

Building Responsible Lotteries Through Partnership

How Scientific Games supports lotteries in meeting sustainability, responsible gaming and regulatory requirements



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Why Partnership Matters

Suppliers influence a significant share of the environmental footprint, make product-design decisions that affect player protection and hold much of the evidence lotteries need for regulatory compliance.

Decarbonisation

A significant share of a lottery's emissions may sit upstream. Supplier performance can support operator targets.

Player trust

Licences and social mandates increasingly rest on demonstrable player protection, not intent. Evidence must be produced continuously.

Regulatory load

Increasing regulatory requirements demand more verifiable data from the supply chain.

What We Will Cover

01

Sustainability across the product lifecycle

GHG emissions, energy efficiency, lifecycle assessment – scratchcard, circular economy - terminal and waste management.

02

Responsible gaming

SG strategy and framework, player research and game design supporting lottery responsible gaming programmes.

03

Regulatory readiness

How supply-chain data and documentation support evolving requirements.

PART ONE
**Sustainability:
Reducing
Environmental
Impact Across
the Supply Chain**



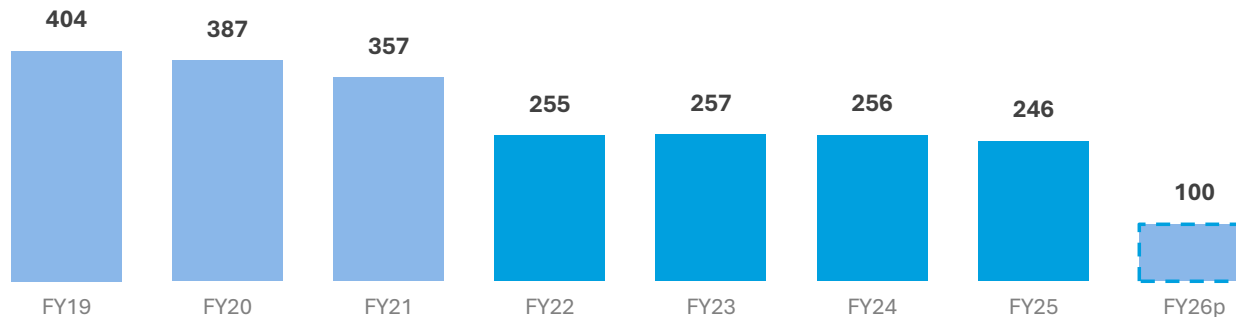
GHG Emissions

SG Leads Scope 1 & Scope 2 emissions

FY19–FY25 actuals with FY26 projection



Emissions intensity – tCO₂e per billion STUs



Key takeaways

- Intensity fell from 404 to 246 tCO₂e per billion STUs, a 39% reduction from the FY19 baseline.
- Output nearly doubled, from 7.6 billion to 14.8 billion STUs.
- Absolute emissions increased 17% despite that growth.
- The site now uses 100% certified renewable electricity, which will reduce reported Scope 2 emissions.

Energy Efficiency: From Monitoring to Action

ESOS

Mandatory UK energy assessment requirement

61

Sub-meters at the SG Leeds manufacturing facility

24

Sub-meters at the UK warehouse and distribution centre

Manufacturing - Print Energy Profile



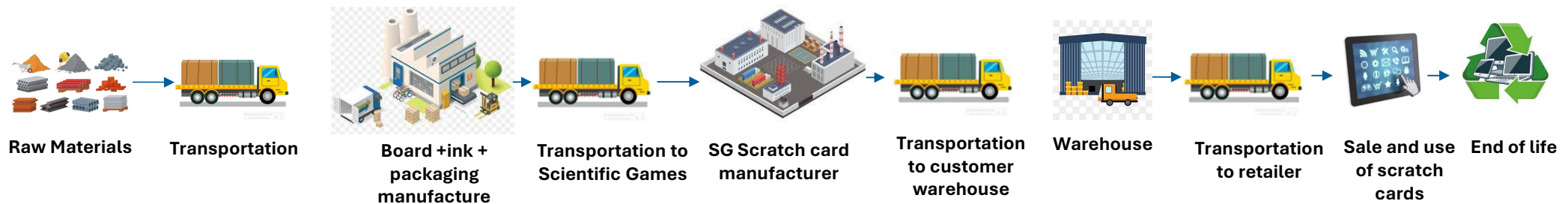
Manufacturing - Packaging line Energy Profile



Detailed usage data helps SG identify where to focus energy-saving projects.

Life Cycle Assessment

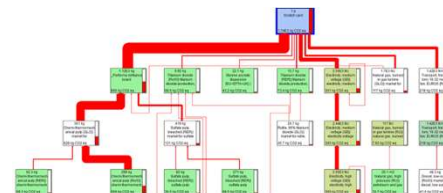
Lottery Scratch Card



Current Assessment: Cradle to Customer Warehouse

Unit of Measurement: To produce and deliver 1 tonne of scratch cards

Footprint calculated using Sima Pro LCA software.
Environmental footprint methodology



Instant Tickets: Decarbonization Projects

Renewable electricity

Use of 100% certified renewable electricity to reduce reported Scope 2 emissions.

Lower carbon board

Substrate switch to lower-carbon board, the largest material component of the ticket.

Lower carbon inks

Use of alternative ink suppliers.

Use of HVO Fuel in distribution

Use of certified, traceable HVO fuel with rail transport through the Eurotunnel.

Up to 25%

Potential reduction in product carbon footprint

Modelled combined impact of the four projects.

LCA Lottery Terminal: Designed for Repair & End-of-Life Recovery

WAVE™
Contour™



our terminal Key attributes

- Significantly less plastic and no glue
- More durable and easier to disassemble and repair.
- Recoverability treated as a design requirement rather than a disposal problem.

Waste Management

SG Leeds FY25 waste performance

2,648t

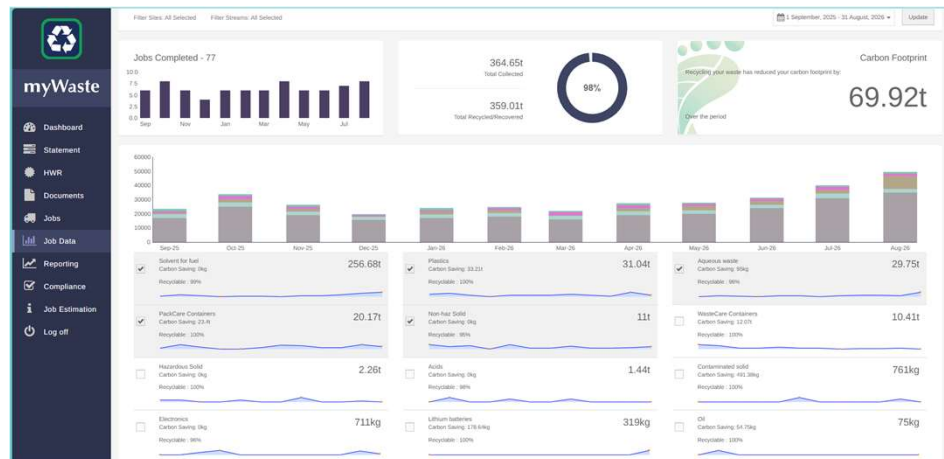
total waste collected in FY25

100%

Non-hazardous waste recycled or recovered and diverted from landfill

98%

Hazardous waste recycled / recovered



Key takeaways

- Paper fibre accounts for 75% of total waste (1,990 tonnes).
- All non-hazardous waste is recycled, recovered or repurposed.
- Hazardous waste reaches 98% recovery.
- Order-level tracking provides auditable waste data for customer reporting.

How SG's Sustainability Programme Supports Lotteries

Supply-chain capabilities that support lottery commitments

Emission Reduction

WHAT THE LOTTERY GETS

Supplier emissions data that operators can use in Scope 3 reporting.

Life Cycle Analysis

WHAT THE LOTTERY GETS

Modelled product footprints that support tender and reporting requirements.

Waste Control

WHAT THE LOTTERY GETS

Effective waste management program and zero-landfill claims that stand up in reporting and contract terms.

Supply Chain Evidence

WHAT THE LOTTERY GETS

Documented product and process evidence from the supply chain.

PART TWO

Responsible Gaming: From Principle to Practice

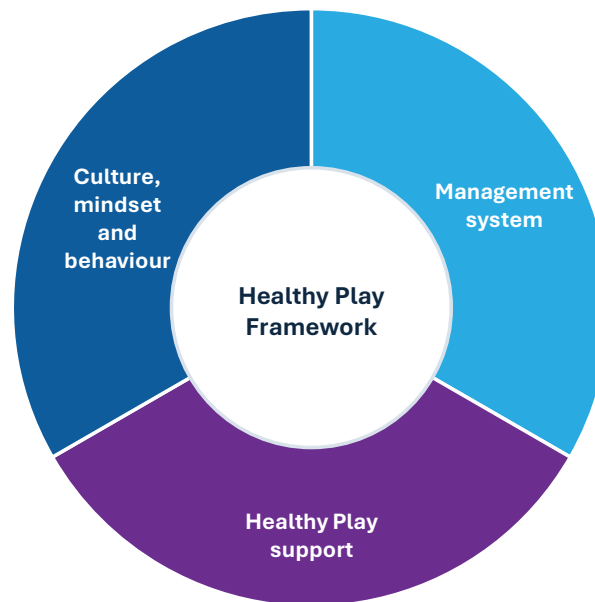


SG Responsible Gaming Strategy

Our Purpose: Trusted Partner in Responsible Gaming

Strategic Objectives

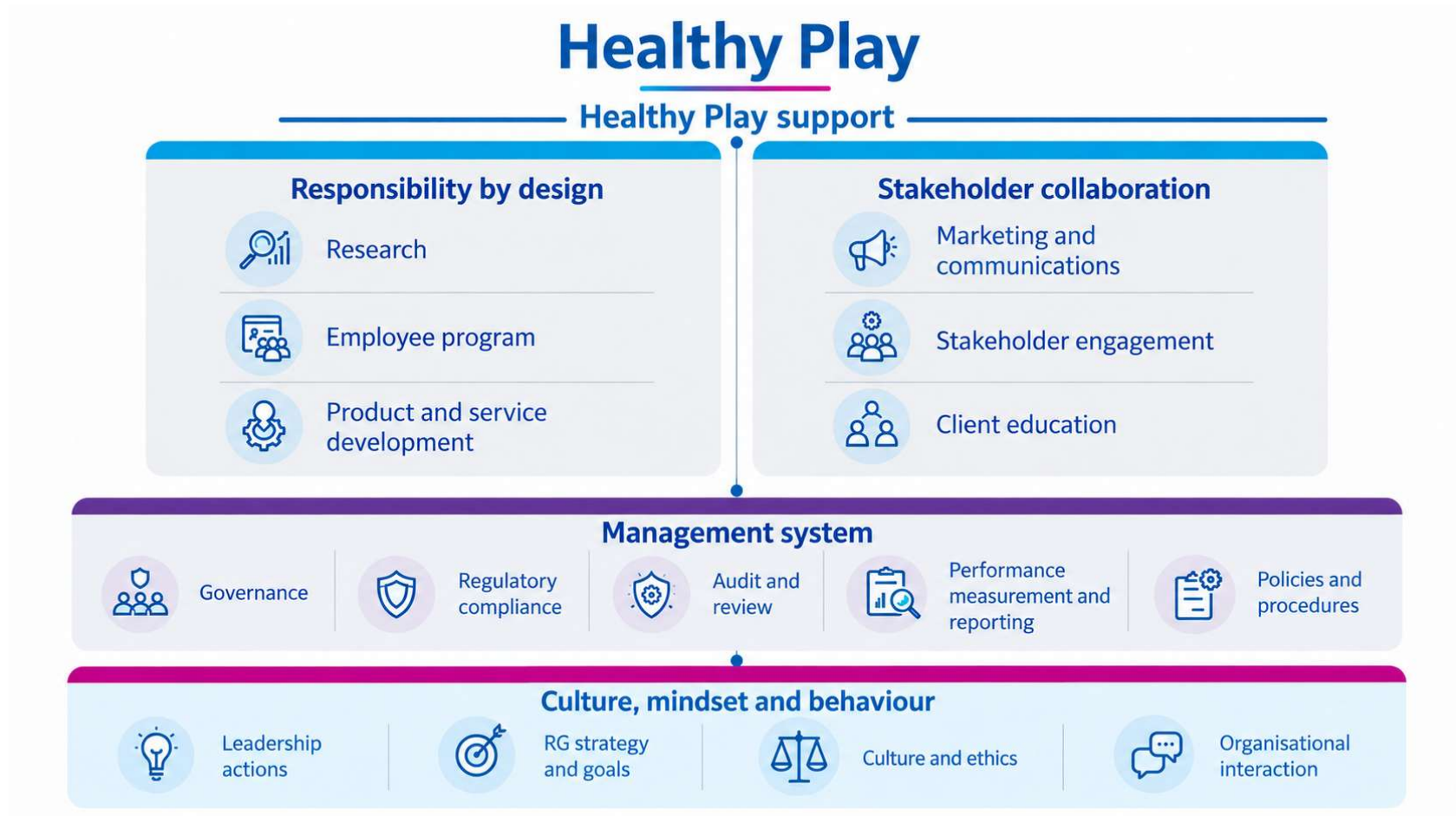
- Safe, controlled play
- Embedded safeguards
- Data-led risk management
- Regulatory and ethical alignment



Expected Outcomes

- Safer player experiences
- Reduced regulatory risk
- Stakeholder trust
- Sustainable responsible gaming ecosystem

SG Responsible Gaming Framework



SG Responsible Gaming Maturity Matrix

Culture, Mindset and Behaviour	Responsible Gaming Management System	Responsibility by Design	Stakeholder Collaboration
- Leadership Actions - Strategy & Goals - Organizational Interaction - Culture & Ethics	- Performance Measurement - Policies & Procedures - Regulatory Compliance - Management oversight	- Research - Employee Programmes - Product & Service Development - Digital Environment	- Stakeholder Engagement - Marketing & Communications - Client Education



Responsible Gaming Maturity Matrix

Illustrative radar charts



Dummy scores for illustration only.
Scale: 1 = ad hoc; 5 = leading.

Responsible Gaming Research - The Study at-a-Glance

3,405

Americans surveyed in a 20-minute online study

±2.4%

Margin of error at 95% confidence

7

Distinct groups of U.S. gamblers profiled

9

States with oversamples (7 at ~n=1,000)

CONTEXT

Fifth Wave

Follows the 2021, 2023 and 2024 studies, tracking how players have changed over five years.

Nov '25 – Jan '26

National fieldwork ran November 4 to January 5; state fieldwork ran to end of January.

4 Regions

Results split across Northeast, Midwest, South and West.

Wide Legal Market

Lottery in 46 states

Source: Scientific Games 2025 Responsible Gaming Research, U.S. National (n=3,405). Conducted by Lotto Research.

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What the Research Tells Us

01

Gambling has normalised

Among Americans not morally opposed to gambling, 83% gambled in the past year, the highest level recorded since the pandemic.

02

The at-risk middle is growing

Group 5 increased to 19% from 14% in 2024. Group 7, the highest-risk group, remained at 5%.

03

Myths cluster in the risk groups

Gambling as a way to make money was endorsed by 65% of Group 7 and 34% of Group 5, compared with 18% nationally.

04

Age-limit confusion is real

Seventeen percent believe there is no minimum age with parental consent, rising to 49% in Group 7.

05

Harm is widely felt

Twenty-nine percent know someone with a gambling problem and 25% say they have been negatively affected.

06

Messaging lands when targeted

“Have Fun. Do Good. Play Healthy.” scored 82% with Group 7, while campaign awareness remains at 13% to 18%.

Source: Scientific Games 2025 Responsible Gaming Research, U.S. National (n=3,405). Conducted by Lotto Research.

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What the Research Means for Lotteries and Suppliers

01

Player protection

Use targeted limits, time-outs and self-exclusion tools for higher-risk players.

02

Player protection

Treat the growing at-risk middle as a priority for prevention and early intervention.

03

Communications

Correct specific myths about odds, randomness and minimum-age requirements.

04

Communications

Use tested messages and place support where players encounter lottery products.

05

Game design

Build odds transparency, spend prompts and responsible win-framing into product design.

06

Game design

Apply appropriate safeguards across digital and draw-game journeys as channels evolve.

Source: Scientific Games 2025 Responsible Gaming Research, U.S. National (n=3,405). Conducted by Lotto Research.

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Designing Protection Into the Game

How supplier capabilities support player protection

Digital game design

Controls for both the digital platform and the digital game.

Digital player behaviour

Use behavioural signals to identify risk patterns and support proportionate, timely interventions.

AI-assisted instant ticket game review

Explore AI-assisted reviews of instant ticket game design.



How SG Responsible Gaming Capabilities Support Lotteries

Strategy and Framework

BENEFIT TO THE LOTTERY

A defined purpose, strategic objectives and a Healthy Play framework.

Maturity Matrix

BENEFIT TO THE LOTTERY

A quantitative process for measuring improvement over time.

Player Research

BENEFIT TO THE LOTTERY

Decisions informed by current player evidence.

Protection by Design

BENEFIT TO THE LOTTERY

Player-protection considerations embedded in product design.

Responsible Gaming Culture

BENEFIT TO THE LOTTERY

A programme that integrates responsible gaming into daily operations

Together, these capabilities help lotteries demonstrate continuous improvement in player protection.

PART THREE

Maintaining Regulatory Compliance Across the Supply Chain



Regulatory Readiness

Current focus

EPR: Instant Tickets and Terminals

Extended producer requirements can apply to instant tickets and terminal packaging. Measuring usage of all boxes, shrink wrap and pallets supports reporting.

EU Packaging and Packaging Waste Regulation

Design, recyclability, labelling and reporting requirements are driving changes across the packaging supply chain.

EU Deforestation Regulation

Not applicable to printed products. Maintain oversight of board suppliers and supporting information.

California Climate Bill SB 253

Scope 1 and Scope 2 reporting begins in 2026. Scope 3 and assurance requirements follow on separate timelines.

EU Packaging and Packaging Waste Regulation

Regulation (EU) 2025/40 applies to packaging and packaging waste

AIMS OF THE REGULATION

01

Reduce packaging waste

02

Support the circular economy

03

Improve consumer information

04

**Strengthen
Extended Producer
Responsibility**

05

**Harmonise waste
management across
the EU**

THE PPWR HAS TWO MAIN CONCEPTS

Extended Producer Responsibility

Producers fund and account for the packaging they place on the market, including its collection, recovery and reporting.

Packaging Compliance

Design, recyclability, labelling and information requirements, evidenced through conformity documentation at every tier.

EU Packaging and Packaging Waste

SG's role as a manufacturer and importer into the EU

SG must demonstrate that packaging introduced to the EU market meets applicable sustainability, safety and labelling requirements.

CONFORMITY ASSESSMENT PROCEDURE

PART 1

Technical Documentation

Qualitative write-up, laboratory test results or technical drawings supporting each claim.

PART 2

Declaration of Conformity

Produced for the product placed on the market, declaring that all requirements are met.

THE EVIDENCE CHAIN

Declaration of Conformity

Issued at manufacturer level for the product placed on the market.

Supplier Declarations

Cascaded through the supply chain so claims hold at every tier.

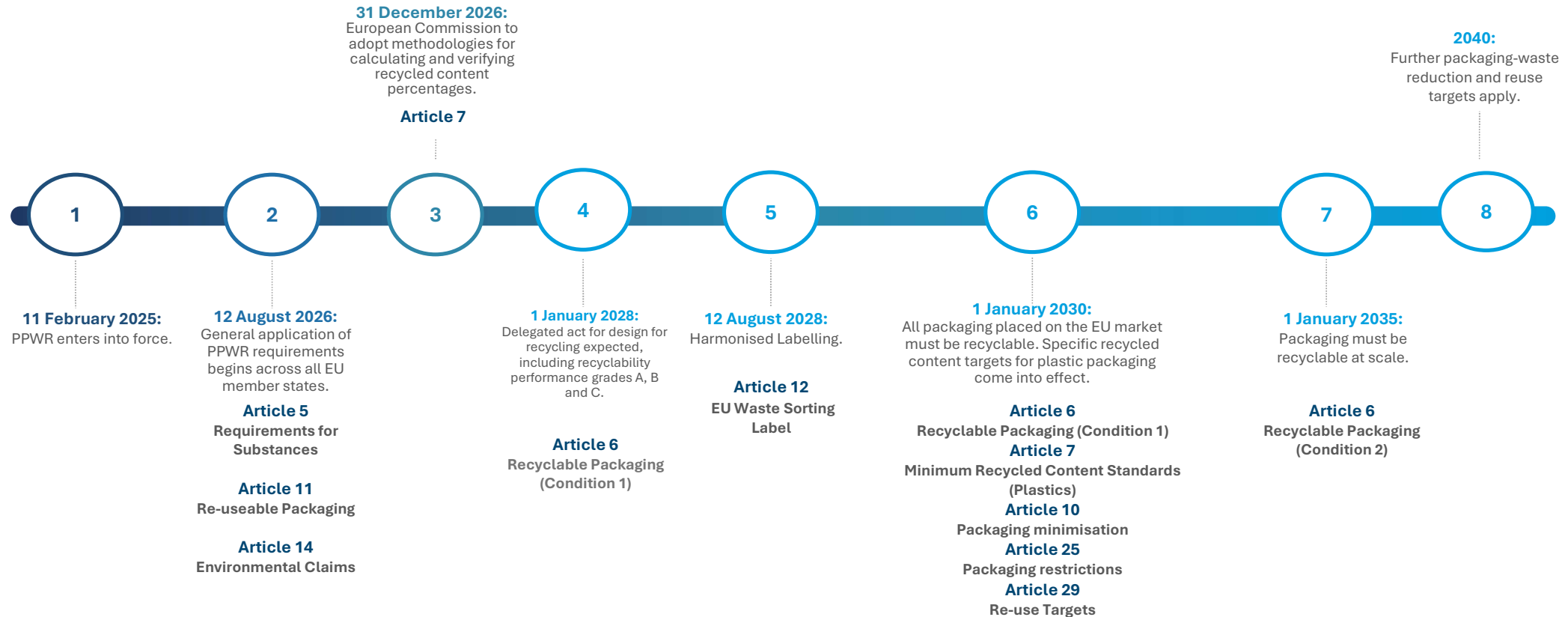
Supplier Test Reports

Underlying test data retained and available when a regulator asks.

Traceability Records

Supplier and batch logged against each customer order, linking evidence to product.

EU Packaging and Packaging Waste Regulation (PPWR)



EU PPWR Compliance: Plastics

Shrink Wrap - Recycled Content

30% recycled content in the shrink wrap film

Paper Strapping

Replaces plastic strapping on outbound pallets.

Pallet Netting

Replaces plastic stretch wrap on pallets.



Applicable EU PPWR requirements: Article 6, recyclable packaging, and Article 7, minimum recycled content

Responsible Lotteries Are Built Together



Practical, Effective Partnerships

A strong lottery–supplier partnership requires shared direction and joint accountability.

01 Shared Direction

Partners agree on the outcomes they want to achieve and how success will be measured.

02 Joint Accountability

They use evidence, govern the work together and review progress against agreed measures.

THE RESULT: The partnership can demonstrate progress against shared priorities.



Thank You

