International

Walter Bugno, CEO

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Non-GAAP Financial Measures

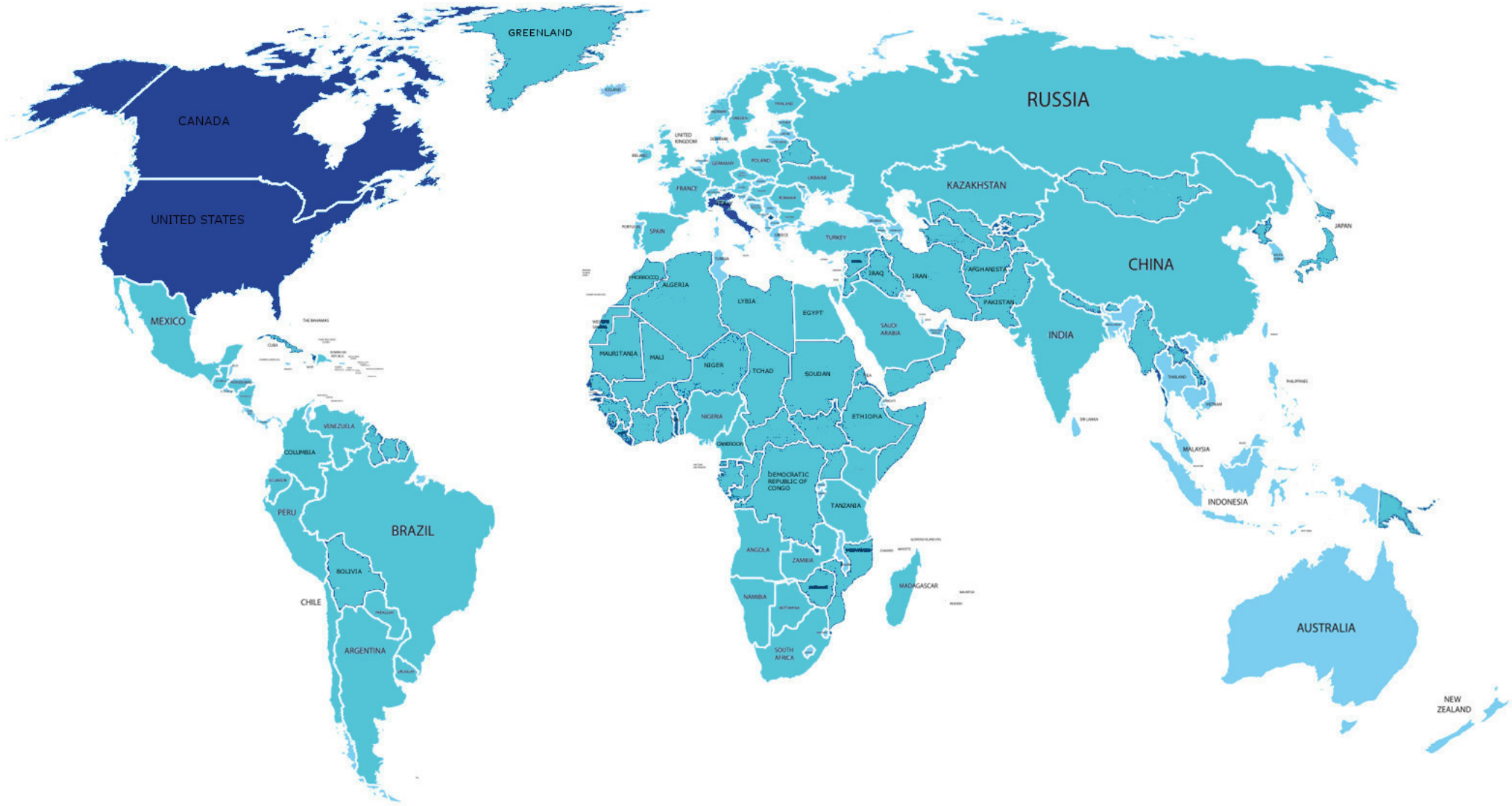
This presentation contains non-GAAP financial measures, including adjusted EBITDA, adjusted operating income, adjusted diluted EPS, and free cash flow. Reconciliations of non-GAAP measures to the most directly comparable GAAP measures are included in the appendix to this presentation.

Agenda

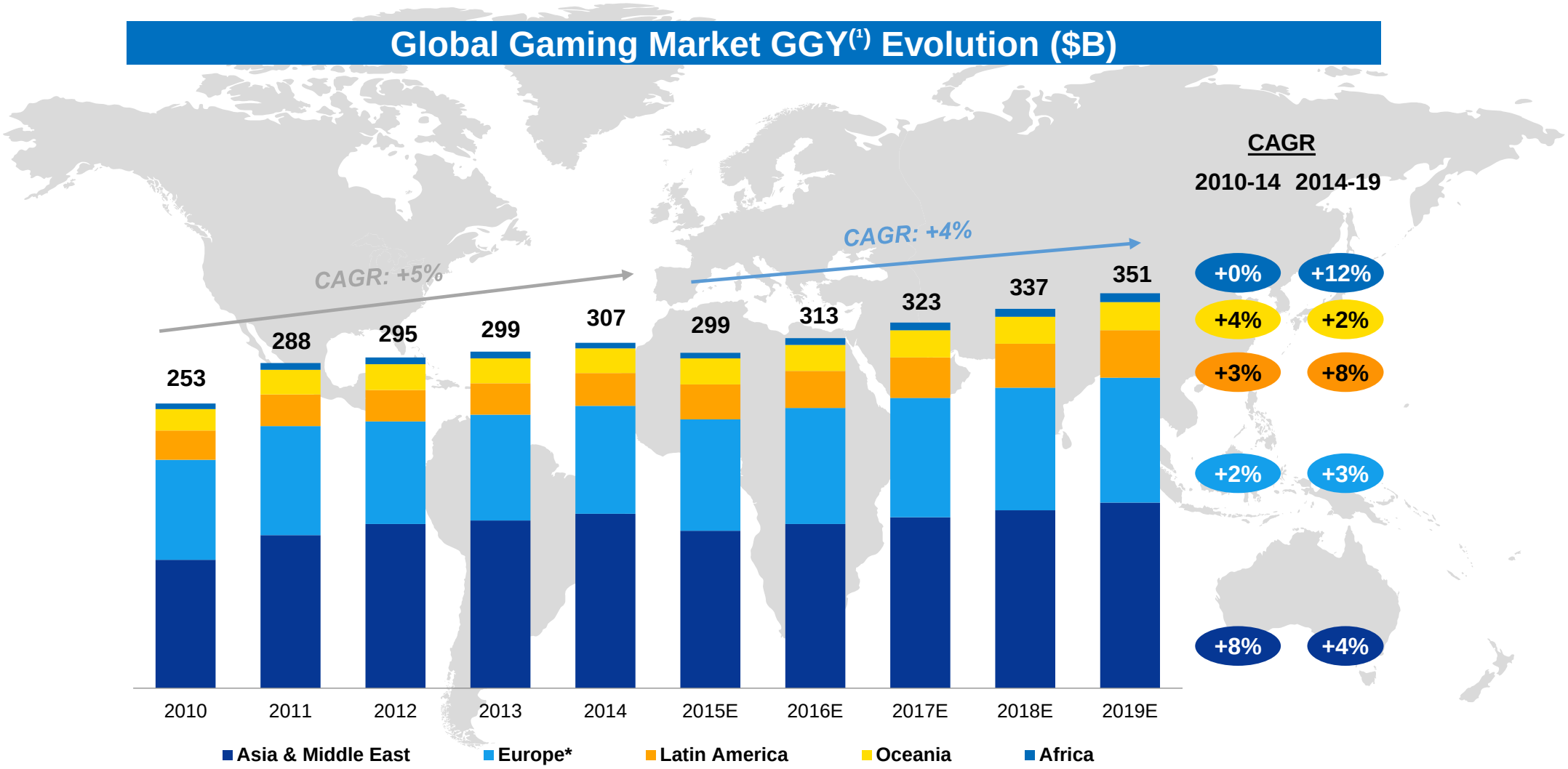
- → Market Context
- → Business Overview
- → Strategic Initiatives
- → Key Drivers

Market Context

IGT International: All Markets Excluding North America and Italy



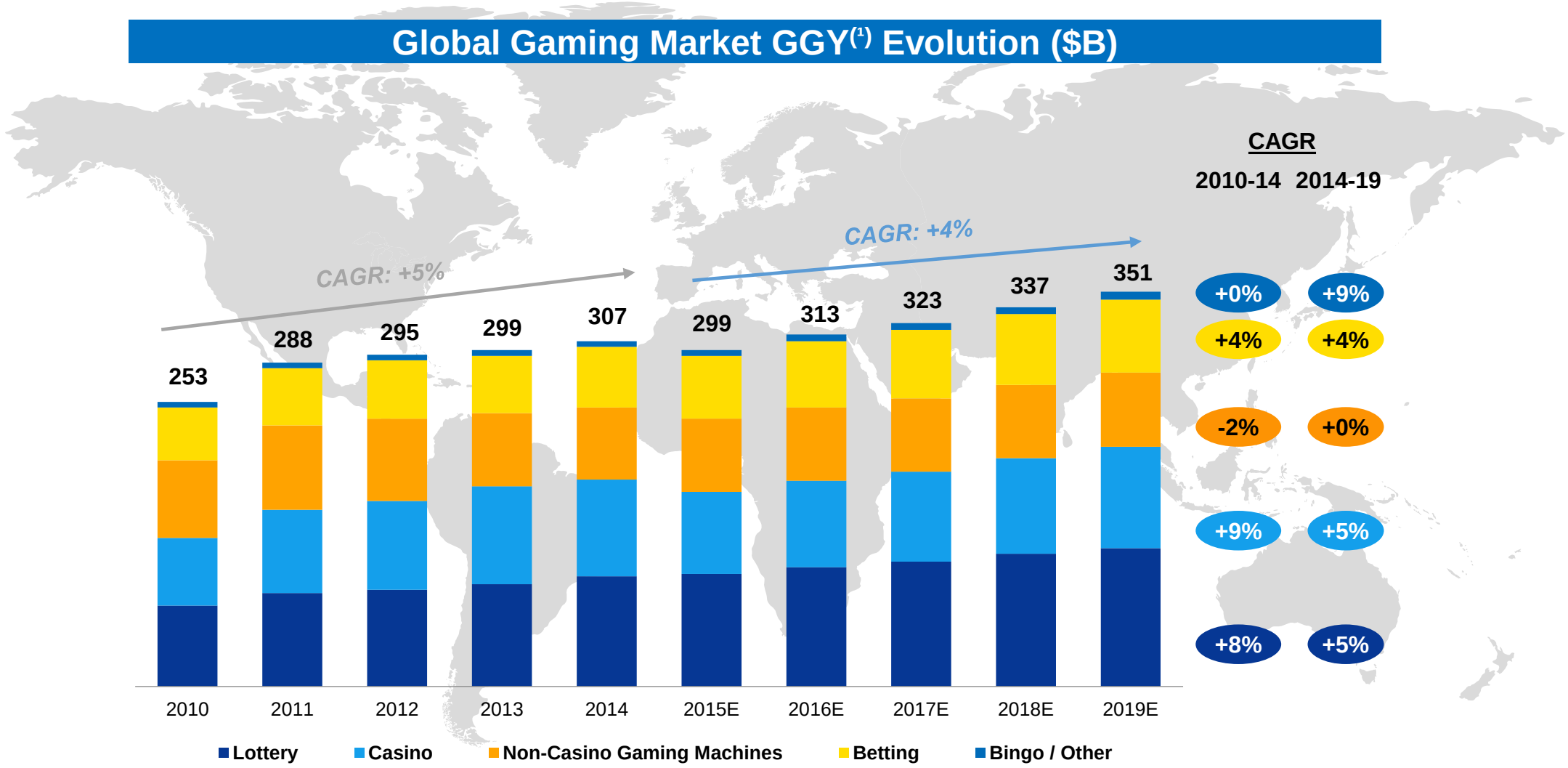
Favorable GGY Outlook in All Regions



Source: GBGC
*Europe excludes Italy
(1) Gross Gaming Yield (GGY) = consumer spending on gaming (wagers less payout). Includes land-based + total interactive (onshore and offshore), and excludes Social Gaming.

Lottery & Casino Growth Leading The Way

Global Gaming Market GGY(1) Evolution ($B)



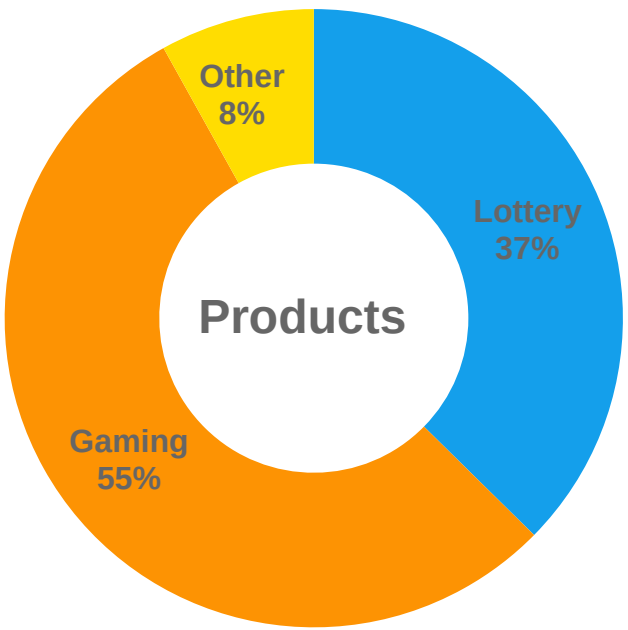
Source: GBGC

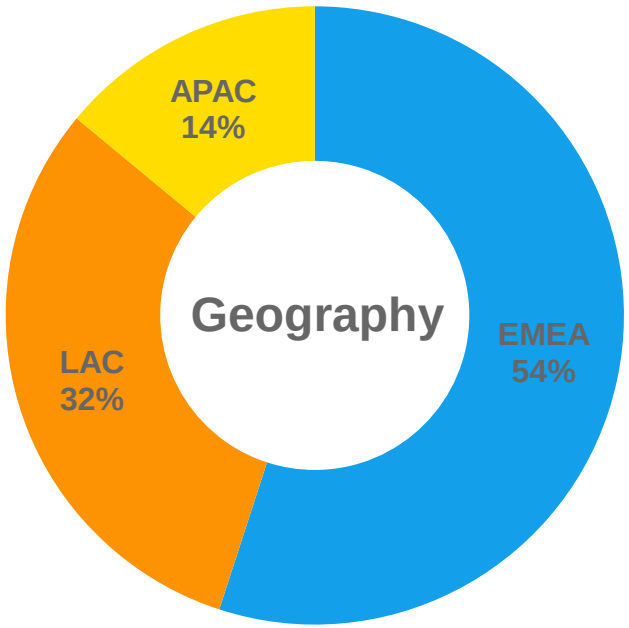
(1) Gross Gaming Yield (GGY) = consumer spending on gaming (wagers less payout). Includes land-based + total interactive (onshore and offshore), and excludes Social Gaming.

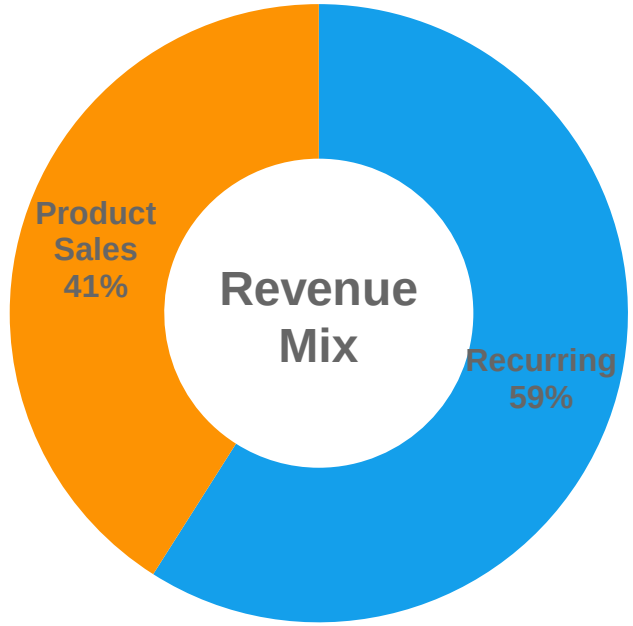
Business Overview

IGT International: A Diversified Business

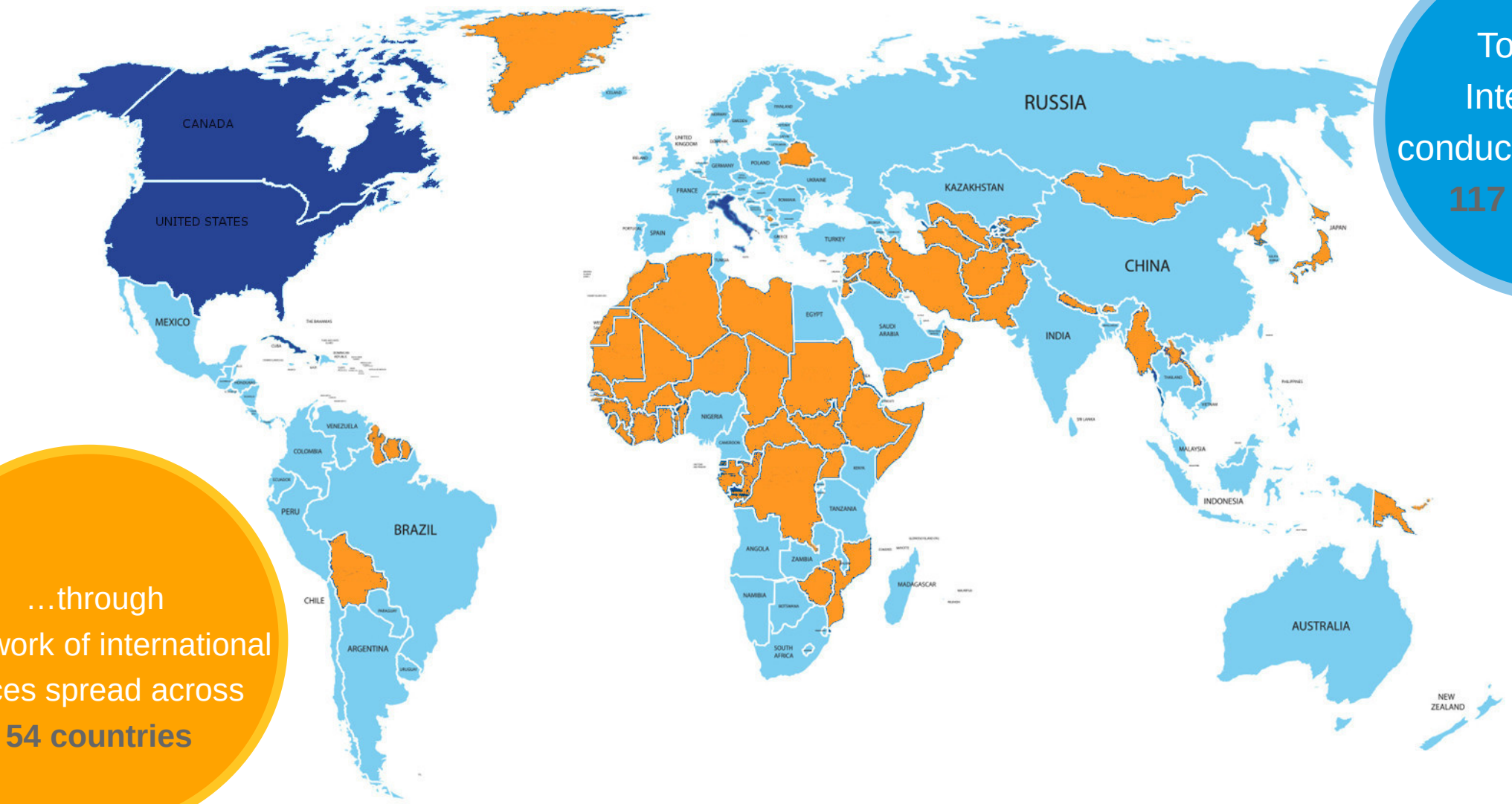
2015 Revenue of **$923m**







IGT, the Global Gaming Leader

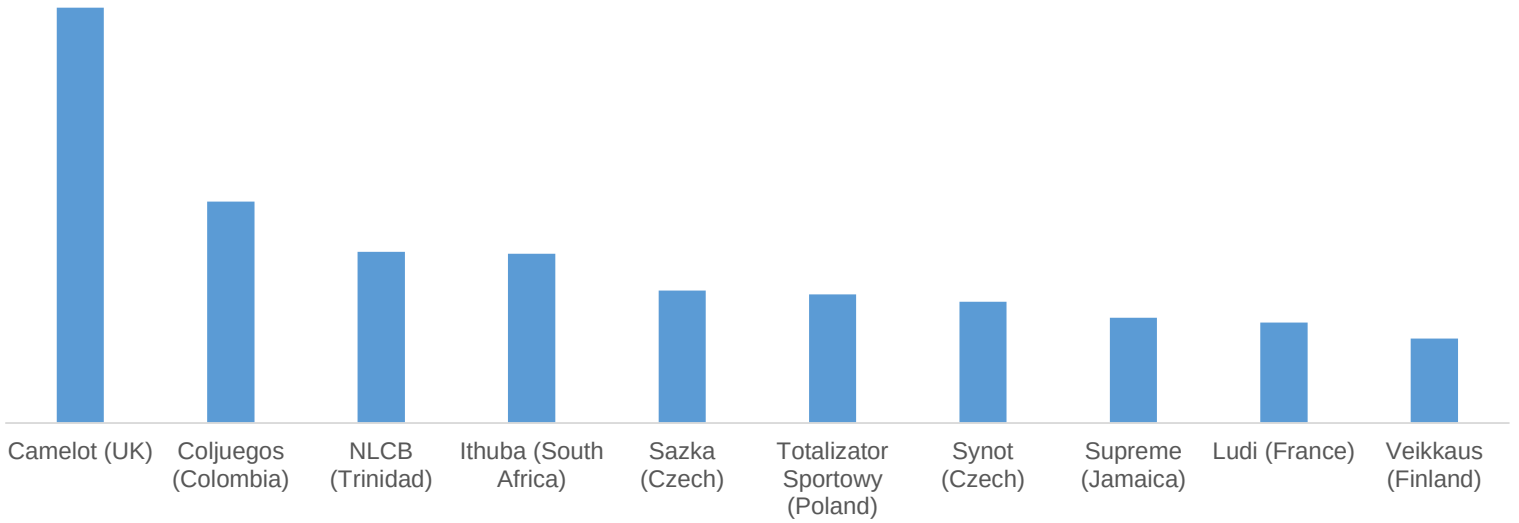


Today, IGT International conducts business in **117 countries**

…through a network of international offices spread across **54 countries**

Extensive Customer Base with Key Long-Term Relationships

2,860 Customers, Top 10: 28% of Revenue



Top 5 Lottery

1. **Camelot** (U.K.)
2. **Coljuegos** (Colombia)
3. **NLCB** (Trinidad & Tobago)
4. **Ithuba** (South Africa)
5. **Sazka** (Czech Republic)

Top 5 Gaming

1. **Synot** (Czech Republic)
2. **Ludi** (France)
3. **Codere** (Mexico)
4. **Tsogo Sun** (South Africa)
5. **Holland Casino** (The Netherlands)

Top 5 Interactive

1. **Probability** (Gibraltar)
2. **BetFred** (U.K.)
3. **Gaming VC** (Malta)
4. **GameSys** (U.K.)
5. **Sky** (U.K.)

Global Lottery GGY by Region ($B)

Latin America: Developing

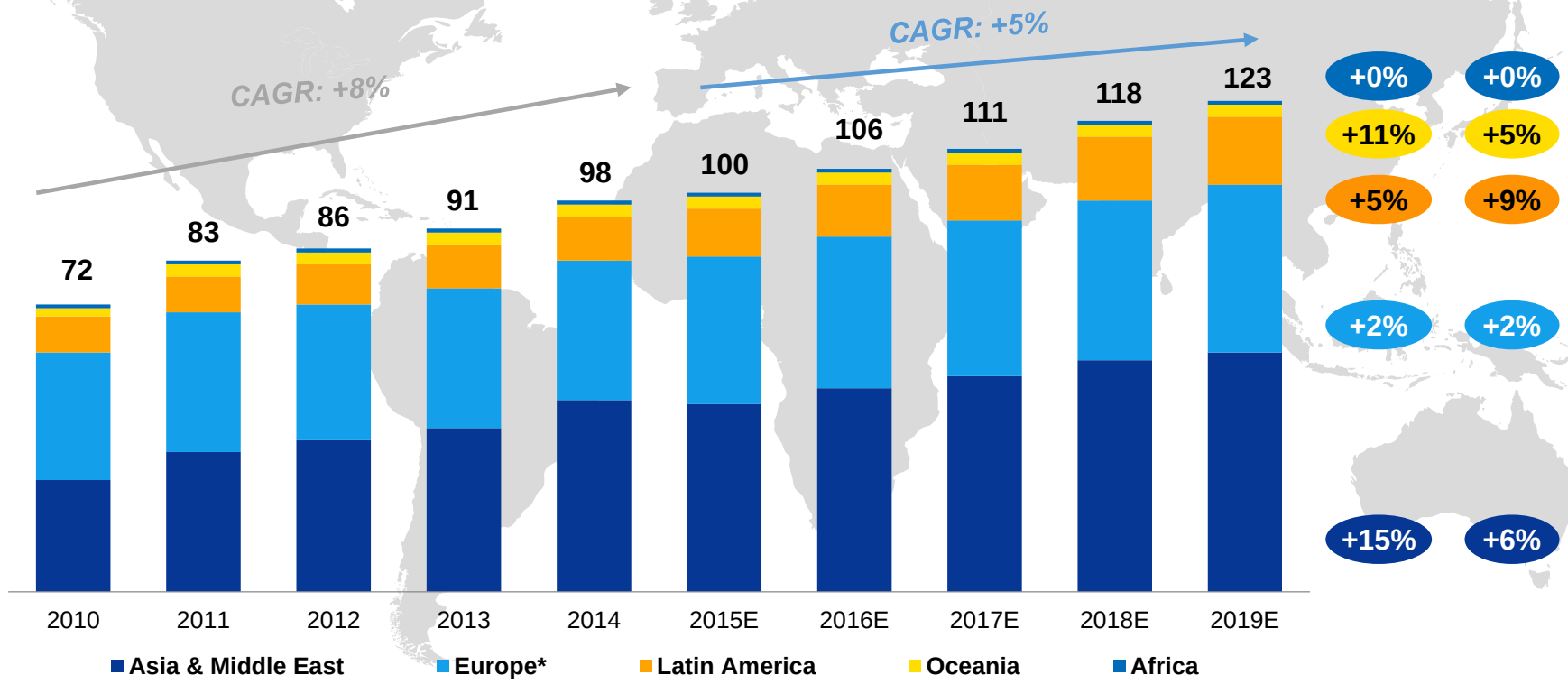
- Market share Latin America 35%
- Expansion of Social Space lottery games
- Growth opportunities in the areas of iLottery/Interactive and VLT's
- Greenfield opportunities

EMEA: Mature

- Market share Africa 44%, Europe 60% (excl. Italy)
- Mature market but still many growth opportunities
- Often multi-channel and multi-product offerings
- Growth driven by multistate game cooperation
- Legislation slowly evolving in E. Europe to allow digital channels

Asia Pacific: Developing

- Market share Oceania 13%; Asia/ME 12%
- Internet legislation in a state of flux
- Significant opportunities once mobile is available
- Regulatory environment slows game development.



CAGR

	2010-14	2014-19
Asia & Middle East	+15%	+6%
Europe*	+2%	+2%
Latin America	+5%	+9%
Oceania	+11%	+5%
Africa	+0%	+0%

Source: GBGC
*Europe excludes Italy
(1) Gross Gaming Yield (GGY) = consumer spending on gaming (wagers less payout). Includes land-based + total interactive (onshore and offshore), and excludes Social Gaming.

Large Presence in Major International Lotteries… with Significant Future Opportunities

Top 20 Lotteries in International Region

	1 China Sports	2 China Welfare	3 FDJ (FRA)	4 National Lottery (UK)	5 SELAE (ESP)	6 Mizuho Bank (JPN)	7 OPAP (GRC)	8 Taiwan Lottery	9 Singapore Pools	10 Caixa Economic (BRA)	11 Nanum Lotto (KOR)	12 Austrian Lotteries	13 SCML (PRT)	14 Norsk Tipping (NOR)	15 Veikkaus Oy (FIN)	16 ONCE (ESP)	17 Westdeutsche Lotterie (GER)	18 Svenska Spel (SWE)	19 Mifal Hapayis (ISR)	20 Loterie Nationale (BEL)
Total Sales (USD M)	$25,632	$24,503	$14,972	$11,237	$9,592	$7,580	$5,176	$4,180	$4,027	$3,818	$3,021	$2,876	$2,447	$2,291	$1,989	$1,972	$1,927	$1,904	$1,610	$1,283
Central Systems		●	●	●					●				●		●	●	●	●	●	●
Point of Access		●	●	●	●				●				●		●	●			●	●
Sports Betting			●				●		●				●		●					●
Interactive														●	●			●		●
VLT							● *											●		

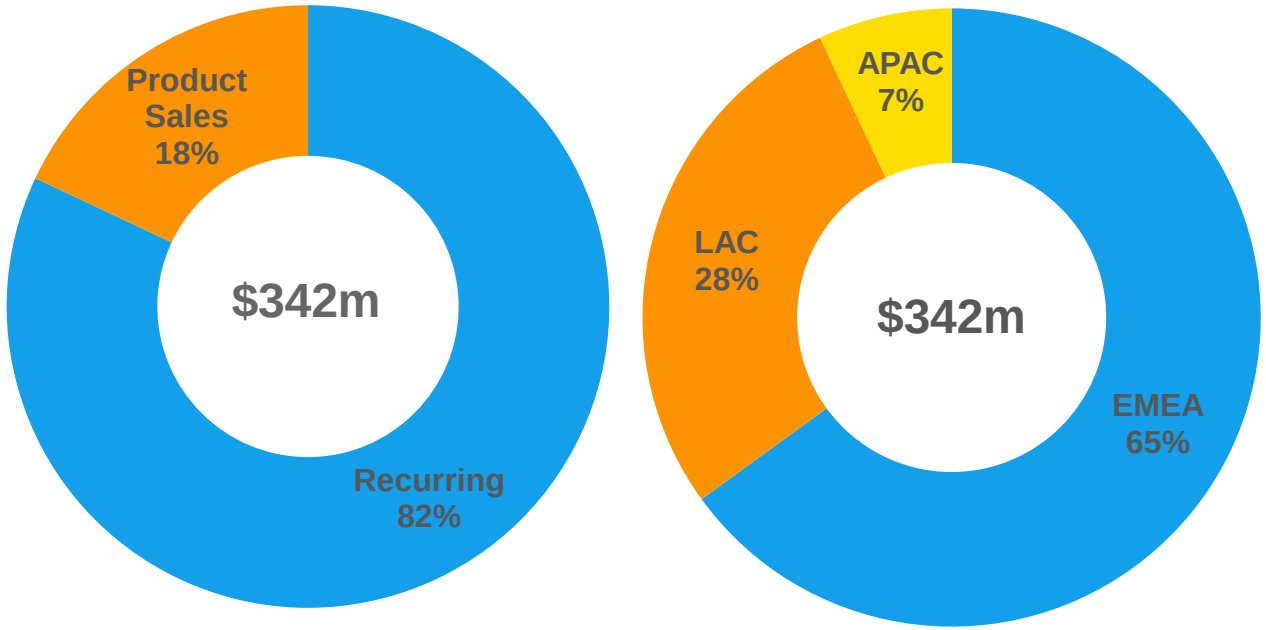
■ No existing market

Source: La Fleur's (excludes VLT)

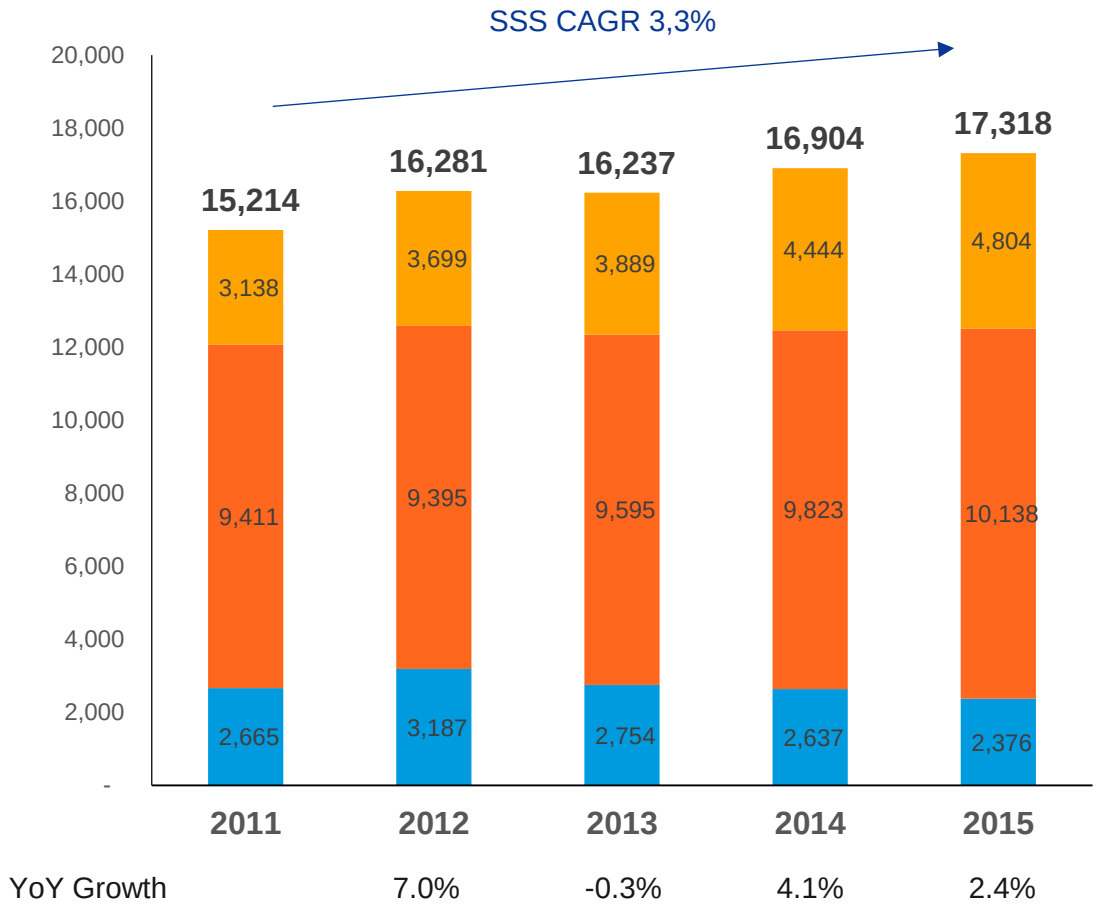
* Awarded VLT contract; OPAP court challenge to regulatory conditions has delayed launch

International Lotteries: Widespread Presence

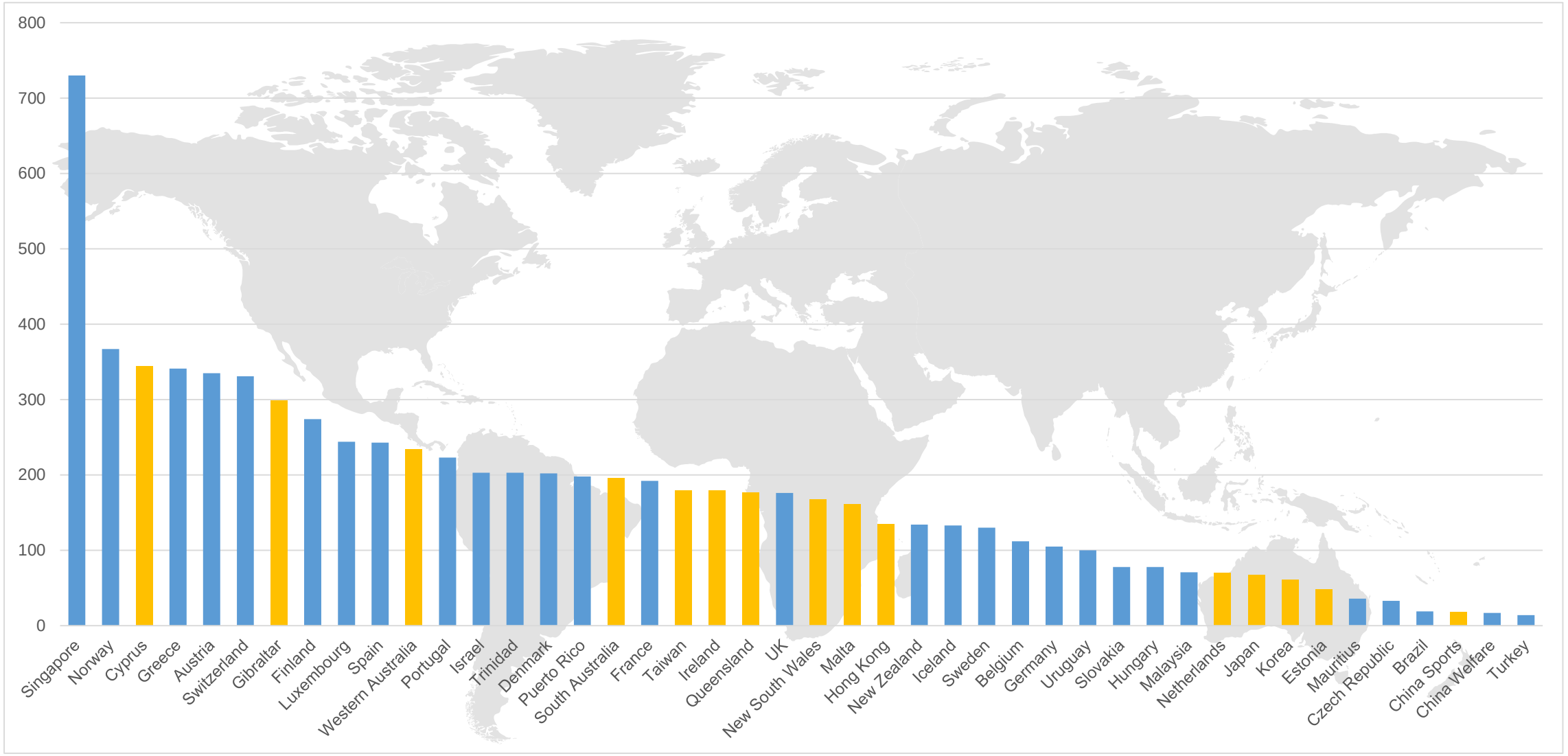
2015 Revenue Mix



Same Store Sales Growth ($M)



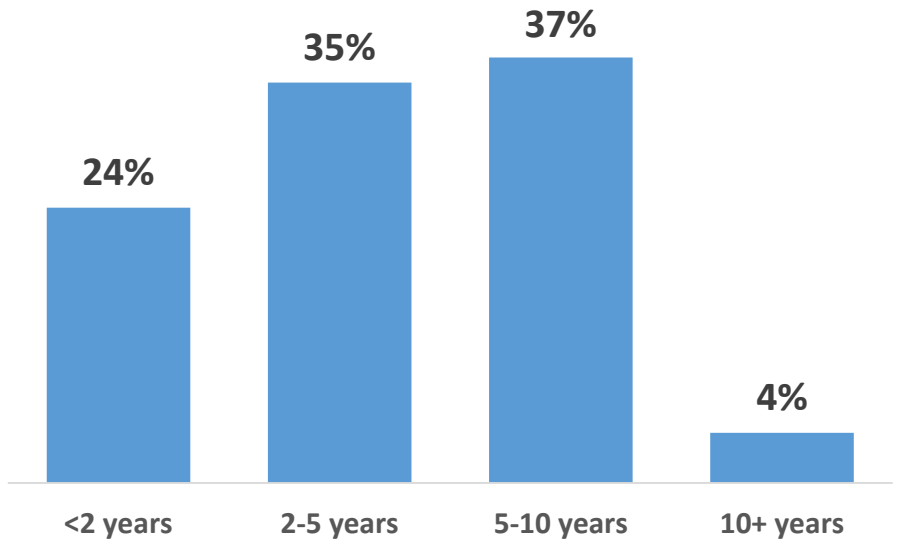
Per Capita Spend Differences Highlight Opportunity for Future Growth



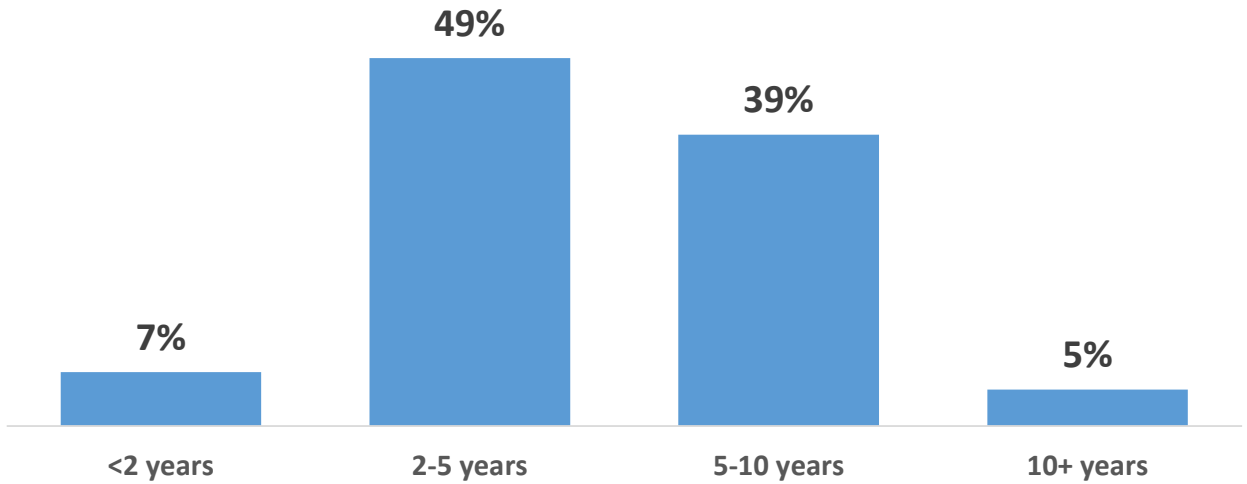
Source: LaFleur's

Significant Portion of Revenue Secured for 5+ Years

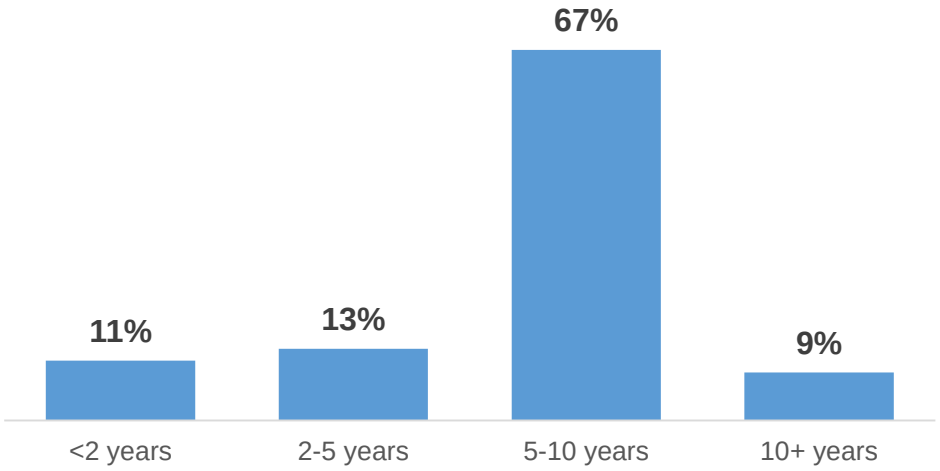
Number of Contracts—Without Extensions



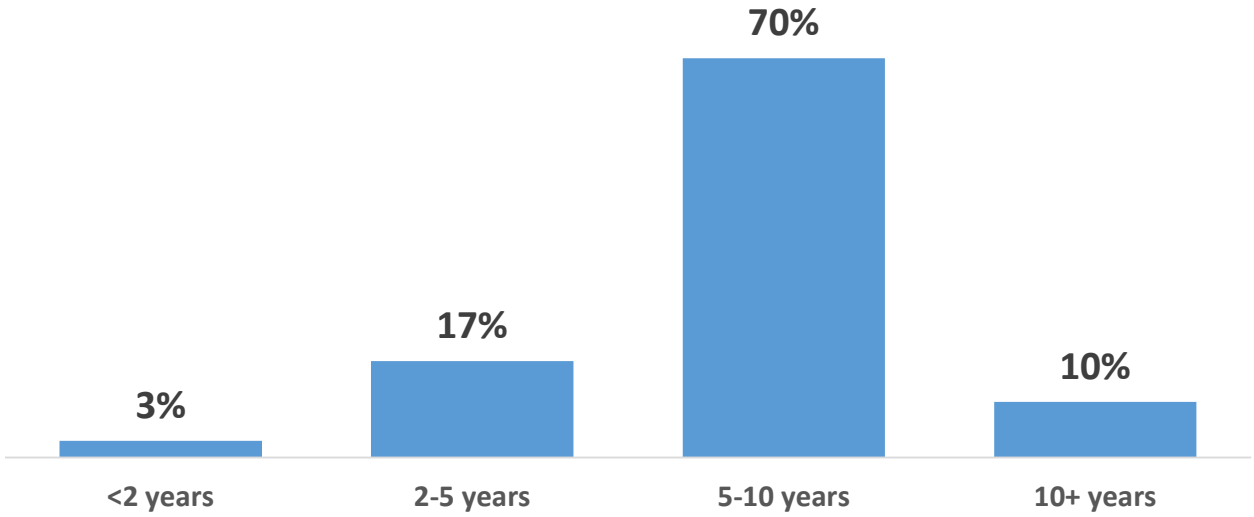
Annual Revenue Mix—Without Extensions



Number of Contracts—With Extensions



Annual Revenue Mix—With Extensions



Casino and Gaming Machines GGR by Region ($B)

Latin America: Developing

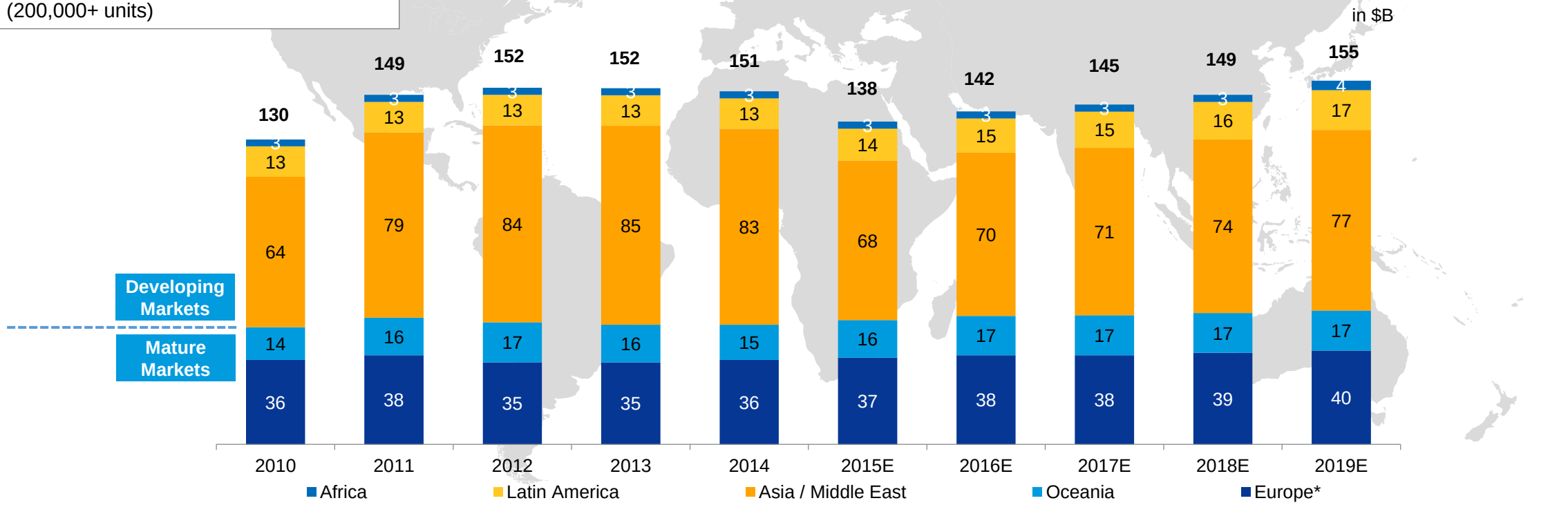
- Challenging business climate due to FX (COL, MEX, ARG), political environment (MEX, ARG), market saturation (PAN, URU) and reduced growth rates of economies (PER)
- Short to mid-term (6-18 months) opportunities in Peru (new openings), Chile (7x re-licenses), Argentina (removal of import restrictions) and Brazil (200,000+ units)

EMEA: Mature

- Mature with exception of VLT expansion (Greece)
- Vertically integrated suppliers present
- Large arcade markets

Asia Pacific: Mix of Mature & Developing

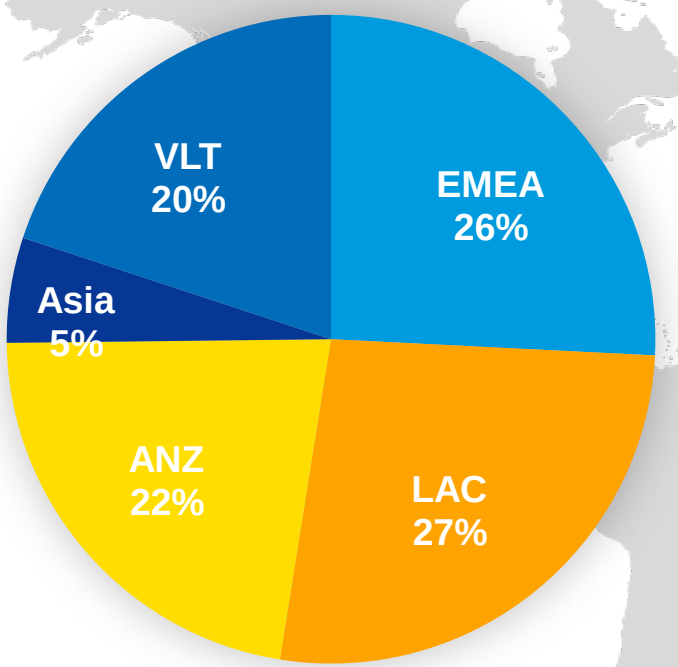
- Majority of machines in mature Australian market
- Expansion in Macau with modest growth across Asia
- Japan & Korea are major opportunities



Source: GBGC
*Europe excludes Italy
Notes: GGR figures include all gaming machine revenue (both in casinos and outside of casinos). AsiaPac excludes estimate for Japan's Pachislot/Pachinko machines.

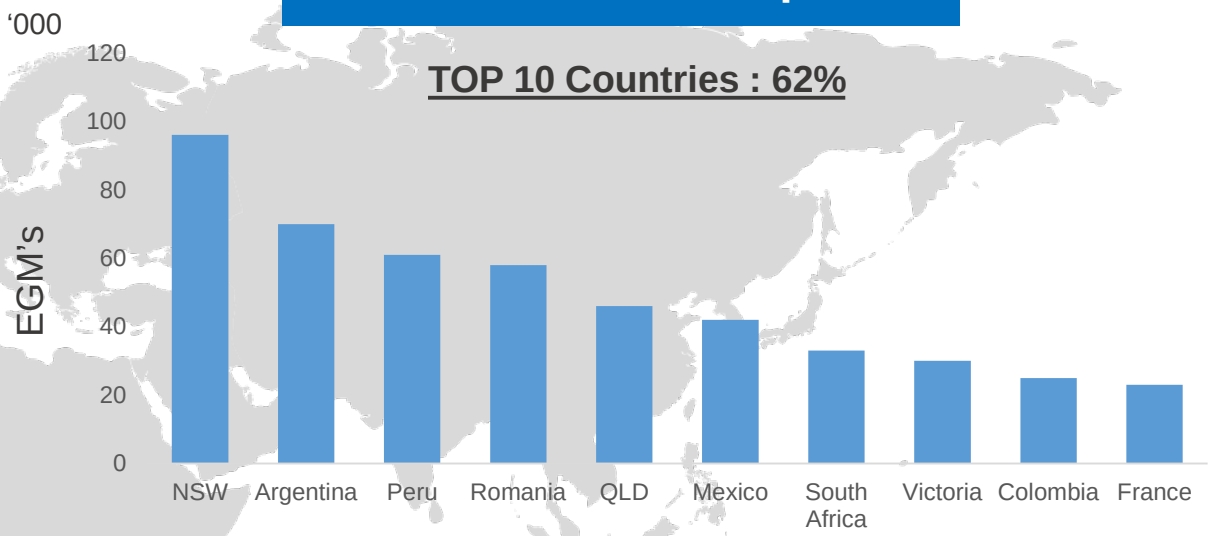
Significant International Install Base, More Room for Expansion

~ 1 million Gaming Machines



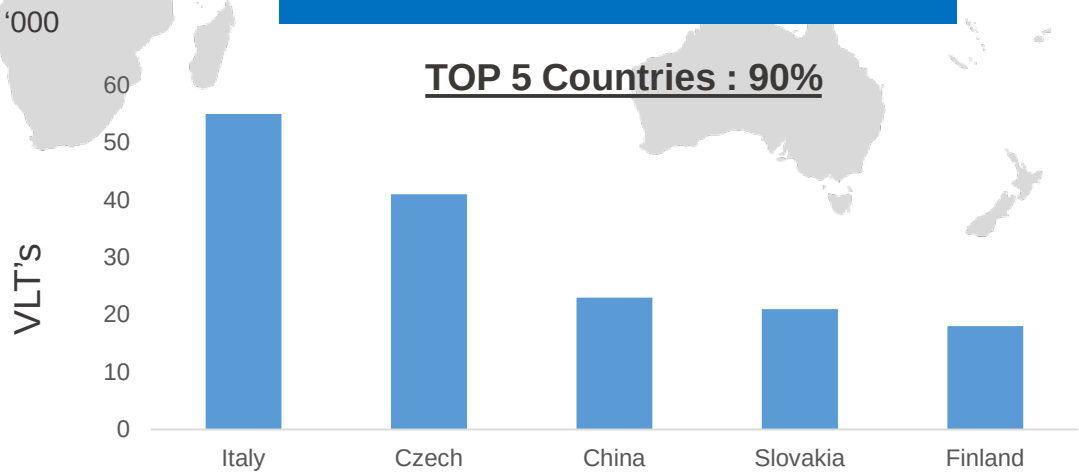
80 / 20 split Casinos vs VLT

Casino Units Widespread



TOP 10 Countries : 62%

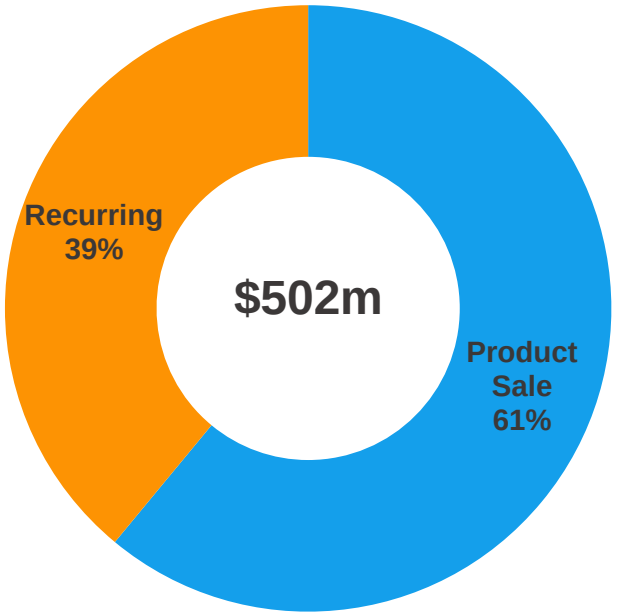
VLT Units Concentrated

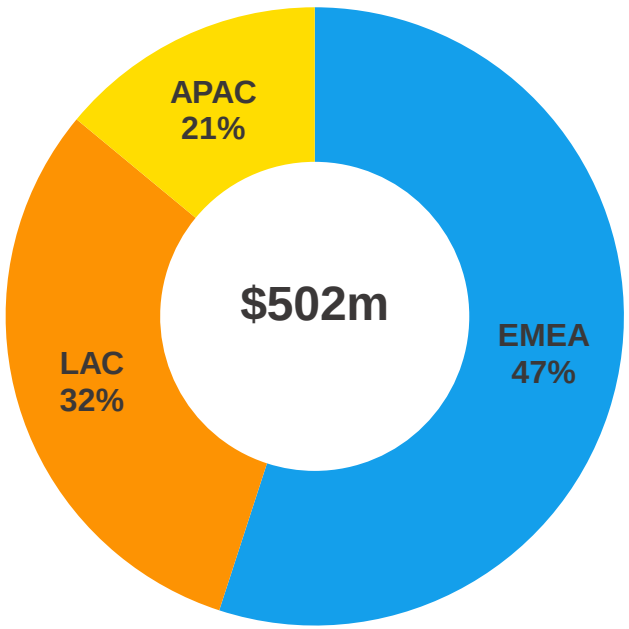


TOP 5 Countries : 90%

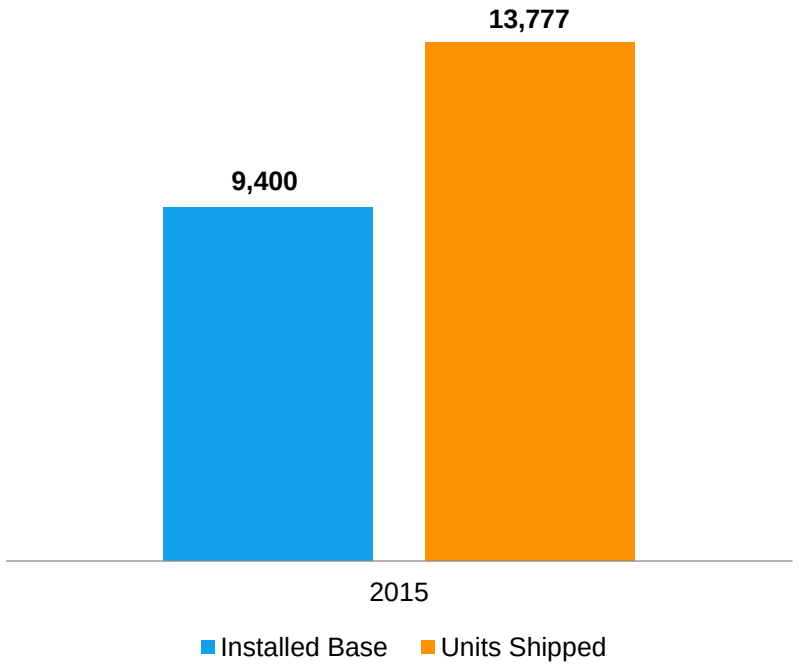
Gaming Snapshot: IGT a Global Player

2015 Revenue Mix





Installed Base & Units Shipped



Strategic Initiatives

Key Strategic Initiatives

Lottery…
Building on Leadership Position

Gaming…
Path to Growth: Focus, Local, Intimacy

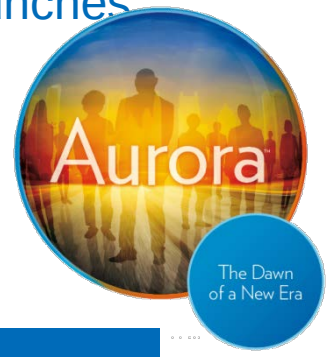
Interactive…
Leveraging Existing Assets

Life is like a box of chocolates…

International Lottery: Building on Leadership Position

Drive Same Store Sales Growth

- ✓ Game innovation, retail terminal expansion, network optimization
- ✓ Marketing as a service
- ✓ Multi-jurisdictional jackpot game enhancements and new launches
- ✓ Instants expansion and product optimization
- ✓ Build upon new market deployments… e.g. South Africa



Migrate / Introduce Customer Base to Aurora

Position For New Opportunities

- ✓ Successful re-bids, extension contract management
- ✓ Multi-channel innovation: e-instants, Bring Your Own Device, interactive
- ✓ VLT expansion

… and Greece!



International Gaming Path to Growth: Focus, Local, Intimacy

Expand Installed Recurring Revenue Base

Product

- ✓ Refresh install base
- ✓ Local content roadmap
- ✓ Primary, secondary market solutions
- ✓ VLT innovation

Geography

- ✓ Existing market expansion (EMEA, South Africa, Mexico)
- ✓ Leverage legacy company positions for LatAm share again
- ✓ Launch into Eastern Europe
- ✓ Target new geographies: Greece, Colombia, China, Trinidad & Tobago

Drive Share Growth in Core Markets

Product

- ✓ Dedicated product roadmap organization
- ✓ Focused studio network
- ✓ Focus group and test bank process
- ✓ Global cabinet program
- ✓ Product diversification (Systems, ETG's, OnPremise)

Geography

- ✓ Consolidate EMEA and LatAm
- ✓ Build Asian presence
- ✓ Ready organization for long term new markets (Brazil, Japan)
- ✓ Australia turnaround

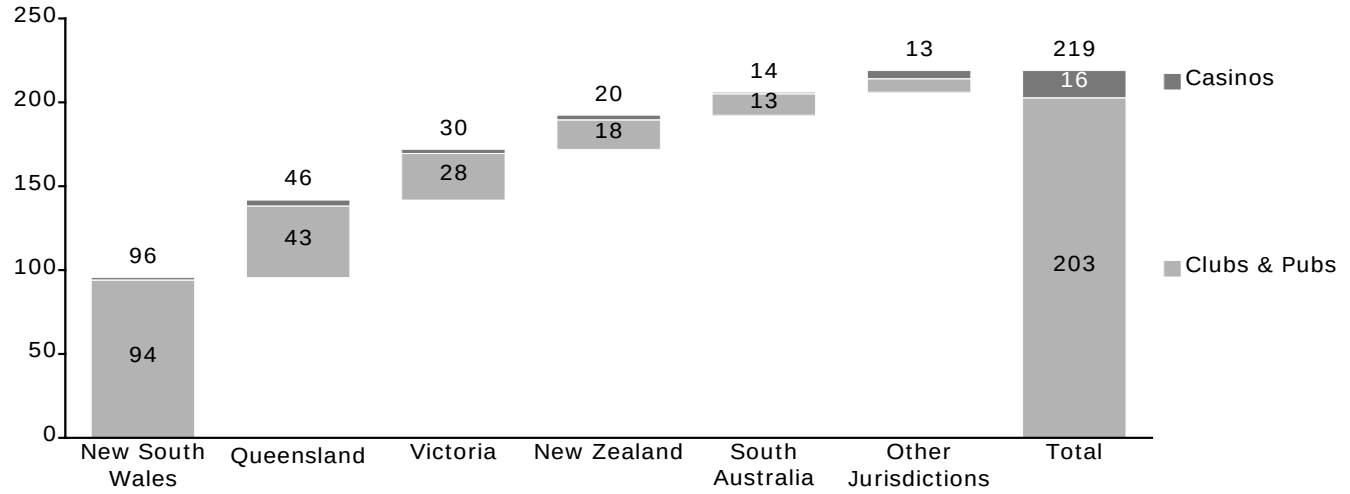


Australia: Rebuild Presence in Important Gaming Market

KEY STRATEGIC GUIDELINES

- ✓ Execution of new cabinet roadmap
- ✓ Expand game design studio for AsiaPac local focus
- ✓ Introduce customer focus group and test bank process
- ✓ Leverage and expand systems field service as 'lead' product
- ✓ Broaden and differentiate product offering: EGM's, Systems, Play For Fun

ANZ Market by Jurisdiction (000's, 2015)





Casinos	Clubs	Pubs
~16,000 EGMs	~145,000 EGMs	~60,000 EGMs

Interactive Growth is a Key Focus for IGT International

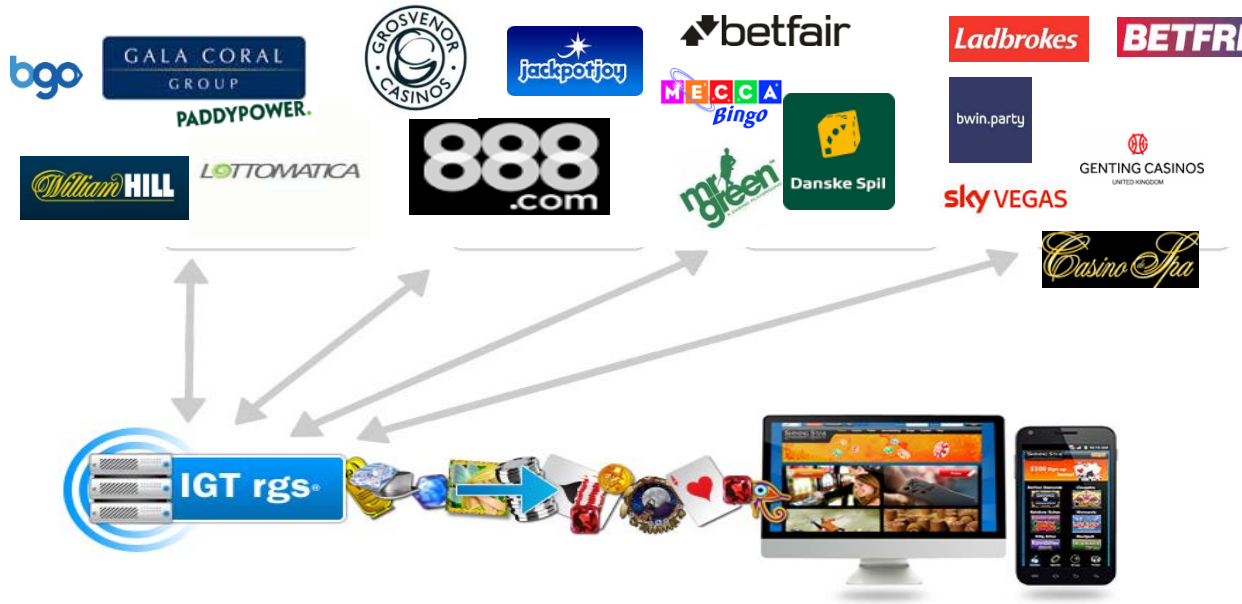
Expand Presence through Content Focus

- ✓ IGT rgs™
- ✓ Locally attuned content
- ✓ Omni-channel focus
- ✓ Exclusivity titles
- ✓ Jackpot game diversity
- ✓ Full IGT + Spielo library
- ✓ Play For Fun, Side bets

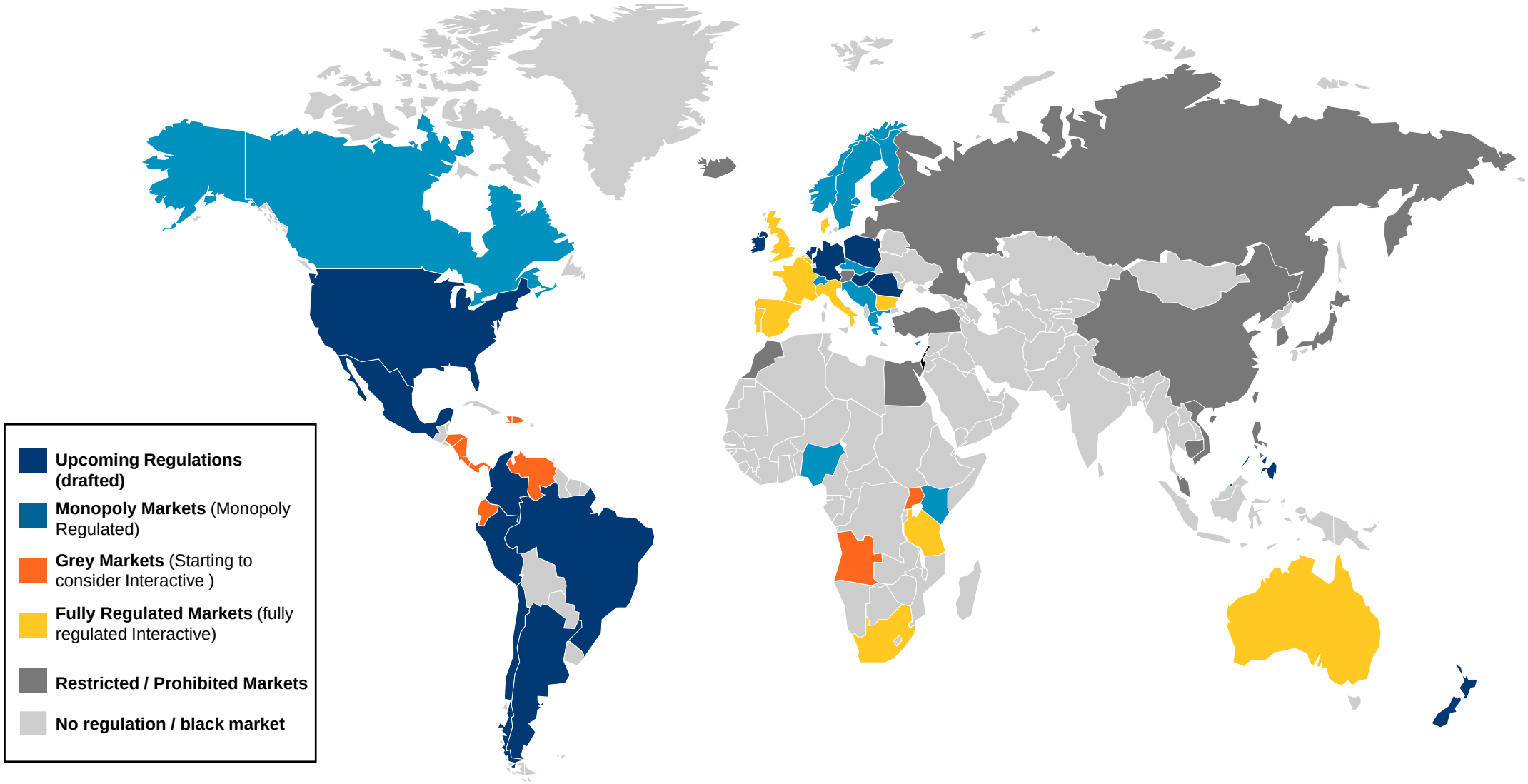
- ✓ EMEA share gain – Top 10
- ✓ New regulated market entry
- ✓ Play For Fun Seeding: Australia, China

IGT rgs™ 2015 Europe's Largest Casino Gaming Network

- ✓ 100+ desktop games
- ✓ 50+ mobile / tablet games
- ✓ 64 integrated operators and over 170 brands
- ✓ 4 regulated markets

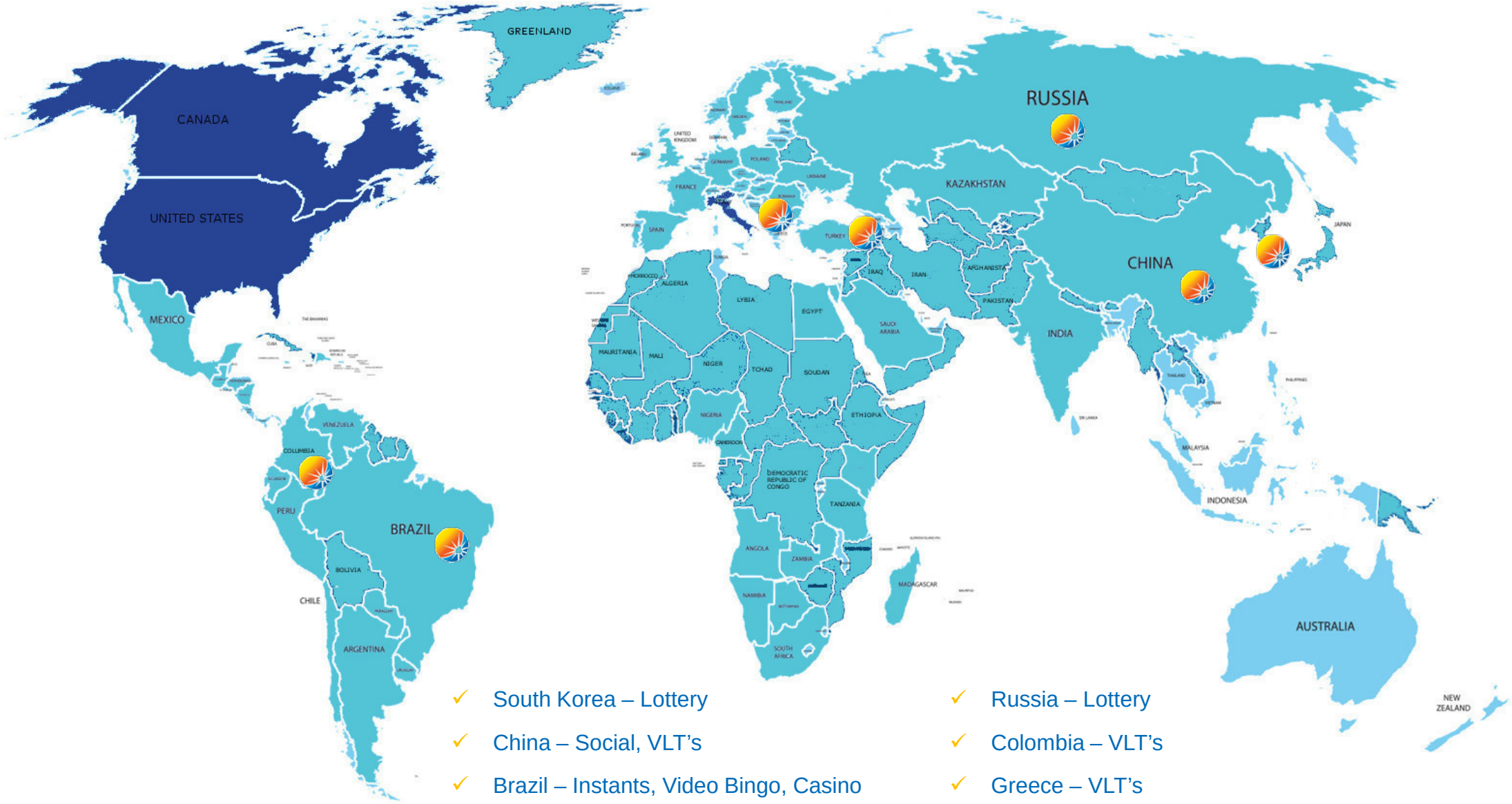


Global Interactive Market: Regulation Models in Place



Source: H2GC

Life is like a box of chocolates… You never know what you're going to get



- ✓ South Korea – Lottery
- ✓ China – Social, VLT's
- ✓ Brazil – Instants, Video Bingo, Casino
- ✓ Turkey - Lottery
- ✓ Russia – Lottery
- ✓ Colombia – VLT's
- ✓ Greece – VLT's

Key Drivers

Key Drivers for Growth

Lottery	Recurring	Marketing capability as a service, coupled with distribution expansion and new channels (BYOD, Online)
	Sale	Introduction of new Aurora platform, new product options
Gaming		Dedicated roadmaps, locally attuned content, planned cabinet roadmap, customer intimacy, new innovations
VLT's		Regulatory openings, INTELLIGEN™ heart, dedicated content
Systems		Full range, modular innovation, customer intimacy
Interactive		RGS content: local, exclusive, feature rich
New Geographies		Prudent approach, market/opportunity ready, regulated

Q&A

Appendix

Reconciliation of Non-GAAP Measures

$m

		INTERNATIONAL																								
		As Reported									Legacy IGT						Pro Forma									
		2014					2015				2014					2015	2014					2015				
		Q1	Q2	Q3	Q4	FY	Q1	Q2	Q3	Q4	FY	Q1	Q2	Q3	Q4	FY	Q1	Q1	Q2	Q3	Q4	FY	Q1	Q2	Q3	Q4	FY
Gaming	**Total Revenue**	**41**	**42**	**35**	**51**	**169**	**31**	**134**	**120**	**148**	**433**	**99**	**93**	**134**	**87**	**413**	**69**	**141**	**135**	**168**	**139**	**583**	**100**	**134**	**120**	**148**	**502**
	Gaming Services	**15**	**17**	**17**	**17**	**65**	**13**	**50**	**50**	**47**	**160**	**45**	**42**	**42**	**38**	**167**	**37**	**60**	**59**	**59**	**54**	**232**	**49**	**50**	**50**	**47**	**197**
	Terminal	1	1	2	2	6	2	15	15	13	44	24	21	20	16	81	15	25	22	22	18	87	17	15	15	13	59
	Social (DDI)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Other	14	16	15	15	60	11	35	36	34	117	21	21	22	22	86	21	35	37	37	37	146	32	35	36	34	138
	Product Sales	**26**	**25**	**18**	**35**	**104**	**18**	**84**	**69**	**101**	**272**	**54**	**51**	**92**	**50**	**247**	**33**	**80**	**76**	**109**	**84**	**350**	**51**	**84**	**69**	**101**	**305**
	Terminal	18	14	11	20	64	12	59	49	74	195	37	36	65	30	167	19	55	50	76	50	231	32	59	49	74	214
	Other	8	11	6	14	40	6	25	20	27	78	17	15	27	20	79	13	25	26	33	34	119	19	25	20	27	91
Lottery	**Total Revenue**	**88**	**82**	**80**	**117**	**367**	**81**	**94**	**73**	**95**	**342**	**0**	**0**	**0**	**0**	**0**	**0**	**88**	**82**	**80**	**117**	**367**	**81**	**94**	**73**	**95**	**342**
	Lottery Services	**83**	**76**	**75**	**88**	**322**	**72**	**67**	**68**	**72**	**279**	**0**	**0**	**0**	**0**	**0**	**0**	**83**	**76**	**75**	**88**	**322**	**72**	**67**	**68**	**72**	**279**
	FM/Concessions	62	56	58	58	234	51	51	49	55	206	0	0	0	0	0	0	62	56	58	58	234	51	51	49	55	206
	LMA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Other Services	21	20	18	30	89	21	17	19	17	73	0	0	0	0	0	0	21	20	18	30	89	21	17	19	17	73
	Product Sales	**6**	**6**	**5**	**29**	**45**	**9**	**26**	**5**	**23**	**63**	**0**	**0**	**0**	**0**	**0**	**0**	**6**	**6**	**5**	**29**	**45**	**9**	**26**	**5**	**23**	**63**
	Terminal	1	1	1	19	22	5	16	0	15	36	0	0	0	0	0	0	1	1	1	19	22	5	16	0	15	36
	Systems/Other	5	5	4	10	24	4	10	5	9	27	0	0	0	0	0	0	5	5	4	10	24	4	10	5	9	27
Other	**Total Revenue**	**22**	**24**	**23**	**24**	**94**	**19**	**19**	**18**	**22**	**78**	**0**	**0**	**0**	**0**	**0**	**0**	**22**	**24**	**23**	**24**	**94**	**19**	**19**	**18**	**22**	**78**
	Service Revenue	**21**	**21**	**22**	**22**	**86**	**18**	**19**	**17**	**18**	**73**	**0**	**0**	**0**	**0**	**0**	**0**	**21**	**21**	**22**	**22**	**86**	**18**	**19**	**17**	**18**	**73**
	Product Sales	**1**	**3**	**1**	**2**	**8**	**1**	**0**	**0**	**4**	**5**	**0**	**0**	**0**	**0**	**0**	**0**	**1**	**3**	**1**	**2**	**8**	**1**	**0**	**0**	**4**	**5**
Total	**Revenue**	**152**	**148**	**138**	**192**	**631**	**131**	**247**	**210**	**265**	**853**	**99**	**93**	**134**	**87**	**413**	**69**	**251**	**241**	**272**	**279**	**1,044**	**200**	**247**	**210**	**265**	**923**
	OI	**36**	**30**	**29**	**61**	**156**	**27**	**47**	**37**	**55**	**165**	**33**	**40**	**64**	**32**	**169**	**24**	**41**	**48**	**69**	**68**	**227**	**27**	**47**	**37**	**55**	**165**