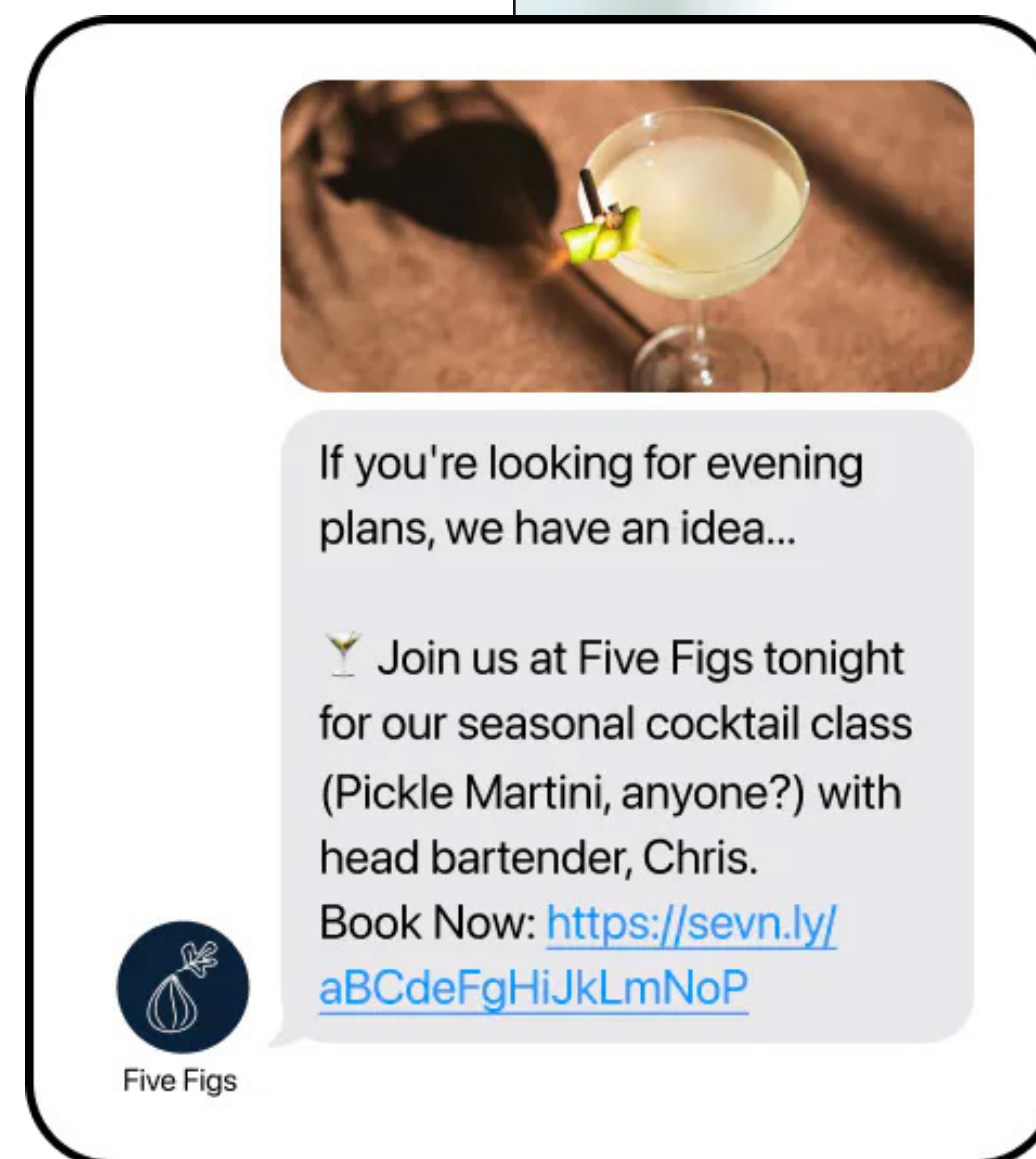
**37%**

of Gen Zers prefer texting for restaurant communications.

For those hoping to get started with text marketing, here are a few tips:

- ✓ Keep text messages short, relevant and valuable to recipients. The more personalised and targeted you can be, the better.
- ✓ Experiment with different copy and campaigns. Use images and links when appropriate.
- ✓ Infuse your brand's personality in text messages. Develop a rapport with frequent diners who see your restaurant as a 'third place'.
- ✓ Always add your restaurant's name in the text to let subscribers know who it's coming from.

[Read more text marketing tips + best practices to connect with more diners ↗](#)



# How restaurants are powering up with AI and automation

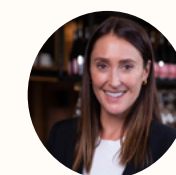
**85% of operators surveyed are using artificial intelligence (AI)** in their business — the future is now in restaurant management.

As operators balance challenges like inflation and rising operational costs, staffing challenges and higher turnover rates, they're leveraging technology to help them maintain quality and great service while filling open tables in real-time.

Today's restaurant tech stack includes AI, automation and marketing tools that are connected and tied to guest revenue and sentiment.



“We're building an AI-assisted data and insights solution that allows our teams to digest information easily. In the future, team members will be able to ask questions in natural language, the tool will pinpoint the relevant data source, identify the specific problem and offer actionable solutions.”



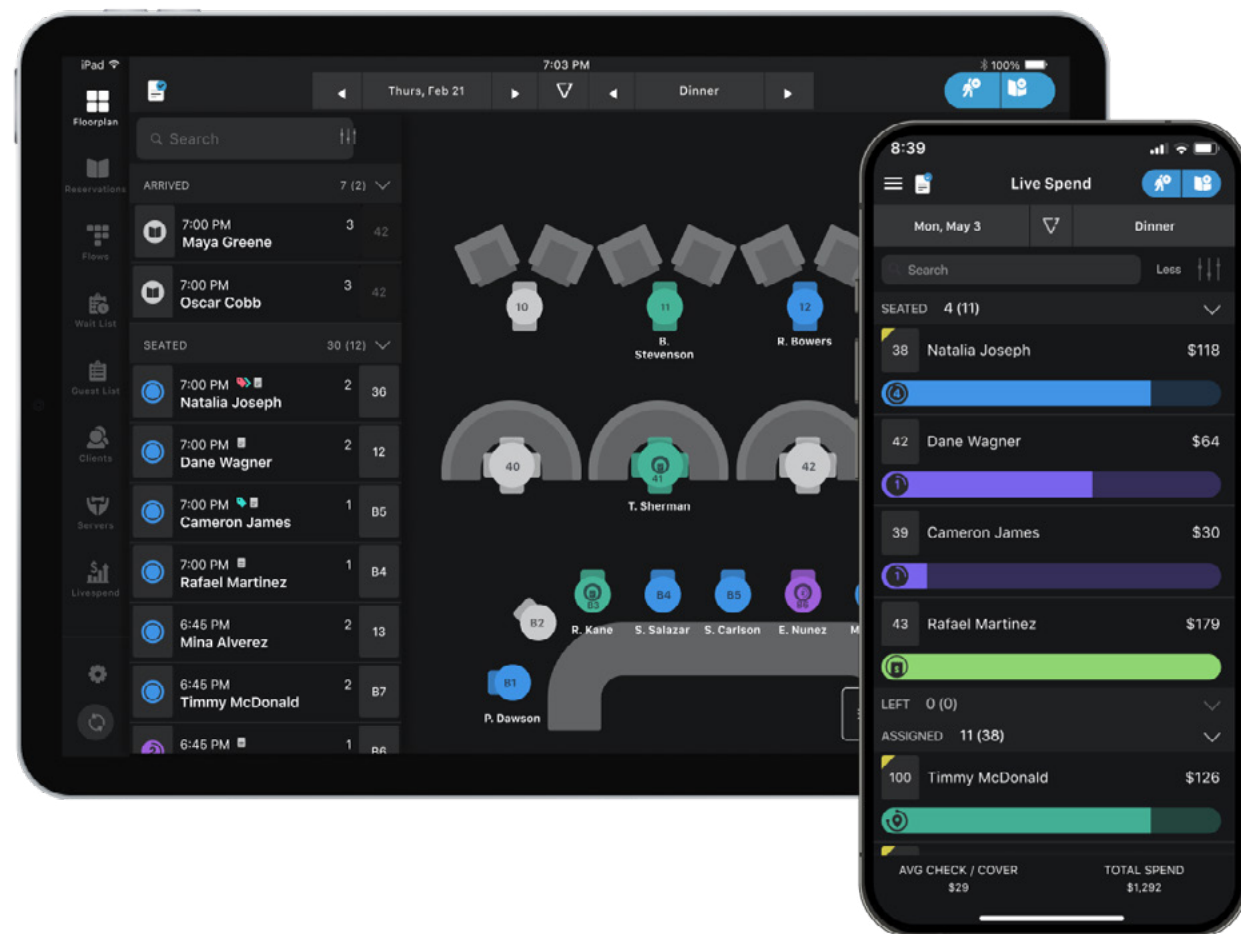
**Kylie Moncur**

Chief Marketing Officer, Australia Venue Co.

# Restaurants are working smarter to improve guest experiences

The most common ways restaurateurs use AI are for manual, time-consuming tasks, like inventory management and data analytics. **One in four restaurants use AI for staff hiring and training**, and nearly a third use it to come up with new menu items and marketing collateral.

There's room to grow in using AI for customer service, pricing and processing reservations – a big challenge for operators in 2024. **The majority of operators (85%) in major cities** like Sydney, Brisbane, Melbourne and Perth are adopting AI in some way to run their business.



## What areas are you using AI in?



SevenRooms Consumer Trends Survey, 2024



# Automagic marketing and operations make for happier guests

Automations have become a part of everyday life – from placing a coffee order to ordering groceries. Today’s consumers are not only used to digital processes and tech – they expect it. In fact, **48% of Gen Zers** and **47% of Millennials** are open to dining at restaurants with fully automated ordering and payment systems.

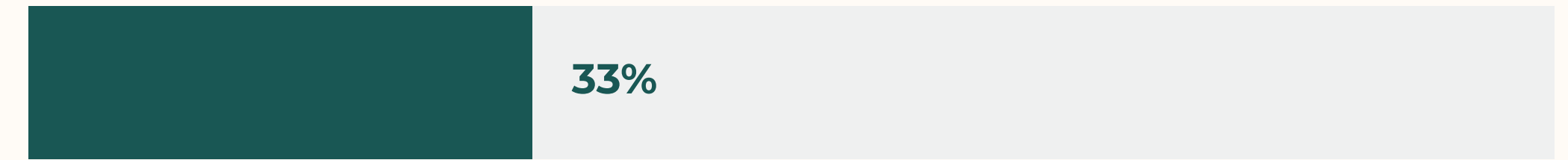
Operators are most interested in using automation for:

- ✔ Staff training and performance evaluation
- ✔ Customer service communication
- ✔ Automated marketing
- ✔ Inventory management
- ✔ Collecting and responding to guest feedback

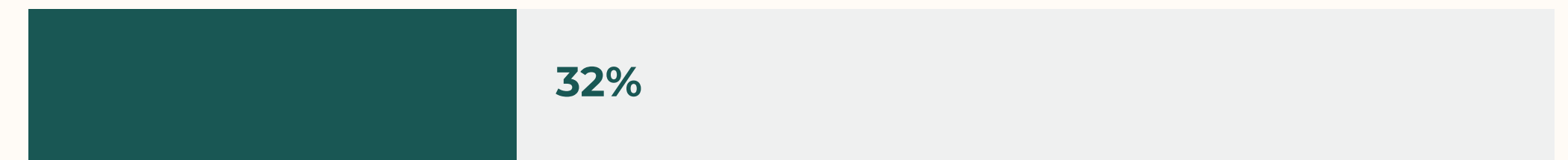
Automated marketing and operations tools can anticipate slow periods and send out targeted promotions to fill those gaps. SevenRooms restaurants see an average of **AUD\$881.25 in revenue** from every [automated email campaign](#). These automated emails might come from the voice of a manager and invite a guest to return to the venue following key events like their first visit to the restaurant, after they leave a negative or positive review or if they haven't visited in 30, 60 or 90 days.

## What would be most valuable to have automated in your business?

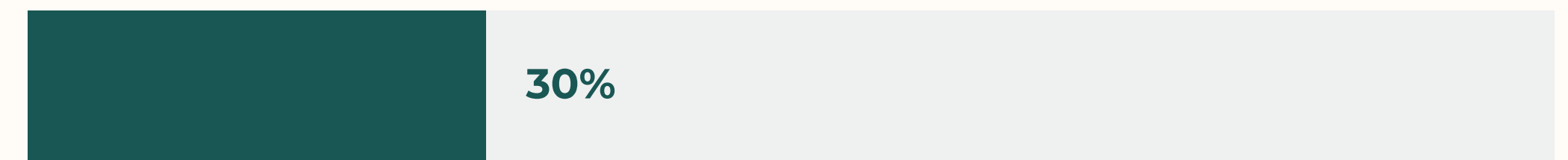
Staff training and performance evaluation



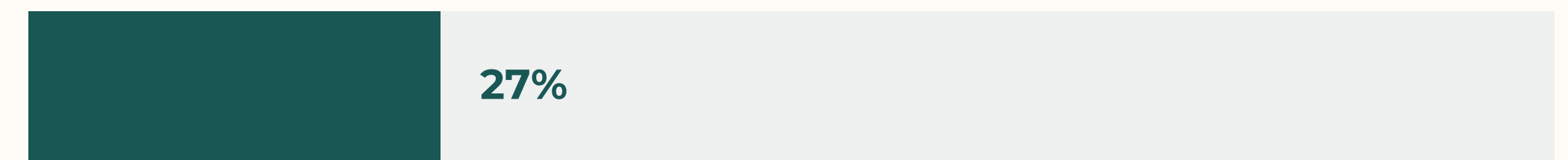
Customer service/ communication (emails, calls, text)



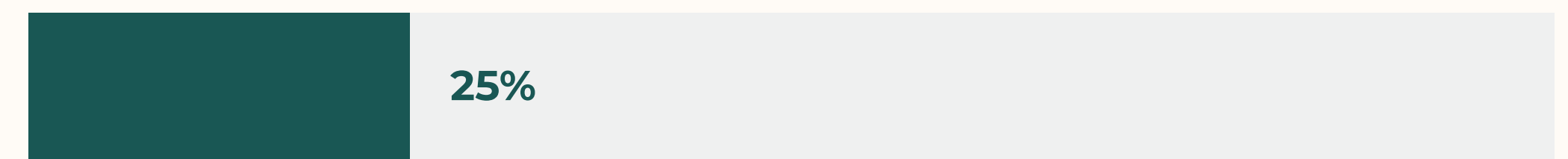
Marketing and promotions automatically triggered by an upcoming slow period



Inventory management and supply chain logistics



Collecting and responding to feedback



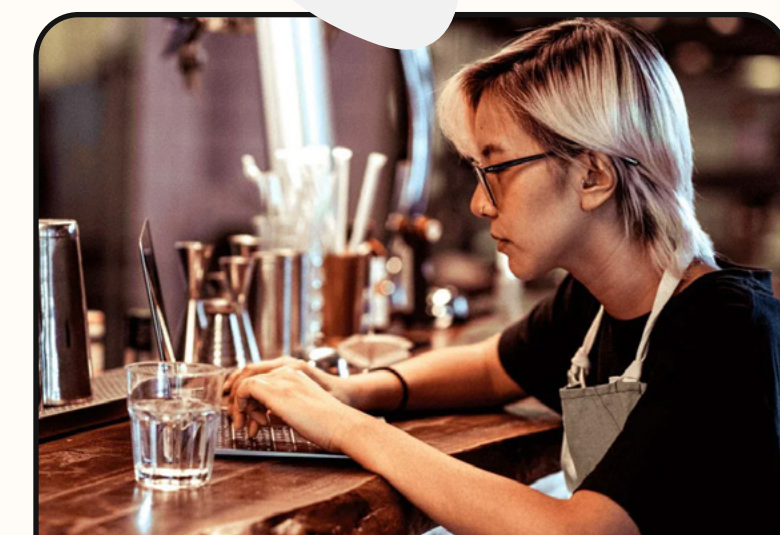
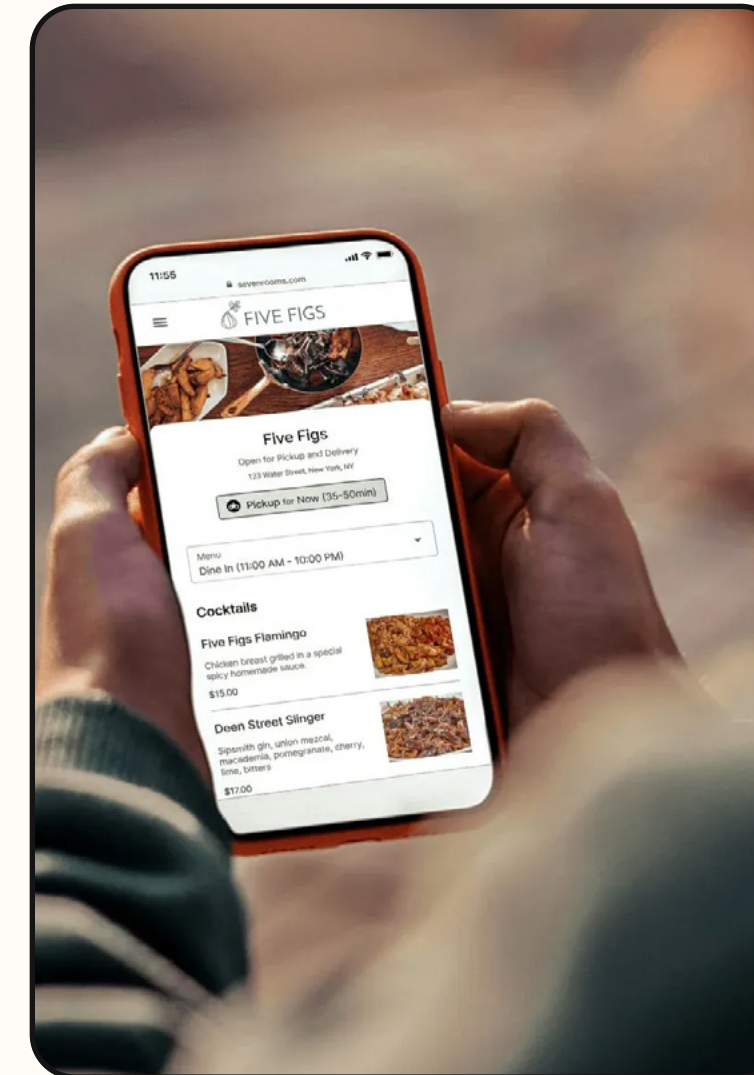
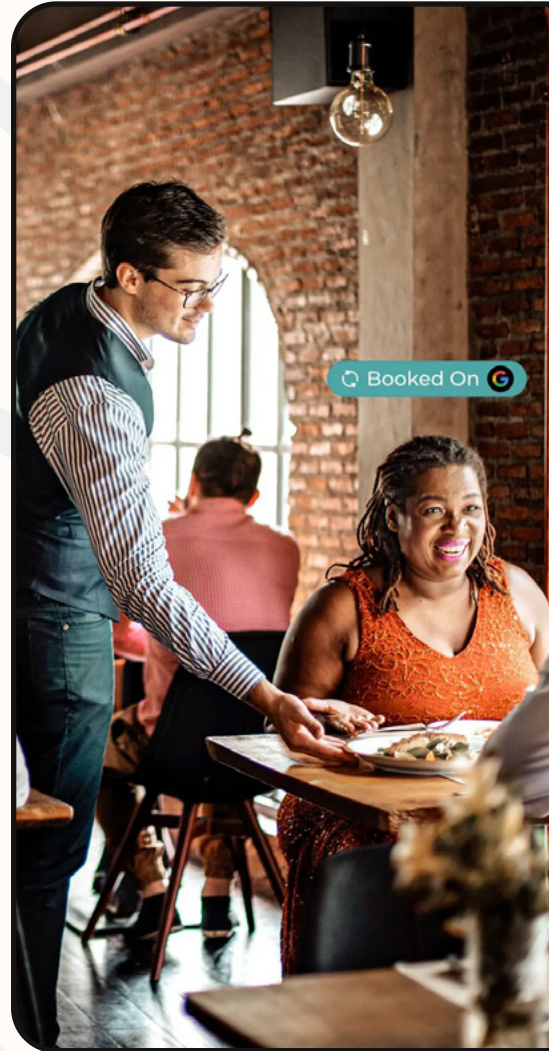
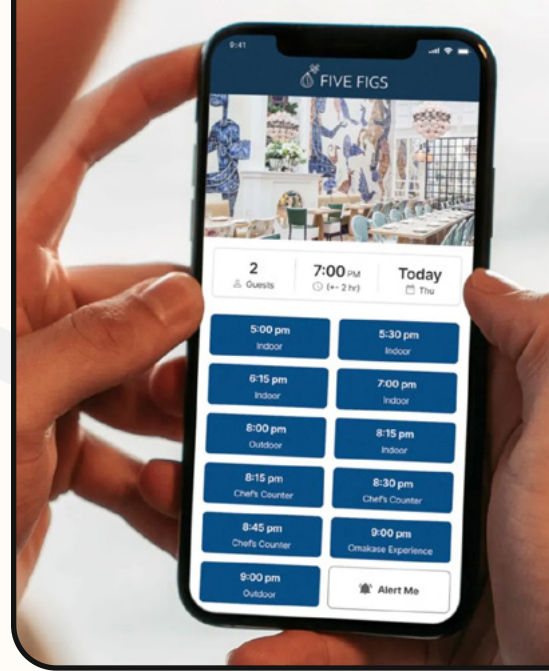
SevenRooms Consumer Trends Survey, 2024

CLOSING

# Investing in the right blend of **humanity**, **hospitality** and **high-tech**

When dining out, people want to feel pampered and taken care of — like they're in a comfortable 'third place' that feels like home. They want to feel like they got value for their money and that the entire experience was worth it. They're saving their extra cash for experiences, so they want to be treated like VIPs, make memories and be transported for a few hours.

To keep up with these demands, the restaurants that are succeeding are those that have embraced new ways of thinking. Having to be more efficient with business funds and staff time doesn't mean cutting corners or compromising on quality, but getting smarter about operations and marketing. When leveraging technology to automate manual, time-consuming tasks, everyone can spend more time building deeper connections.

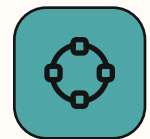


SEVENROOMS

# Take your hospitality further and build meaningful guest relationships

SevenRooms' all-in-one marketing and operations platform helps you grow and deliver personalised experiences to every guest — whether they're visiting for the first time, sliding into your DMs or their favourite booth.

[Book a demo](#)



## CRM & Marketing

Turn customer data into repeat visits with a unified database of guest profiles that connects with 100+ integrations.



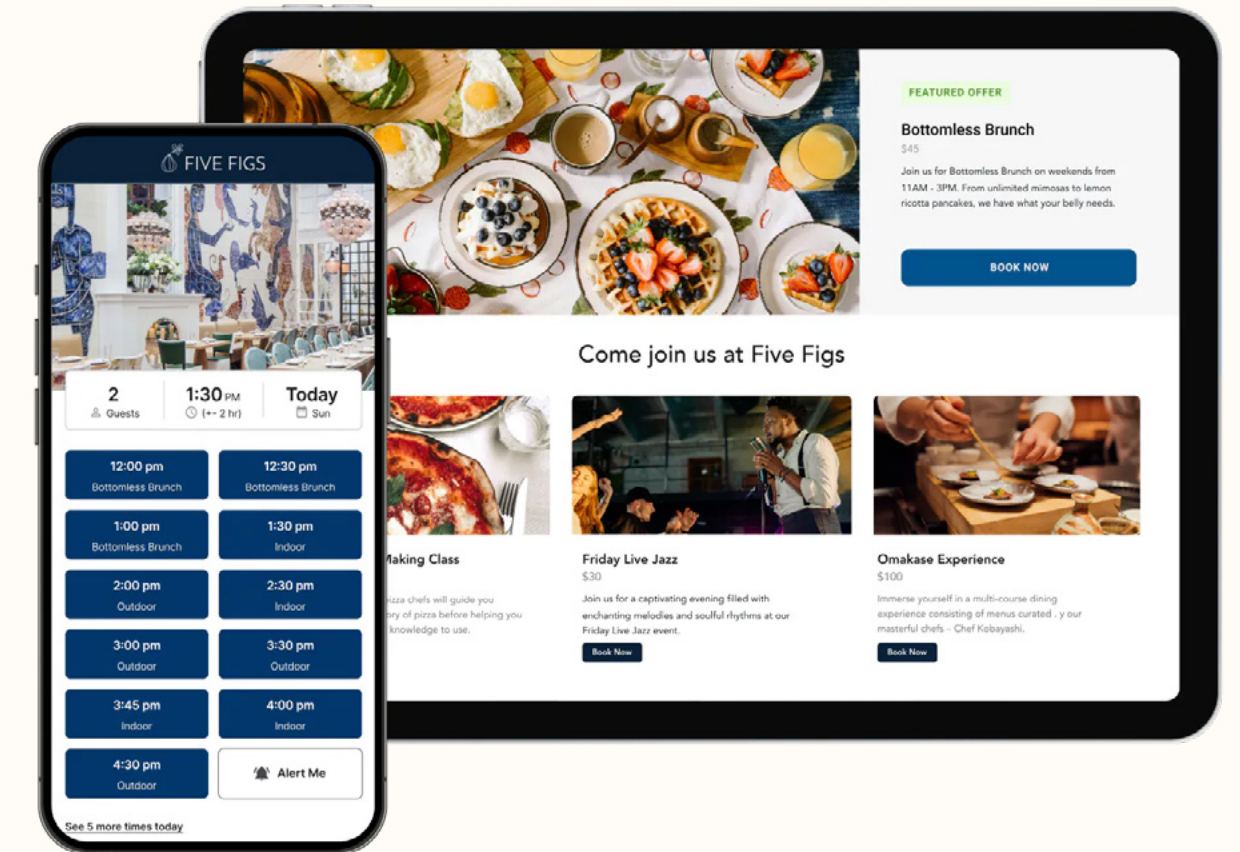
## Guest Experience

Create personalised experiences for every guest with branded booking, dining, marketing and communications tools.



## Operations

Run more efficient front-of-house operations using smarter tech. Manage pre-shifts, reservations, seating, waitlists and turns.



“When we talk about SevenRooms, it’s my customer service manager, digital marketing manager and my marketing manager from the restaurant family all together having one conversation around one bit of information instead of everyone trying to pull data from different directions.”



**Robert Squillacioti**  
Chief Marketing Officer,  
Solotel

# Research Methodology

To gather the data and insights for this report, SevenRooms partnered with various sources, including Censuswide, our internal data team and SevenRooms operators.

## CENSUSWIDE

### Australian Consumers

SevenRooms partnered with Censuswide Research – a third-party, professional research and consulting organisation. Total sample size was 1,008 Australian consumers. Fieldwork was undertaken between March 4-11, 2024. The survey was carried out online. The figures have been weighted and are representative of all Australian adults (aged 16+).

### Australian Operators

SevenRooms partnered with Censuswide Research – a third-party, professional research and consulting organisation. Total sample size was 250 Australian operators (hospitality decision-makers). Fieldwork was undertaken between March 4-19, 2024. The survey was carried out online. The figures have been weighted and are representative of Australian hospitality operators.

## SEVENROOMS

### Platform & Operator Data

Anonymised internal data representative of Australia-based restaurants using the SevenRooms platform. SevenRooms also surveyed Australia-based operators for this survey in March 2024.

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SevenRooms is a marketing and operations platform for growing restaurants in the hospitality industry. From Michelin star gems to local favorites, the all-in-one platform helps restaurants increase sales, delight guests and keep them coming back, automatically. The full suite of products includes reservations, waitlist and table management, review aggregation, referrals, email marketing and marketing automation. Founded in 2011 and venture-backed by Amazon, Comcast Ventures and PSG, SevenRooms has more than 10,000 dining, hotel F&B, nightlife and entertainment clients globally, including: Marriott International, MGM Resorts International, Mandarin Oriental Hotel Group, Wynn Resorts, Jumeirah Group, Hard Rock Hotels & Resorts, Wolfgang Puck, Michael Mina, Bloomin' Brands, Union Square Hospitality Group, Australian Venue Co., The Wolseley Hospitality Group, Dishoom, Live Nation and Topgolf.