

KC LA ROCHELLE (KEEP COOL)

2 clubs operated · PUILBOREAU, ROCHEFORT · company founded 2015-12-01

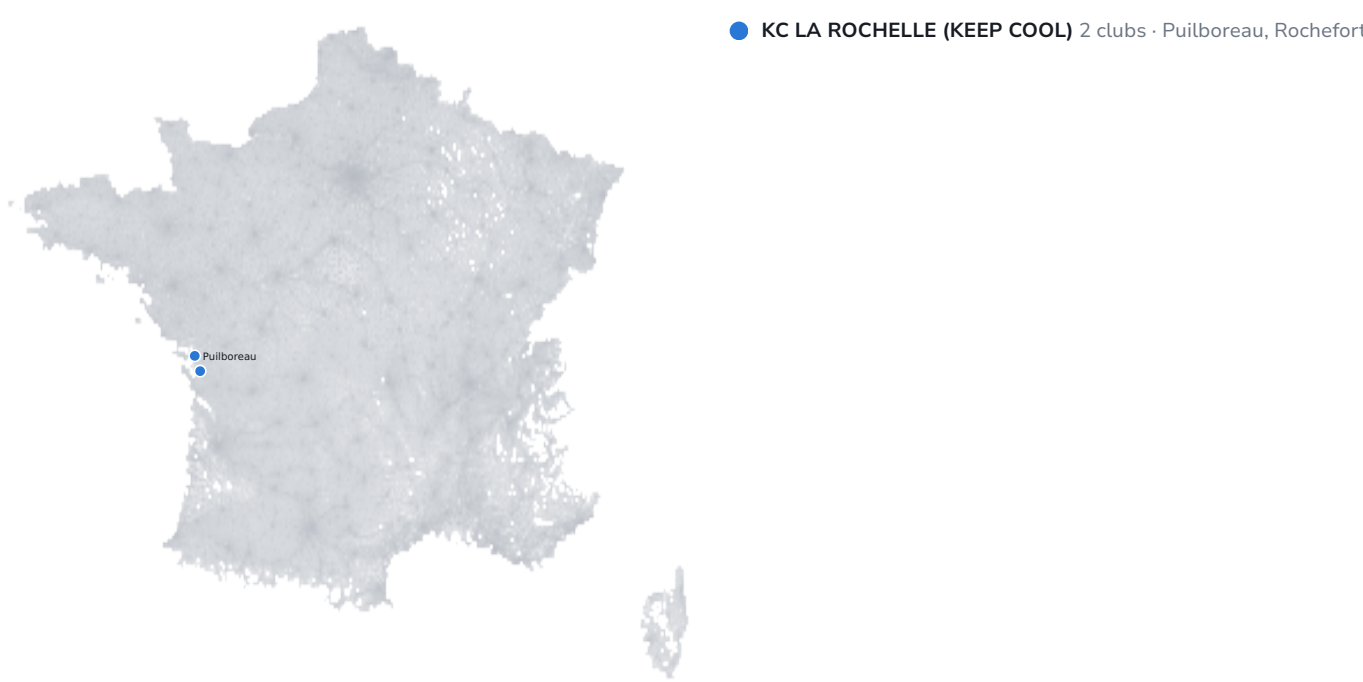
2
clubs

Puilboreau, Rochefort
opened 2015–2020

€-41,982
EBITDA 2016

**revenue €164,356 ·
net €-84,033**
equity €-14,033 · financial
debt €296,030 · cash
€29,922 · 2 risk flags

WHERE THE CLUBS ARE — 2 clubs



CLUBS OPERATED — competition and capture, at opening and today

CLUB	CITY	OPENED	COMPETITION GYMS WITHIN, OPENING → TODAY		CAPTURE PEOPLE, OPENING → TODAY	
			500 M	2 KM	500 M	2 KM
KEEP COOL	Puilboreau 17138	2015	0 → 1	1 → 5	736 → 473	6,516 → 2,659
KEEP COOL	Rochefort 17300	2020	2 → 3	3 → 4	500 → 298	5,109 → 3,152

Competition: genuine gym floors within the ring, by registry opening date. Capture: residents and workers the gravity model assigns to this floor against every competitor within 3 km, demand at its 2021 vintage.

LEGAL IDENTITY — INSEE Sirene

Legal name	KC LA ROCHELLE (KEEP COOL)
SIREN	815137492
Founded	2015-12-01
Activity	93.13Z NAF/APE code
Employees	02 Sirene band
Officers	SOPHIE GAINARD (Gérant)

FILING & CAPITAL — INPI RNE

Registered capital	€70,000
Years filed	1 of the last 1 on record — 1 complete
Debt falling due	€142,811 within a year · €140,097 in one to five · €42,741 beyond five against cash of €29,922
Confidentiality	never invoked — every filed income statement is public
Ownership changes	not tracked — officers are a snapshot at each data refresh, not a filing history; France also closed the beneficial-ownership registry to public access in July 2024

RISK FLAGS — from the accounts

▼ **negative equity** — 2016, €-14,033

▼ **high leverage** — 2016, debt €296,030 vs EBITDA €-41,982

FILED ACCOUNTS — INPI, keyed annual accounts; one filing covers all 2 clubs

YEAR	REVENUE	EBITDA	MARGIN	OPERATING	NET	EQUITY	FIN. DEBT	CASH	STAFF COST	EXT. CHARGES	FTE
2016	€164,356	€-41,982	-26%	€-77,936	€-84,033	€-14,033	€296,030	€29,922	€37,340	€167,218	—

Per club, 2016 revenue **€82,178** · EBITDA €-20,991 · net €-42,016 · staff €18,670 · external charges €83,609 arithmetic
split over 2 clubs; no club's own share is published

EBITDA derived from the filed income statement; rent sits inside external charges; "withheld" is an L.232-25 confidentiality declaration.

KEEP COOL Puilboreau

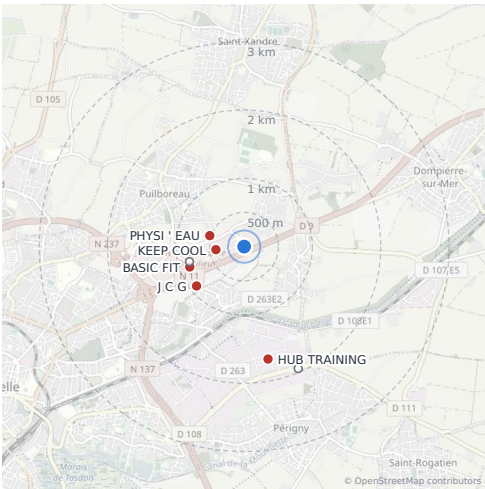
ZA DE BEAULIEU - LE TREUIL GRAS RUE DIX HUIT JUIN 17138 PUILBOREAU · opened 2015-12-01 · SIRET 81513749200014

CHANGE SINCE OPENING — 2015 → today

	AT OPENING	TODAY	CHANGE
Location score	69.8	38	-31.8
Gyms within 1 km	1	4	+3
Gyms within 2 km	1	5	+4
Competition weight, 2 km	1.40	4.80	+243%
Capture, 2 km	6,516	2,659	-59%
Saturation, 2 km vs national baseline	-17%	+314%	+331 pts

Competitor field as it stood on 2015-12-01 against today's; demand at its 2021 vintage at both dates. Red is a move against the club of five score points, two gym floors or a quarter of the measure; green the reverse.

WITHIN 3 KM TODAY



5 gym floors, 2 other sports sites. Rings at 500 m, 1, 2 and 3 km.

SCORE TODAY — seven parameters, five measured at 500 m and 2 km

PARAMETER	WHERE	MEASURED	SCORE	HOW IT WAS ARRIVED AT
Catchment weight 20%	38	500 m	1,001 people	36 168 aged 18-64 + 832 workers = 1,001 over 0.79 km2 = 1,274/km2
		2 km	14,276 people	40 6,190 aged 18-64 + 8,086 workers = 14,276 over 12.57 km2 = 1,136/km2
Competition weight 15%	54	500 m	1.00 wt	58 1 genuine gym floor and 0 other sports sites within 500 m, weighted by competition tier (price tier on direct rivals)
		2 km	4.80 wt	51 5 genuine gym floors and 2 other sports sites within 2 km, weighted by competition tier (price tier on direct rivals)
Capture weight 20%	23	500 m	473 people	24 134 residents + 339 workers, demand within 500 m against every competitor within 3 km
		2 km	2,659 people	23 1,833 residents + 826 workers, demand within 2 km against every competitor within 3 km
Saturation weight 15%	0	500 m	not measured	— catchment of 297 residents is below the 10,000 needed for a density measure to mean anything — one club would move it by 29.8 LQ
		2 km	LQ 4.14	0 5 clubs / 10,686 residents = 46.79 per 100k against 11.31 nationally
Fit weight 10%	—	unit	not measured	— no floor area recorded for this unit
Rental weight 10%	—	unit	not measured	— no rent or no floor area recorded
Income weight 10%	100	500 m	1.12×	100 24,990 EUR against 22,380 nationally, containing IRIS (no IRIS centre inside the radius)
		2 km	1.12×	100 25,015 EUR against 22,380 nationally, median of 2 IRIS within 2 km

NEAREST GYMS — 5 within 3 km; ▲ opened after 2015

0.41 ▲ KEEP COOL Keepcool 2025	0.53 PHYSI' EAU 2013
0.85 ▲ BASIC FIT Basic-Fit 2018	0.9 ▲ J C G 2018
1.68 ▲ HUB TRAINING 2024	

ACCESS — straight-line, GTFS

Rail	La Rochelle Porte Dauphine — 3984 m
Bus	P+R Beaulieu — 140 m
Footfall	La Rochelle Porte Dauphine — 3984 m, 98,919 travellers/yr SNCF
Shops	12 within 150 m INSEE BPE

KEEP COOL Rochefort

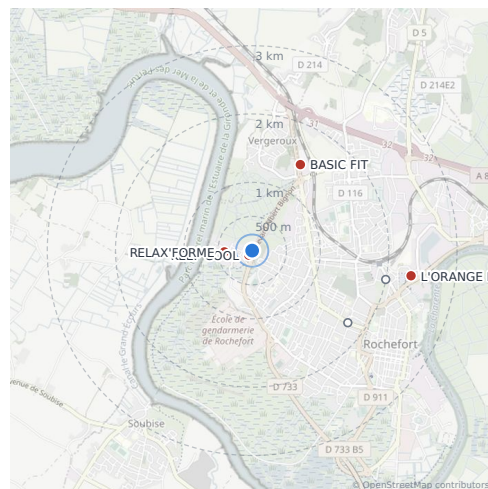
95-97 95 RUE DES PECHEURS D'ISLANDE 17300 ROCHEFORT · opened 2020-08-01 · SIRET 81513749200022

CHANGE SINCE OPENING — 2020 → today

	AT OPENING	TODAY	CHANGE
Location score	51.6	37.4	-14.2
Gyms within 1 km	2	3	+1
Gyms within 2 km	3	4	+1
Competition weight, 2 km	1.50	2.70	+80%
Capture, 2 km	5,109	3,152	-38%
Saturation, 2 km vs national baseline	+28%	+97%	+69 pts

Competitor field as it stood on 2020-08-01 against today's; demand at its 2021 vintage at both dates. Red is a move against the club of five score points, two gym floors or a quarter of the measure; green the reverse.

WITHIN 3 KM TODAY



4 gym floors, 2 other sports sites. Rings at 500 m, 1, 2 and 3 km.

SCORE TODAY — seven parameters, five measured at 500 m and 2 km

PARAMETER	WHERE	MEASURED	SCORE	HOW IT WAS ARRIVED AT
Catchment weight 20%	30 500 m	631 people	27	213 aged 18-64 + 418 workers = 631 over 0.79 km2 = 803/km2
	2 km	9,735 people	33	7,394 aged 18-64 + 2,341 workers = 9,735 over 12.57 km2 = 775/km2
Competition weight 15%	51 500 m	2.00 wt	33	2 genuine gym floors and 0 other sports sites within 500 m, weighted by substitutability and price tier
	2 km	2.70 wt	64	3 genuine gym floors and 1 other sports site within 2 km, weighted by substitutability and price tier
Capture weight 20%	22 500 m	298 people	10	166 residents + 132 workers, demand within 500 m against every competitor within 3 km
	2 km	3,152 people	30	2,707 residents + 445 workers, demand within 2 km against every competitor within 3 km
Saturation weight 15%	52 500 m	<i>not measured</i>	—	catchment of 406 residents is below the 10,000 needed for a density measure to mean anything — one club would move it by 22.4 LQ
	2 km	LQ 1.97	52	3 clubs / 13,858 residents = 21.65 per 100k against 11.01 nationally
Fit weight 10%	— unit	<i>not measured</i>	—	no floor area recorded for this unit
Rental weight 10%	— unit	<i>not measured</i>	—	no rent or no floor area recorded
Income weight 10%	40 500 m	0.90×	35	20,230 EUR against 22,380 nationally, median of 1 IRIS within 500 m
	2 km	0.93×	44	20,840 EUR against 22,380 nationally, median of 6 IRIS within 2 km

NEAREST GYMS — 4 within 3 km; ▲ opened after 2020

0.08 ▲ KEEP COOL Keepcool 2025	0.41 RELAX'FORME 2006
1.44 BASIC FIT Basic-Fit	2.35 ▲ L'ORANGE BLEUE L'Orange Bleue 2025

ACCESS — straight-line, GTFS

Rail	Rochefort — 1873 m
Bus	Pêcheurs d'Islande — 192 m
Footfall	Rochefort — 1873 m, 709,451 travellers/yr SNCF
Shops	14 within 150 m INSEE BPE

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