North America Lottery

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2016

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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.

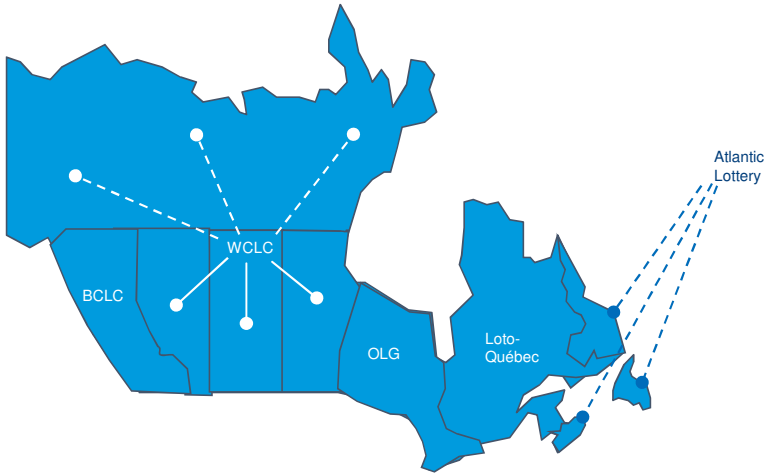
Agenda

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

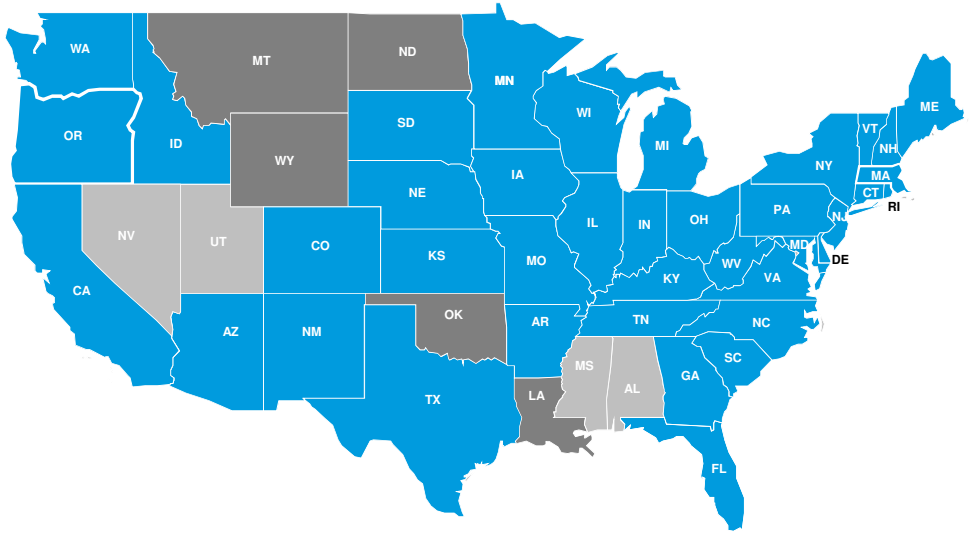
Market Context

IGT's North America Lottery Footprint

Canada
(not to scale)



United States
(not to scale)

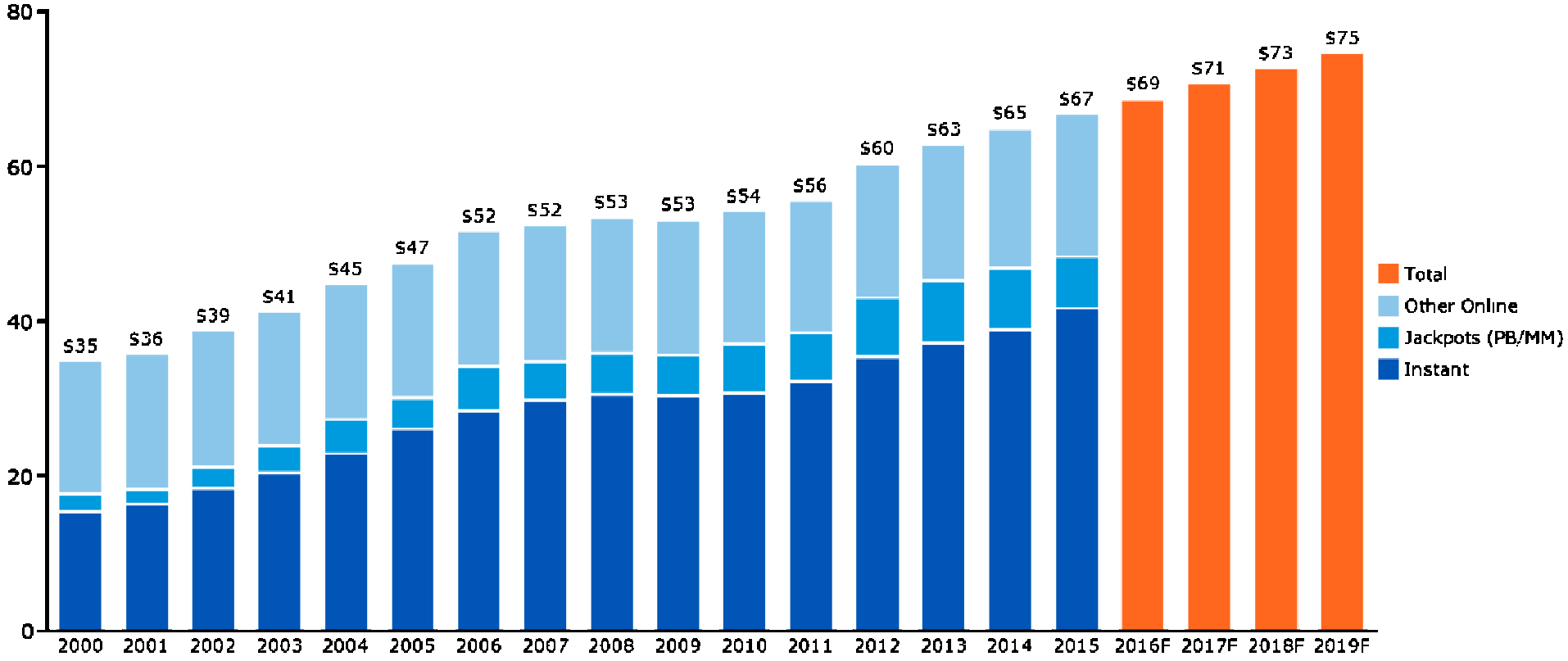


IGT Lottery Presence

No IGT Lottery Presence

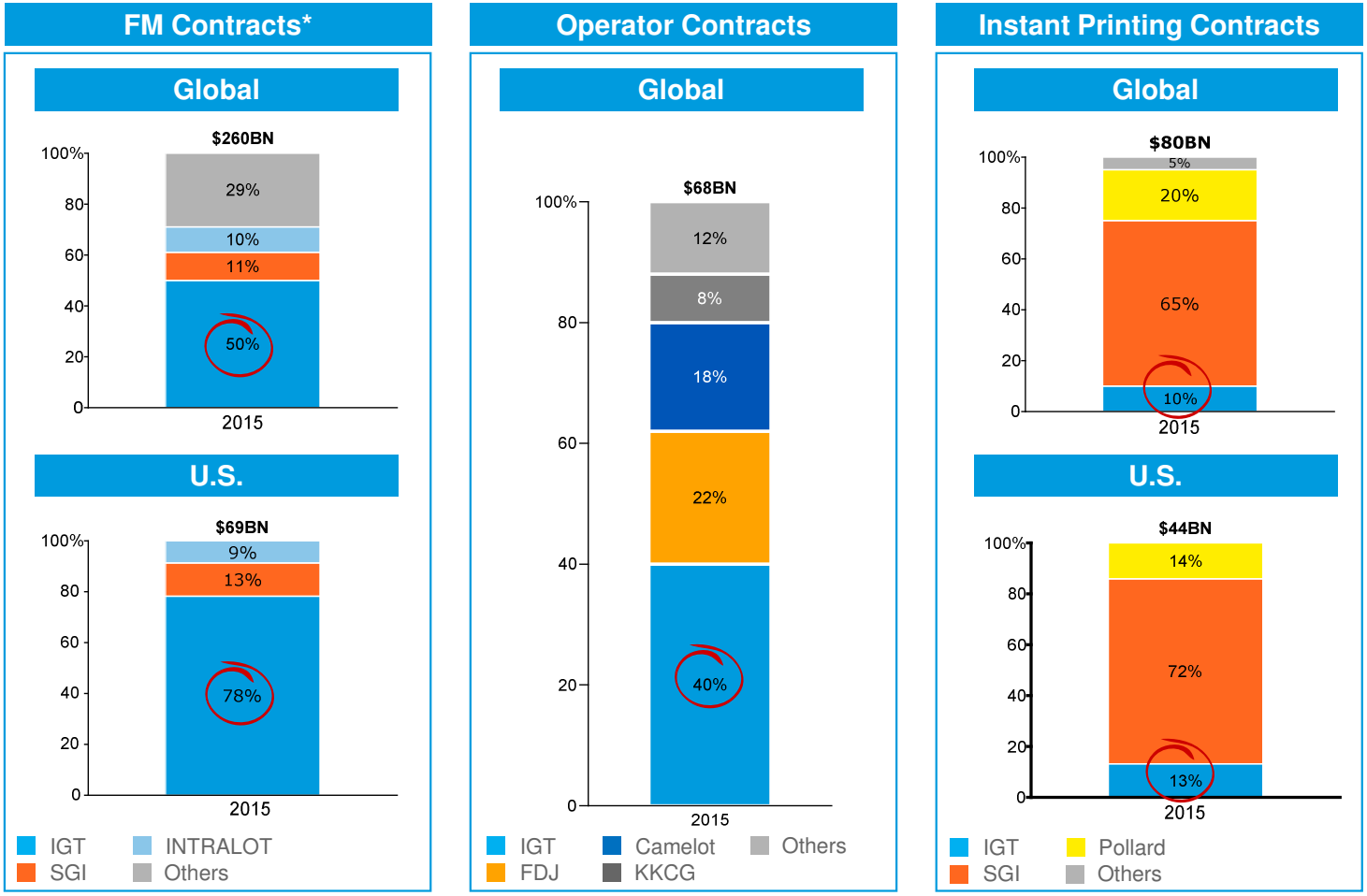
No Legal Lottery

Market Context: Consistent Industry Growth ($B)



Source: La Fleur's, GBGC

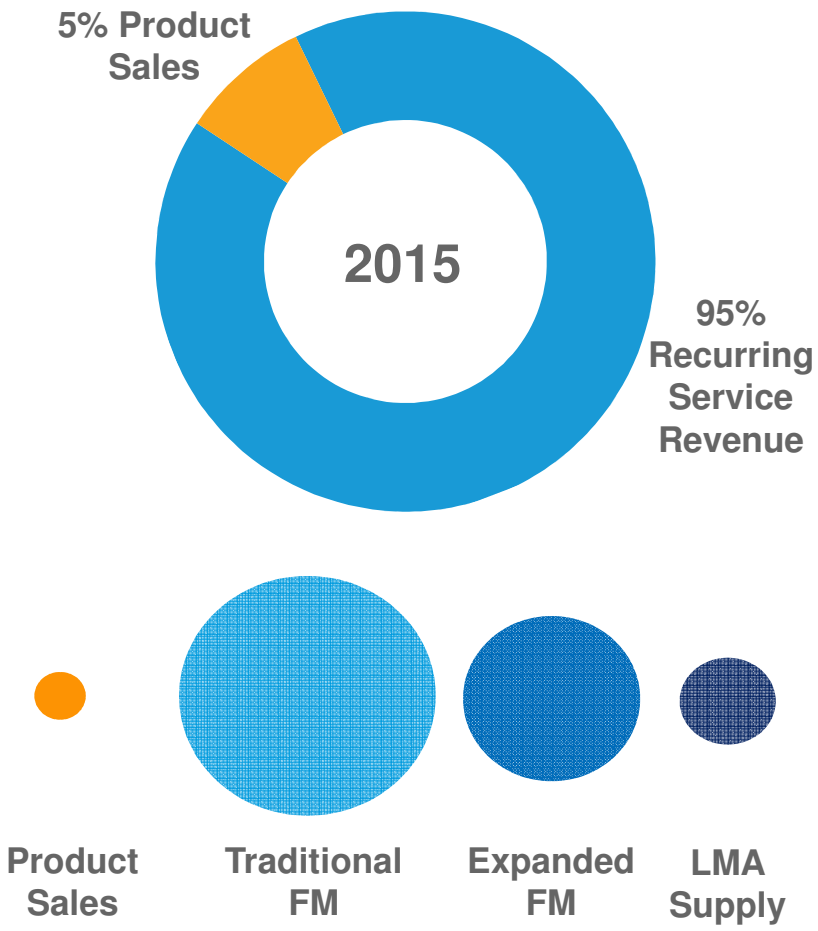
Market Share Summary



* Facilities Management Contracts information includes the processing of Instant tickets in most jurisdictions
Source: La Fleur's, IGT Printing Market Share Estimates

Business Overview

North America Lottery Revenue Mix



50 Billion+
US Lottery Transactions/Year

40 out 45
US Lotteries Served

185,000
Terminals Deployed in US

2,500
Employees

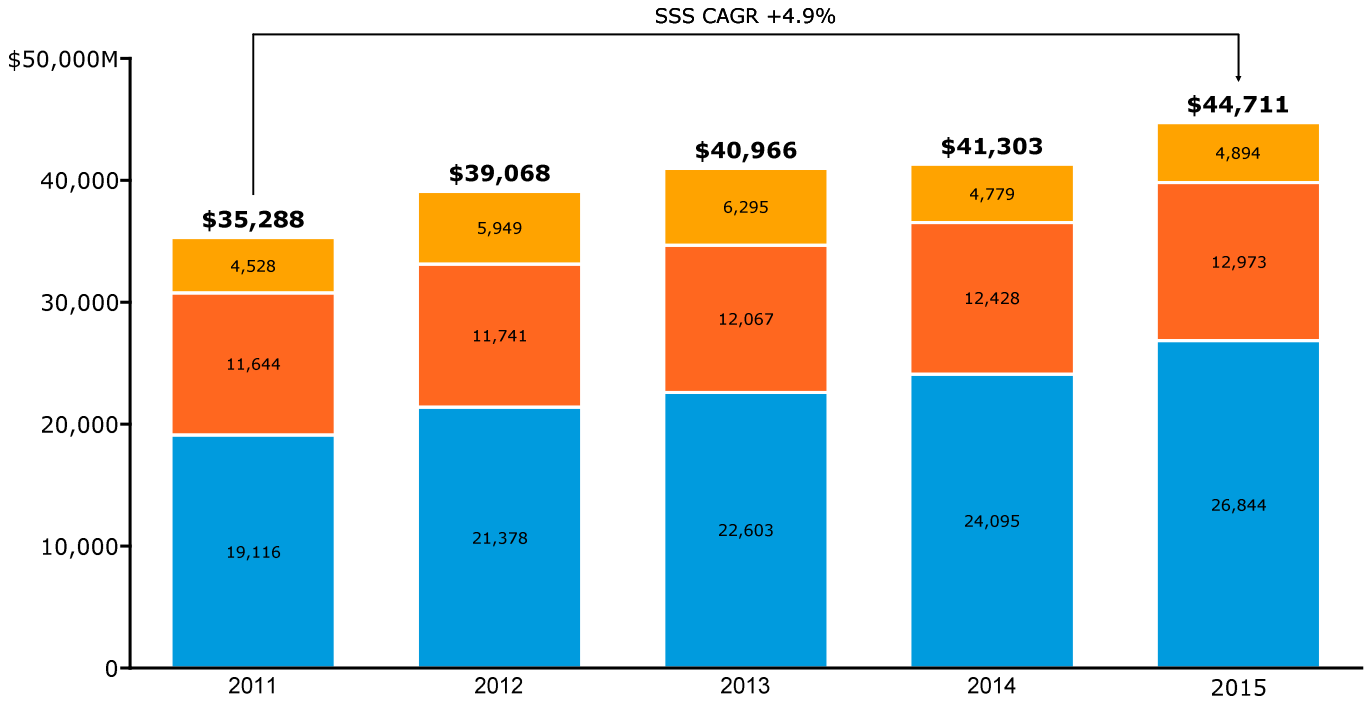
Characteristics of US Lottery Contracts

	Product Sales	Traditional FM	Expanded FM	LMA Supply/Operator
Description	*Ad hoc sales of IGT equipment, including terminals, ITVM's, self-service, etc.*	• *Central system* • *Terminals* • *Client services* • *Consumables* • *Maintenance/field services*	*Traditional FM plus:* • *Instant Ticket Warehouse and Distribution* • *Sales force* • *Marketing support* • *Retail development* • *Other needs as required*	*Full range of lottery management and operational services*
Payment Mechanism	*Fixed*	*Variable - % of Lottery Sales, varies based on services offered*	*Variable - % of Lottery Sales, varies based on services offered*	• *Variable - % of Revenue (supply)* • *Target Based (operator)*
Benefits	*Reduced capital exposure as compared to traditional FM Model*	*Predictable revenue streams; alignment with customers*	*Increased ability to drive lottery sales growth and subsequent IGT revenues*	*Full flexibility to implement sales-growth strategies*
IGT's Competitive Advantage	*Highest rated hardware and software as scored in recent bids; strongest R&D investment*	*Market share leader; ability to leverage suite of services*	*Unparalleled, multi-continent operator experience; only relevant player in US market*	*Impressive sales growth in first three LMA states; majority operating partner in NJ, IL and sole operator in IN*

Current Revenue Mix (Approximate)



Sales Trend Reflects Attractive Market Growth Dynamics

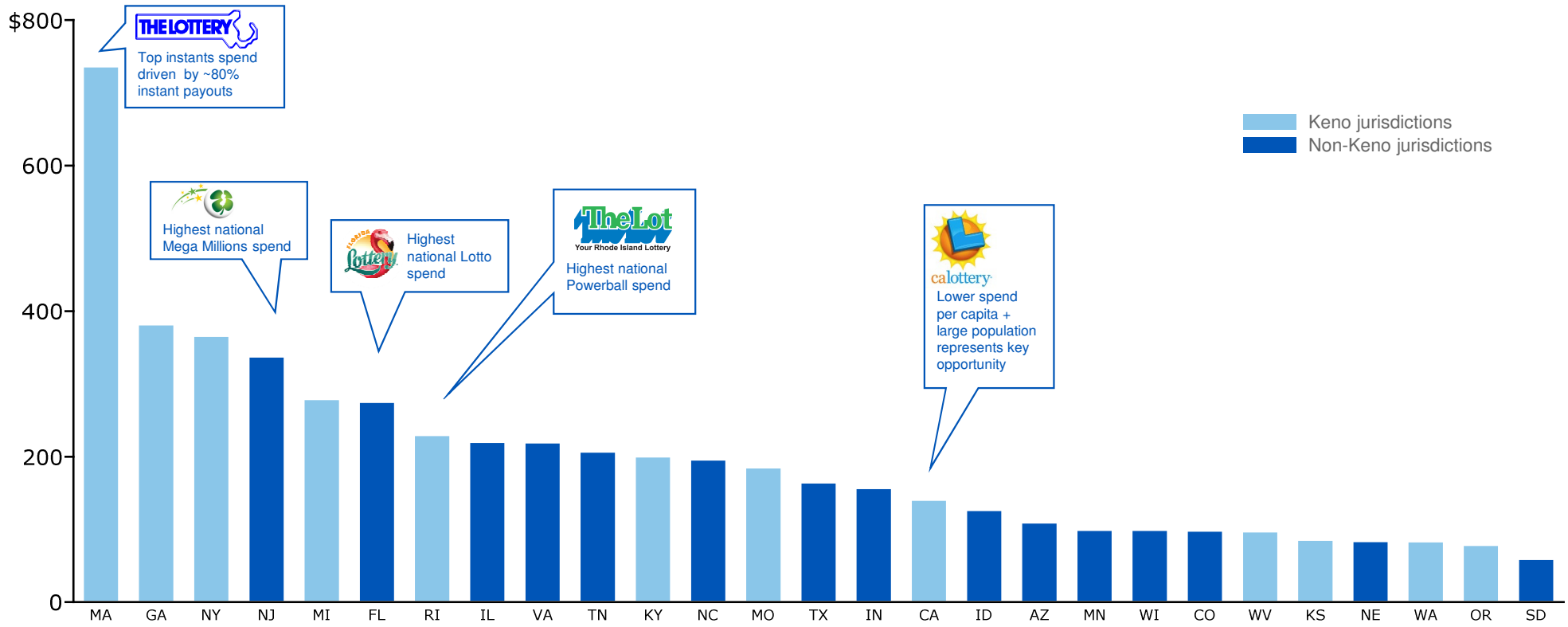


	2011	2012	2013	2014	2015
SSS YoY % Change	5.0%	9.9%	3.0%	0.0%	6.9%

Source: IGT Internal Same Store Sales Analysis

Lottery Popularity Fueled by Quality & Scope of Offer

Annual Per Capita Spend by State



Source: La Fleur''s (FY15)

US Lottery Recent FM Bids Status

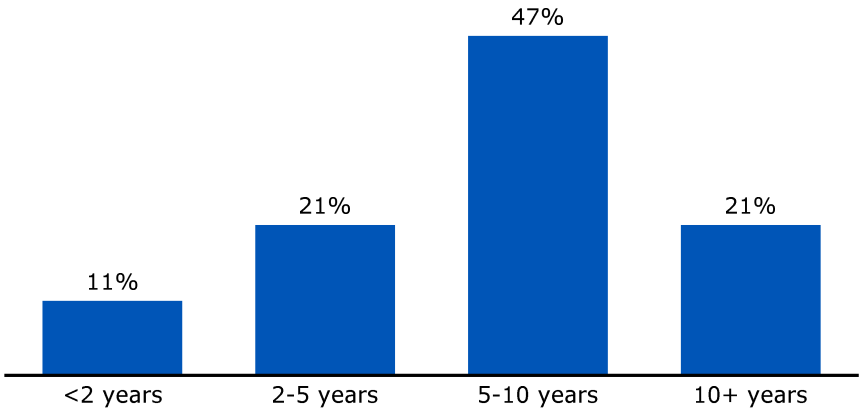
*IGT is winning on **total solution offering**, not price*

State	IGT Highest Total Solution Overall Score?	IGT Lowest Price?
North Carolina	✓	✓
Tennessee	✓	✗
Missouri	✓	✗
Wisconsin	✓	✓
Washington	✓	✗
Arizona	✗	✗
Minnesota	✓	✗
Virginia	✓	*
Florida	✓	**

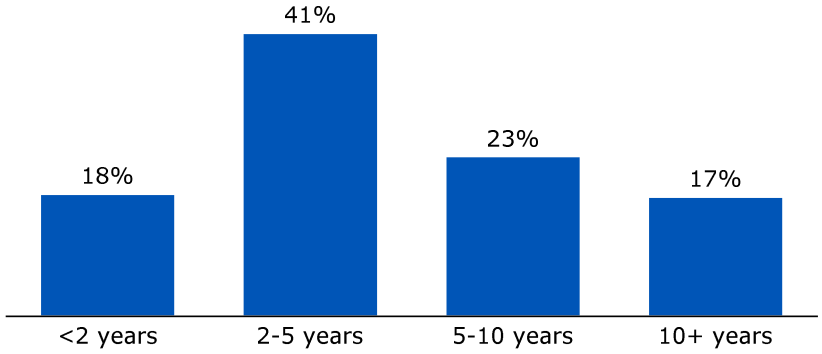
*IGT was sole bidder
**In negotiation

Significant Portion of Revenue Secured for 5+ Years

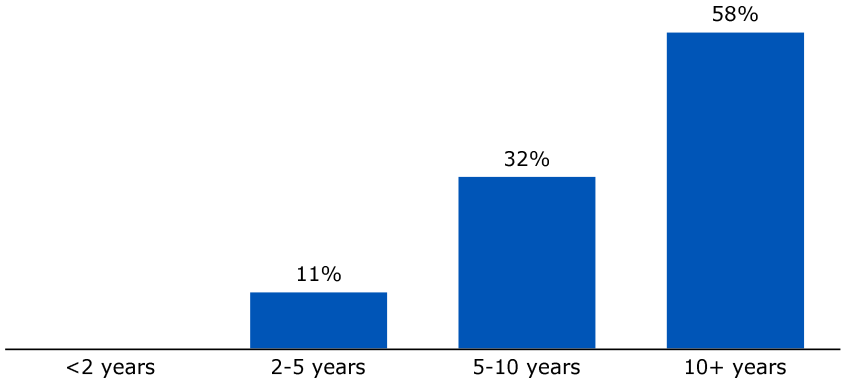
Number of Contracts—Without Extensions



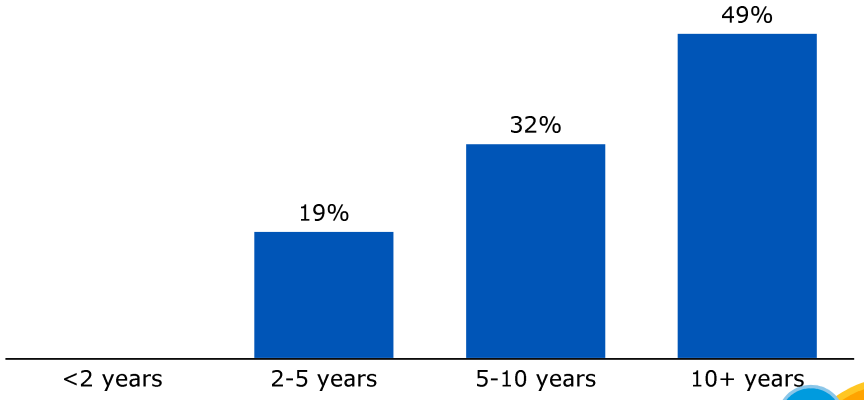
Annual Revenue Mix—Without Extensions



Number of Contracts—With Extensions



Annual Revenue Mix—With Extensions



Favorable Re-Bid Outlook

After successfully renewing contracts in latest cycle,
IGT has a positive outlook to maintain market share

IGT Incumbent:

- Georgia
- West Virginia
- Kansas

Competitor Incumbent:

- Pennsylvania
- Arkansas
- South Carolina
- Connecticut
- Delaware
- Idaho

Delivering Italy's Lottery Growth Expertise to IGT's Global Footprint

1. Lottomatica's sales, marketing and operational operator expertise from Italy combines with GTECH's global lottery footprint

2. US market further enhanced through LMA operations in New Jersey, Illinois, and Indiana

3. Expanded FM contracts will be leveraged to extend operator services across US jurisdictions and drive same-store-sales growth

LOTTOMATICA GROUP

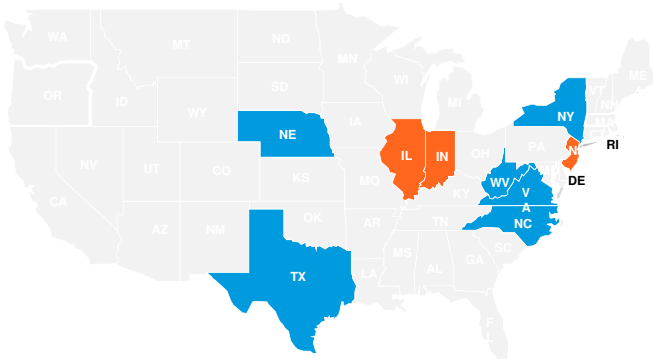
GTECH

SPIELO International

Illinois LOTTERY

New Jersey Lottery

HOOSIER LOTTERY



On track to exceed goals for the first year!

Strategic Initiatives

Key Strategic Initiatives

Widen the Innovation Gap: Technology



Deliver Operator Expertise to US Market



Widen the Innovation Gap: Content



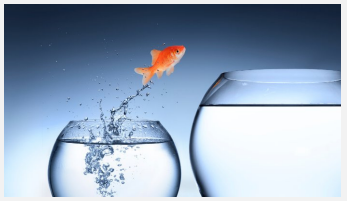
Evolve and Grow Instant Tickets



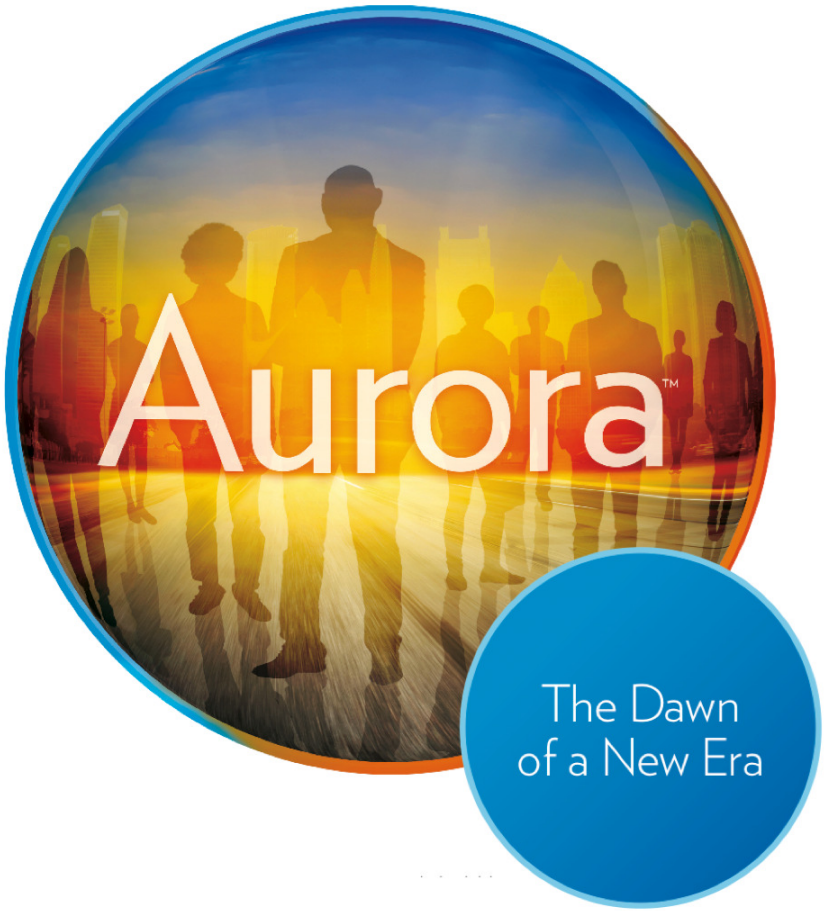
Grow Same Store Sales



Change the Paradigm



Widen the Innovation Gap: Aurora



A Complete Redesign

of Our Entire Lottery solution

Key Features:

- Improved User Interface
- True Omnichannel and Player Support
- Faster Time to Market
- Increased Flexibility over the Contract Life

Widen the Innovation Gap: State-of-the-Art Technology

Altura Flex



- IGT's **core terminal offering**
- Ergonomic and user-friendly
- High reliability and maintainability
- High performance and future-proofed
- Largest high-res display on the market
- Fastest play slip reader on the market
- Wireless barcode reader options

AccuTherm Flex Printer



- High speed—prints at 12 inches per second on a large 7.5" roll
- Smart sensors (paper out, paper low, active jam prevention)
- Prints barcodes, images, and true type fonts
- Wireless barcode reader options

69,100
terminal deployment commitments



Grow Same Store Sales

FutureGame™
Engineering the next generation of game experiences

Player-focused | Data-driven | Creative | Innovative

-Deliver short term solutions

-Improve existing games under current regulations, player behaviors

-Maintain current profits

-Respond to demand for mid/long term innovation

-Design future games to fit new regulations and evolving player behaviors

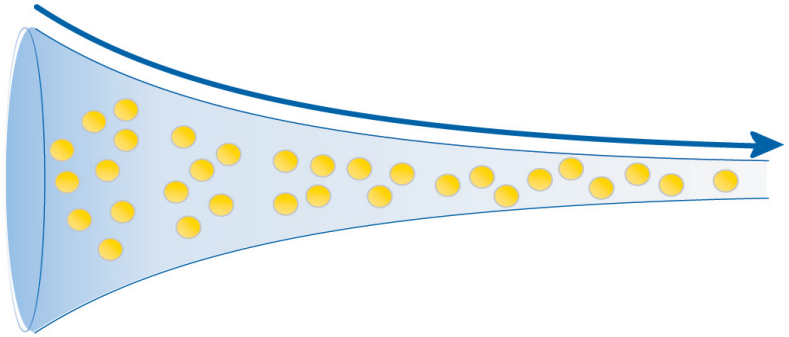
-Secure future profits

-Create a disciplined, IGT proprietary innovation system to generate, rank and test ideas on an ongoing basis

-Build a credible roadmap to the market

FutureGame™

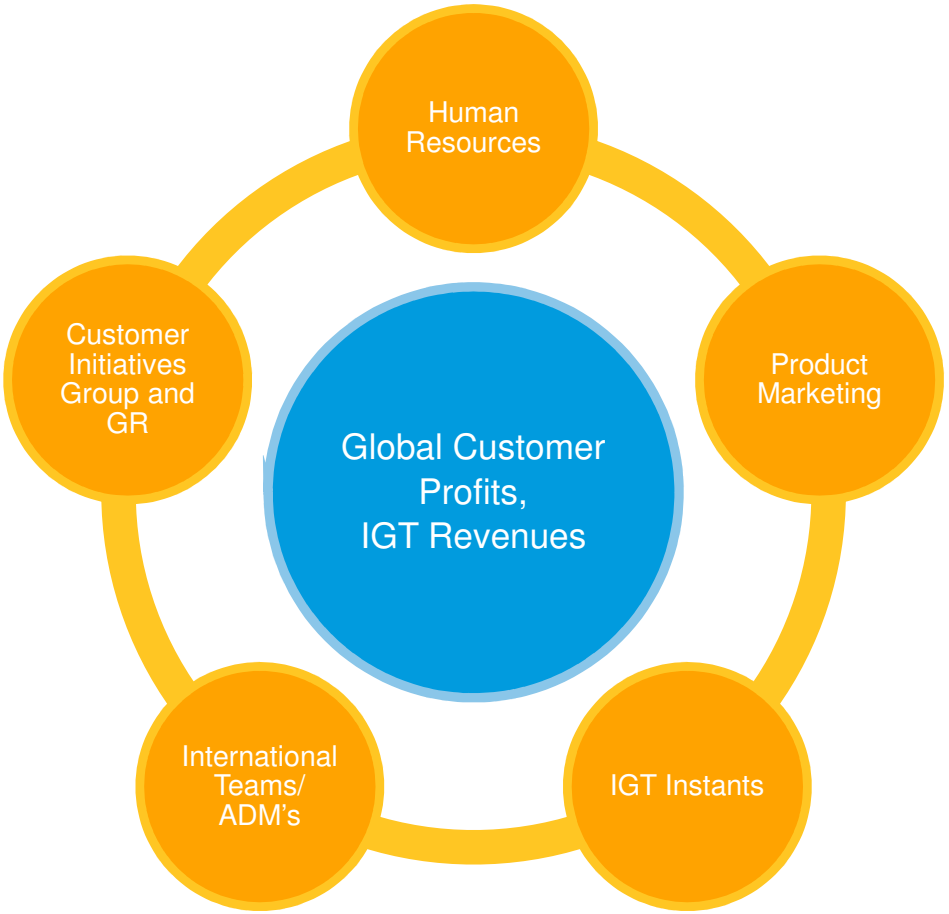
An ongoing process that **accelerates products to market…**



1	2	3	4	5	6	7	8
Diagnostics	Consumer Context	Game Ideation	Game Funneling	Operational Check	Evaluation & Shortlisting	Prototyping/ Market Test	Finalization and Approval
Day 30	Day 45	Day 75	Day 105	Day 120	Day 165	Day 225	Day 240

Multiple games cycling through the process in various stages

Grow Same Store Sales: One, Cohesive Team Approach



Deliver Operator Expertise to US Market through LMA experience



- **Develop** Operator Skills
- Potential incentives if profit goals attained

- Delivered **record sales and profits**
- High targets → high penalties and **customer frustration**
- **Renegotiated** contracts to ensure mutual **long-term viability and success**

- **Extend the experiences** across all FM jurisdictions
- **Shift** traditional FM contracts **to the "extended FM"** contract type:
  1. **Drive sales and profits for lotteries**
  2. **Grow** IGT **revenues**
  3. **Reduce Penalties**
  4. Reinforces IGT as the Lottery industry **thought —and action—leader**

Evolve and Grow Instant Tickets

1

Drive Value to Customers Leveraging Deep Operator Experience

The Six Pillars of Instants Success



2

Grow Printing Business

- Increased Instants Market Share
- Increased Capacity to Sustain Long-Term Growth
- Improved Stability of Revenues through Multi-Vendor Approach
- Fresh and Growing Portfolio of Licensed Content

Change the Paradigm







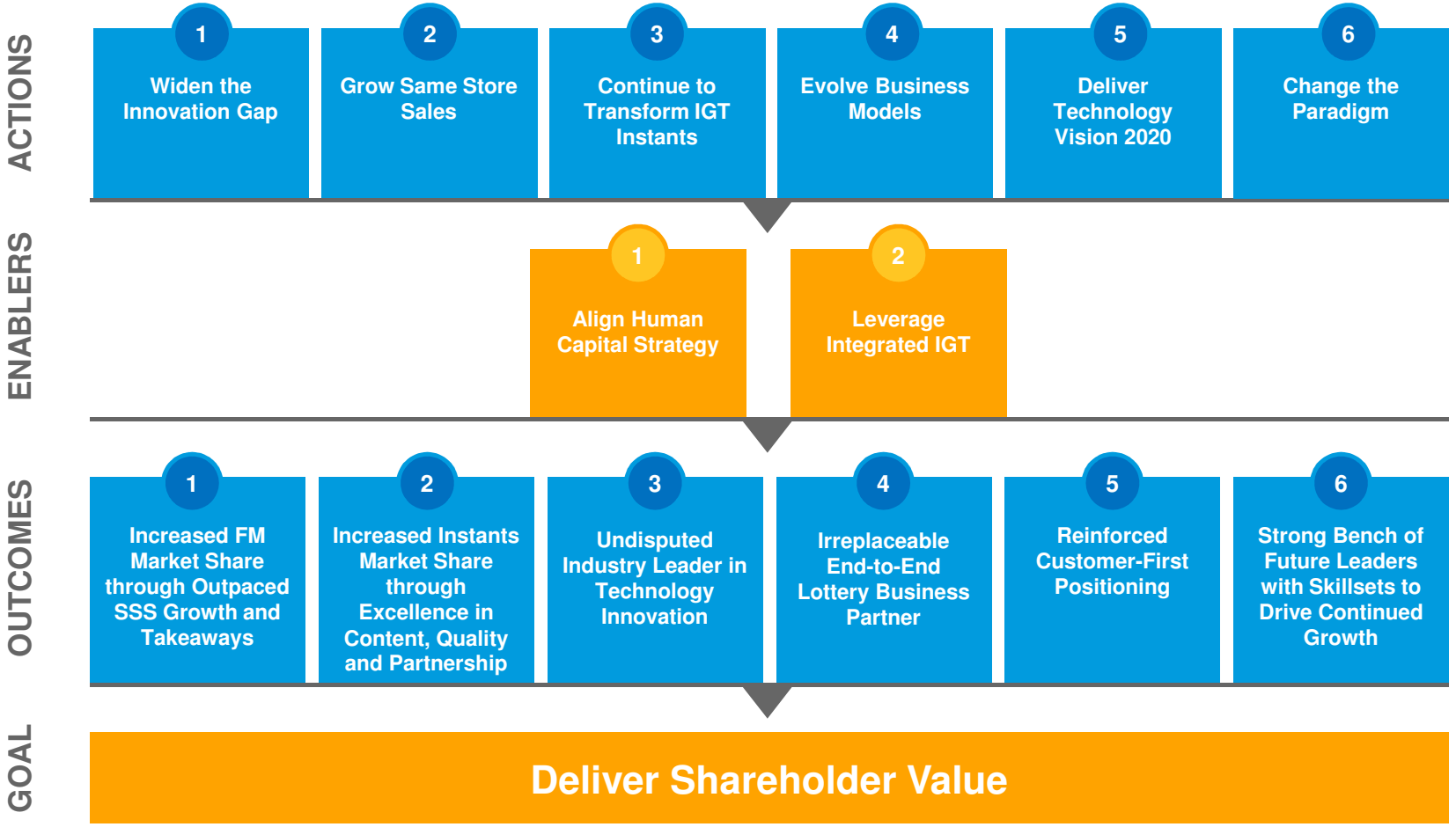


1. Reduce new product development time to market
2. Expand the value chain and IGT's scope of services and expertise
3. Define a new delivery model to keep customers at the cutting edge of technology
4. Build a product offering to meet the needs of different customers

At the same time, guide industry to show how this will ultimately benefit customers most of all

Key Drivers

Key Drivers of Success: 6 Actions, 2 Enablers, 6 Outcomes, 1 Goal



Q&A

Appendix

Reconciliation of Non-GAAP Measures

$m

		NORTH AMERICA LOTTERY																								
		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**	**16**	**24**	**17**	**16**	**73**	**18**	**37**	**37**	**37**	**130**	**20**	**20**	**20**	**20**	**81**	**19**	**36**	**44**	**37**	**36**	**154**	**37**	**37**	**37**	**37**	**149**
	Gaming Services	**16**	**17**	**17**	**16**	**65**	**18**	**37**	**36**	**37**	**128**	**20**	**20**	**20**	**20**	**81**	**19**	**36**	**37**	**37**	**36**	**146**	**37**	**37**	**36**	**37**	**148**
	Terminal	8	9	7	7	31	8	25	26	25	85	19	19	19	19	76	18	27	28	26	27	108	26	25	26	25	103
	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	8	8	9	9	34	9	12	10	12	44	1	1	1	1	4	1	9	9	10	10	38	11	12	10	12	45
	Product Sales	**0**	**7**	**0**	**0**	**8**	**0**	**0**	**0**	**0**	**1**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**7**	**0**	**0**	**8**	**0**	**0**	**0**	**0**	**1**
	Terminal	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	0	7	0	0	8	0	0	0	0	1	0	0	0	0	0	0	0	7	0	0	8	0	0	0	0	1
Lottery	**Total Revenue**	**245**	**193**	**221**	**208**	**867**	**235**	**233**	**216**	**232**	**916**	**0**	**0**	**0**	**0**	**0**	**0**	**245**	**193**	**221**	**208**	**867**	**235**	**233**	**216**	**232**	**916**
	Lottery Services	**222**	**171**	**206**	**201**	**800**	**224**	**216**	**206**	**219**	**864**	**0**	**0**	**0**	**0**	**0**	**0**	**222**	**171**	**206**	**201**	**800**	**224**	**216**	**206**	**219**	**864**
	FM/Concessions	156	145	144	153	599	165	154	156	161	636	0	0	0	0	0	0	156	145	144	153	599	165	154	156	161	636
	LMA	43	0	36	24	102	33	38	22	35	128	0	0	0	0	0	0	43	0	36	24	102	33	38	22	35	128
	Other Services	23	25	26	24	99	25	25	29	22	101	0	0	0	0	0	0	23	25	26	24	99	25	25	29	22	101
	Product Sales	**23**	**22**	**15**	**7**	**67**	**12**	**17**	**10**	**13**	**52**	**0**	**0**	**0**	**0**	**0**	**0**	**23**	**22**	**15**	**7**	**67**	**12**	**17**	**10**	**13**	**52**
	Terminal	0	1	2	0	3	0	5	0	0	5	0	0	0	0	0	0	0	1	2	0	3	0	5	0	0	5
	Systems/Other	23	21	13	7	64	11	12	10	13	46	0	0	0	0	0	0	23	21	13	7	64	11	12	10	13	46
Other	**Total Revenue**	**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**
	Service Revenue	**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**
	Product Sales	**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**
Total	**Revenue**	**261**	**217**	**238**	**224**	**940**	**253**	**270**	**253**	**269**	**1,046**	**20**	**20**	**20**	**20**	**81**	**19**	**282**	**237**	**258**	**245**	**1,021**	**273**	**270**	**253**	**269**	**1,065**
	OI	**43**	**(6)**	**20**	**17**	**74**	**43**	**47**	**50**	**43**	**183**	**14**	**14**	**14**	**15**	**57**	**15**	**54**	**5**	**30**	**29**	**118**	**55**	**47**	**50**	**43**	**195**