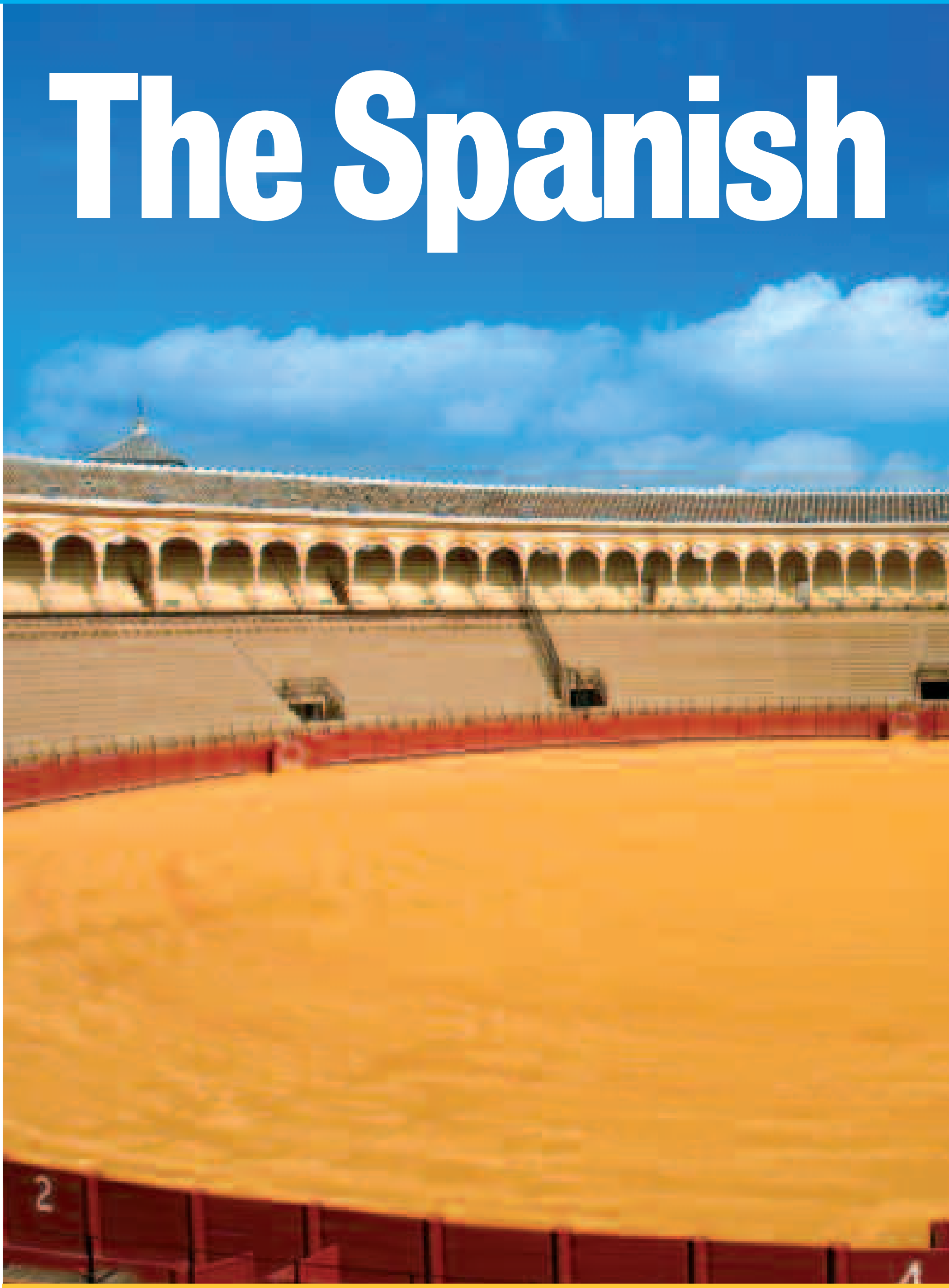
The Spanish



G3 investigates the games and gaming culture in Spain to discover the effects of recent legislation change on this huge European market

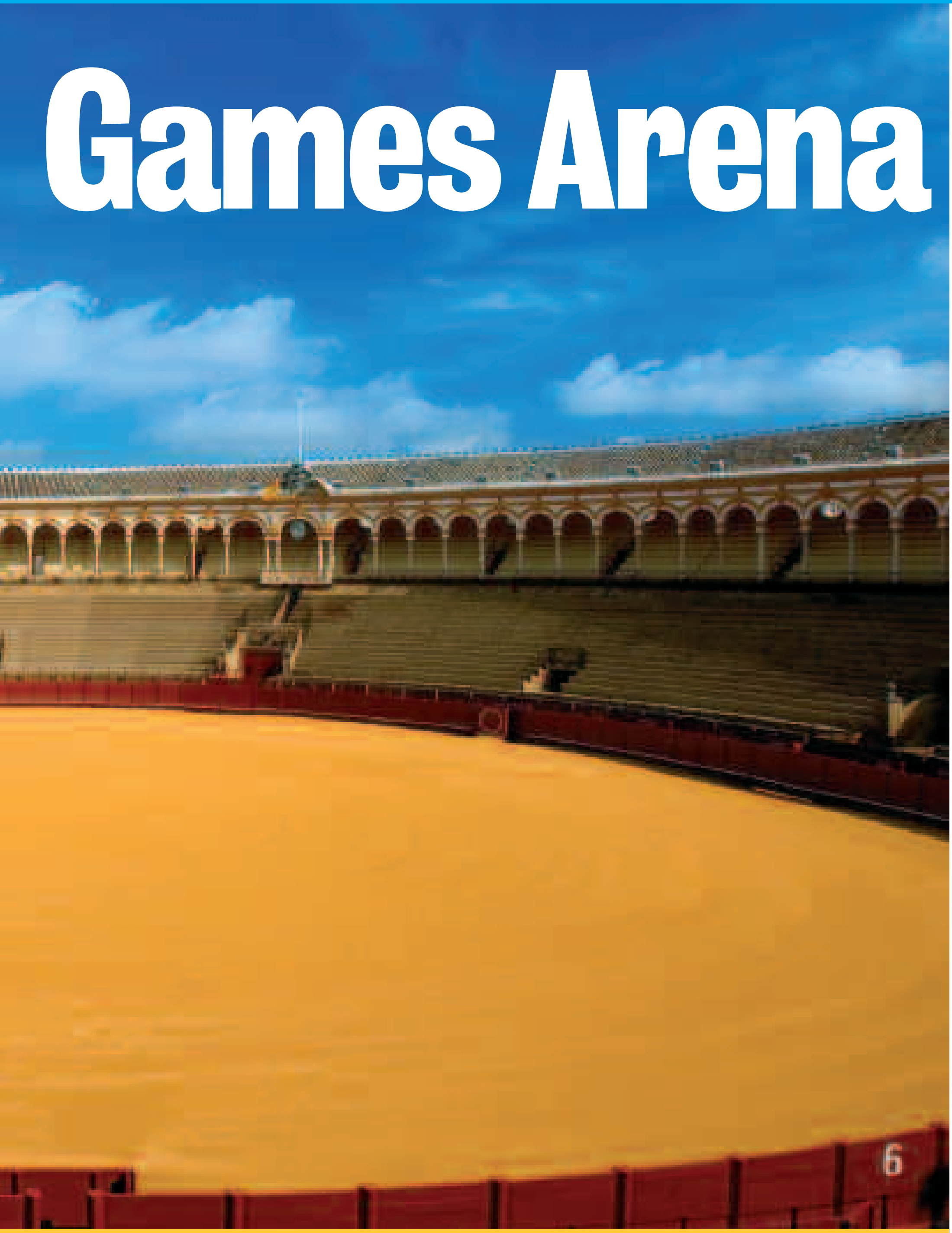
The introduction of new legislation always brings a new spark to a floundering coin-op market.
Whether the legislation is positive for all involved or for a select few, change, as they say, is as good as a rest.
In the case of the Spanish market change is exactly what was needed. However, will the new legislation be enough to ignite the dying embers of a struggling AWP market?
Spain has always had a strong gaming industry. In Europe it boasts the one of the highest numbers of AWPs in the market alongside the UK market, whilst the casino sector, although not huge with 36 casinos, is free of monopoly and well established.
However, this was not always the case and surprisingly, the Spanish gaming sector is only 28 years old.
During the mid-half of the 20th Century, Nationalist General Franco, who led his party during the Spanish civil war between 1936 and 1939 against the Republican government, governed Spain. After defeating the Republicans, Franco continued his reign, although his military dictatorship led to political and economical isolation.
This began to improve during the 1950s and 1960s as every effort was taken to improve international relations and in 1975, when Franco died, a constitutional monarchy was established.
Juan Carlos de Borbon became the King of Spain and democracy would slowly but surely bring membership of the European community.
And as Spain shook off the shackles of the dictatorship ruling, changes also began to take place in Spain within the gaming sector. In 1977, private gaming was legalised, whereas previously only public controlled gaming such as lotteries and football pools existed.
This heralded a new start for the industry and business boomed. In the 1980s Spain flourished and grew rapidly with companies such as Madrid-based R. Franco and Barcelona's Cirsa beginning to take control of the gaming market. After a tough recession during the early 1990s, when business began to slow down, the mid- and late 1990s again saw a significant boom period. The economy increased, wages improved and the real estate market rocketed. Disposable income was at an all-time high and the gaming market began to reap the rewards.

"The benefits are still to be proven. However, there is already a moderate increase in collections of approximately five per cent, as the operators tune the machines to higher payout percentages."

Eduardo Antoja, Cirsa.

It was during this time that the flourishing Spanish market began to catch the eye of the foreign companies. German, Dutch and UK companies began to infiltrate the market and provided a range of different style AWPs to compete against the main three Spanish companies, R. Franco, Cirsa and SegaSA. But there was enough room for everyone and Spain suddenly became *the* export market for the non-domestic companies. And so the future looked bright. Then along came the millennium and the arrival of the new euro currency.
Initially everyone heralded this time as an opportunity to replace the entire market with new euro-ready machines. However, the operators had a different idea. With their traditional 'manaña' attitude, not only did they wait until the very last minute before changing their old machines, but also around 30 per cent of them merely updated their old machines with kits.
With an increase in stakes due to the changeover in coinage, not to mention a general inflation all round, which hit the Spanish pockets hard, it seemed the operators wanted to hang fire to see which AWP would prove to be the 'best' in the market before they parted with their cash.
The winner proved to be R. Franco's Santa Fe model, which sold more than 30,000 during this period. Of course this left many of the other companies merely

Games Arena



counting the cost of their development. Some companies were hit harder than others. Madrid-based SegaSA struggled to compete against the two manufacturing and operating giants Cirsa and R. Franco, whilst many foreign companies such as Jac van Ham pulled out of Spain followed more recently by Maygay and also Barcrest España, which closed its dedicated Spanish offices last year moving development back to the UK. Times were hard and so the market began to push for new legislation in a bid to re-ignite the market. Basically, they called for an increase in stakes and payouts. Then more recently, and more importantly, the introduction of video AWPs and multiplayers.

> **"We find that the operator has preferred to go slow, trying small quantities of machines to be safe before they realise the importance of investment and the acceptance and profitability of this new line of products."**
>
> **Alejandro Escribano R. Franco.**

So today, with new legislation being implemented, the Spanish market is the buzzword for European and domestic AWP developers who are once again eagerly looking to new opportunities. But as manufacturers now pin their hopes on the video AWP market, the question is: will this new style gaming for Spain really be accepted in the market?

GAMING MACHINES

Spain is a complicated market in so much as it's broken down into 17 different autonomous communities each with its own gaming laws.

Previously most of the regions all followed the same regulations, which offered stakes of 0.20 euros or 0.40 and payouts of 80 or 120 euros with a payout percentage of 75 per cent.

In March last year, Spain saw a Socialist party take over from the Conservatives and it is those regions with a Socialist government that are changing their legislation first.

The regions of Aragon, Cataluña and Andalucia have all introduced new legislation, which includes an increase in the maximum stake for Aragon and Cataluña (up to 0.60) and a maximum payout of 400 times the stake (240 euros). Payout percentages are now 70 per cent in these regions rather than 75 per cent. Video AWPs, which previously were only permitted in the Basque Country and the Canary Islands are now permitted in Aragon, Cataluña and Murcia. At the moment the other regions remain similar in that they have a maximum stake of 0.40 euros (0.20 x 2) and maximum payout of 400 times the maximum stake with a 75 per cent payout. The full legislation breakdown per region can be seen in the chart Fig 1.

Last year saw a lull in the market as the new regulations were introduced whilst the other regions were waiting to see how these would affect the market before looking at their own laws.

In addition large AWP communities such as Valencia and Madrid are the regions in which manufacturers are waiting to implement changes.

The estimates for further new regulations for higher stakes and prizes and video AWPs include Andalucia this month (November) followed by Valencia in January 2006, Madrid in March 2006 with the predication that most other regions will follow suit next year.

So will the introduction of higher stakes and video AWP help boost the market? Eduardo Antoja of Cirsa said: "Yes, but the benefits are still to be proven. There is already a moderate increase in collections of approximately five per cent, as the operators tune the machines to higher payout percentages."

Many developers are now pinning their hopes on the new video AWP, particularly the foreign companies who believe this could be the shot in the arm Spain needs to boost sales.

Higher stake models are produced for Cataluña and Aragon whilst standard versions of these games are released for all other regions. Video AWPs, however, have a much more dedicated market ,but will the cost of development be returned? Bally Wulff, via distributor Costa Calida, has launched a reel AWP alongside a video AWP and say they now have a strong foothold within the Spanish market and believe video AWP will only help to increase this.

Astra Games, which previously never developed for Spain following its

>>

>> link with Eduardo Morales of SegaSA, has now launched its first video AWP for Spain via distributor MGA. Meanwhile, some developers are sceptical that the new video AWPs will bring positive change.

One fear is the average age of an AWP player in Spain is around 50 years and as they come from the Franco era may find it difficult to embrace new technology. Culturally AWPs go hand in hand with coffee and brandy in the Spanish bars and if, as some suggest, manufacturers are simply revamping casino machines into street video AWPs, then these games could be too hardcore for many of the AWP players. In addition, the gaming sector has always been very conservative, whilst the operators have been as equally conservative when it comes to buying and accepting new technology. As R. Franco's Alejandro Escribano said: "We find that the operator has preferred to go slow, trying small quantities of machines to be safe before they realise the importance of investment and the acceptance and profitability of this new line of products."

Barcrest, who now develops Spanish AWPs from its UK base and distributes via Servimatic, does not believe video AWPs will change the market drastically. Willem Korteweg said: "My feeling is, as we have seen in many other countries with established gaming markets, players are so based on reel products that video will come, but I don't know how long it will take.

"Market share for video AWPs in normal operations is low and I don't think it will have more than 10 per cent of the Spanish market share. It could attract younger players, but they have less money to play. Video AWP is a niche market and we do not want to lose focus on reel-based products."

Meanwhile, the introduction of multiplayers is expected to boost business in gaming arcades due to higher percentage payouts.

R. Franco's Alejandro Escribano said: "The introduction of multiplayer machines with roulette and card games, for example, offer a range of products that will, without doubt, contribute a growth factor in our traditional gaming halls.

"This is because the payout percentage is higher (more than 20 per cent) than the traditional machines for the same stake and the game is much more interesting."

Spain is still a big gaming market and the number of AWPs has risen from 241,907 AWPs in 2003 to 243,206 in 2004 and 1,903 gaming arcades. The chart Fig 1. shows the number of AWPs in 2003 and 2004 and the number of gaming halls in 2004.

The total amount gambled on gaming machines in 2004 was almost 16m euros (casinos, bingo and AWPs) with just over 10m of that on AWPs alone. However this has dropped slightly from the previous year, whilst operators saw net incomes of around 2.5m euros from AWP machines.

AWP spending has dropped by almost five per cent. Bingo spending has also dropped from the previous year by 4.75 per cent whilst casino spending has increased by more than six per cent.

But AWPs still control the largest chunk of the entire gaming spending market with 28.5 per cent compared to 15 per cent for bingo, 5.35 for casinos and 37.64 for the five lotteries put together and 13.32 for the privately run ONCE lottery.

AWPs can be located in bars and cafes, bingo halls, gaming arcades and casinos. They cannot, however, be installed in airports, commercial shopping centres or recreation areas.

FIG.1 - REGIONAL BREAKDOWN OF AWPS AND GAMING HALLS

REGION	No. OF AWPS IN 2003	No. OF AWPS IN 2004	No. OF GAMING HALLS 2004
ANDALUCIA	35,796	36,809	522
ARAGON	8,369	8,437	87
ASTURIAS	6,855	6,664	18
BALEARICS	6,057	7,419	133
CANARIES	11,592	10,879	297
CANTABRIA	3,771	3,777	20
CASTILLA Y LEON	17,007	16,757	42
CASTILLA LA MANCHA	9,172	9,279	19
CATALUÑA	38,756	38,714	126
EXTREMADURA	5,388	5,312	6
GALICIA	12,340	12,185	62
LA RIOJA	1,902	1,892	12
MADRID	30,196	30,138	141
MURCIA	9,865	9,907	141
NAVARRA	2,062	2,186	21
PAIS VASCO	12,600	12,753	N/A
VALENCIA	29,643	29,558	205
CEUTA	212	206	3
MELILLA	324	334	10
TOTAL	241,907	243,206	1,903

FIG.2 - REGIONAL BREAKDOWN OF BINGO HALLS

REGION	NO. OF BINGO HALLS	BINGO BOOK SALES	AVERAGE INCOME PER HALL
ANDALUCIA	63	537,51	1,07
ARAGON	23	196,15	1,1
ASTURIAS	7	57,12	0,97
BALEARICS	15	81,73	0,63
CANARY ISLANDS	35	287,68	1,06
CANTABRIA	6	43,31	0,26
CASTILLA Y LEON	21	176,47	0,97
CASTILLA LA MANCHA	9	54,07	0,67
CATALUÑA	68	569,84	0,99
EXTREMADURA	8	63,61	0,86
GALICIA	18	130,56	0,8
LA RIOJA	4	5,57	0,14
MADRID	74	819,77	1,22
MURCIA	8	79,15	1,18
NAVARRA	4	35,65	0,82
PAIS VASCO	21	148,56	0,84
VALENCIA	75	542,64	0,91
CEUTA	3	21,92	0,87
MELILLA	1	2,83	0,34
TOTAL	463	3,854,14	0,99

Source: Comisión Nacional del Juego – Memoria 2004

FIG.3 - REGIONAL BREAKDOWN OF GAMING ACTIVITIES

REGION	CASINO	BINGO	MACHINES	NAT.LOTTERY	PRIMITIVA	BONO LOTO	QUINIELA	EURO MILLION	ONCE CUPON
Andalucia	304,52	537,51	1,442,08	635,09	339,57	102,98	70,35	82,56	534,97
Aragon	49,56	196,15	356,42	161,27	60,29	15,17	14,95	12,93	36,73
Asturias		57,12	329,59	128,83	66,77	19,77	9,80	13,54	61,58
Balearics	64,29	81,73	204,18	86,26	59,03	14,49	14,97	17,96	79,16
Canaries	157,94	287,68	493,68	165,06	115,43	38,74	27,51	36,15	131,61
Cantabria	52,55	43,31	141,73	63,03	32,35	7,91	7,88	7,29	21,76
Castilla y Leon	50,70	176,47	724,29	360,14	159,68	37,33	32,05	32,36	76,42
Castilla La Mancha		54,07	390,62	230,07	89,49	21,06	19,36	19,33	76,18
Cataluña	535,74	569,84	1,648,75	726,81	365,65	60,40	93,87	76,13	358,26
Extremadura		63,61	229,47	77,35	52,22	13,74	10,63	13,29	53,00
Galicia	45,10	130,56	389,94	242,23	163,00	43,34	30,02	35,59	78,68
La Rioja		5,57	81,00	39,20	16,84	4,06	3,16	4,80	13,73
Madrid	423,38	819,77	1,286,00	838,77	353,56	88,18	91,13	84,84	221,41
Murcia	70,37	79,15	420,13	188,75	58,07	16,94	12,97	14,84	221,41
Navarra		35,65	111,63	57,06	28,17	6,98	7,43	6,01	23,41
Pais Vasco	79,19	148,56	543,12	292,67	138,05	30,65	26,80	29,69	74,71
Valencia	224,93	542,64	1,262,44	695,38	251,55	67,59	57,41	62,55	304,90
Ceuta	3,97	21,92	7,42	2,07	3,62	1,23	2,39	1,11	4,49
Melilla	5,21	2,83	13,80	2,10	3,36	1,22	1,12	0,93	3,72
TOTAL	2,067,45	3,854,14	10,076,29	4,992,14	2,356,70	591,78	533,80	551,90	2,262,63

Source: Comisión Nacional del Juego – Memoria 2004

Bingo is another prime gambling field for the Spanish who love the game, although the number of bingo halls has been dropping steadily over the last 10 years.
There are now 463 halls in Spain compared to 468 in 2003 and 602 back in 1992. Valencia has the most bingo halls with 75 followed by Madrid with 74, Cataluña with 68 and Andalucia with 63.
The bingo halls saw 3,854,14 euros gambled on bingo books in 2004 compared to 3,929,58 in 2003, whilst 65 per cent of this was returned in prizes.
Bingo halls are permitted to install gaming machines in the visitors reception area and there must be no more than one AWP for each 50 bingo places. There are an estimated 4,630 AWPs located within bingo halls.
The Chart Fig.2 shows the number of bingo halls per region and incomes from bingo book sales in 2004 (in millions of euros).
Meanwhile there is big competition from the public gaming sector with five state run lotteries (National Lottery, Primitiva Lottery, Bono Loto, Quiniela football pools and the new Euromillion lottery) and the privately run ONCE lottery.
The figures show the public gaming sector for all six lotteries saw a total of 11.2m euros gambled in 2004.
The chart Fig.3 shows the amount gambled at a national level between each gaming sector and per each Autonomous Community during the year 2004.

AMUSEMENT MACHINES

Like in other parts of the world the amusement sector continues to struggle in Spain, not only against the onslaught of home console games, but also against a strong gaming sector.
Only two video game distributors exist today, MGA and Covielsa, whilst foreign touchscreen developers are finding domestic products too cheap to compete against.
Two amusement machines can be located in bars, cafes and restaurant locations and up to six machines in hotels and also in campsites, theme parks and fairgrounds.
The last three years has seen a steady decline for amusement machines in general, however Spain still remains one of the best European markets for this sector. Last year there were 119,031 amusement machines – an 11.8 per cent drop on 2003 figures of 130,912
As Sega's Maria Carmen Villarroya said: "Even though the players profile for video games and AWP are different the introduction of video AWP and multiplayers does affect amusement machines in the sense of the operators budget, as Spain has always been a more gambling orientated market.
"On the other hand, if those machines are a success, as the multiplayers have proved, the operators will have more disposable cash to invest in other products."
Spanish players prefer realistic games to fantasy games and Sega, for example, has seen success with games such as Virtua Striker 4, Out Run 2 SP and Ghost Squad.
In the late 1990s amusements experienced a boom due to the heavy FEC development. However, as in other parts of the world, smaller sites are closing whilst larger operators are finding the increase in real estate too costly to lease large spaces.

Even though the players profile for video games and AWP are different, the introduction of video AWP and multiplayers affects amusement machines in the sense of the operators budget, as Spain has always been a more gambling orientated market."

Maria Carmen Villarroya, Sega Amusements Europe.

As Intercard's Alberto Borrero said: "This makes the business model a non-cost effective one with a large capital investment for potentially small returns."
The future for this industry lies in creating centres with more attractions for youngsters that they cannot find at home and the tendency in Spain now is for Bowling FECs, which offer sports games, redemption, video and children's areas.
The chart Fig.4 shows the number of amusements in each region during the last two years and the number of amusement halls in 2004.
For the younger end of the market the kiddie ride sector has also seen a drop in operator incomes. Although a huge market in terms of numbers thanks to a large coastal sector, Spain is also a mature market with less need for replacement models.
Topdiver, part of the Falgas group of companies, is the largest Iberian operator with more than 2,500 kiddie rides and sport machines.
However, figures show a drop of about 10 per cent in incomes compared to last year. The best region for kiddie ride sales is in Andalucia which supports a large tourism sector with 20m of the 56m total tourists in Spain and the best selling rides for Falgas include the premium series type Magnum car and London Bus.
As Falgas' Jose Saus said: "As a manufacturer and generally speaking, this industry is still in the negative spiral started in September 2001 and the

current dollar rate won't help the Euro zone producers for the next coming months."

Meanwhile the darts market, which has grown in Spain, is also seeing a shift and the move now is towards the consolidation between prime darts developers.

As the sector began to grow many domestic companies began to develop electronic darts machines, but with a lack of league structure these are slowly being replaced in the market by American style machines that support tournaments.

In addition, players are eager to experience new technology and the new games that are being supplied by American manufacturers.

There are now three main darts companies active in Spain including: the Lowen/Valley products, Arachnid and Shelti.

Adrian Buckley of Diana Marketing, which distributes the Arachnid dart machines, said: "What I can see in the world of darts is that a lot of smaller Spanish manufacturers have dropped out and people are going back to American machines because they are much more developed than anyone else.

"There are some old machines from traditional manufacturers in the market, but as they come to the end of their life operators want new machines. The problem is that there is no league championship structure in Spain and the first ones to get their wings clipped are the ones without league structures."

The American machines support championships, such as the Arachnid Bullshooter, plus different style darts games than traditional 501, which are beginning to attract both new and old players.

CASINO MARKET

There are currently 36 casinos in Spain, whilst last year there were also two temporary gaming halls attached to the two casinos in Valencia that opened for a few months only.

Three new casinos have opened since 2004, including a second casino for the Madrid region, Casino Aranjuez, operated by the Grupo Comar which opened in May this year following an investment of 18m euros and two years construction work.

Also opened were first time casinos for the regions of Extremadura with an investment of 10m euros and La Rioja, Casino Electra, which cost 12m, both operated by Grupo Orenes. After three years construction, La Rioja casino opened its doors in May and expects to receive 75,000 visitors per year.

The main casino operators in Spain include Cirsa (four casinos), Grupo Comar (nine casinos) and Grupo

FIG.4 - REGIONAL BREAKDOWN OF AMUSEMENT DEVICES AND LOCATIONS

REGION	No. OF AMUSEMENTS IN 2003	No. OF AMUSEMENTS IN 2004	No. OF AMUSEMENT HALLS
ANDALUCIA	27,356	26,629	275
ARAGON	4,009	3,453	12
ASTURIAS	3,018	3,018	40
BALEARICS	5,846	8,086	29
CANARIES	7,706	7,104	11
CASTILLA Y LEON	11,120	10,467	70
CASTILLA LA MANCHA	10,465	6,653	93
CATALUÑA	8,983	8,089	121
EXTREMADURA	6,233	6,150	52
GALICIA	6,664	5,990	52
LA RIOJA	1,865	1,864	35
MADRID	6,926	6,183	61
MURCIA	997	1,024	60
NAVARRA	3,943	3,061	47
PAIS VASCO	10,397	8,837	N/a
VALENCIA	13,454	10,518	120
CEUTA	5	4	0
MELILLA	40	42	0
TOTAL	130,912	119,031	1,109

Source: Comisión Nacional del Juego – Memoria 2004

FIG.5 - INCREASE IN CASINO INCOMES YEAR ON YEAR

TYPE	2001	2002	2003	2004
Gaming incomes	234,99	257,80	262,80	283,27
Slot machine takings	85,07	96,27	101,95	118,26
Tips	65,96	65,81	66,24	67,53
Entry	3,42	3,27	2,87	2,88
TOTAL	389,44	423,15	433,86	471,94

Source: Comisión Nacional del Juego – Memoria 2004

>> Orenes (four casinos). On the island of Tenerife all three of the casinos are government run, whilst independent family companies run the other casinos in Spain.

Orenes Casinos (part of the R. Franco company) was born in 1997 when the Gran Casino Murcia was opened. Another three have opened since.

There are some changes expected next year as Casino de Taoro in Puerto de la Cruz in Tenerife is expected to move location within the same area, while it is believed Casino de Lloret de Mar may close down and re-open in the bigger town of Taragona. It is also rumoured that Casino de la Toja in Pontevedra may also move to Vigo.

Meanwhile, there are possibly three new casinos opening soon. In November this year, an independently operated casino in Gijon, Asturias, will open followed by one in Seville in February next year. There is also a tender for another casino in Castilla y Leon from Grupo Orenes and talk of further casinos in the Canary Islands.

Although each local region has the authority to grant casino openings, some manufacturers feel the market is now pretty much full with little opportunity for new casinos.

As TCSJohnHuxley's David Charnock said: "The Spanish market is at saturation point. There is a reasonable level of activity and buoyancy in Madrid and Barcelona but I think some of the islands have suffered over the last 12 months with the downturn in German visitors."

Meanwhile the possibility of new legislation in Spain for no-smoking zones could be a huge threat to the nicotine culture of Spain. If no-smoking areas are enforced in casinos many feel this could have a detrimental impact on visitor figures and incomes.

There was also an initial outcry from the casino association following the introduction of multiplayers in the street market however the affect these games will have on the casino sector is now expected to be minimal due to the difference in players and products.

Cirsa's Spanish Casino Director, Javier Burgues said: "AWP video slots have different games, different prizes and different payout percentages. An important aspect is that casino video products are really random. The introduction of multiplayers has diversified the themes we have in both markets, but just like video machines we are speaking about different products."

Interestingly, with only 36 casinos in Spain compared to 1,900 gaming halls, some casino manufacturers who previously developed multiplayer games for this sector are now looking at the street market for further sales opportunities and the gap between street machines and casinos grows smaller.

The structure of casino legislation in Spain has remained pretty much the same since 1979 and the Comisión Nacional del Jeugo (Gaming Commission) rules from 1981, which covers all regions, is applied to an individual mechanical machine and today the industry is demanding rules for electronic machines to play individually and as a multiplayer.

With the introduction of new technology some regions are now re-writing their legislation following confusion over some games. Austrian Gaming Industries' Novo TouchBet Roulette saw difficulties with the approval process as legislators couldn't determine if it was a table game or slot. Other changes include the possibility of advertising casinos in some regions, which was previously prohibited. All incomes for the Spanish casino sector have increased from the previous year by a total of 8.78 per cent, which includes gaming incomes, slot machine incomes, tips and entry fees.

The chart Fig.5 shows the increase over the last four years in millions of euros.

The regions of Andalucia, Cataluña, Madrid and Valencia between them represent almost 70 per cent of the gaming incomes with 10 casinos of the 33 open in 2004. Meanwhile, the number of visitors to the Spanish casinos increased last year after a steady drop since 2001. In 2004 some 3,049,984 people visited casinos compared to 2,966,164 in 2003 – an increase of 83 per cent. It is thought the increase is partly due to the opening last year of the new casino in Panticosa (Huesca) in July 2004 and also the temporary annex gaming halls of the two casinos in Valencia.

The number of slot machines in casinos has also increased from 2003 with 1,843 slots last year compared to 1,712 in 2003, 1,905 in 2002 and 1,879 in 2001.

The chart Fig.6 shows a run down of incomes (in millions of euros) in 2004 for the various regions including the number of casinos and visitors, gaming incomes, number of slots machines, slot takings and total casino incomes which includes entry fees, tips and gaming incomes.

"The Spanish market is at saturation point. There is a reasonable level of activity and buoyancy in Madrid and Barcelona but I think some of the islands have suffered over the last 12 months with the downturn in German visitors."

David Charnock, TCSJohnHuxley.

"AWP video slots have different games, different prizes and different payout percentages. An important aspect is that casino video products are really random. The introduction of multiplayers has diversified the themes we have in both markets, but just like video machines we are speaking about different products."

Javier Burgues, Cirsa Group.

FIG.6 - REGIONAL INCOME (EURO MILLIONS) CASINOS

REGION	No. OF CASINOS	VISITORS	GAMING INCOMES	No.OF SLOTS	SLOT TAKINGS	TOTAL INCOMES
Andalucia	4	333,414	41,79	251	17,20	69,57
Aragon*	2	80,027	7,74	48*	1,20	10,42
Balearics	3	160,395	15,37	103	6,08	24,21
Canary Islands	6	414,811	19,73	315	13,71	39,11
Cantabria	1	48,372	2,86	41	7,62	11,05
Castilla y Leon	3	94,713	6,77	49	2,12	10,25
Cataluña	3	744,931	57,69	360	38,66	117,60
Galicia	2	70,531	4,97	59	2,36	8,28
Madrid	1	518,04	60,82	205	13,15	88,96
Murcia	2	102,602	13,76	83	1,79	17,83
Pais Vasco	2	99,719	11,56	68	6,66	19,77
Valencia*	2	357,334	38,50	236*	7,58	52,77
Ceuta	1	10,223	0,82	15	0,11	1,07
Melilla	1	14,508	0,89	10	0,02	1,05
TOTAL	33	3,049,984	283,27	1,843	118,26	471,94

Source: Comisión Nacional del Juego – Memoria 2004

*Aragon installed 14 machines in the new Casino de Panticosa and in Valencia 128 of these machines were installed in the new annex gaming halls.

Country Report: Spain

To follow is a complete list of all 36 casinos currently open for business in Spain with operator and games information for each where available.

ANDALUCIA

CASINO: Casino Nueva Andalucia Marbella
LOCATION: Marbella
OPEN: 8pm until 5am
GAMES: 70 slots and 31 table games
OPERATOR: Cirsa Group
OTHER: Casino is 12,912 sq.ft and has one restaurant and hotel with 416 rooms.

CASINO: Bahia de Cadiz
LOCATION: Puerto de Santa Maria, Cadiz
OPEN: 5pm until 4am
GAMES: 32 slots and 10 table games
OPERATOR: Grupo Comar
OTHER: Two restaurants

CASINO: Casino San Roque
LOCATION: Cadiz
OPEN: 6pm until 4am
GAMES: 40 slots and nine table games
OPERATOR: Groupe Partouche
OTHER: Two restaurants

CASINO: Casino Torrequebrada
LOCATION: Benalmadena, Malaga
OPEN: 8pm until 4am
GAMES: 80 slots and 24 table games
OPERATOR: Grupo Casino Gran Madrid
OTHER: Hotel, nightclub, beach club, restaurants

ARAGON

CASINO: Casino de Zaragoza
LOCATION: Zaragoza
OPEN: 7pm until 5am
GAMES: 47 slots and 14 table games
OPERATOR: Grupo Comar
OTHER: Restaurant, swimming pool, tennis court

CASINO: Casino de Panticosa
LOCATION: Huesca
OPEN: N/a
GAMES: N/a
OPERATOR: Independent

BALEARIC ISLANDS

CASINO: Sporting Club Sol de Mallorca
LOCATION: Calvia
OPEN: 8pm until 5am
GAMES: 79 slots and 17 tables games
OPERATOR: Cañavate family
OTHER: Two restaurants, nightclubs, swimming pool, tennis court

CASINO: Casino de Ibiza
LOCATION: Ibiza
OPEN: 5pm until 5am
GAMES: 87 slots and four table games

OPERATOR: Independent
OTHER: Two restaurants and nightclub

CASINO: Casino Maritimo Mahon
LOCATION: Menorca
OPEN: 9pm until 5am
GAMES: 20 slots and four table games
OPERATOR: Grupo Comar

CANARY ISLANDS

CASINO: Casino Playa de las Americas
LOCATION: Adeje, Tenerife
OPEN: 3pm until 2am (slots) and from 9pm-4am (tables).
GAMES: 60 slots and 15 tables
OPERATOR: Government owned
OTHER: Restaurant and hotel with 361 rooms, swimming pool, tennis

CASINO: Casino de Taoro
LOCATION: Puerto de la Cruz, Tenerife
OPEN: 8pm until 4am
GAMES: 60 slots and seven table games
OPERATOR: Government owned
OTHER: Restaurant

CASINO: Casino de Santa Cruz
LOCATION: Tenerife
OPEN: 6pm until 5am
GAMES: 20 slots and seven table games
OPERATOR: Government owned
OTHER: Restaurant and hotel with 290 rooms, swimming pool and tennis court.

CASINO: Casino de Gran Canaria
LOCATION: Gran Canaria
OPEN: 9pm until 4am
GAMES: 75 slots and 12 table games
OPERATOR: 50 per cent Cirsa Group and 50 per cent independent
OTHER: Casino is 9,900 sq.ft and has one restaurant and hotel with 337 rooms, swimming pool and tennis court.

CASINO: Casino Tamarindos
LOCATION: Gran Canaria
OPEN: 9pm until 5am
GAMES: 81 slots and 13 table games
OPERATOR: Independent

CASINO: Oasis Gran Casino
LOCATION: Lanzarote
OPEN: n/a
GAMES: 38 slots and six table games
OPERATOR: Grupo Orenes

CANTABRIA

CASINO: Gran Casino del Sardinero
LOCATION: Santander
OPEN: 7pm until 5am
GAMES: 41 slots and nine table games
OPERATOR: Grupo Comar

CASTILLA Y LEON

CASINO: Casino de Castilla-Leon
LOCATION: Boecillo, Valladolid
OPEN: 8.30pm until 5am
GAMES: 21 slots and 10 table games
OPERATOR: Independent
OTHER: Two restaurants, Nightclub

CASINO: Casino del Tormes
LOCATION: Salamanca
OPEN: 4pm until 5am
GAMES: 15 slots and nine table games
OPERATOR: Grupo Comar
OTHER: Restaurant

CASINO: Casino Conde Luna
LOCATION: León
OPEN: 11am until 5am
GAMES: n/a
OPERATOR: Grupo Comar
OTHER: Nightclub

CATALUÑA

CASINO: Gran Casino de Barcelona
LOCATION: Barcelona
OPEN: 11am until 5am (slots) and from 3pm until 5am (tables)
GAMES: 219 slots and 45 table games
OPERATOR: Grupo Perelada (Inverana company)
OTHER: Casino is 33,000 sq.ft and has four restaurants, open air cabaret, Piano Bar

CASINO: Casino Castillo de Perelada
LOCATION: Gerona
OPEN: 7pm until 5am
GAMES: 81 slots and 16 table games
OPERATOR: Grupo Perelada
OTHER: Three restaurants

CASINO: Casino de Lloret de Mar
LOCATION: Gerona
OPEN: 5.30pm until 4am
GAMES: 106 slots and 22 table games
OPERATOR: Grupo Perelada
OTHER: Three restaurants

CEUTA

CASINO: Gran Casino de Ceuta
LOCATION: Ceuta
OPEN: 9pm until 5am
GAMES: 15 slots and five table games
OPERATOR: Grupo Casino Gran Madrid
OTHER: Restaurant

EXTREMADURA

CASINO: Casino Extremadura
LOCATION: Merida, Trujillanos
OPEN: n/a
GAMES: n/a
OPERATOR: Grupo Orenes
OTHER: Hotel with 100 rooms,

GALICIA

CASINO: Casino de Atlantico
LOCATION: La Coruña
OPEN: 11am until 5am
GAMES: 60 slots and eight table games
OPERATOR: Grupo Comar
OTHER: One restaurant and hotel with 205 rooms.

CASINO: Casino de La Toja
LOCATION: Pontevedra
OPEN: 6pm until 4am
GAMES: 27 slots and 13 table games
OPERATOR: Cirsa Group
OTHER: Casino is 15,372 sq.ft and has a restaurant and hotel with 202 rooms, nightclub, swimming pool

LA RIOJA

CASINO: Electra Rioja Gran Casino
LOCATION:: La Rioja
OPEN: n/a
GAMES: 75 slots
OPERATOR: Grupo Orenes
OTHER: Bingo hall with 320 places, restaurant

MADRID

CASINO: Casino de Jeugo Gran Madrid
LOCATION: Torrelondones, Madrid
OPEN: 4pm until 5am
GAMES: 174 slots and 20 table games
OPERATOR: Grupo Casino Gran Madrid
OTHER: Casino is 110,000 sq.ft and has one restaurant

CASINO: Casino Aranjuez
LOCATION: Aranjuez
OPEN: 5pm until 6am
GAMES: 150 slots
OPERATOR: Grupo Comar
OTHER: Casino is 12,500 sq.m and includes restaurants, cafes and nightclub

MELILLA

CASINO: Gran Casino de Melilla
LOCATION: Melilla
OPEN: 9pm until 4am
GAMES: 10 slots and five table games
OPERATOR: Grupo Comar

MURCIA

CASINO: Casino Costa Calida/La Manga
LOCATION: Los Belones
OPEN: 8pm until 5am
GAMES: 20 slots and 11 table games
OPERATOR: Grupo Casino Gran Madrid
OTHER: Hotel

CASINO: Gran Casino de Murcia
LOCATION: Murcia
OPEN: n/a
GAMES: 72 slots and nine table games
OPERATOR: Grupo Orenes

PAIS VASCO

CASINO: Gran Casino Nervion
LOCATION: Vizcaya, Bilbao
OPEN: 10am until 5am (slots)
GAMES: 58 slots and six table games
OPERATOR: Cañavate family
OTHER: The casino is 19,368sq.ft and has one restaurant

CASINO: Nuevo Gran Casino del Kursaal de San Sebastian
LOCATION: Guipúzcoa
OPEN: 1pm until 5am
GAMES: 34 slots and five table games
OPERATOR: Cañavate family
OTHER: Restaurant

VALENCIA

CASINO: Casino Mediterraneo
LOCATION: Villajoyosa
OPEN: 8pm until 4am
GAMES: 38 slots and 23 table games
OPERATOR: Grupo Acrismatic
OTHER: Restaurant

CASINO: Casino Monte Picayo
LOCATION: Puzol, Valencia
OPEN: 7pm until 5am
GAMES: 48 slots and 20 table games
OPERATOR: Cirsa Group
OTHER: Restaurant