



# Coates Panelists

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Wes Fagan

Global Head of  
Design & Hardware



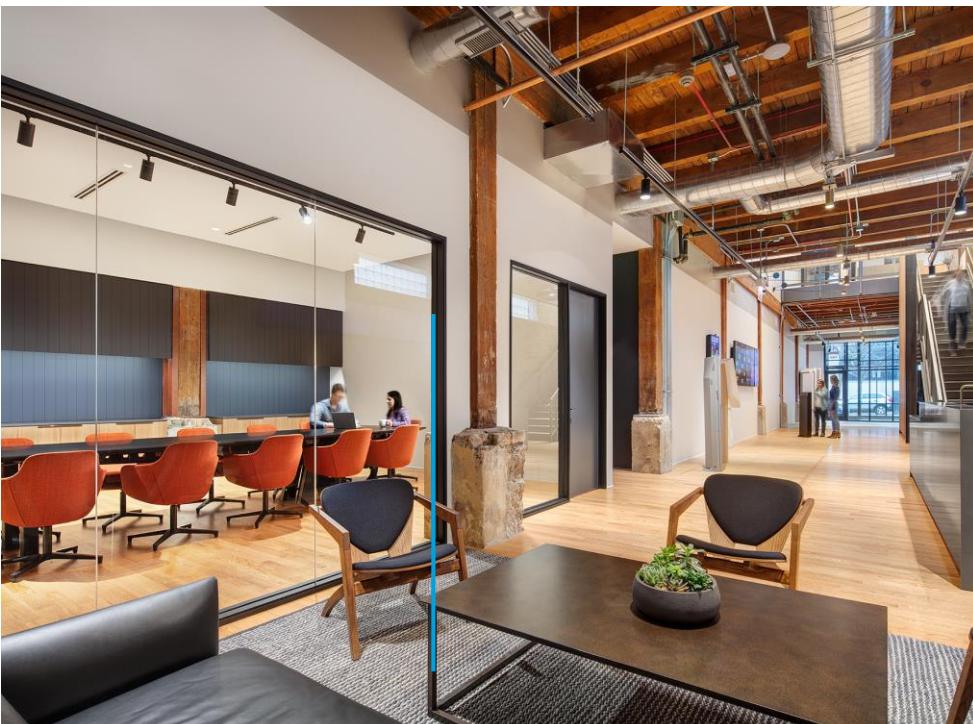
Brian Selman

Director of  
Software  
Innovation

# Chicago Office & Innovation Lab

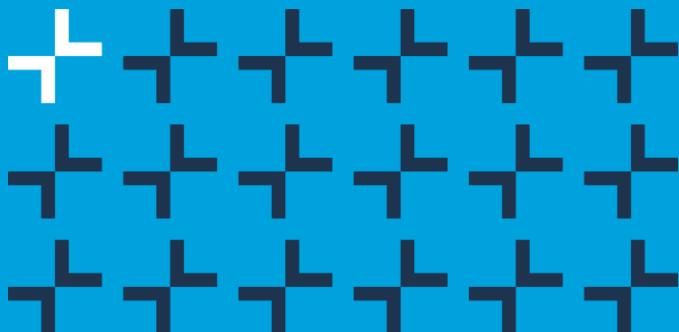
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The Innovation Lab allows Coates to test, showcase and refine our latest technology and data-driven capabilities, while also providing a space for client collaboration, ideation and development.



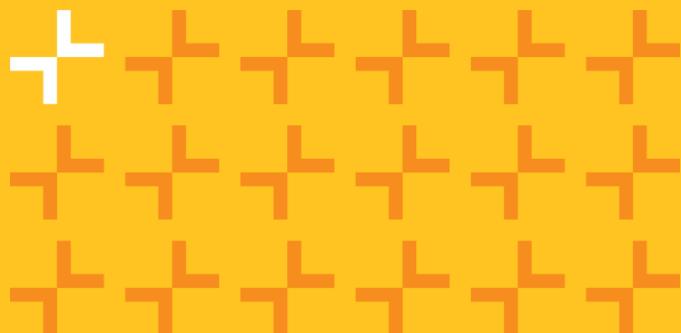
# About Coates

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Creators of immersive  
brand experiences for  
everyone.

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We are a collaborative crew  
across 8 global offices.

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Chicago  
Coates Office  
Innovation Lab

Paris  
Coates Office

Dubai  
Coates Office

India  
Coates Office

Tokyo  
Coates Office  
Innovation Lab

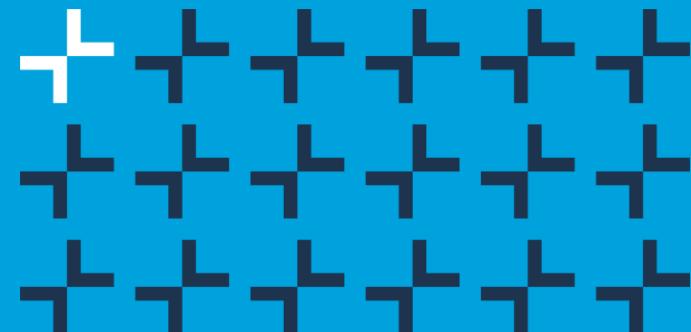
Shanghai  
Coates Office

Guangzhou  
Coates Office  
Innovation Lab

Sydney  
Coates Global HQ  
Innovation Lab

Innovation & expertise,  
demonstrated in our  
rich history.

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1960 – 1969

# Business Foundations

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Coates' history begins in an underground studio at the family home, built for Kathleen Coates in the late 1940's.

With the help of her son, Alan Coates, the small lettering and indoor retail signage business quickly grew into a national supplier after landing our first major project with well renowned Australian supermarket chain, Woolworths.





1969 – 2008

# Signage of Tomorrow

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As the casual dining landscape began finding its way into Australian culture, Alan Coates recognised the huge opportunity unfolding within this industry.

With the increasing significance of signage within the QSR industry, Coates was able to build long-standing partnerships with many QSRs including McDonald's, through our continuous innovation of signage and menu boards in the merchandising space.





2008 – 2017

# Digital Evolution

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As Alan's son, Leo, took leadership of the family business, he brought along a strong vision for a digital evolution. As a result, our in-house Content Management System, Switchboard was born.

Advancements in technology paired with our expertise in merchandising, led to a natural desire to provide our clients with a complete solution – including software, digital hardware and signage. This brought opportunity for Coates to grow worldwide as a Crew, coming together to deliver large scale global roll-outs.





2017 – Future

# Today & Tomorrow

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Innovation and the evolution of our product design remain our core focus, as we continue to challenge the industry norm, keeping our clients in front.

We are actively exploring exciting new technologies around machine learning, trialling licence plate recognition and leveraging the power of analytics.

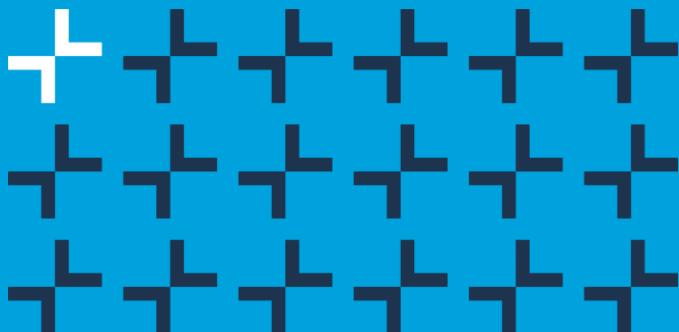
We're committed to the growth and development of our people, the driving force of our brand, as we continue to forge new partnerships.



The QSR Experience

# Current State

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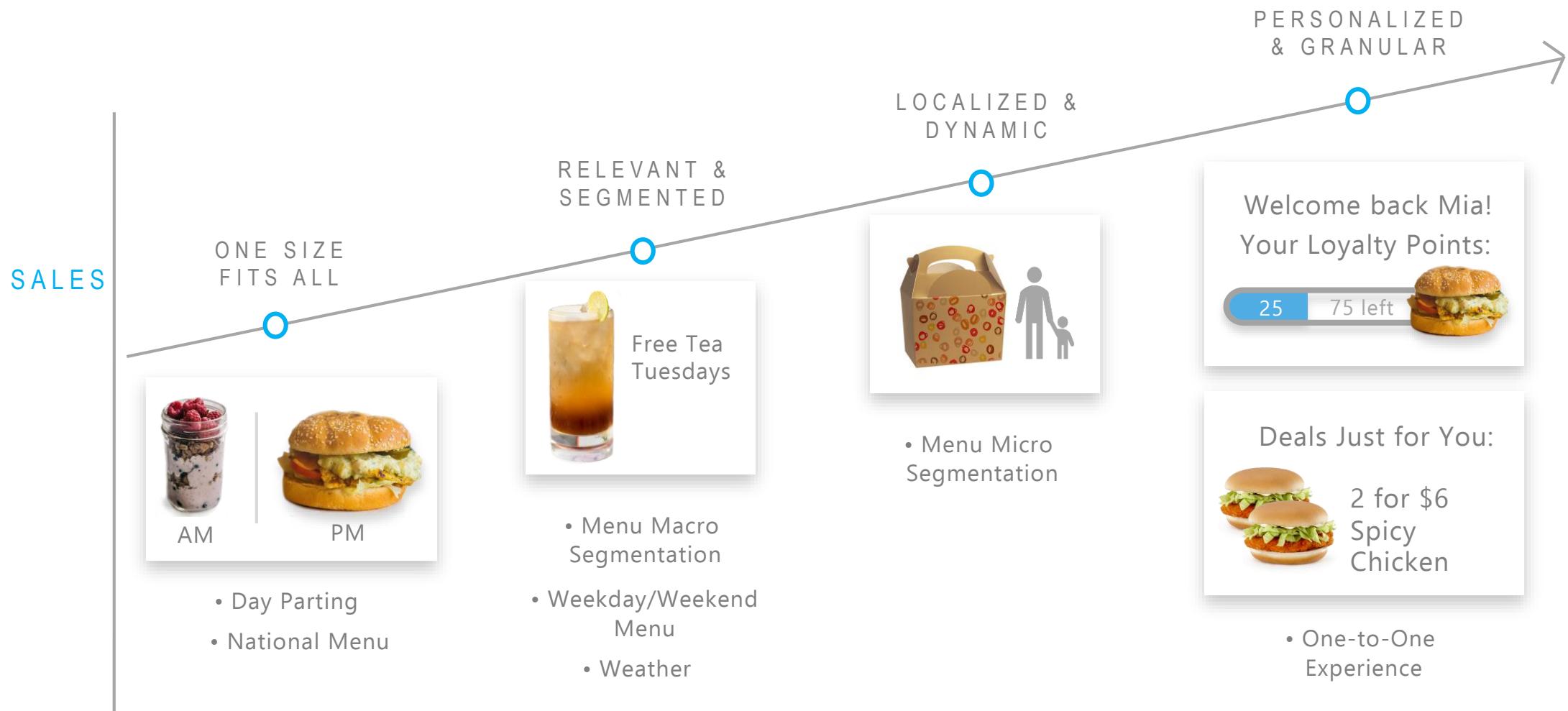
The QSR Experience

# Current State

Within drive thru & in-store experiences,  
personalization is driving an incredible jump in  
customer satisfaction and return on investment.

## The QSR Experience

# Personalization



The QSR Experience

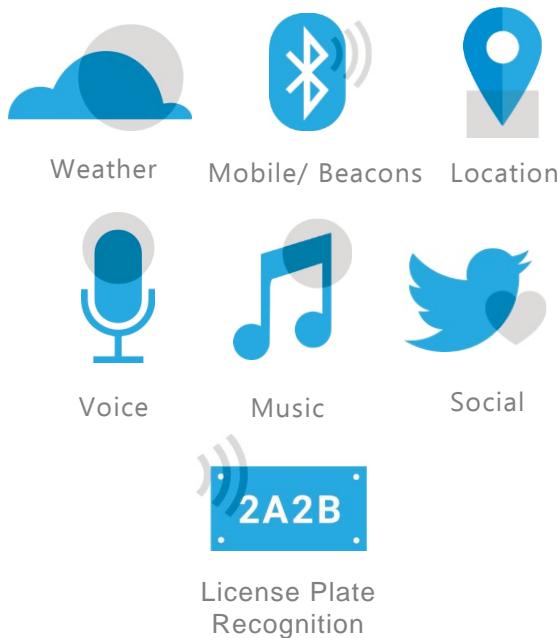
# Current State

At its core, what is enabling this personalization is the inferred, observed and obtained data. We utilize and craft "data-driven content" that is then displayed within the drive thru, at the point of sale interaction points (SOKs), or across in-store activations.

## The QSR Experience

# Data-Driven Content

### EXTERNAL DATA



### CONTENT



Full HTML & CSS  
Templates & Dynamic Layouts  
Animations & Transitions  
API Layer for Integrations  
Media Players & Communication

### INTERNAL DATA



The QSR Experience

# Current State

Once we have this content generated, it's immensely important to further localize and regionalize. In order to maximize the engagement and potential ROI, we do this through management and dynamic tagging at scale.

## The QSR Experience

# Managing Content at Scale

✗ easter



National

✗ Southern Region



Region

✗ mobile

✗ segment-family

✗ zipcode-37235



or



State

✗ Tennessee

✗ Nashville Hot Chicken



Store

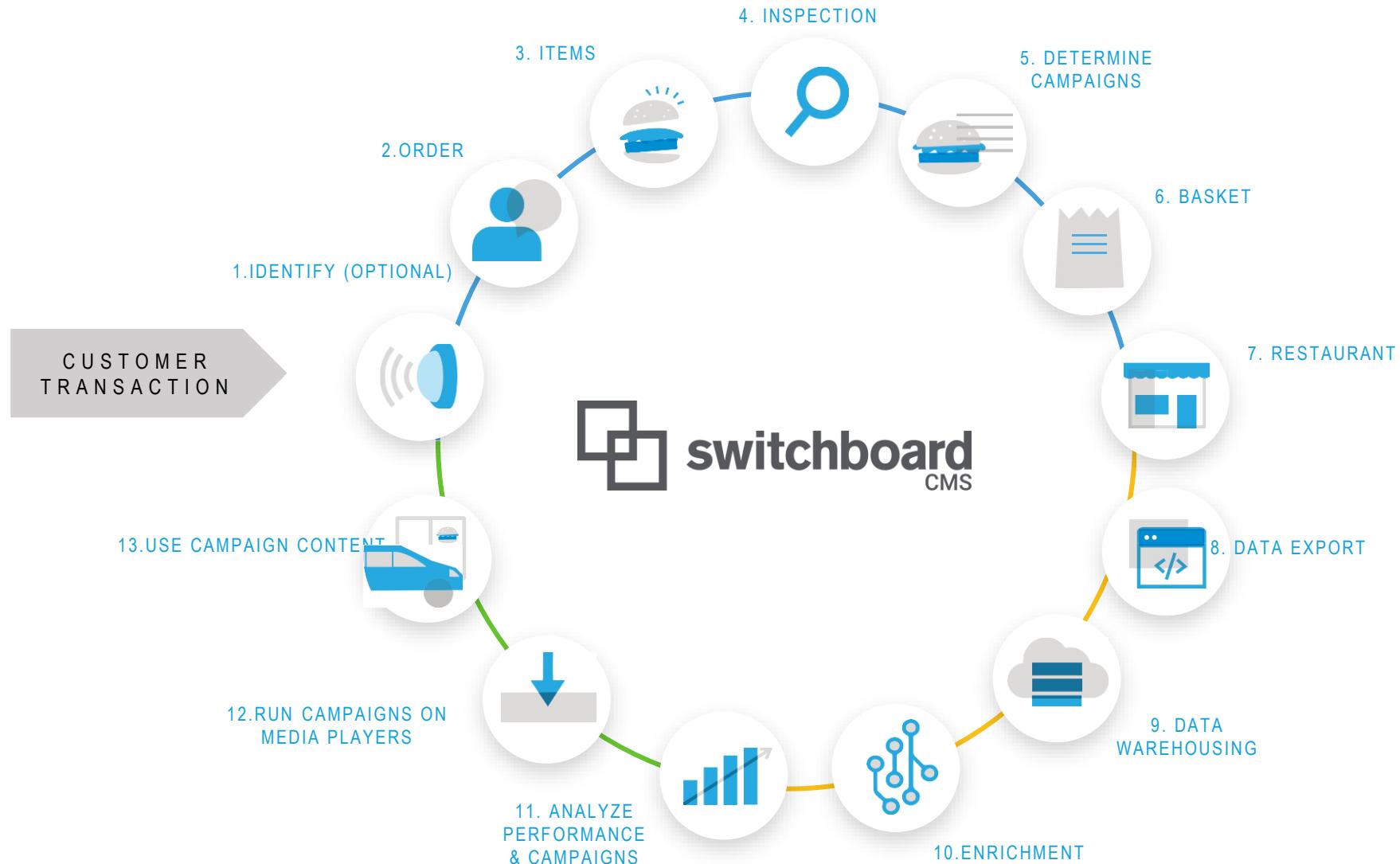
The QSR Experience

# Current State

Lastly, we deploy a lens of analysis and categorize the data into datasets. This gives us a full vantage across our customer lifecycle.

## The QSR Experience

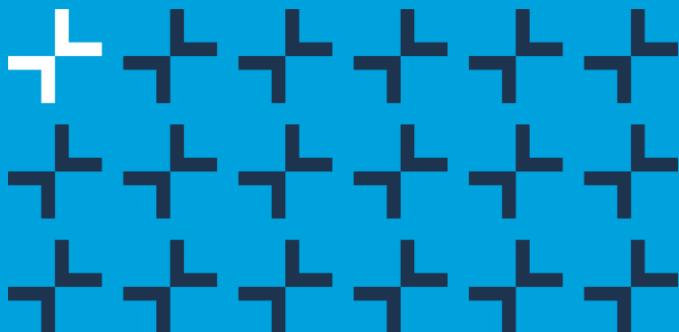
# Event-Driven Content, Data Collection & Analytics



The QSR Experience

# How It Comes to Life

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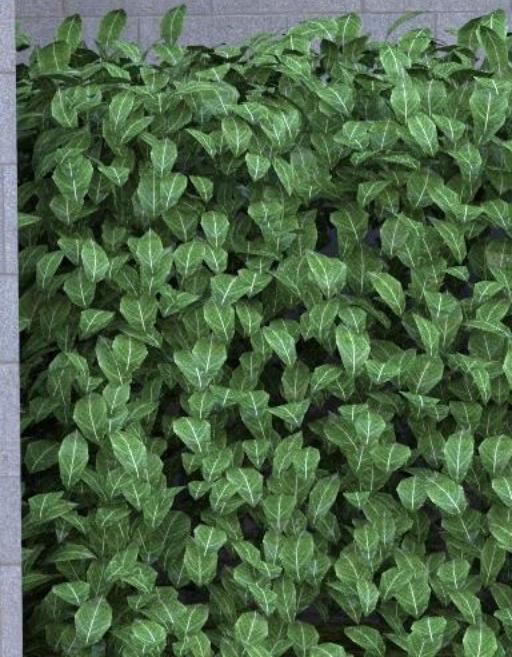


















The menu board is divided into several sections:

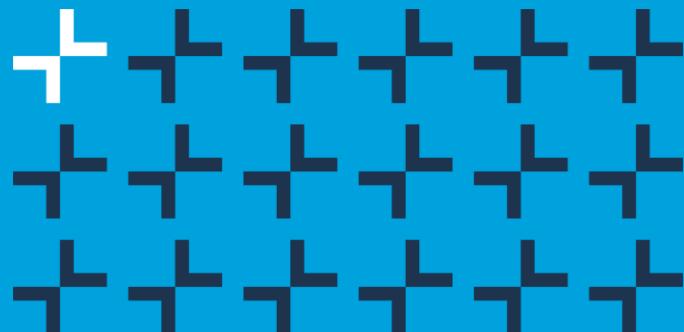
- Beef Burger Meals:** Classic Beef (\$4.29), Beef & Bacon (\$6.99), Mexican Beef (\$5.29), Beef & Mushroom (\$6.99), Mega Beef (\$6.49).
- Chicken Burger Meals:** Classic Chicken (\$4.19), Chicken Schnitzel (\$4.59), BBQ Chicken (\$4.99), Chicken Caesar (\$2.99).
- Selection Wrap Meals:** Spicy Lamb (\$2.99), Chicken Caesar (\$2.99), Teriyaki Chicken (\$4.99).
- Sides & Salads:** Onion Rings (\$1.79), Fries (\$2.19), Chicken Strips (\$2.99), Greek Salad (\$3.99), Mexican Salad (\$3.99), Chicken Salad (\$4.99).
- Drinks:** ColeFizz (\$1.10), OrangeFizz (\$1.10), LemonFizz (\$1.10), Mocha Frappe (\$1.99), Coffee Frappe (\$1.99).

A promotional section on the right features a strawberry smoothie with a straw and mint leaves. A pink circle indicates a price of "\$3".

The QSR Experience

# Global Snapshot

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# McDonald's Australia & New Zealand Digital Drive Thru

Creating a smoother, faster and smarter experience.





McDonald's U.S.

# Outdoor Digital Menu Board Rollout

Driving (Thru) Results



LEGOLAND



Japan

# Legoland

Connecting our clients and their customers  
with a splash of color.

 coates



Australia

KitKat

Customizing digital solutions to bring brand interactions to life.



Merlin Entertainment Australia

# Sealife Aquarium

Dive into an unforgettable experience.



McDonald's Australia & New Zealand  
Create Your Taste

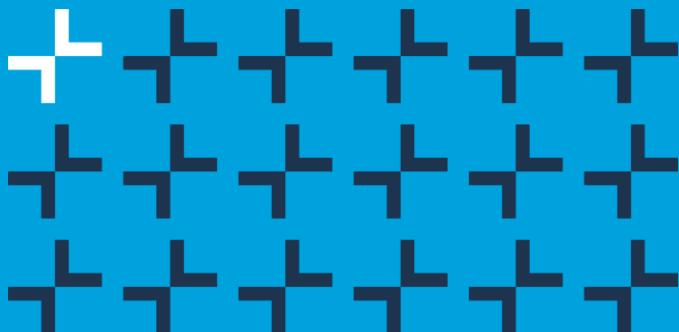
Forever changing the landscape of

fast food.

The QSR Experience

# Future State

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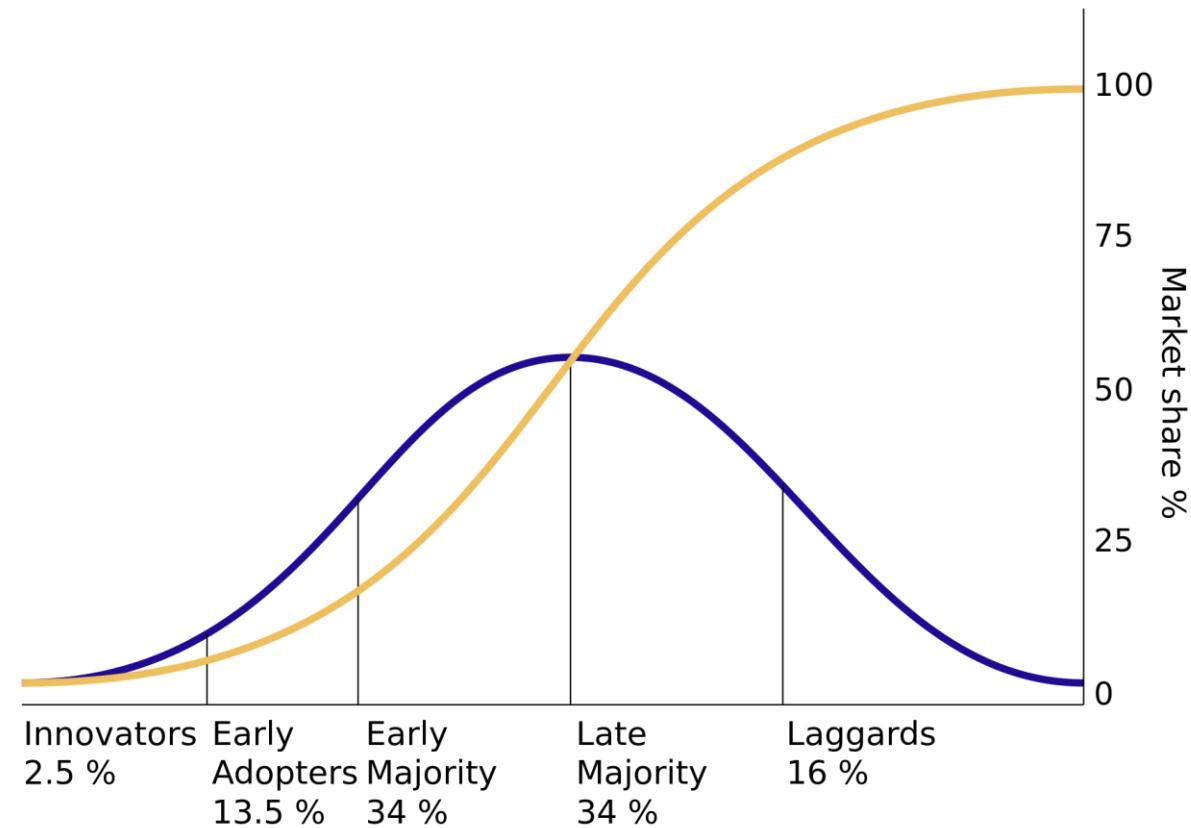
The QSR Experience

# Future State

As we look to the future, trends and influencers across technology are shaping our decisions around product development.

# Future State

When we consider Everett's Bell Curve, or the *Technology Adaption Curve*<sup>1</sup>, we can see that as the development of technology increases and new ideas spread, market share and saturation reach peak levels.



<sup>1</sup>Diffusion of Ideas

The QSR Experience

# Future State

With regards to the hyper-focused experiences from a hardware development perspective, we are seeing 5 key trends that are having an immense impact and influence on our product development.

The QSR Experience

# Future Trends

## Voice

AI that can hold eerily human-like conversations will offer immense value to the future of QSR as it has impacts on OPEX and end-customer interaction.

The goal for any QSR is efficiency and speed, and automation promises to do just that.

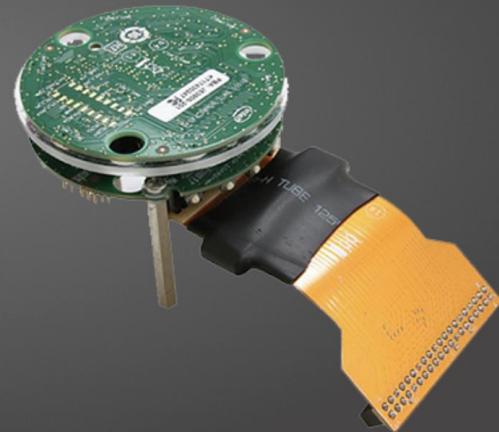
[« All Kits](#)

## INTEL® SPEECH ENABLING DEVELOPER KIT

Enable speech recognition capabilities on your IoT-based products.

- Prototype and quickly take products to market
- Runs on cloud-based Amazon Alexa\* Voice Service (AVS)
- Intel Atom® processor and Raspberry Pi® versions

[Get Started](#) [Buy](#)

The image shows the Intel Speech Enabling Developer Kit, which consists of a circular green printed circuit board (PCB) with various electronic components and a black ribbon cable with a yellow connector. The PCB is mounted on a white stand.

Intel Speech Dev KIT & Amazon Alexa

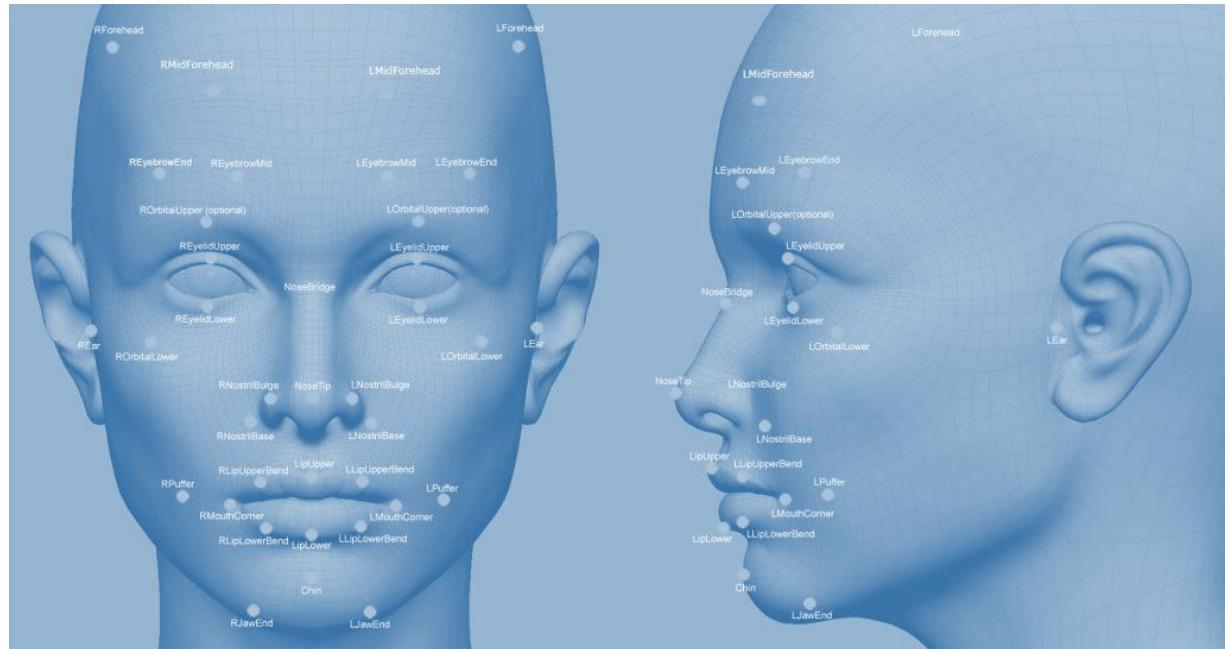
## The QSR Experience

# Future Trends

## AI & ML

It's likely that data-driven automation in restaurants will initially focus on operations - things like using sophisticated forecasting to automate scheduling, and to optimize inventory and menu design.

Within the QSR industry, we'll see something more like machine-in-the-loop, where the human is at the forefront and the machine augments service with activities that are less central to the guest experience.



## The QSR Experience

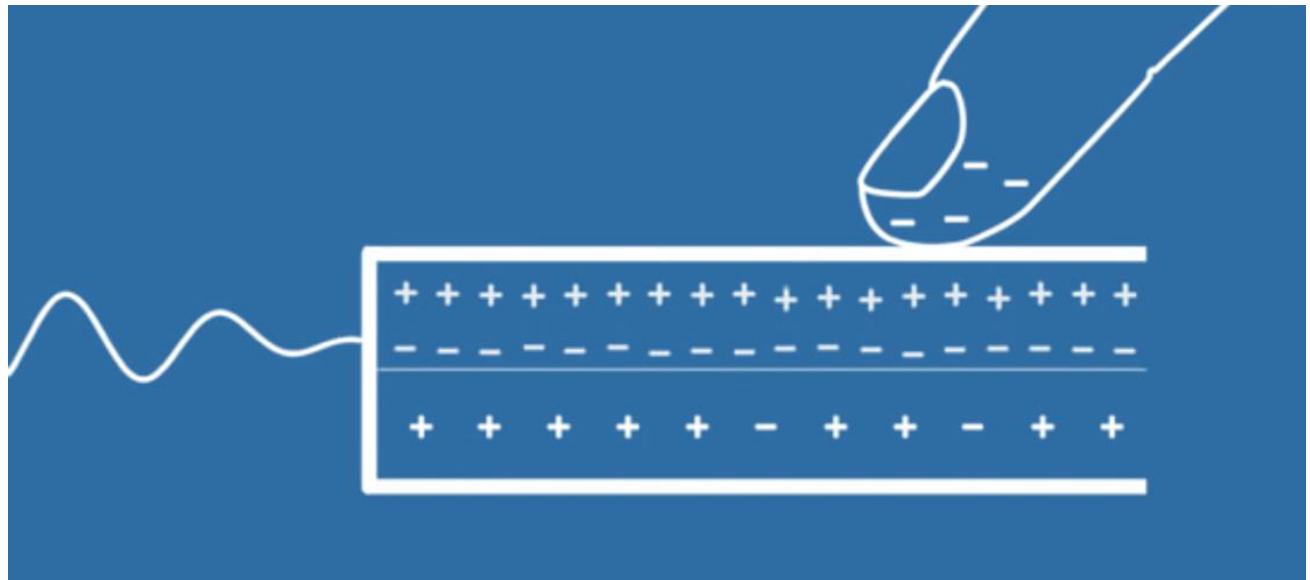
# Future Trends

## Force Feedback

One innovation currently being developed for screens is the use of haptics.

Electrostatic fields can fool human fingers, stimulating nerve impulses that register in the brain as various physical textures – smooth, bumpy, rough, etc.

The haptic technologies being developed will be overlays that can fit over any existing touchscreen, and will add a totally new dimension to interactive displays.



## The QSR Experience

# Future Trends

## 5G Connectivity

More and more, 4G LTE is being used to meet the need for constant, flexible connectivity and provide a failover backup solution for business continuity for traditional wired networks.

As we move towards 5G, we will now have incredible speeds that are reliable, in turn allowing kiosks to be mobile and prompting architecture changes within restaurants.



The infographic features a dark blue background with a central graphic of water ripples and bubbles. At the top left is the Intel logo. The title "HOW 5G WILL TRANSFORM THE GLOBAL ECONOMY" is in large white capital letters. A quote in white text reads: "It's a fact—5G is coming and it will touch every aspect of our lives. Let's explore the ripple effect 5G will have on the economy and why it's more than just the next 'G.'" Below the title, the main heading "THE 5G EVOLUTION:" is in large yellow and white letters, with "AN INTELLIGENT NETWORK FOR FUTURE INNOVATION" in smaller white text underneath. The evolution is shown in four stages: 1G ANALOG (Voice Capability, Limited Coverage and Mobility), 2G DIGITAL (Better Voice and Coverage, Text Messaging), 3G MOBILE DATA (Basic Internet, Multimedia, Smaller Phones), and 4G MOBILE BROADBAND (High-Speed Data, Smartphones). At the bottom, five circular icons represent applications: SMART CITIES, CONNECTED VEHICLES, SMART AGRICULTURE, SMART HOME, and SMART INDUSTRIAL. To the right, a dashed line leads to a summary box: "EXTREME SPEED, CONNECTIVITY & RELIABILITY" above a large yellow "5G" icon, with the text "Transformed 5G networks designed to support a broad range of devices and use cases". The bottom right corner contains the text "Proprietary & Confidential: Coates Group".

HOW 5G WILL TRANSFORM  
THE GLOBAL ECONOMY

It's a fact—5G is coming and it will touch every aspect of our lives. Let's explore the ripple effect 5G will have on the economy and why it's more than just the next "G."

# THE 5G EVOLUTION:

AN INTELLIGENT NETWORK FOR FUTURE INNOVATION

1G ANALOG	2G DIGITAL	3G MOBILE DATA	4G MOBILE BROADBAND
Voice Capability, Limited Coverage and Mobility	Better Voice and Coverage, Text Messaging	Basic Internet, Multimedia, Smaller Phones	High-Speed Data, Smartphones

SMART CITIES  
CONNECTED VEHICLES  
SMART AGRICULTURE  
SMART HOME  
SMART INDUSTRIAL

EXTREME SPEED,  
CONNECTIVITY &  
RELIABILITY

**5G**

Transformed 5G networks designed to support a broad range of devices and use cases

Proprietary & Confidential: Coates Group

The QSR Experience

# Future Trends

## Robotics

When is robotics friendly?

When it makes things speedy and personalized. If we can offer interaction points, then customers can quickly customize their orders.

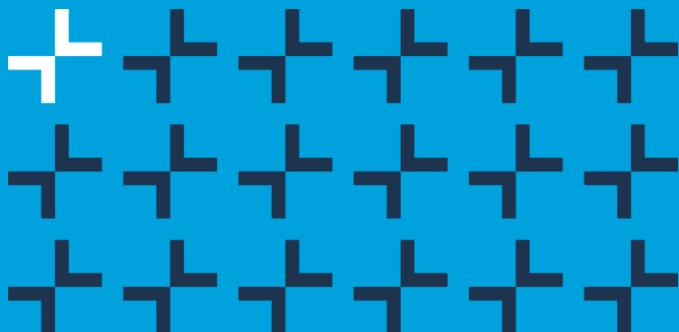
Behind the scenes, robotics place the orders into individual containers whose digital screens show the customers' names, and the containers are then displayed on connected cabinets.



The QSR Experience

# Q&A Opportunity

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# Thank You!

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