



Building the Future of Play, Powering Community Impact

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Here to Play: Lotteries' Unique Legacy

For more than 60 years, North American lotteries have been about far more than entertainment. They have served as essential economic engines for good—funding public education, healthcare, environmental programs and more in their communities.

Globally, lotteries return over \$100 billion every year to beneficiary programs, reinforcing the powerful social contract at the heart of our industry: every ticket sold uplifts lives. This is our industry's unique, shared legacy and enduring purpose.



As we look to the next several decades, the question is clear: How do we protect and grow this impact so it continues to benefit future generations? At Scientific Games, we believe the answer lies in relentless innovation, operational excellence and trusted partnerships.

A Shifting Marketplace

Lottery faces a rapidly evolving environment. Competition for players' discretionary dollars is intensifying—from casinos and sports betting to streaming, mobile apps and digital entertainment.

Player expectations are rising just as quickly. Shaped by seamless retail, streaming and e-commerce experiences, today's consumers demand personalization, convenience and connection from every interaction.

To remain relevant, lotteries must balance a shrinking retail footprint with the growth of self-service and robust digital engagement—while always maintaining public trust through secure operations and responsible growth.

For more than five decades, Scientific Games has pioneered the world's most engaging lottery games. Today, reimagining engagement means creating unforgettable play experiences that attract new audiences and retain loyal ones.



Instant scratch games remain the bedrock of many portfolios. To keep them fresh, we continually introduce advanced play mechanics and new *Strategic Product Enhancements* that elevate the scratch category into premium, must-play products, including:

- **Obsidian** – 18 all-black holographic ultra-lux games
- **GlowMark** – vibrant fluorescent marking system for extended play games
- **FusionHolo** – two shimmering holographics fused together in one game design
- **Dimension** – glossy overtones creating depth and movement for subtle luxury
- **Sparkle** – dazzling holographics or metallic foil graphics that stand out at retail



We're also modernizing the player journey with *Scratch Connect* and *iDecide*, scratch game innovations that link retail and digital play. Our *Linked Games* give players more than prizes, they deliver once-in-a-lifetime, brand-immersive experiences. And with the industry's largest portfolio of licensed brands—including *SQUID GAME*, *JURASSIC WORLD* and *GAME OF THRONES*—we create omnichannel entertainment that excites players across every touchpoint.

Beyond retail, Scientific Games offers iLottery platforms, CRM tools and loyalty programs that bridge the physical and digital experience. These programs reward players, deliver valuable insights and strengthen lottery brands. By continuously refreshing engagement, we help lotteries meet expectations—and drive higher sales.

Operational Excellence & Integrity

While engagement excites, operational excellence and integrity sustain growth. These pillars also directly impact how much funding flows back to good causes.

At the core is *Momentum*, our integrated ecosystem—the framework that unifies games, systems, retail solutions and digital offerings so that lotteries' technologies work together to process secure transactions. With this ecosystem, SG Analytics transforms raw data into actionable insights, enabling smarter decisions on game performance, retail optimization and player behavior.



Trust is the industry's most valuable currency. Scientific Games designs every solution with transparency, compliance and robust security, ensuring lotteries meet the highest standards for stakeholders and the public.

Equally important is our commitment to responsibility. Through the award-winning *Healthy Play* program, we provide research, tools and best practices that help lotteries market and sell responsibly. For us, it's not just about compliance—it's about sustainable growth and protecting players for generations to come.

Future-Proofing Through Partnership

Future-proofing lottery means anticipating tomorrow's needs today. Over the last decade, Scientific Games has invested more than \$100 million in technology modernization, including \$20 million in iLottery innovation and \$65 million in instant game production technology. These investments ensure scalable, adaptable platforms and unmatched production capabilities.



But technology alone isn't enough. True resilience comes from partnership. With more than 150 lottery partners in 50 countries, we collaborate closely with each to co-create solutions tailored to unique challenges and goals. By sharing insights from our global network and working side by side, we ensure lotteries remain sustainable, adaptable and ready for the future.

Beyond Business: Community Commitment

Lotteries exist to strengthen communities, and we believe our role must reflect that same purpose. At our Montreal production facility, we've transformed unused land into the "Manger et jouer sainement" urban farm, producing 15 tons of fresh food annually for collective kitchens.



In metro Atlanta where our global headquarters is located, our SG Tech Project donates refurbished technology to schools, supporting education and environmental sustainability. Through the Tech Alpharetta Women's Forum STEAM Mentoring Program, our employees inspire young women to pursue careers in science, technology, engineering, arts and mathematics.

These initiatives demonstrate our belief that community impact must go hand in hand with business success.

Always Here to Play

Lotteries return more than \$100 billion annually to good causes worldwide. Protecting and growing that impact requires continuous innovation, operational excellence and trusted partnerships.

At Scientific Games, our commitment is strong: to ensure lotteries remain “here to play”—building the future of play and powering community impact for generations to come.



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