

Demographic Analysis

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Draft Handout

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The City of Leawood, Kansas

Underway by:



LandUseUSA
UrbanStrategies

in Collaboration with:

olsson[®]
PLANNING & DESIGN

November 10, 2025



Demographic Analysis

Draft | Charrette Handout

135th Street Corridor | Leawood, Kansas

Introduction – Work that is underway on the new City of Leawood's new Comprehensive Plan includes a Demographic Analysis, Residential Market Analysis ("housing study"), and Retail Market Analysis ("retail study"). Study results will be used to guide the future plan for the city and the 135th Street Corridor.

Handouts – The most salient conclusions from the market studies reports also have been extracted and assembled into "Handouts" to help facilitate stakeholder engagement, input, and discussion. The following narrative focuses on the Demographic Analysis and will be refined based on the results of the charrette taking place during the week of November 10, 2025.

Geographic Perspective – To support the Comprehensive Plan and process, and also as a foundation for the retail and residential market studies, a detailed Demographic Analysis has been completed with comparisons between the City of Leawood and the adjacent cities of Prairie Village, Overland Park, and Kansas City. The demographic analysis also has been completed for Johnson County and five other counties in the Greater Kansas City, MO-KS metropolitan area. Lastly, demographic profiles also have been provided for a polygon that reaches half (1/2) of a mile north and south of the 135th Street Corridor; and for trade areas based on 10, 15, and 20 minute drive-time distances.

Variables – The Demographic Analysis focuses on variables that are considered most salient to the retail and housing studies. The underlying data includes the 2010 and 2020 U.S. Decennial Census, plus the American Community Survey between through the year 2023. Results have been used to estimate the data for 2024 and 2025, and to provide forecasts through the years 2030 and 2040.

For the retail study, the Demographic Analysis focuses on the following variables: a) population; b) per capita income; c) total personal income; and d) resident expenditure potential. Supplemental economic variables also are provided, including: e) marital status; f) educational attainment; g) labor force participation and unemployment rates; h) white collar occupations; and i) daytime worker populations.

For the housing study, the Demographic Analysis focuses on the following variables: a) households and incomes by tenure (owners and renters); b) existing housing units; c) reasons for vacancies; d) existing units by building size; e) existing units by decade built; f) approved building permit activity; and g) median home values and monthly contract rents.

Interested stakeholders are encouraged to explore the entire Demographic Analysis for the results on the many variables included in the retail and housing studies. Meanwhile, the following narratives is intentionally designed to be succinct with a focus on a few of the most salient observations.

Population – The City of Leawood is a small, land-constrained city with a current population of about 34,500 residents and representing just five percent (5%) of the total population for Johnson County (629,255). Under a conservative scenario, the city's population could easily approach 36,000 by the year 2030. A more aggressive forecast (supported by the accelerated development of new housing choices) suggests that the city could approach 40,000 by 2030.

Per Capita Income – Current residents in Leawood have a per capita income of about \$118,000, which is 80% higher than the average for Johnson County (\$65,000). Based on the gains over the past two years, the city's per capita income could easily exceed \$140,000 by the year 2030.

Import and Export – Collectively, the City of Leawood's small population and high incomes generate a collective retail expenditure potential that exceeds \$2 billion in annual store sales. Many of Leawood's established brick-and-mortar retail stores are importing their transacted retail sales from shoppers who live in other cities and places. However, many of the city's established resident shoppers are exporting their expenditures to other cities and places.

Net Leakage or Export – As a result of significant export among resident expenditures, Leawood has a net retail leakage that represents about -70% of its total potential. Even so, most of the gap will tend to gravitate toward highway interchanges and established shopping destinations, rather than the 135th Street Corridor.

Households – As previously noted, Leawood is a small city with a current population of about 34,500 residents and representing just five percent (5%) of the total population for Johnson County (629,255). The city has about 2.5 persons per household, representing 13,840 total households in 2025. This compares similarly to the average of 2.5 persons per household for Johnson County.

Owners and Renters – Over 90% of Leawood's households are homeowners, and only 10% of its households are renters. The city's renter share is exceptionally low compared to the average of 30% for Johnson County. Also, renter households in the city have had modest gains since 2010. About +200 net new renters households were added between 2010 and 2015, and roughly +450 renters were added between 2015 and 2020. However, a net of about -155 renters had left the market between 2020 and 2025.

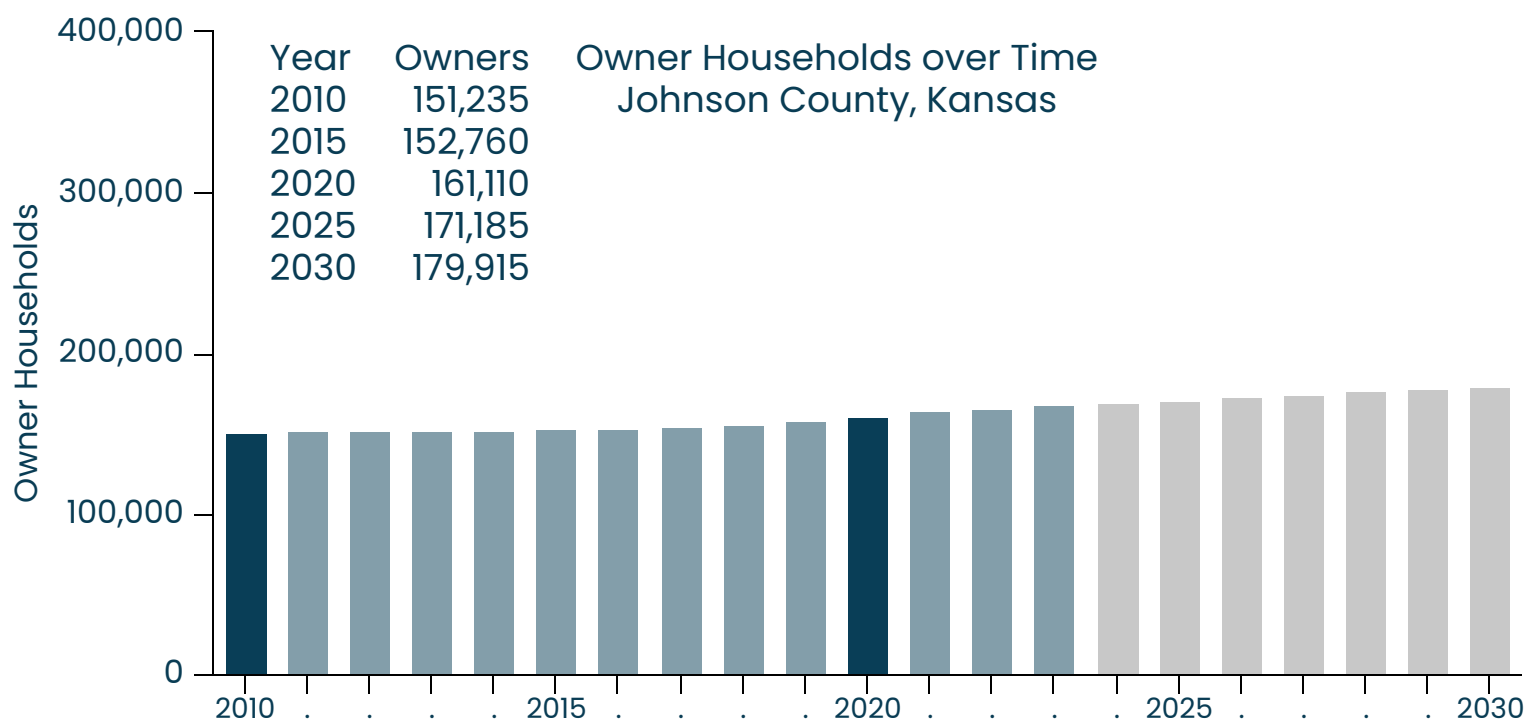
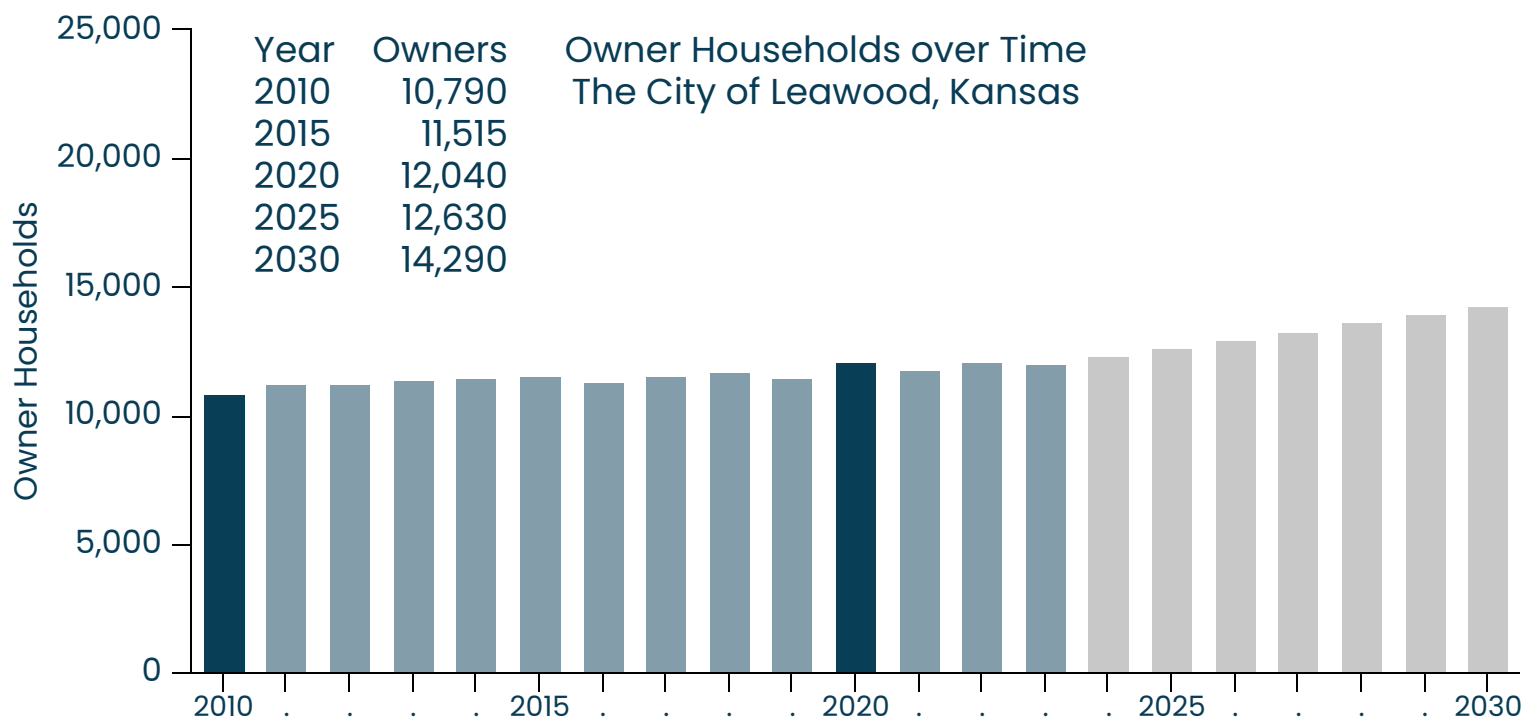
Median Household Income – Leawood currently has a median household income of about \$200,000, which is significantly higher than the average of just \$115,000 for Johnson County. The city's owner-occupied households have median household incomes of about \$230,000, which also is high compared to the median of \$140,000 for the county. The city's few renter-occupied households have median incomes of about \$95,000, which also is high compared to the average of \$70,000 for Johnson County.

Home Values and Rents – Leawood also has high median home values and high median contract rents compared to Johnson County, and those relationships are generally consistent with that of household incomes. The city currently has a median home value of about \$650,000; and it is expected to increase to about \$725,000 by the year 2030. In comparison, the county has a median home value of about \$395,000, which is forecast to reach \$470,000 by 2030. Similarly, rents also are higher in the city (\$1,825 median monthly contract, cash, or net rent) than the county (\$1,300).

The home values and rents described above include all existing units regardless of their age, condition, and format (i.e., detached houses vs. attached lofts). Therefore, the median prices among the new-builds will be considerably higher.

Existing Owner Households | Leawood City

Owner households are a basis when forecasting demand among for-sale units.

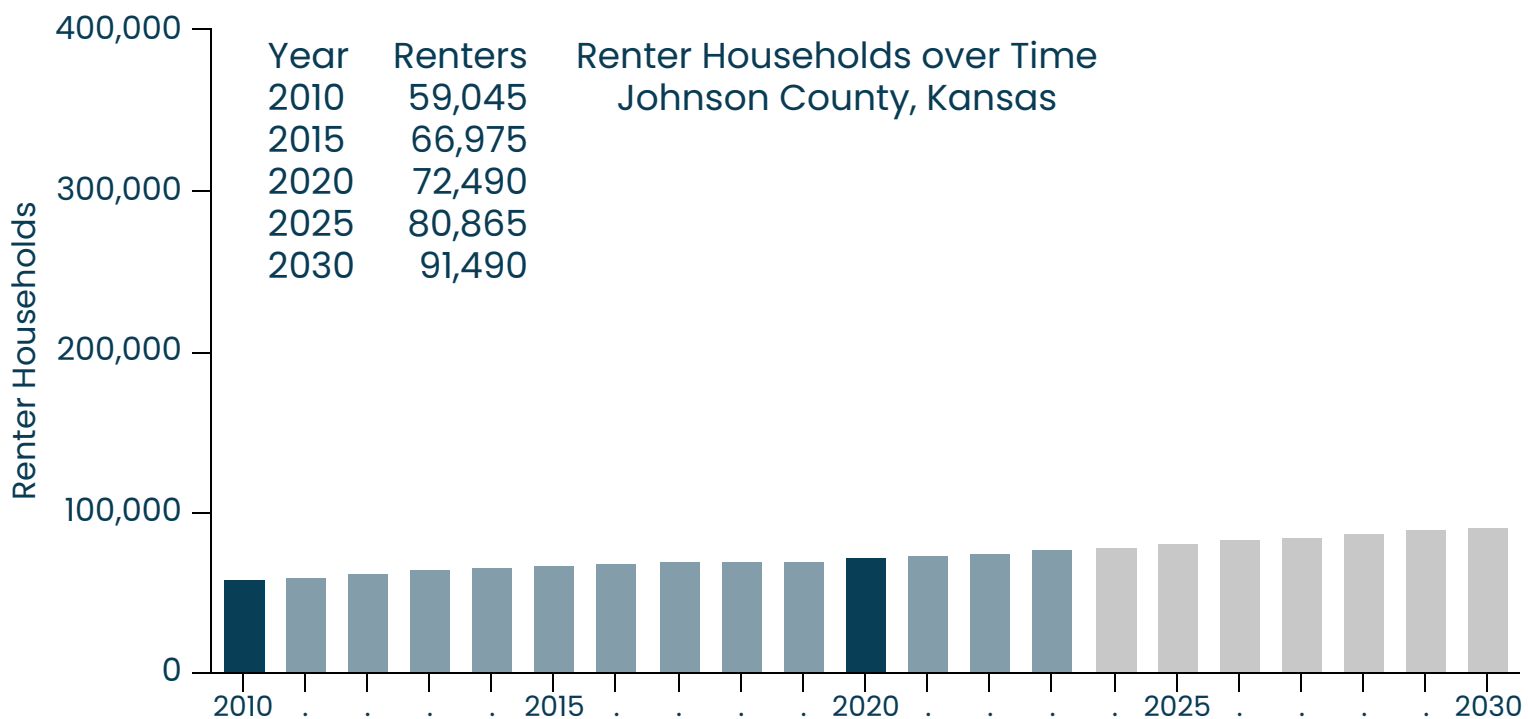
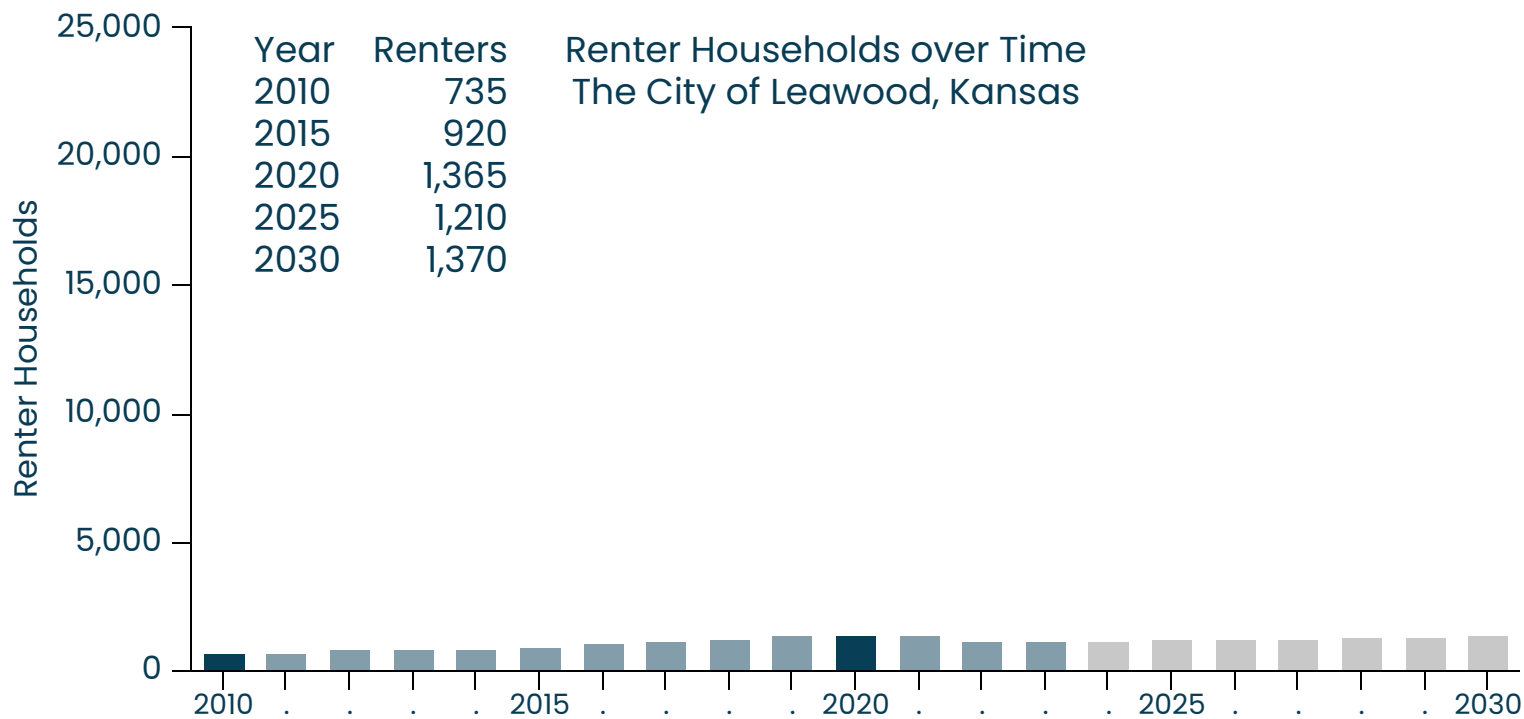


Underlying data by the Decennial Census and American Community Survey (ACS) through 2023. Analysis & exhibit prepared by LandUseUSA | Urban Strategies; 2025.



Existing Renter Households | Leawood City

Renter households are a basis when forecasting demand among for-sale units.

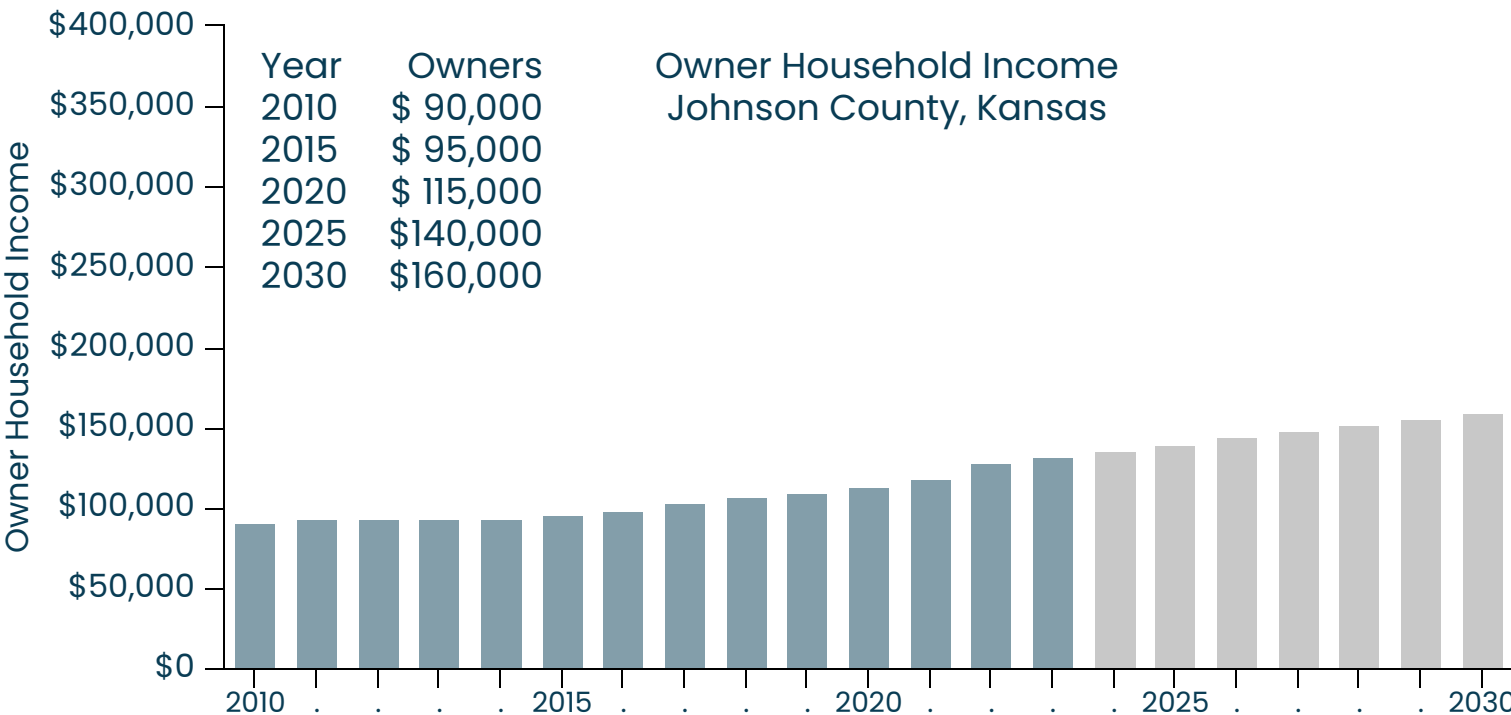
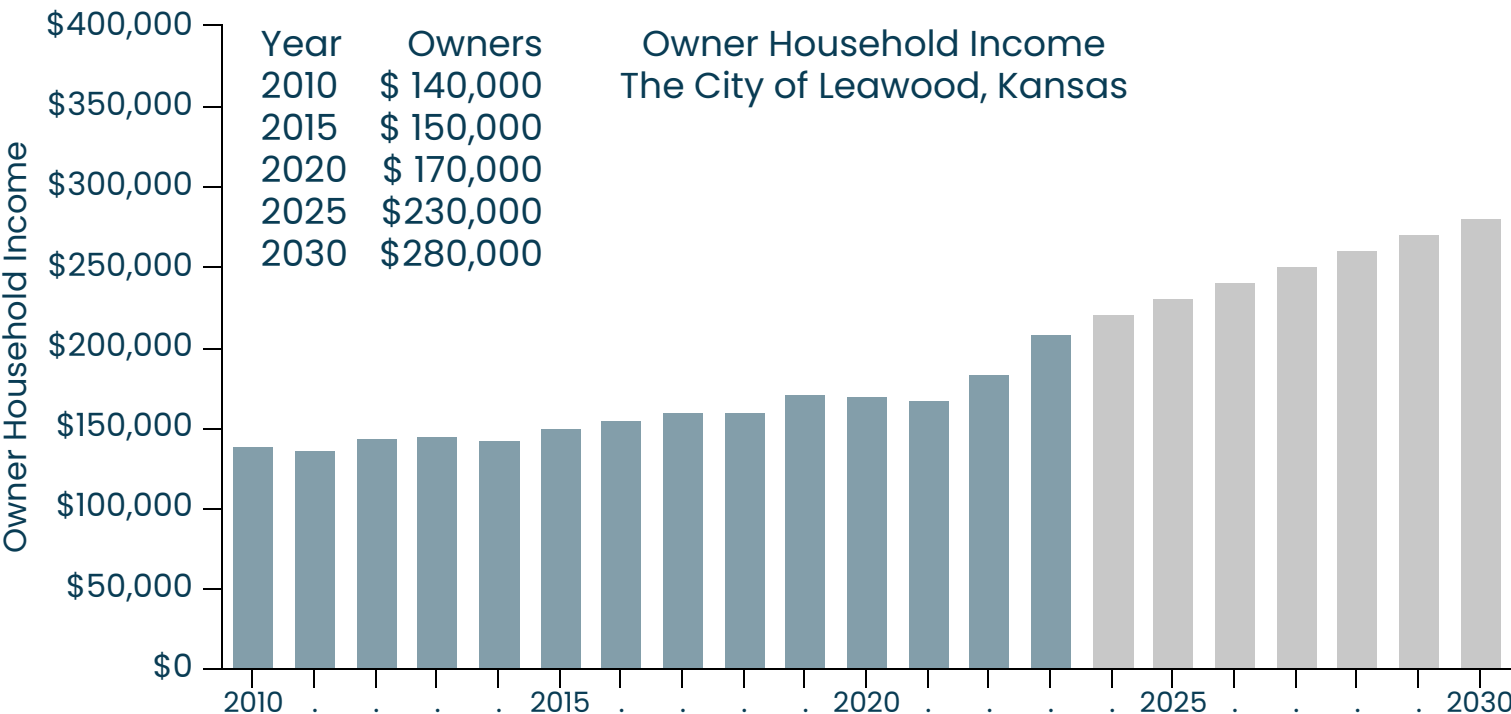


Underlying data by the Decennial Census and American Community Survey (ACS) through 2023. Analysis & exhibit prepared by LandUseUSA | Urban Strategies; 2025.



Owner Household Income | Leawood City

Owner household incomes are used to forecast price tolerances for home values.

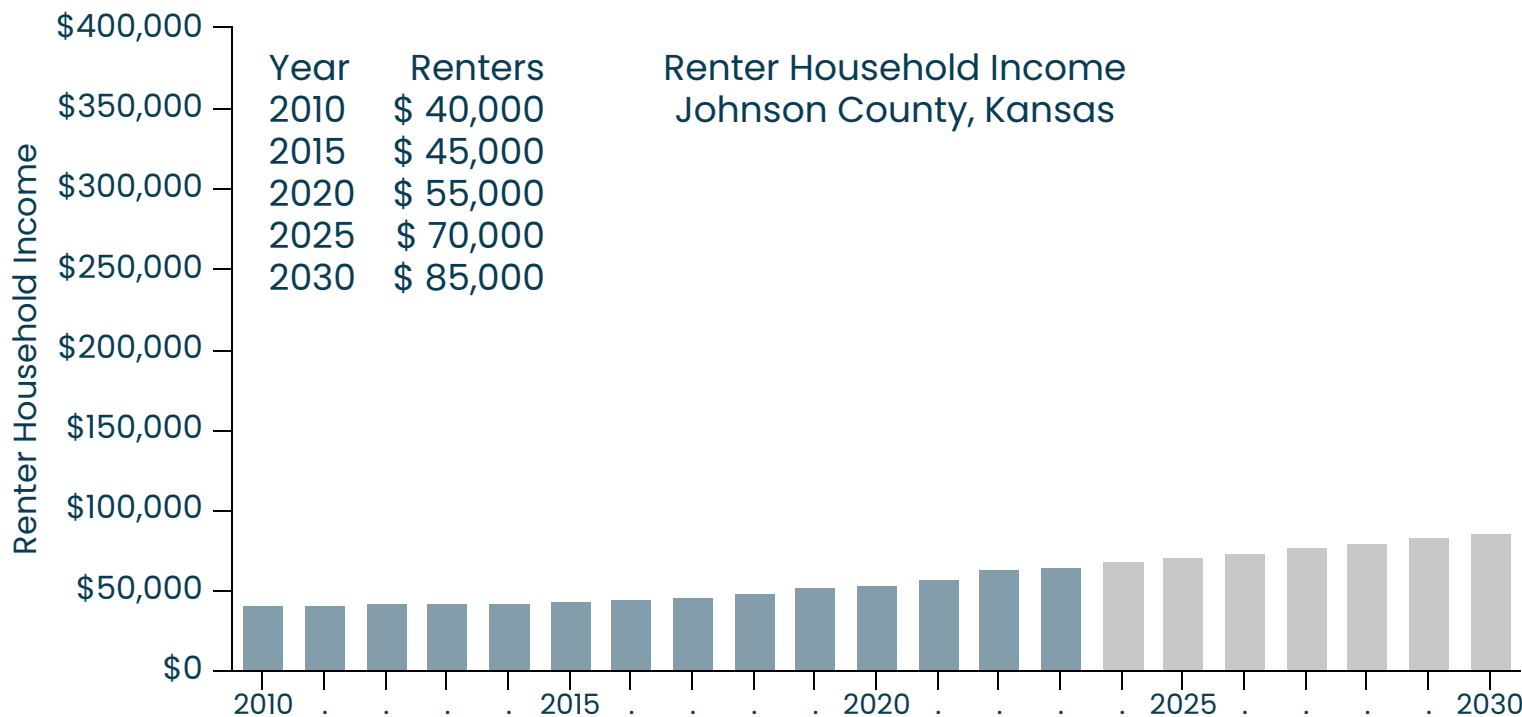
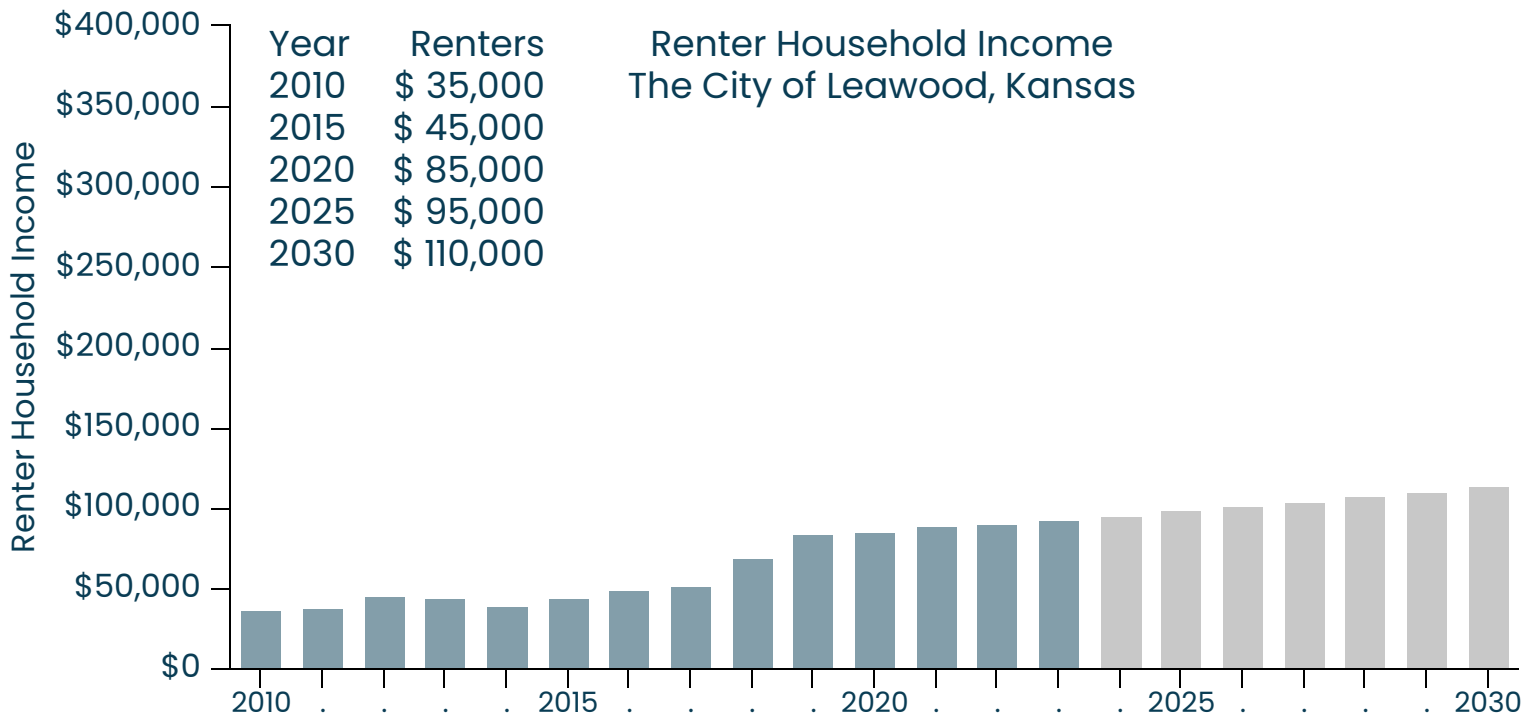


Underlying data by the Decennial Census and American Community Survey (ACS) through 2023. Analysis & exhibit prepared by LandUseUSA | Urban Strategies; 2025.



Renter Household Income | Leawood City

Owner household incomes are used to forecast price tolerances for home values.

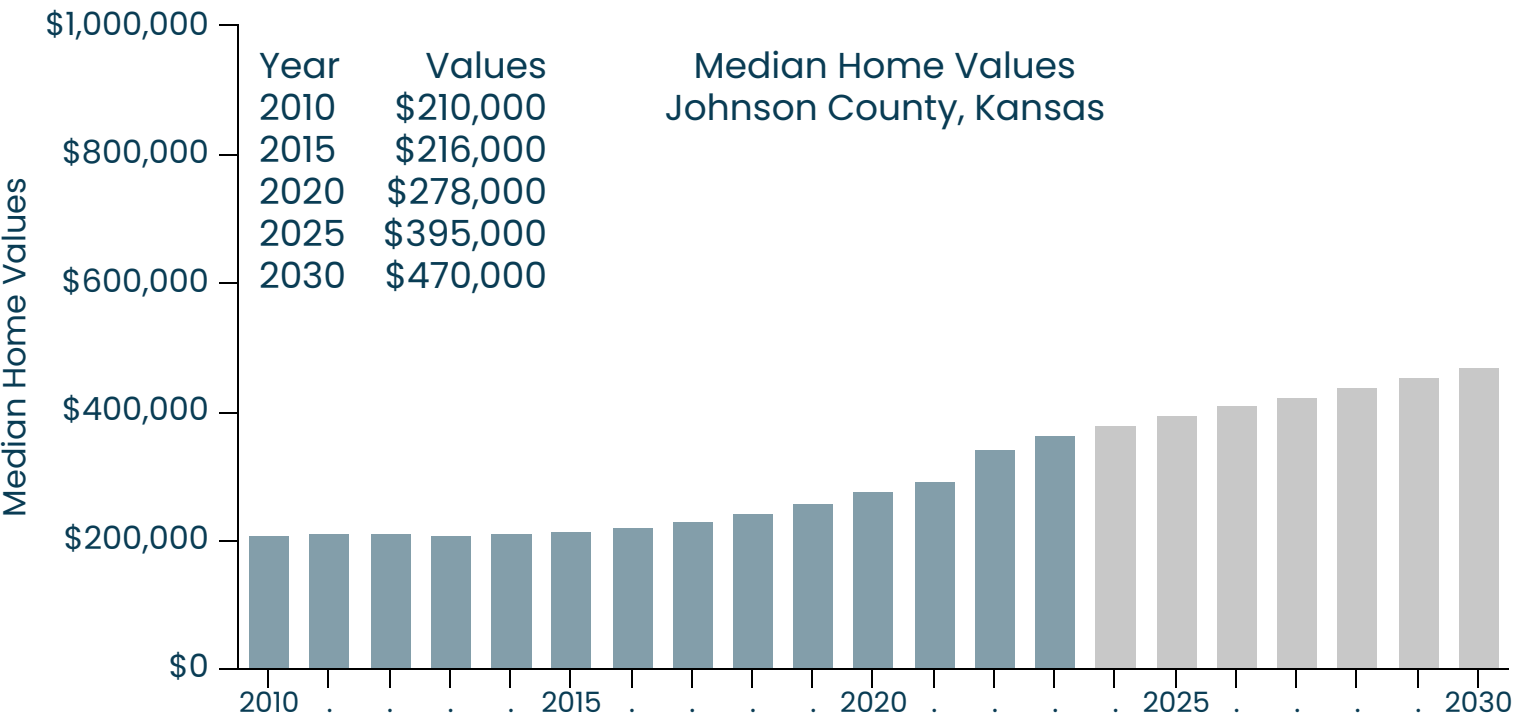
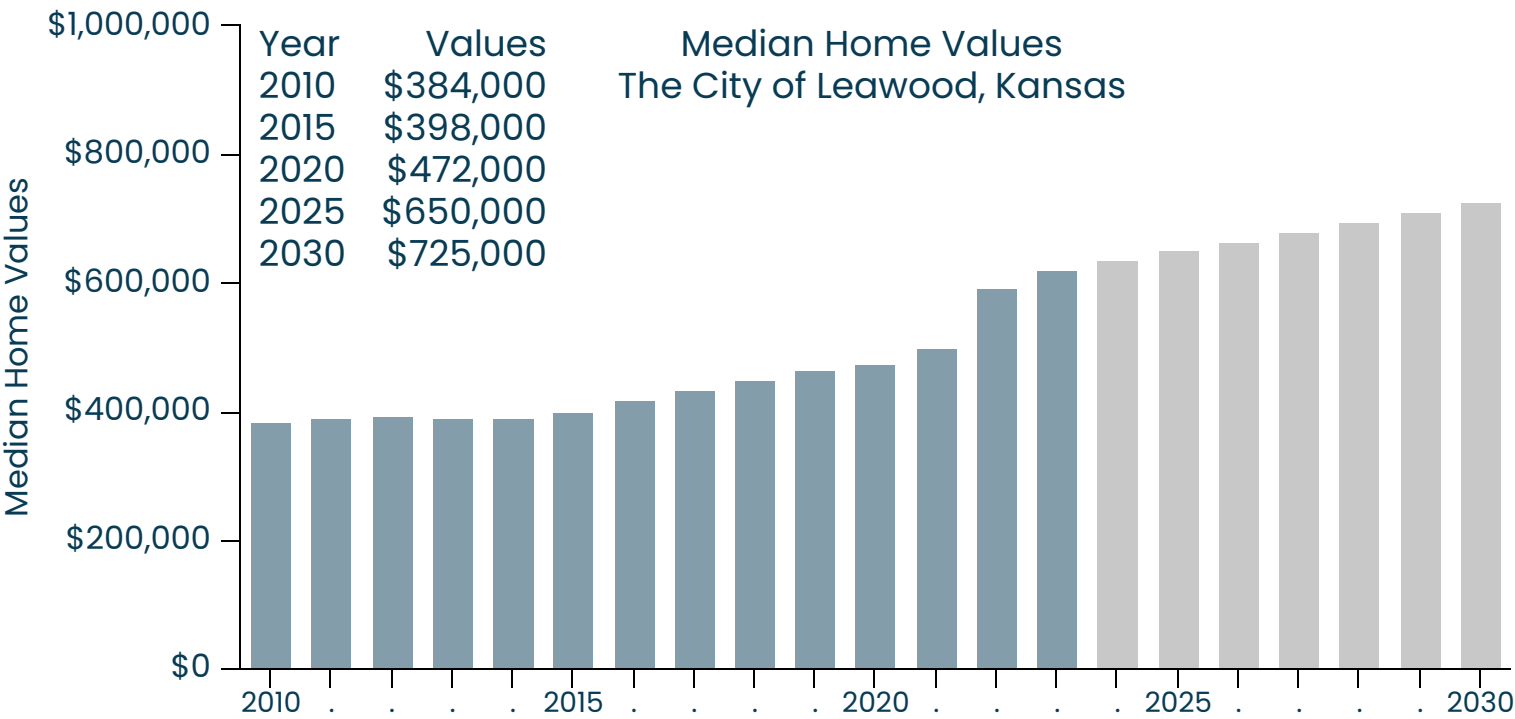


Underlying data by the Decennial Census and American Community Survey (ACS) through 2023. Analysis & exhibit prepared by LandUseUSA | Urban Strategies; 2025.



Median Home Values | Leawood City

Home values can help demonstrate quality and affordability of housing supply.

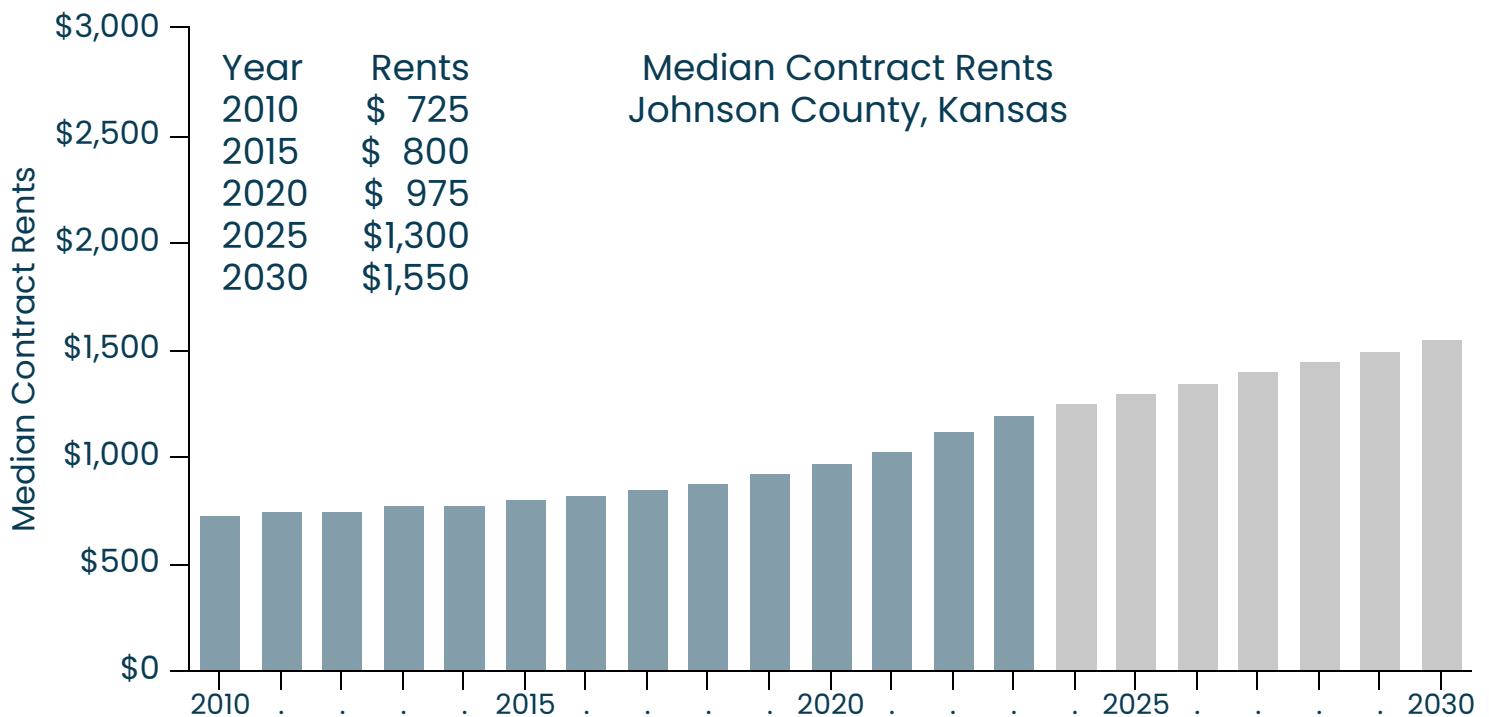
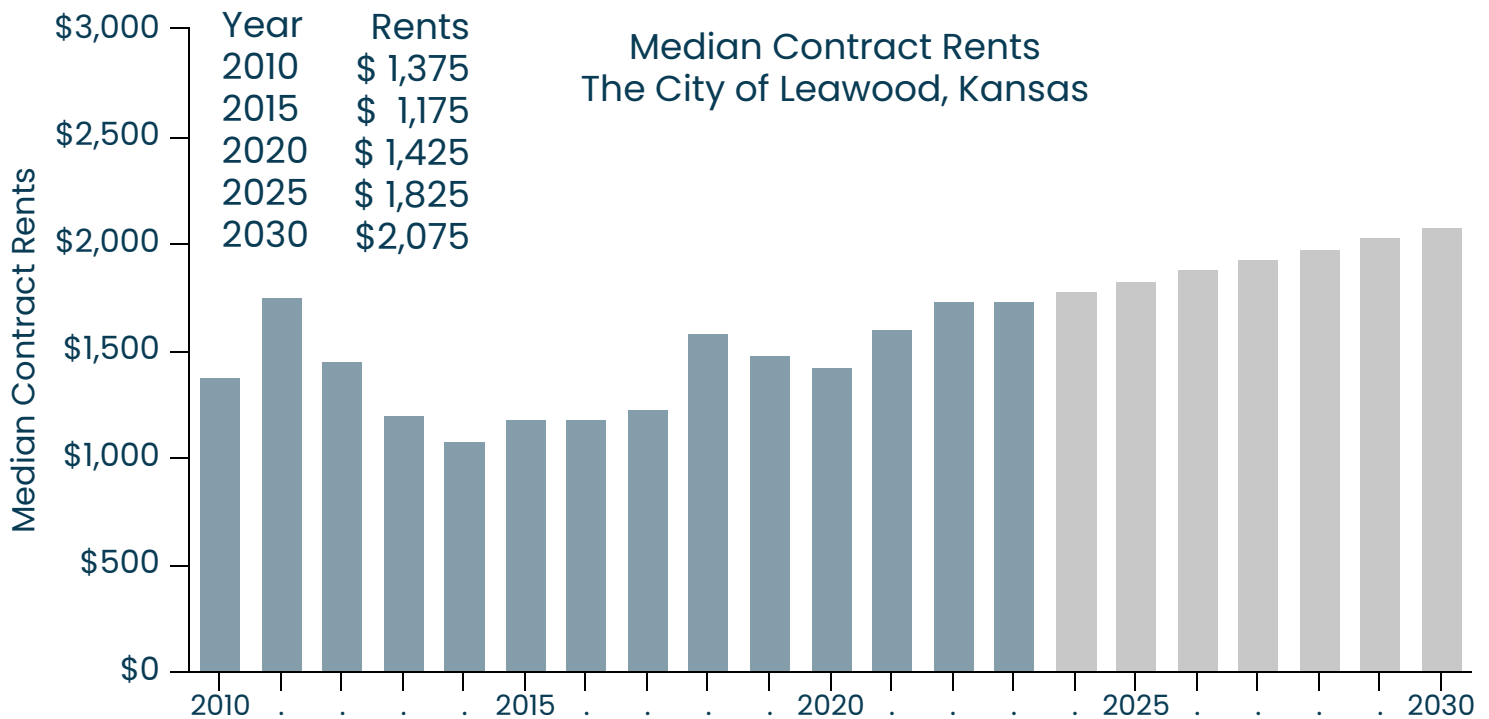


Underlying data by the Decennial Census and American Community Survey (ACS) through 2023. Analysis & exhibit prepared by LandUseUSA | Urban Strategies in collaboration with Olsson, 2025.



Monthly Contract Rents | Leawood City

Contract (cash or net) rents can help gauge the quality & affordability of supply.



Underlying data by the Decennial Census and American Community Survey (ACS) through 2023. Analysis & exhibit prepared by LandUseUSA | Urban Strategies; 2025.