

Report: Gaming Market in Madrid Analysis

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Executive Summary:

This report provides a comprehensive analysis of the cyber club market in Madrid, with the objective of assessing the demand, supply, market saturation, and potential growth opportunities for opening new cyber clubs in the city. It includes a detailed evaluation of existing cyber clubs, customer feedback, foot traffic, and relevant demographic factors. Based on the findings, strategic recommendations are made to guide optimization of operations within Madrid.

This report includes data collection using google trends, social media analysis, the data is analyzed using statistical frameworks, using models like autocorrelation, slope, and others. Furthermore, it includes demographics research, competitor analysis, feedback analysis, traffic analysis & popularity data.

The focus of the report is on comparing demand to supply to determine the best locations & neighborhood within Madrid, using the demand vs supply matrix & mapping. The final recommendations include key findings from the report, and its appliance to the market.

Introduction

The cyber club market in Madrid has experienced significant growth in recent years, fueled by the increasing popularity of esports, online gaming, and social gaming experiences. As demand for specialized gaming spaces continues to rise, understanding the current state of the market and identifying areas of opportunity has become essential for businesses looking to either optimize their operations or explore new market entry.

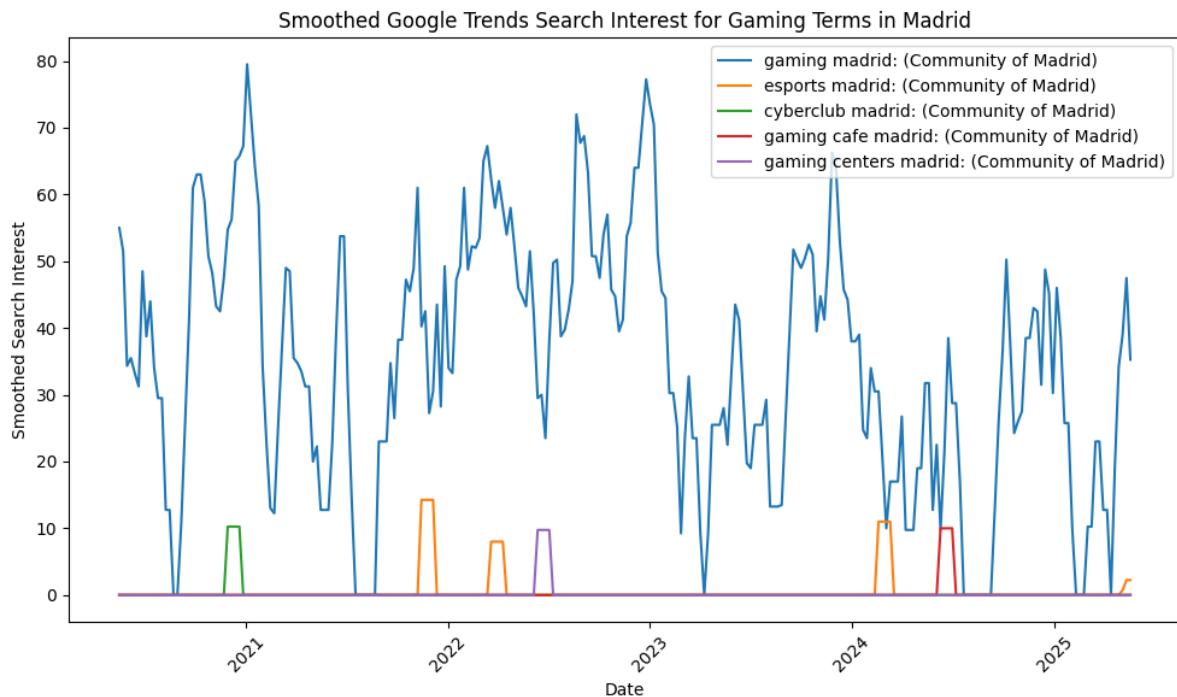
This report aims to provide an in-depth analysis of the cyber club market within Madrid, focusing on both demand and supply factors. The primary goal is to assess the existing competition, customer demand, and traffic patterns to provide actionable insights for businesses considering the opening of a new cyber club in Madrid.

By examining search trends, social media mentions, youth demographics, and competition levels, the report will help identify areas in Madrid with the highest demand but low supply, presenting the best opportunities for new entrants into the market. Additionally, it will highlight areas with potential growth, as well as offer strategic recommendations for differentiating a new cyber club from existing competitors.

Ultimately, this report serves as a decision-making tool for businesses, investors, and entrepreneurs seeking to capitalize on the growing demand for cyber clubs in Madrid while navigating the competitive market dynamics.

Data Collection: Demand Side

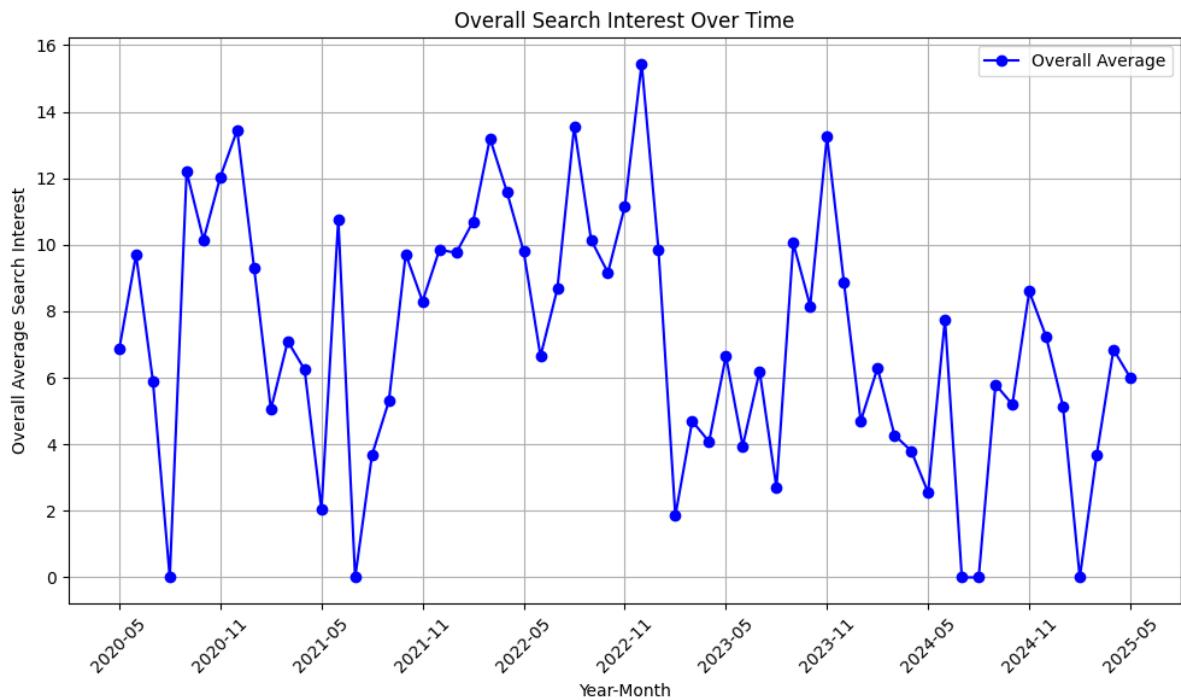
Google Trends



The graph above represents the search interest in terms like “gaming madrid”, “esports madrid”, “cyberclub madrid”, “gaming cafe madrid”, “gaming centers madrid” in google over the past 5 years. The average trend is going downwards, and the average slope is -0.002007, suggesting that on average the search interest for the indicated items is declining. However, the rate of the decline is very low, therefore, it is declining very slowly. Such factors as lockdown, during coronavirus may have influenced the search trend from 2020 to mid 2021.

Based on the declining trend in traditional cyberclubs, it's crucial to adapt to changing preferences by incorporating more modern and social gaming experiences (e.g., VR, bootcamps, esports, gaming cafes). This will help ensure that your business stays relevant and appealing to Madrid's gaming audience.

Seasonal Patterns:



The graph above represents the overall average searches for gaming in Madrid in google in the past 5 years. The y-axis represents the overall interest, ranging from 0 to 16.

There are peaks in search interest in November-December-January every year, where the overall averages were 13, 11.5, 12, 10, and 7. And lower peaks in September-October, with overall averages at 11, 7.5, 11.5, 9, and 6. Furthermore, there are severe downward trends in summer, especially July-August, except in 2022, it wasn't as dramatic. The overall averages interest in these months are 3, 2, 11, 4.5, 0.

Therefore, there are positive trends every year in the holiday season (November-December-January), downward trend during vacation season, where most people, are likely leaving the city, and the trend is coming back up after people come back from vacations, and started missing gaming.

Therefore, when opening a new cyber club in Madrid, the following factors should be considered:

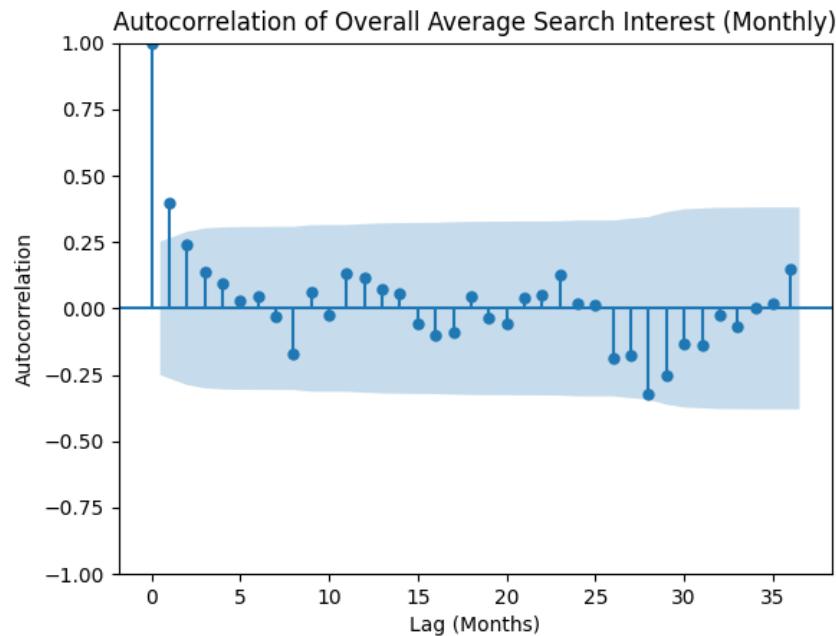
Focus on Winter: Make the most of November to January by planning major events and promotions during these months.

Prepare for Summer Decline: During the summer months, adjust your offerings to maintain engagement with lighter events and target tourists.

Post-Summer Revival: Use September and October to prepare for the winter rush by targeting students and offering re-engagement promotions.

Adapt Monthly: Constantly adapt to the data-driven insights you get from monthly trends to keep your strategy aligned with audience interest.

Patterns:



Autocorrelation is the correlation between the interest shown in gaming this month, compared to past months. The recent positive correlation (Lag 1 & 2), show that there is a positive trend, this implies that May 2025 is moderately likely to see a similar amount of interest in gaming as the previous months (April and March 2025).

Seasonality: Slightly positive correlation in Lags 12 & 36 suggest that there is an annual correlation, e. g. the pattern of interest in gaming, is likely going to be repeating itself every year. For example, search interest in May 2025 could be slightly influenced by trends from May 2024 and May 2022, indicating that certain seasonal peaks might recur each year.

The slight negative correlation in Lags 15-31 (October 2022 - February 2024) show that there was a trend, which may have reversely impacted the interest in gaming shown in May 2025. These lags suggest that, after a certain period, search interest in gaming decreased, which could have a slightly negative impact on May 2025's interest. In other words, the trends from late 2022 to early 2024 may have suppressed gaming interest, making it somewhat less likely that interest in May 2025 will continue the same upward trend. Therefore, interest might decline in the upcoming months, though this decline will be mild, given the weak nature of the negative correlations

Social Media Mentions & Forum Discussions

Key Trends and Patterns:

Looking through different social media ([Reddit/Discord](#)), looking for mentions of gaming in Madrid, there were several discussions found (Appendix 1 & 2), and the key takeaways go as follows:

Mar 2024: There's a lot of activity around Valorant Tournaments:

High Engagement: One post got 2800 upvotes and 911 comments (March 2024), which indicates significant interest in Valorant tournaments in Madrid.

Multiple Mentions: These tournaments seem to be consistently discussed, indicating a strong demand for competitive gaming and esports events.

Sentiment: Most posts are neutral, except one, which is positive and mentions a good crowd at the tournament. This suggests that people are engaged but not necessarily thrilled, unless a large crowd is involved.

Retro Gaming and Bars for Esports:

Retro Gaming: A mention of a retro gaming shop with positive sentiment indicates that there is some demand for nostalgic or vintage gaming in Madrid.

Bars for Esports: There's positive sentiment about bars in Madrid for watching esports. This implies that Madrid already has some good infrastructure for watching esports, but there might be opportunities to expand or enhance these offerings.

Looking for Gaming Spaces/Community:

Community: A post about people looking to play MTG (Magic: The Gathering) suggests that board game and card game communities are active in Madrid.

Gaming Spaces: Someone posted about playing in a hostel in Madrid, indicating that people are looking for gaming spaces or gaming-friendly venues, suggesting a gap in the market for more dedicated spaces.

Insights into Demand:

Esports Tournaments (Valorant): Based on the number of mentions and the high engagement around Valorant tournaments, there is clear demand for esports events in Madrid. The positive sentiment (1/3 of the mentions has positive sentiments, others are neutral) (Appendix 3) around a good crowd further reinforces the idea that large-scale gaming events are well-received. This is an opportunity to host esports tournaments and esports viewing parties in a gaming venue or cyberclub.

Retro Gaming and Bars for Watching Esports: The positive sentiment about retro gaming shops and esports bars suggests that there is a community interested in alternative gaming experiences (like retro games) and bars with esports infrastructure. If you're planning a venue, incorporating retro gaming sections or live esports streaming in your space could be a unique selling point.

Need for Gaming Spaces: The search for places to play Magic: The Gathering, and gaming at hostels suggests that there is a demand for more dedicated gaming spaces. People want places to meet up and game socially, indicating that opening a gaming venue could meet this demand.

Youth Demographics & Educational Institutions

Understanding the demographics is crucial to identify the target audience, and understand the patterns related to that audience. The population of Comunidad de Madrid is 6,750,336 people, where 1,514,166 of these people are 15-34 years old, e. g. 22.4% of the population is considered youth population (Appendix 4). 3,230,154 (47.9%) of the population of Comunidad de Madrid are men, and 3,520,182 (52.1%) are women. Moreover, 754,979 (49.9%) are young (15-34 years old) men, and 759187 (50.1%) are young women (Appendix 5). The population of Madrid is 83% Spanish, and the other 17% are foreigners (Appendix 6). Furthermore, approx. 29.5% of the youth (15-34 years old) population in Madrid are foreign (Appendix 7).

Universities and employment:

There are 317,577 students in Madrid universities. Furthermore, whilst there is not appropriate data for the total young professionals in Madrid, Spain has reached a record 37.7% youth unemployment rate, suggesting that a large number of the youth population does not have a job.

Based on high volume youth population, and university students, the best locations to set a new cyber club would be in districts where there are many young habitants. These include Ciudad Universitaria (Complutense University of Madrid), Cantoblanco (Autonomous University of Madrid), Chamartin, and Arguelles (Professional Hubs with a high concentration of young professionals in technology).

Data Collection (Supply Side)

Existing Cyber Clubs and Competitors:

There are approx. 252 direct/indirect competitors in the Community of Madrid, with the highest-rated, and a reliable number of reviews are Next Move Café, Vape It Aravaca, TECNICLUB, El Templo Esports Gaming Center, and Virtual Zone Madrid. They have an average rating of 3.95 (Google Maps) based on the average amount of reviews of 2392, where 39.7% are rated from 3.8 to 4.1 (Appendix 8)

According to the interactive competitors, and competitors heat maps (Appendix 9 & 10), areas like Ciudad Universitaria, Ciudad Jardín, Sol, and Goya are the most popular spots for Cyber clubs and other competitors in Madrid, whilst areas like El Viso, Retiro, Chamberí, Valdezarza, and Valdeacederas, are the least popular. These maps may illustrate that there is higher demand in blue/green areas, and that the demand might be met/market may be saturated in red areas.

Reviews & Feedback:

After conducting an analysis of 286 recent google reviews and feedback from clients of the competitors, the following was deduced:

Most Common Positive Feedback:

The clients have mentioned Friendly staff, good devices, food, good prices, atmosphere, quietness, cleanliness, and high-speed internet more often than other factors. The top-3 most common topic in positive reviews highlight friendly staff (31.9%), good devices (19.0%), and gaming atmosphere (17.2%) (Appendix 11). This highlights the main fields that Coliseum should consider, when opening a new center, to not experience competitive disadvantage.

Most Common Negative Feedback:

According to the google reviews, most competitors experience troubles in the following fields: bad prices, bad devices, dirtiness, noisiness, uneducated/rude (Bad) staff, slow internet, and lack of fresh air. The top-3 most concerning factors of this list are bad devices

(27.3%), uneducated/rude (Bad) staff (27.3%), and expensive prices for the offered quality (18.2%) (Appendix 12). Therefore, it may be deduced, that competitive advantage could be gained through offering good devices, friendly and educated staff, and lower prices.

Growth Trends in Cyberclubs:

Whilst there is scarce data about closed and opened cyberclubs in Madrid, at least 5 new cyberclubs have opened in recent years, these include Colizeum, UNTTS gaming lounge, Meltdown gaming bar, Madrid In Game, and The Games VR. Whilst at least one gaming has closed in the past years, e. g. Elite Gaming Center Atocha.

Overall, there is a positive trend, e. g. there are more cyberclubs opening in Madrid, than closing. This indicates that the market is expanding, and ready for new entrants. However, it is crucial to find unique selling points, and competitive advantages.

Traffic Analysis & Popularity Data

Google Maps “Popular Hours” Data:

The conducted analysis of the google maps “Popular Hours”, of the most popular cyberclubs in Madrid (Appendix 13), where an hour is considered peak, when the index of the amount of people is above 50 (out of a 100), and The index on the y-axis represents the amount of people visiting cyberclubs in suggested hours, suggests that the most popular hours to visit the cyberclubs in Madrid are on Fridays from 19:00 until 02:00, Saturdays from 20:00 until 02:00, and Wednesdays from 20:00 until 21:00. The least popular hours are 00:00 – 17:00 on weekdays, and the least popular days are Monday and Tuesday.

Therefore, the staff schedule should be optimized to ensure there are enough staff to cover the number of visitors during the peak hours. Furthermore, when opening a new establishment, it is useful to consider offering special offers during peak hours, when interest is the highest to attract more customers. Moreover, understanding peak hours helps to identify the target audience, e. g. late hours suggest attracting younger generations, and take advantage of the people who would look for entertainment after other venues closed.

Web Traffic (Can’t Access)

Data Analysis and Insights

Demand vs Supply Analysis:

Additional Factors (Demand Side):

Where:

This section will offer an index of demand for each neighborhood to better understand the interest. The index is out of 100.

Moncloa-Aravaca (Ciudad Universitaria): this district houses several major universities like Universidad Complutense de Madrid, and Universidad Politecnica de Madrid. These universities have a high volume of students (Over 125,000 students shared by these two universities). Furthermore, this district offers co-living, where students may share apartments, and live closer to their universities (Korotkova, 2019). This data suggests a high demand for entertainment and, potentially, cyber clubs, in this district. Index 92/100

Chamberí is a popular district among students and young professionals, offering a wide range of entertainment facilities. The Comillas University and Pontifical University of Comillas count with approximately 30,000 students. Primarily the neighborhood is filled with young families and professionals (Janicke, 2025). Index 84/100

Malasaña: Filled with several universities, offering a creative, trendy, and unique lifestyle, Malasaña attracts creative young students, artists, and professionals. The lower rent prices attract students (Janicke, 2025). Index 61/100

Salamanca: The high concentration of private schools and universities makes Salamanca a perfect district for families with children. Its proximity to business center and luxury amenities attracts high-end customers (*The best neighborhoods for students in Madrid* 2024). Whilst due to the exclusivity of the district the demand is likely to be lower than in the previously mentioned neighborhoods, the demand is still significant and should not be overlooked. Index 53/100

Retiro: Located next to the famous Retiro Park, the district offers a lot of outdoor activities, attracting students and young professionals, who look for a balanced lifestyle. Furthermore, the neighborhood offers a mix of residential opportunities (Janicke, 2025). Index 75/100

Hortaleza: The international schools and universities, and not overpriced rent continuously attracts youthful demographics. Index 50/100

Vallehermoso: A trendy neighborhood that is slowly evolving thanks to local businesses, offers a wide range of sports activities, which attracts students from other parts of Madrid. The Western part of the district is filled with small colleges attached to major universities,

and, therefore, filled with students (*Distinguished Madrid neighborhoods north of the center* 2019). Index 59/100

The Interactive Heatmap (Appendix 14) offers an insight to the suggested demand for gaming on a map of Madrid.

What:

As mentioned in the Social Media & Forum discussions section of the report, the habitants of Madrid are looking for new venues for gaming, excited over eSports bars, and alternative gaming, opening an opportunity for niche markets.

When:

The Google Trends Analysis suggest a high demand in holiday seasons in winter (November-December-January), and after-vacation period in September-October. There is much lower interest in gaming in summer, specifically in July-Summer, when people are most likely leaving the city to go to vacations.

Demand vs Supply Mapped out:

According to the demand vs supply matrix and chart (Appendix 15 & 16), which was based on the indexes deduced from the heat maps of Competitors (Appendix 10), and the heat map of demand (Appendix 14), the districts with the highest Opportunity Scores are Hortaleza (Opportunity Score of 9), Retiro (10), Chamberi (9), and Moncloa-Aravaca (7). However, the locations with a medium/high demand and low supply are to be considered outliers, as supposedly there are external factors in effect. Therefore, the main areas that should be considered are Chamberi, and Moncloa-Aravaca (Retiro may be a good district to open a new cyber club, however, more data should be collected).

The neighborhoods that have more supply than demand, are marked with an Opportunity score less than 5, and should be avoided. These include Salamanca and Malasaña, supposedly the market in these districts is saturated.

Market Saturation & Growth Potential

As mentioned above, the best district to penetrate the market are to be Chamberi, Moncloa-Aravaca, and, possibly, Retiro. When choosing the neighborhood, it is important to consider the saturation of the market, nevertheless of demand. E. g. Chamberi, with a supply score of 4 is not overwhelmingly saturated, as well as Retiro (Supply Score 2), whilst Moncloa-Aravaca is more saturated (Supply Score 7), and differentiation of the product should be considered to achieve success.

Final Recommendations & Strategy

Based on the findings in this report, Madrid is a city with moderate demand for gaming venues, and low supply of those. There is a high percentage of youth population (22.4%) in Madrid, many major universities, and therefore, many students, and young professionals, some of the districts are more filled with those, creating more demand, and some less.

Customers in the cyber clubs value friendly staff the most (31.9%), as well as good devices (19%), and gaming atmosphere (17.2%). Furthermore, they are the most concerned about uneducated/rude staff (27.3%), bad devices (27.3), and high prices (18.2%). When opening a new cyber club in this market, the factors above should be considered. The most demand for gaming in Madrid is shown on Wednesdays (Evenings), Fridays (Evenings + Nights), and Saturdays (Evenings + Nights), therefore, the staff schedules should be optimized to manage the high volume of clients at peak hours. The areas with most demand for gaming are Moncloa-Aravaca, Chanberi, Retiro, Vallehermoso, and Malasaña.

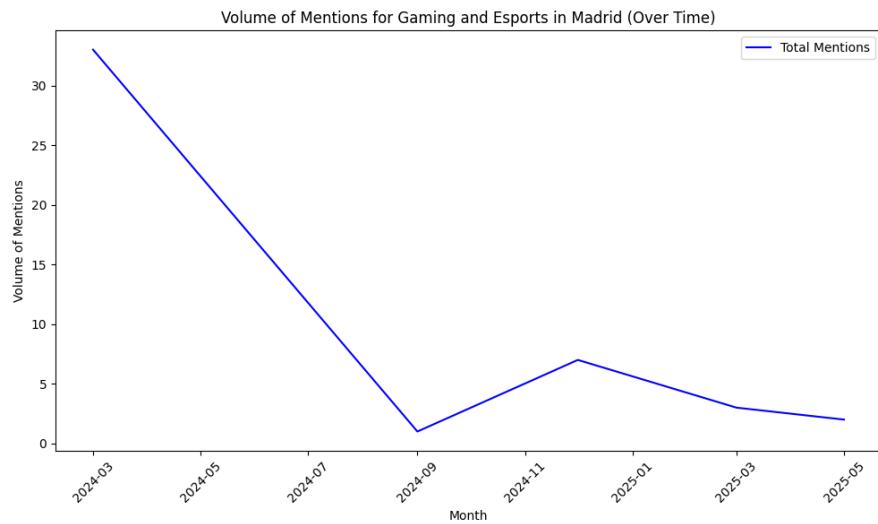
The market has several main competitors like Coliseum, Diamond, UNNTS, and El Templo ESPORTS Gaming Center. The average rating of the competitors is 3.95, with an average number of reviews of 2392. The market is saturated in districts like Malasaña, Moncloa-Aravaca, Salamanca, Vallehermoso.

Based on the demand vs supply analysis, the best neighborhoods to enter the market are Moncloa-Aravaca, Chanberi, and Retiro (More data required). When considering Moncloa-Aravaca, as the market is considered saturated, differentiation of the product should be considered. These differentiations may include, but not limit to, opening a section to watch eSports events, or offering retro-gaming experiences.

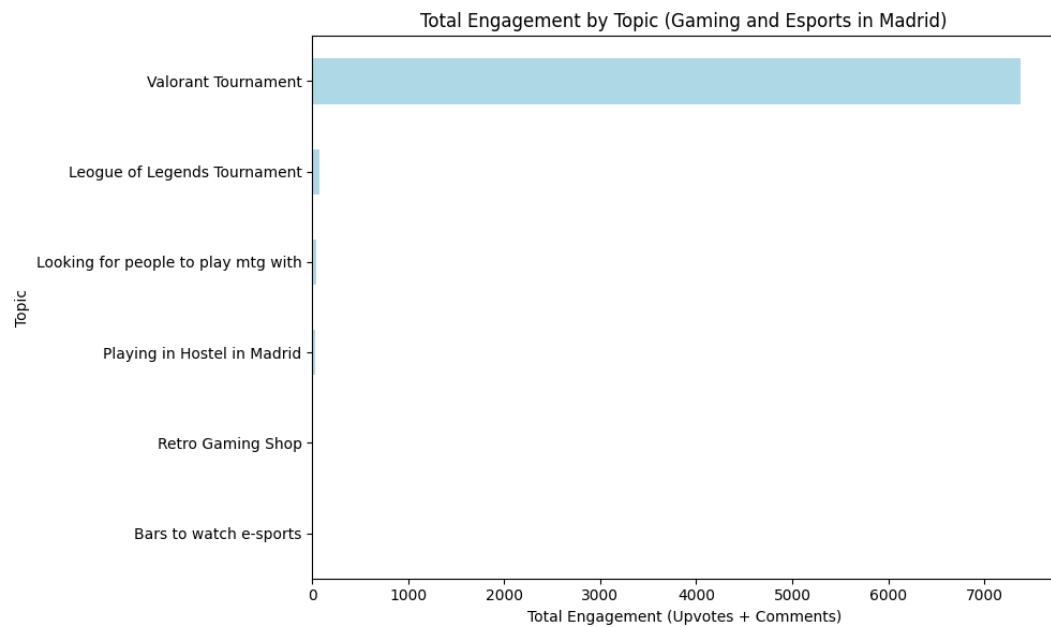
In general, Madrid is a city that offers good opportunities in the market of gaming. The market is not yet overwhelmingly saturated, and habitats show stable demand, with seasonal patterns.

Appendices:

Appendix 1: Volume of Mentions for Gaming and Esports in Madrid (Over Time)

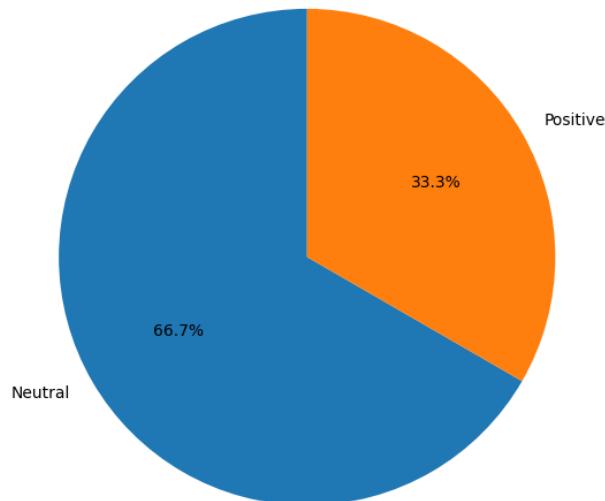


Appendix 2: Total Engagement by Topic



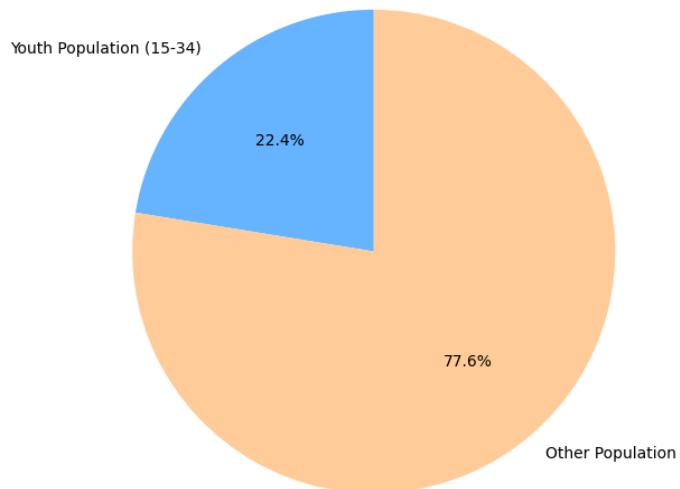
Appendix 3: Sentiment Distribution About Gaming in Madrid (Reddit)

Sentiment Distribution of Reddit Posts About Gaming in Madrid



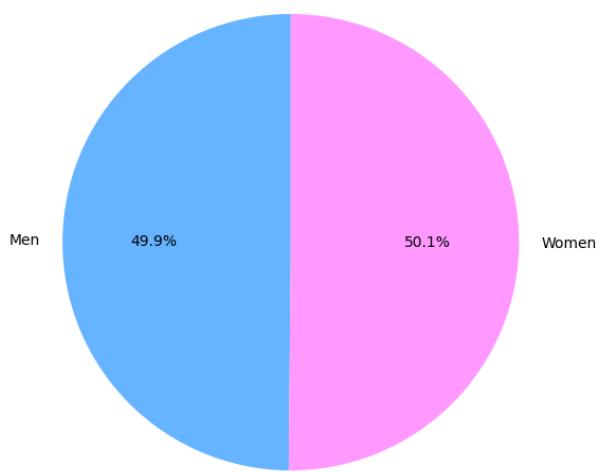
Appendix 4: Youth Population vs Total Population (Madrid)

Youth Population vs Total Population in Madrid



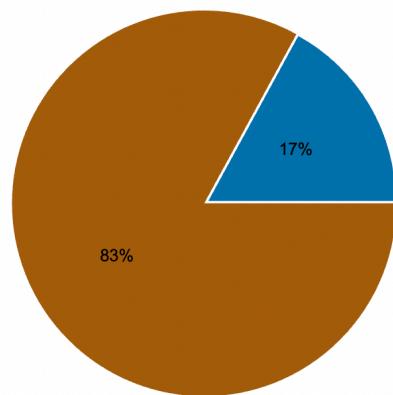
Appendix 5: Youth Population Gender Distribution (Madrid)

Youth Population Gender Distribution (15-34 years old) in Madrid

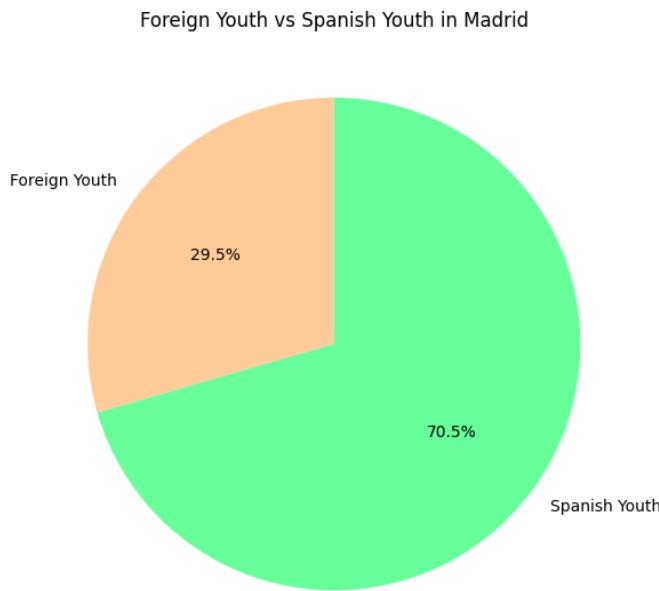


Appendix 6: Spanish vs Foreign Population (Madrid)

Continuous Population Statistics, Madrid, Comunidad de, All ages, Nationality, Total, April 1st, 2025



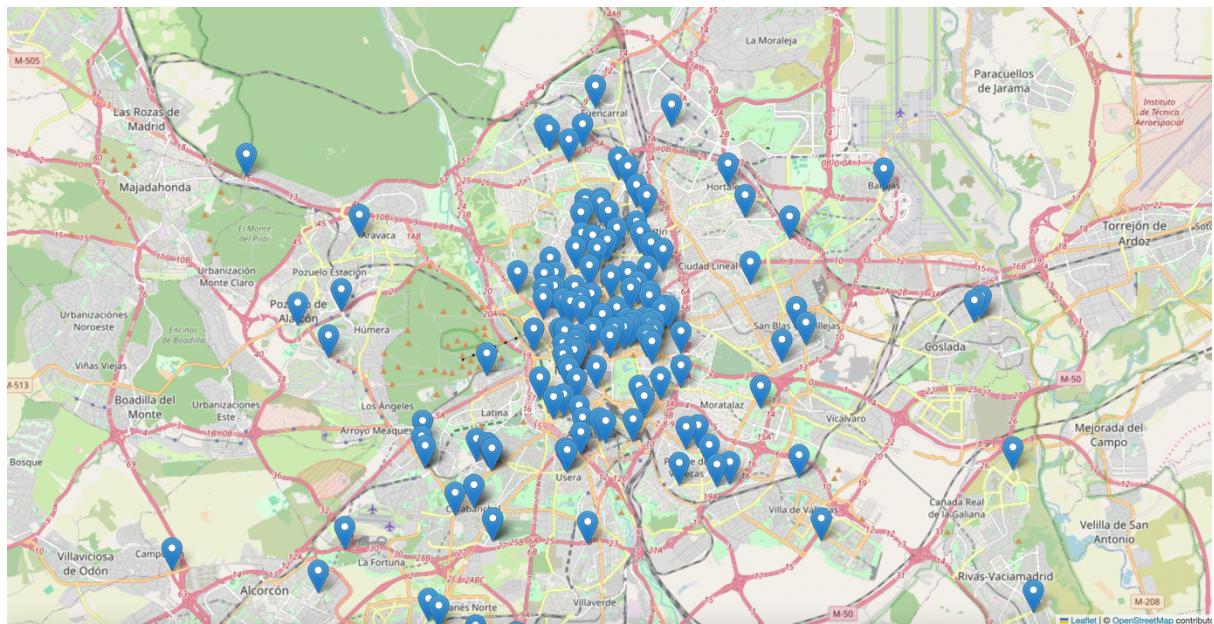
Appendix 7: Spanish Youth vs Foreign Youth (Madrid)



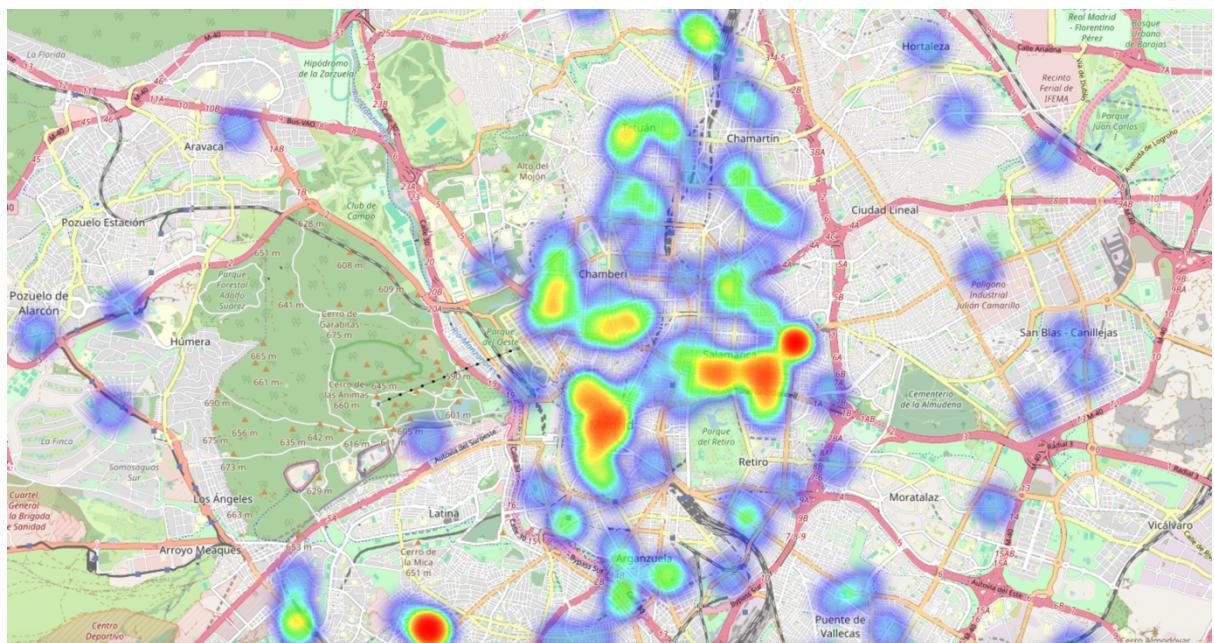
Appendix 8: Main Competitors sorted by rating, and reviews

A	B	C	D	E	F	G
City	Country	Type	Name	Address	Rating	Reviews
1 Madrid	Spain	gaming cafe	Next Move Cafe	6 Bay 23rd St, Brooklyn, NY 11214, United States	5.0	526
2 Madrid	Spain	computer club	Vape it Aravaca - Tienda de vapeo	Av. de la Osa Mayor, 103, Moncloa - Aravaca, 28023 Madrid, Spain	5.0	427
3 Madrid	Spain	computer club	TECNICLUB	C. de Andrés Mellado, 5, local 4, Chamberí, 28015 Madrid, Spain	5.0	184
4 Madrid	Spain	esports arena	Vanja	C. Alcalá, 271, 4C, Cdad. Lineal, 28027 Madrid, Spain	5.0	35
5 Madrid	Spain	esports arena	HEART AND FIT	C. Parque Bajuruelo, 9, 28924 Alcorcón, Madrid, Spain	5.0	33
6 Madrid	Spain	esports arena	Club Deportivo Tsunami	C. Francisco Salas, 22, bajo, Tetuán, 28039 Madrid, Spain	5.0	17
7 Madrid	Spain	computer club	Centro de Innovación de Despachos Profesionales	Avenida de la Albufera, 321, Planta 2 Of. 6, 28031 España, Madrid, Spain	5.0	6
8 Madrid	Spain	computer club	GOLFMANAGER S.L.	Calle Velázquez, bajo centro, Salamanca, 28006 Madrid, Spain	5.0	4
9 Madrid	Spain	computer club	BMC SOFTWARE SA	P.º Club Deportivo, 1, edificio 17, 28223 Madrid, Spain	5.0	2
10 Madrid	Spain	computer club	Whydonate Plataforma de Crowdfunding y Recaudación de Fondos Para Recaudar Dinero	Av. de Europa, 26, ATICA 5, 2º planta, 28224 Madrid, Spain	5.0	2
11 Madrid	Spain	computer club	4Real2True 🎮	Carabanchel, 28019 Madrid, Spain	5.0	1
12 Madrid	Spain	gaming cafe	The Strangers	C. de la Libertad, Centro, 28004 Madrid, Spain	5.0	1
13 Madrid	Spain	esports arena	EL DESCANSAR ARENA	CCB#1SM, 28821 Coslada, Madrid, Spain	5.0	1
14 Madrid	Spain	cyber club	El Templo Esports Gaming Center	Carrer de la Diputació, 160, l'Eixample, 08011 Barcelona, Spain	4.9	2405
15 Madrid	Spain	esports arena	Virtual Zone Madrid	Pl. de Carlos Triás Beltrán, 3, Planta 1, Tetuán, 28020 Madrid, Spain	4.9	2022
16 Madrid	Spain	gaming cafe	INTERNET CAFE - Distribuidor Oficial Simyo - Duplicado de tarjeta SIM	C. de Leganitos, 22, Centro, 28013 Madrid, Spain	4.9	971
17 Madrid	Spain	gaming cafe	Crema y Nata	Calle del Dr. Fourquet, 37, Local bajo izquierdo, Centro, 28012 Madrid, Spain	4.9	396
18 Madrid	Spain	computer club	Kingdom Wargames	12 bis, C. Arroyo de la Elipa, Cdad. Lineal, 28017 Madrid, Spain	4.9	365
19 Madrid	Spain	cyber club	KiGePuny CHECKPOINT Arsenal	Kniaziv Ostrozkykh St, 8, Kyiv, Ukraine, 02000	4.9	294
20 Madrid	Spain	cyber club	game center cyber club controller	108 Parnavaz Mepe St, Batumi 6000, Georgia	4.9	250
21 Madrid	Spain	esports arena	MVF Training	C. de Sta. Elena, 11, Cdad. Lineal, 28017 Madrid, Spain	4.9	193
22 Madrid	Spain	gaming cafe	COLIZUM Arena Gaming Center - Madrid	C. de Fernando el Católico, 84, Chamberí, 28015 Madrid, Spain	4.9	130
23 Madrid	Spain	gaming cafe	Reparalo Ya	C. de Galicia, 15, 28942 Madrid, Spain	4.9	125

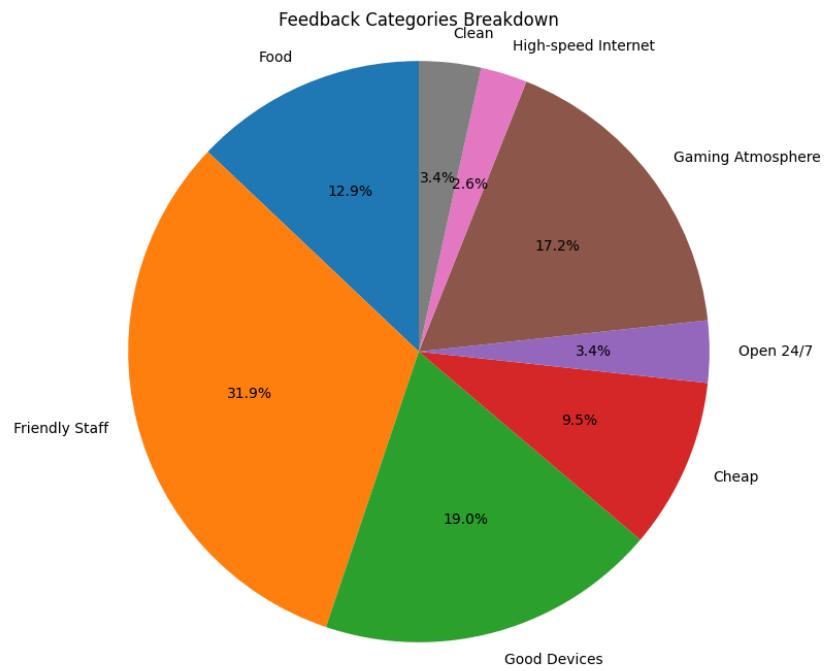
Appendix 9: Interactive Competitors Map (Look at additional files)



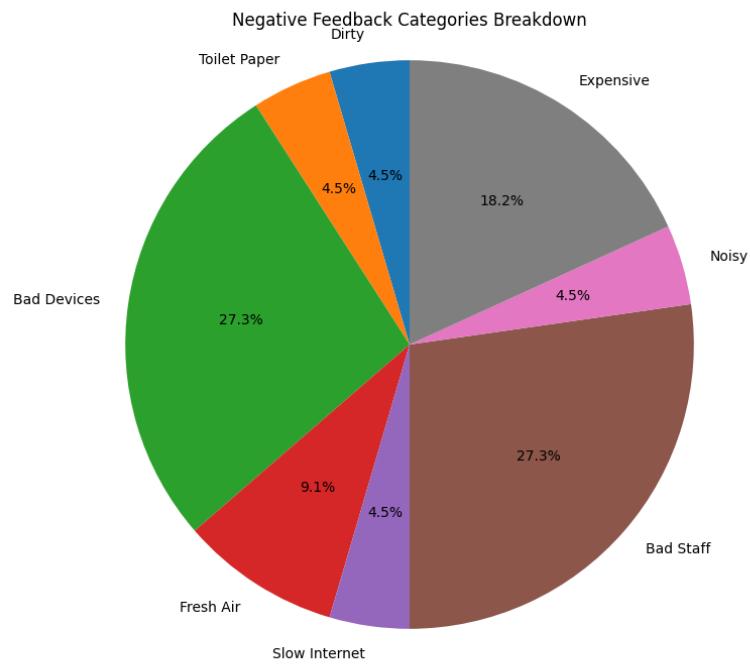
Appendix 10: Interactive Competitors Heat-Map (Look at additional files)



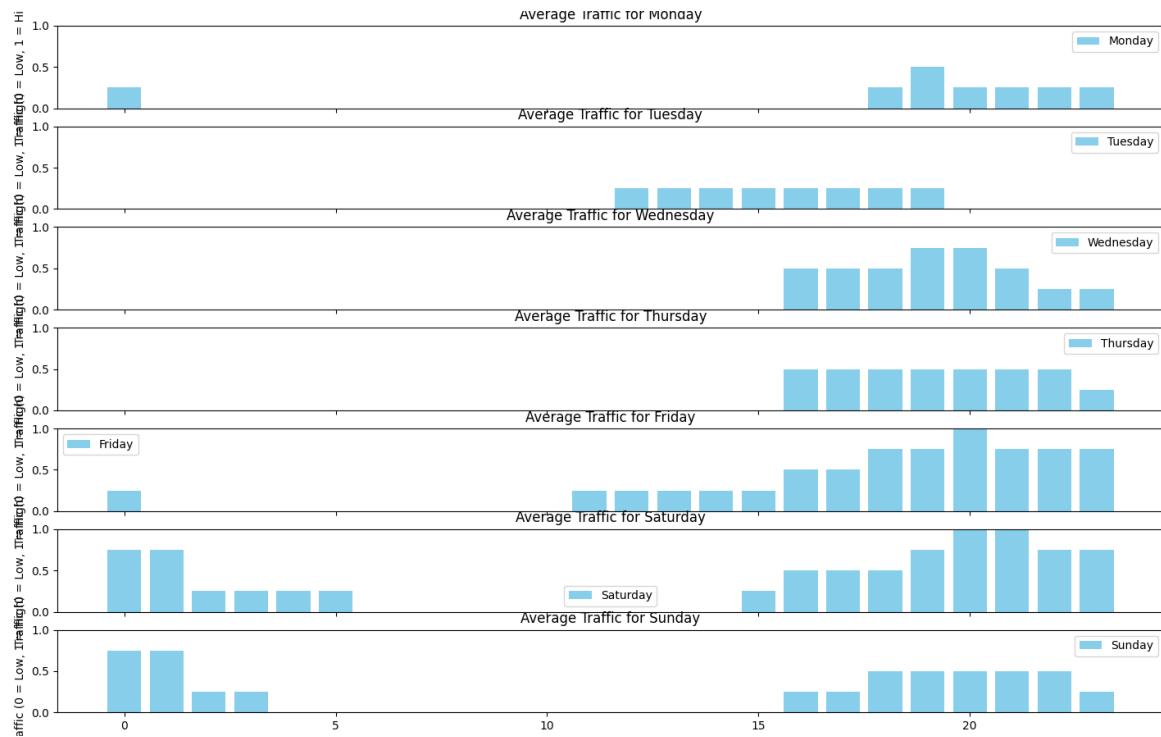
Appendix 11: Good Reviews



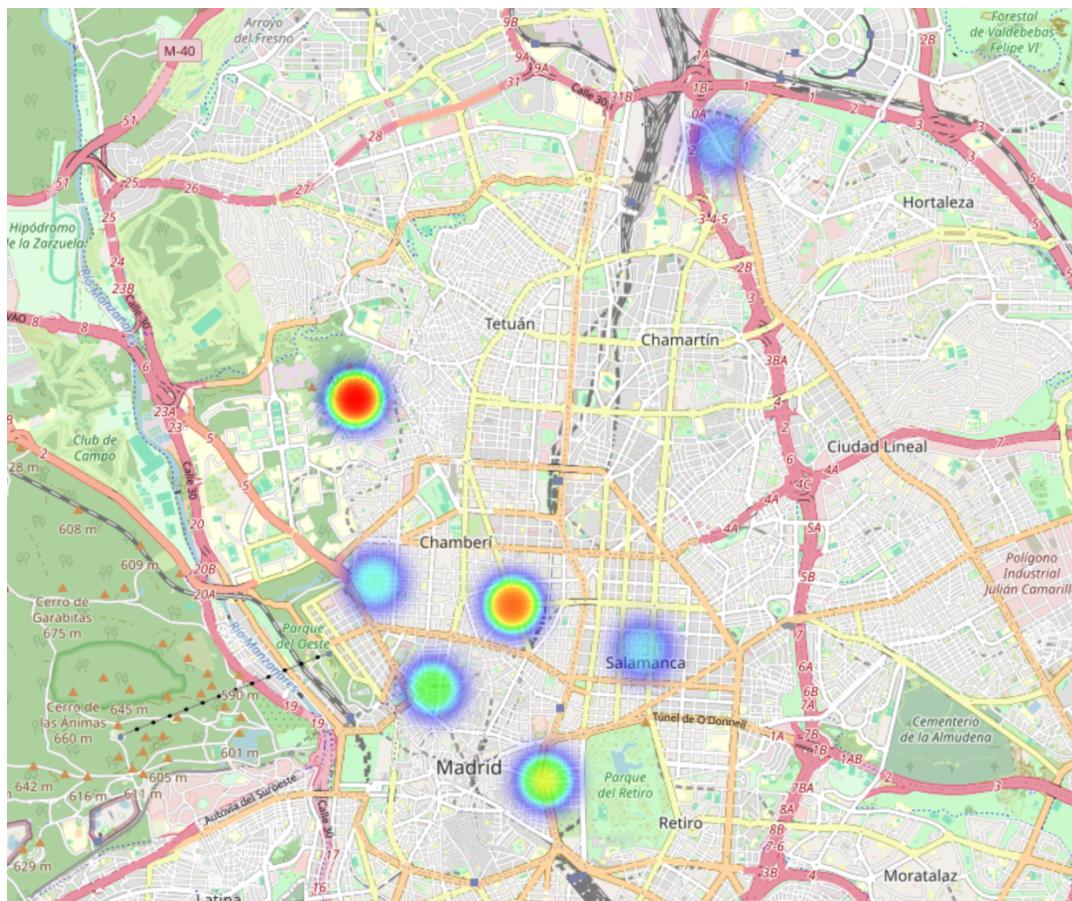
Appendix 12: Bad Reviews



Appendix 13: Peak Hours



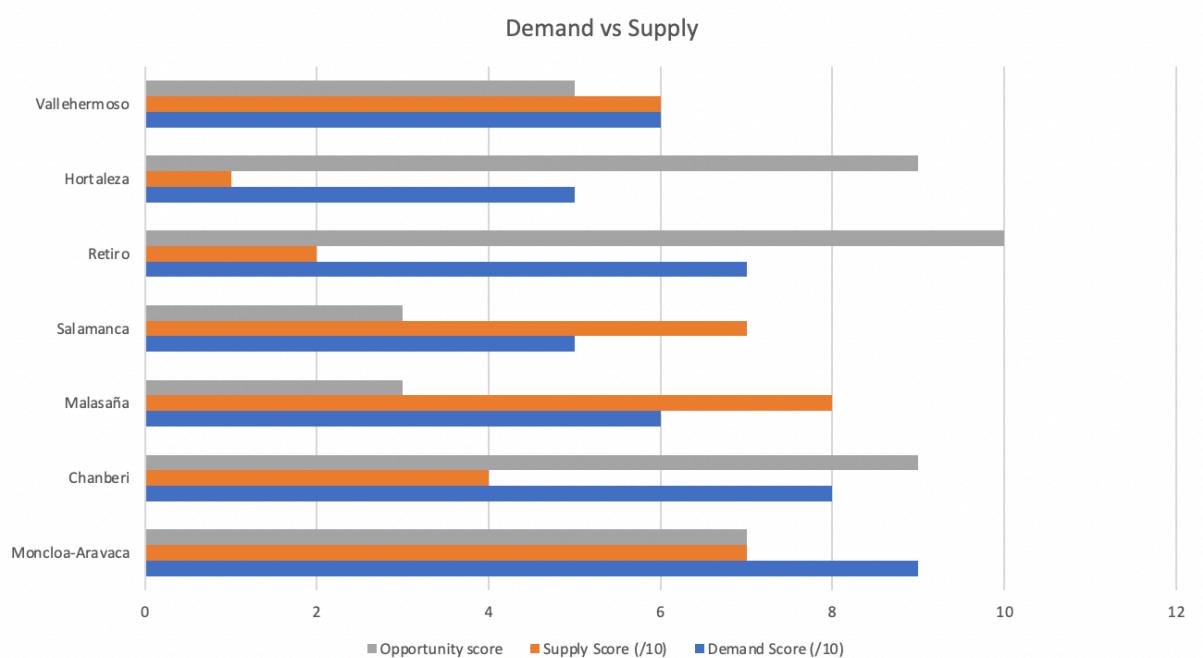
Appendix 14: Interactive Demand Heat-Map (See attached files)



Appendix 15: Demand vs Supply Matrix

Area	Demand Score (/10)	Supply Score (/10)	Opportunity score
Moncloa-Aravaca	9	7	High
Chamberí	8	4	Very High
Malasaña	6	8	Low
Salamanca	5	7	Low
Retiro	7	2	Very High
Hortaleza	5	1	High
Vallehermoso	6	6	Medium

Appendix 16: Demand vs Supply Chart



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