

South Zone

Franchise Location Market Report

47

PROPOSED LOCATIONS

5.394.128

EST. CATCHMENT POPULATION

576.085

EST. SCHOOL-AGE CHILDREN

€56.0m

MODELED ANNUAL MARKET

€63.145

AVG. HOUSEHOLD INCOME

Scope and use

This report covers the proposed CHESS KLUB locations in **South Zone**. It supports franchise territory screening, school-partnership planning, and early-stage demand sizing. Every address is a planning locality; a street site remains pending local validation and franchise award.

Data basis

Population: Destatis GV-ISys, 31 December 2025. Pupils and schools: Destatis, school year 2024/25. Household income: AK VGRdL district disposable income, 2023. School-radius counts: OpenStreetMap/Overpass.

Market-size formula Estimated school-age children × 6% paid participation × €135 monthly tuition × 12 months. Values are rounded and illustrative; they are not revenue guarantees.

Location schedule

All population, child, market, and household-income values are planning estimates derived consistently across the 175-location network.

ID	Franchise location	Planning locality	Population	Schools	School-age	Annual market	Avg. HH income	Role
S-01	Munich Schwabing	Schwabing, Munich, Germany	400.390	346	42.761	€4.2m	€77.500	Primary Hub
S-02	Munich Bogenhausen	Bogenhausen, Munich, Germany	378.940	380	40.470	€3.9m	€77.500	Spoke
S-03	Munich Sendling	Sendling, Munich, Germany	368.215	379	39.325	€3.8m	€77.500	Spoke
S-04	Munich Pasing	Pasing, Munich, Germany	357.491	360	38.179	€3.7m	€77.500	Spoke
S-05	Munich Garching	Garching bei München, Garching bei München, Germany	17.729	382	1.893	€180k	€79.400	Spoke
S-06	Munich Haar	Haar, Haar, Germany	22.934	348	2.449	€240k	€79.400	Spoke
S-07	Munich Starnberg	Starnberg, Starnberg, Germany	24.602	298	2.627	€260k	€90.400	Spoke
S-08	Stuttgart Mitte	Mitte, Stuttgart, Germany	131.755	269	14.071	€1.4m	€63.700	Hub
S-09	Stuttgart Degerloch	Degerloch, Stuttgart, Germany	124.696	266	13.317	€1.3m	€63.700	Spoke
S-10	Stuttgart Bad Cannstatt	Bad Cannstatt, Stuttgart, Germany	121.167	253	12.940	€1.3m	€63.700	Spoke
S-11	Stuttgart Vaihingen	Vaihingen, Stuttgart, Germany	117.638	253	12.564	€1.2m	€63.700	Spoke
S-12	Stuttgart Zuffenhausen	Zuffenhausen, Stuttgart, Germany	114.109	255	12.187	€1.2m	€63.700	Spoke
S-13	Nuremberg Altstadt	Altstadt, Nuremberg, Germany	185.327	190	19.793	€1.9m	€55.200	Hub
S-14	Nuremberg Erlenstegen	Erlenstegen, Nuremberg, Germany	175.398	201	18.732	€1.8m	€55.200	Spoke
S-15	Nuremberg Langwasser	Langwasser, Nuremberg, Germany	170.434	199	18.202	€1.8m	€55.200	Spoke
S-16	Karlsruhe Innenstadt-West	Innenstadt-West, Karlsruhe, Germany	107.899	161	11.523	€1.1m	€57.800	Spoke
S-17	Karlsruhe Südweststadt	Südweststadt, Karlsruhe, Germany	102.119	161	10.906	€1.1m	€57.800	Spoke
S-18	Karlsruhe Durlach	Durlach, Karlsruhe, Germany	99.229	160	10.598	€1.0m	€57.800	Spoke
S-19	Mannheim Oststadt	Oststadt, Mannheim, Germany	111.489	220	11.907	€1.2m	€54.500	Spoke
S-20	Mannheim Lindenhof	Lindenhof, Mannheim, Germany	105.517	225	11.269	€1.1m	€54.500	Spoke
S-21	Mannheim Neckarau	Neckarau, Mannheim, Germany	102.530	216	10.950	€1.1m	€54.500	Spoke
S-22	Augsburg Innenstadt	Innenstadt, Augsburg, Germany	105.296	153	11.245	€1.1m	€51.800	Spoke
S-23	Augsburg Pfersee	Pfersee, Augsburg, Germany	99.655	152	10.643	€1.0m	€51.800	Spoke
S-24	Augsburg Hochzoll	Hochzoll, Augsburg, Germany	96.835	169	10.342	€1.0m	€51.800	Spoke
S-25	Freiburg Wiehre	Wiehre, Freiburg, Germany	122.429	140	13.075	€1.3m	€55.100	Spoke
S-26	Freiburg Herdern	Herdern, Freiburg, Germany	115.870	141	12.375	€1.2m	€55.100	Spoke
S-27	Heidelberg Neuenheim	Neuenheim, Heidelberg, Germany	80.194	128	8.565	€830k	€62.500	Spoke
S-28	Heidelberg Weststadt	Weststadt, Heidelberg, Germany	75.898	134	8.106	€790k	€62.500	Spoke
S-29	Regensburg Altstadt	Altstadt, Regensburg, Germany	77.844	113	8.314	€810k	€59.600	Spoke
S-30	Regensburg Westenviertel	Westenviertel, Regensburg, Germany	73.673	115	7.868	€760k	€59.600	Spoke
S-31	Ulm Mitte	Mitte, Ulm, Germany	66.937	127	7.149	€690k	€66.900	Spoke

ID	Franchise location	Planning locality	Population	Schools	School-age	Annual market	Avg. HH income	Role
S-32	Ulm Söflingen	Söflingen, Ulm, Germany	63.351	117	6.766	€660k	€66.900	Spoke
S-33	Würzburg Altstadt	Altstadt, Würzburg, Germany	68.717	89	7.339	€710k	€59.500	Spoke
S-34	Würzburg Frauenland	Frauenland, Würzburg, Germany	65.036	96	6.946	€680k	€59.500	Spoke
S-35	Ingolstadt Mitte	Mitte, Ingolstadt, Germany	72.337	62	7.725	€750k	€58.100	Spoke
S-36	Ingolstadt Südwest	Südwest, Ingolstadt, Germany	68.462	66	7.312	€710k	€58.100	Spoke
S-37	Fürth Innenstadt	Innenstadt, Fürth, Germany	67.479	191	7.207	€700k	€65.800	Spoke
S-38	Fürth Dambach	Dambach, Fürth, Germany	63.865	146	6.821	€660k	€65.800	Spoke
S-39	Heilbronn Mitte	Mitte, Heilbronn, Germany	68.082	112	7.271	€710k	€82.500	Spoke
S-40	Heilbronn Sontheim	Sontheim, Heilbronn, Germany	64.434	116	6.881	€670k	€82.500	Spoke
S-41	Reutlingen Mitte	Mitte, Reutlingen, Germany	61.158	86	6.532	€630k	€60.900	Spoke
S-42	Reutlingen Betzingen	Betzingen, Reutlingen, Germany	57.882	116	6.182	€600k	€60.900	Spoke
S-43	Bamberg Gartenstadt	Gartenstadt, Bamberg, Germany	77.218	63	8.247	€800k	€56.300	Spoke
S-44	Bayreuth Mitte	Mitte, Bayreuth, Germany	72.919	46	7.788	€760k	€55.300	Spoke
S-45	Konstanz Petershausen	Petershausen, Konstanz, Germany	86.691	75	9.258	€900k	€60.400	Spoke
S-46	Rosenheim Süd	Süd, Rosenheim, Germany	65.808	80	7.028	€680k	€57.300	Spoke
S-47	Erlangen Röthelheimpark	Röthelheimpark, Erlangen, Germany	116.450	81	12.437	€1.2m	€61.100	Spoke

Methodology and source notes

Population

Municipality totals come from the German Federal Statistical Office (Destatis) GV-ISys file for 31 December 2025, based on Census 2022. For cities with multiple proposed protected catchments, the official municipality total is allocated across those catchments using a fixed, deterministic urban-weight profile. The allocation preserves the municipality total.

Schools and school-age children

The Destatis 2024/25 general-school report records 32,836 schools and 8,914,158 pupils. School-age children are estimated by applying the pupil share of the official 2025 population baseline. School counts use OpenStreetMap/Overpass school features within each proposed 8–10 km radius where available; missing counts use the official national pupils-per-school ratio.

Market size

The annual serviceable market is modeled as school-age children × 6% paid participation × €135 per month × 12 months. It describes demand potential for recurring chess education, not expected unit revenue. Actual conversion, pricing, taxes, travel patterns, competition, and center capacity may differ.

Average household income

The annual average household-income estimate uses the AK VGRdL 2023 disposable income per inhabitant for the applicable district, multiplied by the 2.03-person national household factor and rounded to the nearest €100. It is a regional affordability indicator, not a forecast of franchise revenue.

Address status

The report identifies neighborhood and municipality planning localities, not signed premises. Final street addresses require local property review, zoning/use approval, school and transit validation, and franchise award.

Source links

- Destatis GV-ISys municipality directory
- Destatis school statistics
- AK VGRdL district household-income statistics
- OpenStreetMap contributors / ODbL