

Retail Market 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



Retail Market Analysis

Draft | Charrette Handout

135th Street Corridor | Leawood, Kansas

Introduction – Work underway on the 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. 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 Retail Market Analysis and will be refined based on the results of the charrette taking place during the week of November 10, 2025.

Location Analysis – Based on the preliminary results of the retail market analysis, there is a significant market gap for retail sales in the City of Leawood. However, that gap will not necessarily translate into an opportunity for the 135th Street corridor or its prospective developers. Most prospective retailers and tenants will search for available space and parcels in the following order:

Corridor and/or intersection	Quadrant(s)
1. Along 119 th Street, proximate to Blue Valley Pkwy	NWQ, NEQ, SEQ
2. Along 135 th Street, proximate to Highway 69	Overland Park
3. Along State Line Rd, proximate to Interstate 435	SWQ
4. Along 135 th Street, proximate to Nall Ave	SEQ
5. Along 135 th Street, proximate to State Line Rd	NWQ, SWQ
6. Along 135 th Street, proximate to Roe Ave	NEQ, SEQ
7. Along 135 th Street, proximate to Mission Rd	SEQ, SWQ, NWQ

Synergistic Benefits of Clustering – Retailers will seek locations where both north-south and east-west connectors maximize advertising exposures to drive-by traffic. They will seek to leverage the synergistic benefits of clustering and locating within established retail destinations, including big-box formats, town centers, and anchors like grocery stores that generate repeat shopping activity.

The competition includes many destination stores located in Overland Park to the west and the City of Kansas City to the east. They include big-box formats (Walmart, Sam's Club, Target, Lowe's, Home Depot, Home Goods, JCPenney, Von Maurer, etc.), mid-sized chains (Ulta Beauty, World Market, REI, Scheels, Michael's, etc.), and furniture galleries (Bassett, Ethan Allen, La-Z-Boy, and Luxuria), and new car dealerships (Mercedes-Benz, Mazda, and Ford).

These types of stores tend to draw visiting shoppers from a large geographic trade area, resulting in net import for their host cities and siphoning sales away from neighboring jurisdictions. In this competitive retail environment, the City of Leawood has a net sales leakage of about -70% among all retail trade categories (based on 2022 data), with considerable expenditures flowing to Overland Park and Kansas City.

Net Import and Export – Even with significant competition in the surrounding cities, Leawood has succeeded in achieving its own net import among a few sub-categories, namely furniture (about +55%), appliances (+45%), and apparel (+35%). The city also had relatively moderate levels of net export among grocery stores (about -20%) and sporting goods stores (about -30%). These categories also are listed below.

<i>Category</i>	<i>Import/Export</i>	<i>Businesses like...</i>
Furniture Stores	+55%	Madden-McFarland, Seville, Crate & Barrel
Appliance Stores	+45%	Warner' Stellan
Apparel Stores	+35%	119 th Street Corridor
Grocery Stores	-20%	Price Chopper, Trader Joe's
Sporting Goods	-30%	Dick's Sporting Goods

Optimal Retail Format – The City of Leawood and its development and investment community should consider limiting the magnitude and location of new retail space along the 135th Street Corridor. Rather than developing retail space under speculation (i.e., without signed anchors or letters of interest from tenants) or in fragmented, free-standing locations, it should be knit together into a few small and walkable “neighborhood town centers”.

The ideal new retail projects would be designed in ways that enable small tenants to leverage the synergistic benefits of clustering and optimize their visibility to drive-by traffic. They also would provide enjoyable places for local residents and shoppers to see, be seen, and feel socially connected. This can be achieved with a new branch of the public library, a town square, public plaza, indoor-outdoor event venue, restaurants and eateries, and complementary types of small businesses.

135th Street Corridor – Based on results of the retail supply-demand analysis, there is a near-term gap and market opportunity for up to (i.e., no more than) 100,000 square feet of additional retail and complementary types of commercial space along Leawood's 135th Street Corridor. This includes non-retail anchors like one or more event venues and a public library. It also includes personal care services (like salons, chiropractors, etc.); home support services (like security, cleaning, home improvement, and maintenance); and business support services (like media, marketing, advertising, and property maintenance).

Event Planning Industry – The ideal niche retail sector is in the event planning industry, with retailers, merchants, small businesses, and services in supporting types of categories. Examples include a party planning store, florist with gift shop, photography, fine art and gifts, a party planner or consultant, men's sportswear, dance studio, and a toy store like GameStop. These opportunities would be strengthened by one or more event venues, including an outdoor area with a multi-purpose stage similar to an outdoor gazebo, multi-purpose chapel, or community amphitheater.

Other Niche Retail Categories – There also is an opportunity for a neighborhood hardware store like Ace, which could serve as a small-to-mid-sized anchor. Complementary tenants can include independently-owned pet, book, and bicycle shops. There also is an opportunity for at least three unique restaurants offering BBQ, Middle Eastern, and Italian cuisines, which are under-represented in the local market.

Chain Store Opportunities – A small number of chain stores have been identified for other locations within the City of Leawood and inclined to seek alternatives to the 135th Street Corridor. They currently are under-represented in the local market and region; they have store expansion strategies underway in the Midwest and Upper Midwestern states. More specifically, they include At Home, Ross Dress for Less, Sierra Sporting Goods by TJX Co, Hibbett Sporting Goods, and Birkenstock Shoes.

Shopper Preferences – The Retail Market Analysis includes fifteen (15) pages of histograms demonstrating the shopping preferences of target markets (lifestyle clusters) most inclined to migrate into the City of Leawood. Those shopping preferences are based on national averages, and include the following, with the top of the list being the category most likely to be visited:

Conventional Retail Categories

1. Grocery Stores, Food Markets
2. Pharmacies, Drug Stores
3. Hardware Stores
4. Convenience Stores
5. Game and Toy Stores
6. Electronics Stores
7. Sporting Goods Stores
8. Novelty, Art, Antique Stores
9. Home Furnishings, Décor Stores

Arts, Entertainment, Recreation

1. Walking, Jogging, Bicycling, Climbing
2. Theaters and Cinemas
3. Restaurants and Eateries
4. Performing Arts Centers
5. Fitness Centers and YMCA's
6. Golf Courses and Country Clubs

In general, nearly everyone shops at grocery stores, food markets, and pharmacies; whereas fewer shoppers will gravitate toward novelty, art, and décor stores. About half of the population will participate in outdoor recreation like walking, jogging, bicycling; and fewer of us will attend a performing arts event or take in a game of golf.

Commercial Space Recommendations 135th Street Corridor | Leawood, KS

135th Street Corridor	Sq. Ft.	135th Street Corridor	Sq. Ft.
Party Planning Store	3,000	Unique Pet Supply Shop	1,000
Florist with Gift Shop	1,500	Public Library Branch	20,000
Photographer	1,000	Book Store	2,000
Fine Art, Gift Shops	2,000	Bicycle Shop	1,500
Party Planner	1,000		
Men's Sportswear	2,000	BBQ Restaurant	2,500
Toy store like GameStop	1,500	Middle Eastern Cuisine	2,500
Botanical Garden	.	Italian Restaurant	2,500
Event Venues	12,000		
Dance Studio	3,000	Personal Care Services	10,000
		Home Support Services	10,000
Nbh'd Hardware like Ace	9,000	Business Support Svcs	<u>10,000</u>
Int'l Grocery & Market	2,000		
		GRAND TOTAL	100,000

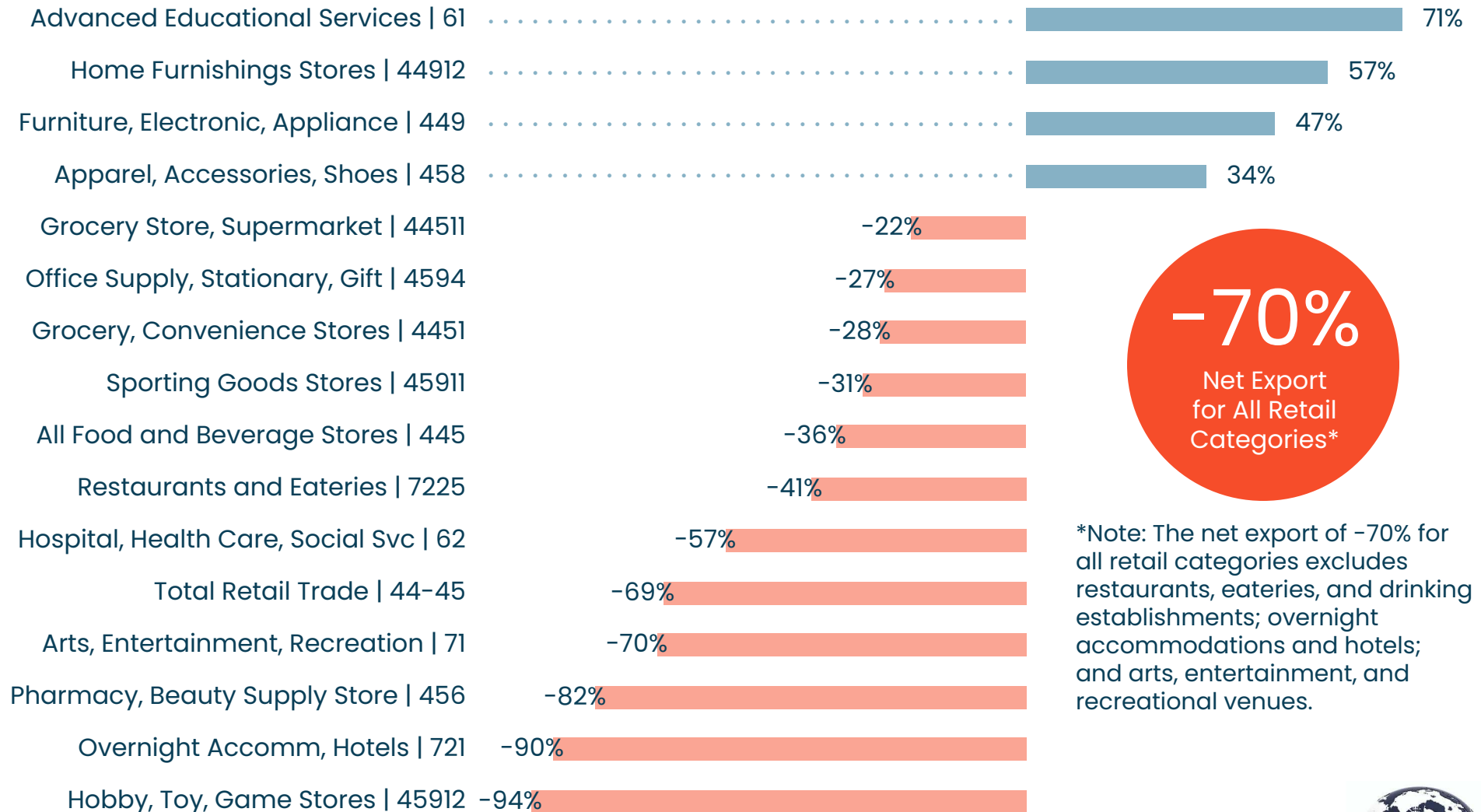
National Chains Adding New Locations For Consideration by the City of Leawood

The City of Leawood	Like...	Sq. Ft.
Home Furnishings	At Home	100,000
Apparel	Ross Dress for Less	20,000
Sporting Goods	Sierra by TJX Co	20,000
Sporting Goods	Hibbett	5,500
Shoe Stores	Birkenstock	1,500

Source: Highly preliminary recommendations provided by
LandUseUSA | Urban Strategies in collaboration with Olsson, 2025.

Net Import-Export for Retail Trade | City of Leawood

Based on actual 2022 transacted sales compared to the expenditure potential of local residents.



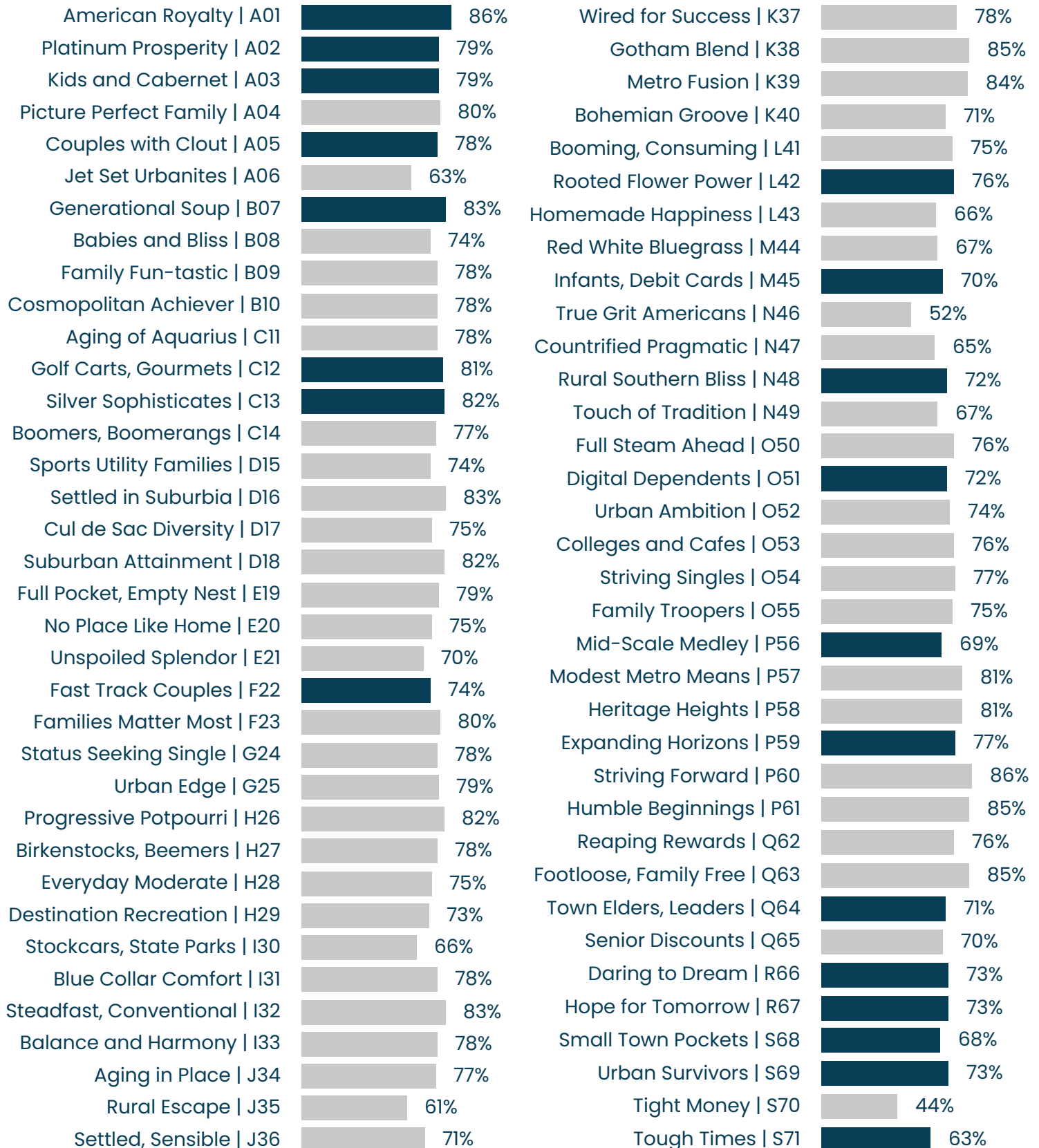
Underlying data provided by the 2022 U.S. Economic Census, 2020 Decennial Census, and 2023 American Community Survey. Analysis, interpolations, and exhibit prepared by LandUseUSA | Urban Strategies in collaboration with Olsson; 2025.



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KS-MO Mosaic | Pharmacies, Drug

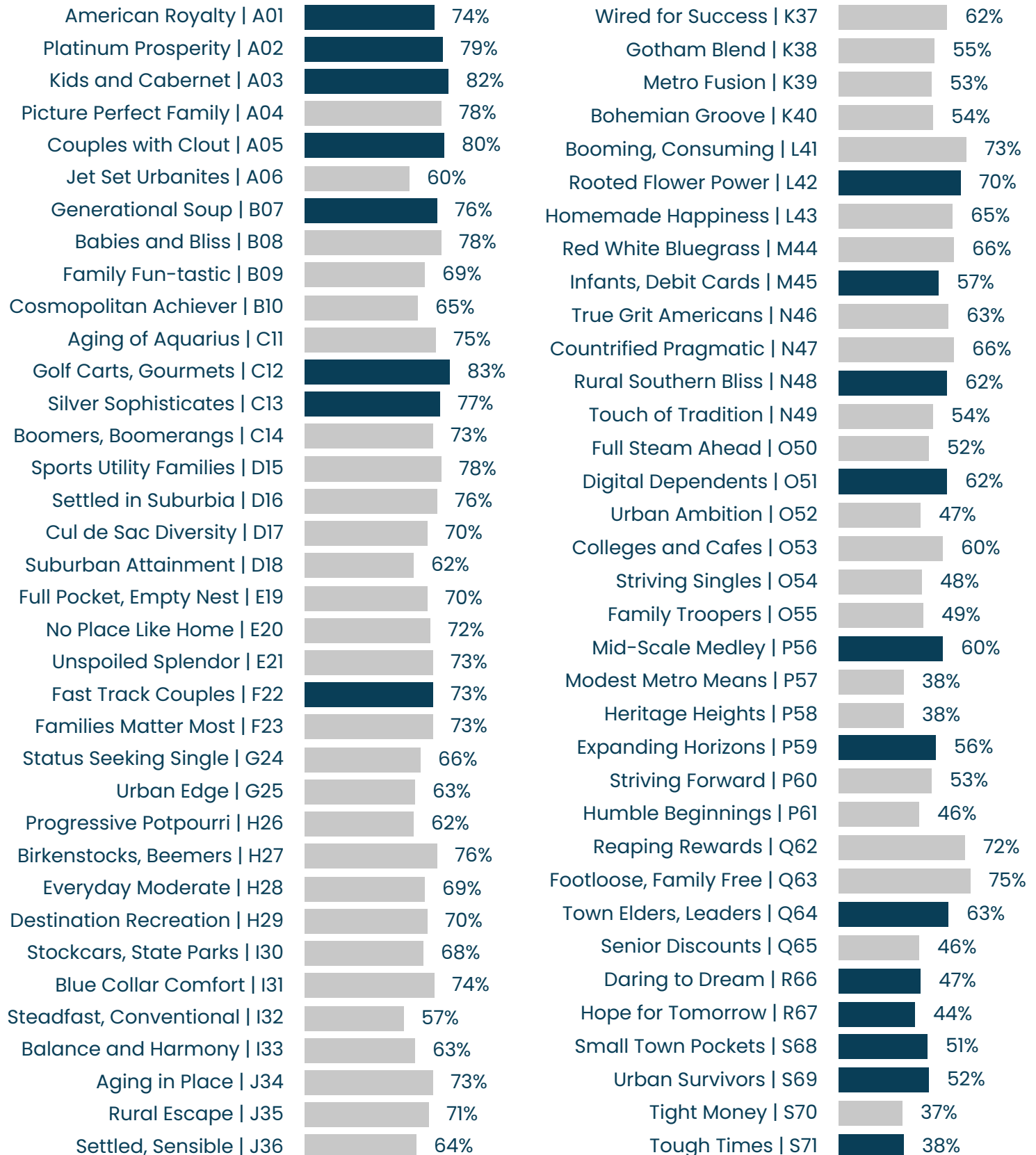
Share of households that shopped at a pharmacy/drug store in past 30 days.



Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through year-end 2023. Analysis & exhibit prepared by LandUseUSA, 2024. Blue indicates the top 20 most prevalent lifestyle clusters currently living in the City of Leawood, Kansas.

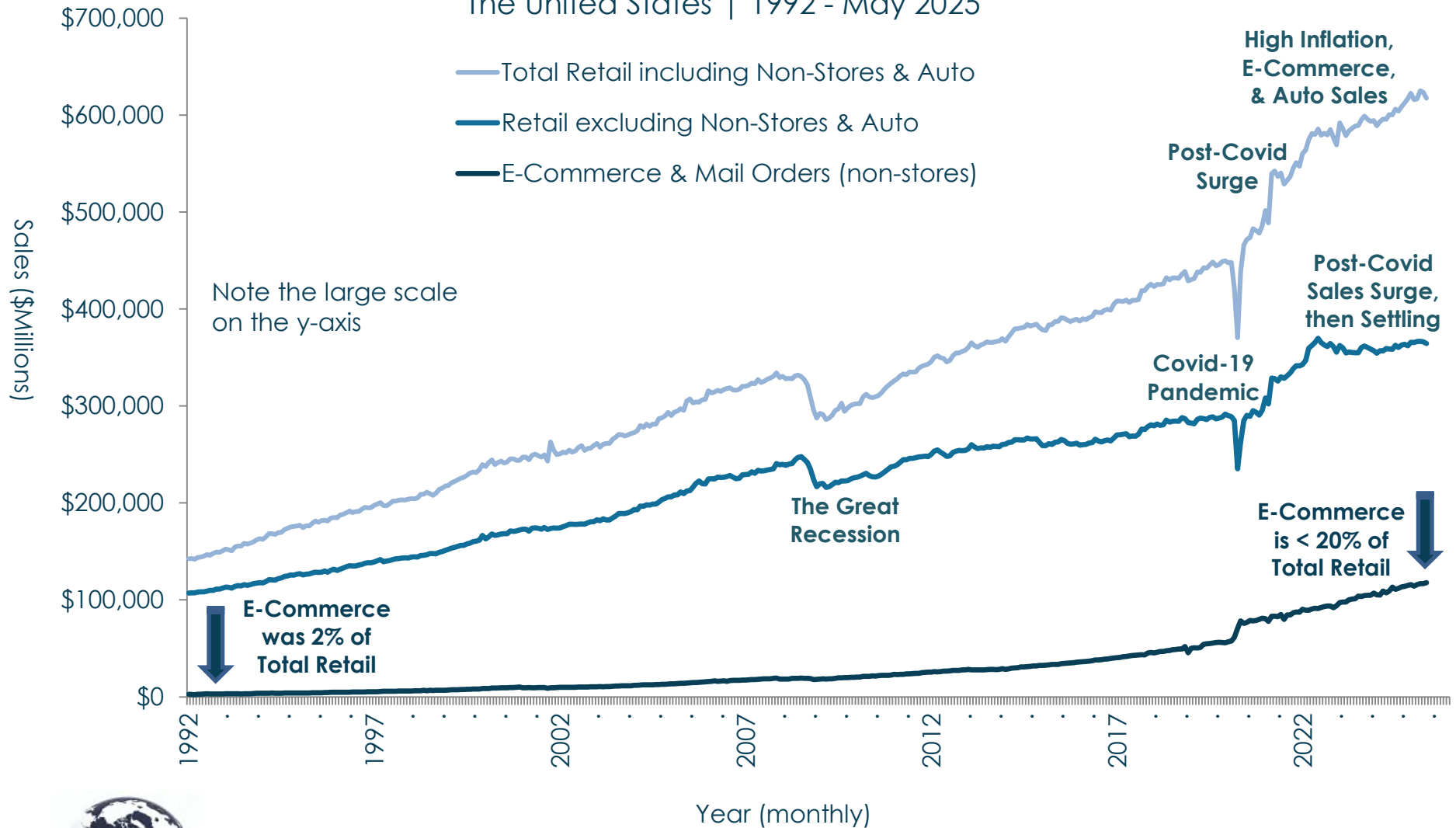
KS-MO Mosaic | Hardware Stores

Share of households that shopped at home improvement stores in past 30 days.



Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through year-end 2023. Analysis & exhibit prepared by LandUseUSA, 2024. Blue indicates the top 20 most prevalent lifestyle clusters currently living in the City of Leawood, Kansas.

Brick & Mortar Retail | Monthly Sales
Total Retail Trade v. E-Commerce
The United States | 1992 - May 2025



Source: United States Census of Monthly Retail Sales through May 2025. Analysis and exhibit prepared by LandUseUSA | Urban Strategies © 2025. Non-Stores include all electronic shopping (e-commerce), mail order houses (catalogs), and miscellaneous vendors. All figures are seasonally adjusted, but not adjusted for inflation.