

Subject: WAIOS Daily Intel — Thursday, July 23, 2026
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WAIOS

WILLIE'S AI OPERATING SYSTEM

Thursday, July 23, 2026

Daily Restaurant Intelligence

830
ARTICLES

19
URGENT

MARKET WEATHER

Texas Operating Conditions

HOUSTON



83°F

Sunny
H:93° L:80°

Good patio day

SAN ANTONIO



87°F

Sunny
H:99° L:81°

Heat advisory

AUSTIN



85°F

Partly cloudy
H:103° L:77°

Heat advisory

COLLEGE STATION



81°F

Sunny
H:100° L:78°

Heat advisory

YESTERDAY PERFORMANCE

All Locations

Location	DO	Sales	vs LY	Guests	vs LY	PPA	Comps%
	Brandon	\$7,030	+22.6%	382	+10.1%	\$18.43	9.8%

#05 Highway 6

#07 Highway 249	Brandon	\$8,067	-7.5%	422	-11.4%	\$19.09	8.4%
#09 Sugarland	Brandon	\$4,091	+7.5%	230	+8.0%	\$17.79	10.3%
#10 Katy	Brandon	\$5,503	-10.6%	286	-9.7%	\$19.27	10.8%
#15 New Braunfels	Brandon	\$10,118	-16.3%	494	-20.5%	\$20.46	5.4%
#21 Cibolo	Brandon	\$7,938	-16.0%	375	-22.7%	\$21.17	8.3%
#22 Pearland	Brandon	\$3,304	-12.9%	155	-20.5%	\$21.32	7.1%
#24 Kyle	Brandon	\$10,836	+25.0%	466	+17.8%	\$23.25	5.6%
#03 San Pedro	Dylan	\$8,743	-5.7%	458	-13.0%	\$19.07	6.9%
#12 Leon Springs	Dylan	\$8,027	+15.0%	402	+6.9%	\$19.99	4.9%
#13 NW Military	Dylan	\$5,980	+22.6%	300	+14.5%	\$19.90	8.0%
#17 Highway 151	Dylan	\$6,828	+20.1%	323	+8.2%	\$21.14	7.5%
#18 Zarzamora	Dylan	\$4,760	-15.9%	244	-17.9%	\$19.55	10.7%
#02 Jones Road	Randy	\$5,492	+7.6%	322	+2.7%	\$17.06	11.0%
#08 Woodlands	Randy	\$7,134	+24.0%	381	+18.1%	\$18.72	9.4%
#14 Barker Cypress	Randy	\$8,358	+14.0%	474	+22.5%	\$17.65	11.9%
#16 College Station	Randy	\$5,937	+70.3%	316	+54.0%	\$18.76	9.1%
#19 Spring	Randy	\$4,517	-16.4%	253	-14.1%	\$17.86	8.3%
#20 Georgetown	Randy	\$7,043	-13.0%	350	-15.3%	\$20.15	6.3%
#23 Pflugerville	Randy	\$8,085	+5.4%	374	-3.5%	\$21.62	7.0%
#25 Leander	Randy	\$9,135	+0.0%	406	+0.0%	\$22.53	5.9%

Brandon Johnson Total	Brandon	\$56,887	-2.6%	2,810	-7.9%	\$20.24	7.8%
Dylan Estrumse Total	Dylan	\$34,336	+5.7%	1,727	-1.9%	\$19.88	7.3%
Randy Haizlip Total	Randy	\$46,567	+8.7%	2,470	+6.3%	\$18.86	9.0%
Comp Total		\$137,791	+3.0%	7,006	-1.8%	\$19.67	8.1%

Non-Comp Total	\$9,135	+0.0%	406	+0.0%	\$22.53	5.9%
Total	\$146,926	+9.9%	7,412	+3.9%	\$19.82	8.0%

TOP: #16 College Station +70.3% (\$5,937, 316 guests, PPA \$18.76) | WATCH: #19 Spring -16.4%
| System: +3.0% vs LY on \$137,791

PERIOD TO DATE Cumulative Through Yesterday

Location	DO	Sales	vs LY	Guests	vs LY	PPA	Comps%
#05 Highway 6	Brandon	\$67,562	+4.3%	3,618	+2.3%	\$18.67	9.5%
#07 Highway 249	Brandon	\$89,045	+7.3%	4,592	+5.0%	\$19.39	8.4%
#09 Sugarland	Brandon	\$40,672	-8.3%	2,258	-10.4%	\$18.01	8.7%
#10 Katy	Brandon	\$66,826	+6.1%	3,490	+4.9%	\$19.15	9.8%
#15 New Braunfels	Brandon	\$110,302	+1.8%	5,286	-4.4%	\$20.87	5.9%
#21 Cibolo	Brandon	\$96,201	-8.4%	4,498	-10.8%	\$21.39	7.5%
#22 Pearland	Brandon	\$44,885	+2.0%	2,106	-4.4%	\$21.31	6.1%
#24 Kyle	Brandon	\$99,644	-6.7%	4,310	-10.6%	\$23.12	5.7%
#03 San Pedro	Dylan	\$88,616	+5.9%	4,610	+2.5%	\$19.22	7.4%
#12 Leon Springs	Dylan	\$69,160	+9.0%	3,508	+5.2%	\$19.71	6.5%
#13 NW Military	Dylan	\$60,266	+8.1%	3,067	+4.2%	\$19.65	7.0%
#17 Highway 151	Dylan	\$69,983	+10.1%	3,352	+2.8%	\$20.88	7.1%
#18 Zarzamora	Dylan	\$52,739	-7.7%	2,468	-11.4%	\$21.37	8.0%
#02 Jones Road	Randy	\$49,936	+4.2%	2,842	+2.8%	\$17.57	10.0%
#08 Woodlands	Randy	\$72,173	-1.2%	3,754	-3.0%	\$19.22	9.1%
#14 Barker Cypress	Randy	\$88,954	+4.5%	4,674	+2.0%	\$19.03	9.1%
#16 College Station	Randy	\$58,286	+41.7%	3,000	+31.1%	\$19.43	6.6%
#19 Spring	Randy	\$55,327	-2.0%	2,915	-5.5%	\$18.98	6.5%

#20 Georgetown	Randy	\$74,060	-0.9%	3,700	-4.0%	\$20.01	5.7%
#23 Pflugerville	Randy	\$79,765	-3.0%	3,621	-6.8%	\$22.03	5.9%
#25 Leander	Randy	\$90,714	+0.0%	4,057	+0.0%	\$22.36	4.0%
Brandon Johnson DO Total	Brandon	\$615,137	-0.7%	30,158	-3.8%	\$20.40	7.5%
Dylan Estrumse DO Total	Dylan	\$340,764	+5.3%	17,004	+1.1%	\$20.04	7.2%
Randy Haizlip DO Total	Randy	\$478,503	+3.9%	24,507	+0.7%	\$19.53	7.6%
Comp Total	All	\$1,434,404	+2.2%	71,670	-1.1%	\$20.01	7.4%
Randy Haizlip Non-Comp DO Total	Randy	\$90,714	+0.0%	4,057	+0.0%	\$22.36	4.0%
Non-Comp Total	All	\$90,714	+0.0%	4,057	+0.0%	\$22.36	4.0%
Grand Total	All	\$1,525,118	+8.7%	75,727	+4.4%	\$20.14	7.3%

★ OPERATION KEEP IT WEIRD

FOCUS LOCATION TRACKER

Leander

YESTERDAY
+0.0%
\$9,135

PERIOD
+0.0%
\$90,714

Georgetown

YESTERDAY
-13.0%
\$7,043

PERIOD
-0.9%
\$74,060

Pflugerville

YESTERDAY
+5.4%
\$8,085

PERIOD
-3.0%
\$79,765

Kyle

YESTERDAY
+25.0%
\$10,836

PERIOD
-6.7%
\$99,644

New Braunfels

YESTERDAY
-16.3%
\$10,118

PERIOD
+1.8%
\$110,302

Cibolo

YESTERDAY
-16.0%
\$7,938

PERIOD
-8.4%
\$96,201

TACTICAL NOTES

Leander: ran +0.0% yesterday (\$9,135, PPA \$22.53), PTD +0.0%. suburban growth corridor - watch weekday traffic and World Cup watch-party lift.

Georgetown: ran -13.0% yesterday (\$7,043, PPA \$20.15), PTD -0.9%. family-dense trade area -

PPA via appetizer and beverage attachment is the lever.

Pflugerville: ran +5.4% yesterday (\$8,085, PPA \$21.62), PTD -3.0%. high-competition corridor - traffic capture and repeat visits are critical.

Kyle: ran +25.0% yesterday (\$10,836, PPA \$23.25), PTD -6.7%. high-growth Hays County - drive mix shift toward premium entrees and cocktails.

New Braunfels: ran -16.3% yesterday (\$10,118, PPA \$20.46), PTD +1.8%. summer tourism peak via Schlitterbahn and Comal River - maximize table turns.

Cibolo: ran -16.0% yesterday (\$7,938, PPA \$21.17), PTD -8.4%. On the Border liquidation nearby - capture displaced casual-dining guests.

TODAY'S TOP STORIES

SCORE 9

As a Texas sports bar with beef-heavy menus (burgers, brisket, steaks), Willie's faces margin compression and may need to evaluate menu pricing, portion adjustments, or alternative protein promotions to protect profitability.

SCORE 9

As Willie's operates 21 locations, understanding the structural unit economics challenges of multi-unit scale is directly applicable to sustaining profitability across the system and informing expansion decisions.

SCORE 8

Willie's sports bar locations should capitalize on World Cup match schedules by planning targeted promotions, extended hours, and increased staffing to capture the proven transaction surge happening at sports-viewing venues nationwide.

SCORE 8

Willie's should capitalize on World Cup viewing momentum by promoting game-day specials and watch party events across all 21 locations to capture the demonstrated spike in sports-driven dining traffic.

SCORE 8

High kitchen turnover directly threatens Willie's food quality and service consistency across

21 locations, making retention and kitchen complexity management a critical operational priority.

COMPETITOR WATCH

SCORE 3

Denny's sub-\$10 value meal push signals that casual dining chains are aggressively competing on price, which could pressure Willie's to evaluate its own everyday value positioning against budget-conscious guests.

SCORE 6

LongHorn's 9.5% same-store sales growth signals strong consumer appetite for casual dining and steakhouse concepts in Willie's core market, suggesting Willie's should evaluate its own beef and protein offerings to stay competitive.

SCORE 6

Wingstop's bold LTO flavor innovation with trendy Tajín/Chamoy profiles signals that spicy-sweet Mexican-inspired flavors are gaining mainstream traction, which Willie's should consider for its own wing or sauce offerings to stay competitive.

SCORE 3

Taco Bell's value-priced test item signals continued consumer appetite for affordable comfort food, which could draw budget-conscious guests away from casual dining but is a limited threat to Willie's bar-and-grill positioning.

SCORE 4

BJ's new chicken sandwich lineup signals continued menu innovation in the casual dining/sports bar space, which may pressure Willie's to evaluate its own chicken sandwich offerings to stay competitive.

COMMODITY PULSE

SCORE 7

As a major egg buyer, Willie's may see some modest downward price relief from this DOJ

settlement, which could slightly ease food cost pressures on egg-heavy menu items like breakfast and appetizers.

SCORE 7

A DOJ price-fixing settlement with Cal-Maine, the nation's largest egg producer, signals potential future egg cost relief for Willie's, which relies on eggs across breakfast and appetizer menu items.

SCORE 8

Higher beef prices heading into one of Willie's busiest holidays will squeeze food cost percentages on burgers, steaks, and other beef-centric menu items unless pricing or portioning is adjusted proactively.

SCORE 7

Cal-Maine's DOJ price-fixing settlement signals potential relief in egg cost volatility, which directly affects Willie's menu items like breakfast dishes, burgers, and other egg-dependent offerings.

TECH RADAR Week of Jul 7, 2026

OTHER

LOW WATCH

No signals this week

Stack looks stable.

OTHER

LOW WATCH

No signals this week

Stack looks stable.

OTHER

LOW WATCH

No signals this week

Stack looks stable.

OTHER

LOW WATCH

No signals this week

Stack looks stable.

GUEST FEEDBACK PULSE

Tattle — Last 7 Days

OPEN INCIDENTS BY LOCATION

Tattle data unavailable.

LOW-RATED REVIEWS YESTERDAY (★★★ OR BELOW)

No low-rated reviews yesterday. ✓

WHAT THIS MEANS FOR WILLIE'S

College Station's 70.3% surge and 316-guest count on a single day confirms that World Cup programming is a real traffic multiplier — GMs at underperforming locations like Spring (-16.4%) should immediately audit their match-day scheduling, screen visibility, and promotional signage to capture the same displaced casual-dining guests now orphaned by On the Border's liquidation. With heat advisories blanketing all 21 Texas markets today, activate a system-wide cold beverage upsell push — frozen drinks, iced tea upgrades, and beer buckets — as heat-driven guests seeking refuge in air-conditioned sports bars represent incremental check-builders that can move the needle on a system day already running +3.0%. On the beef cost side, leadership should lock in near-term ground beef and brisket contract pricing this week before World Cup-driven burger and BBQ demand accelerates input costs across Texas foodservice suppliers.

SHARE WITH YOUR TEAM

1. LongHorn's results and Domino's leadership moves are worth watching as signals of where casual dining demand and consumer spending are heading in our market.
2. Industry-wide closures are up significantly, which reinforces why we stay disciplined on cost controls and guest experience — brands that don't adapt are the ones shutting doors.

3. Red Lobster's bankruptcy shows what happens when a chain lets supplier incentives drive menu strategy over profitability — our promotions need to make sense for our bottom line first.
4. Competitors like LongHorn are seeing big sales jumps by leaning into premium protein offerings, so let's make sure our team is spotlighting our own grill favorites and delivering the experience that keeps guests choosing Willie's over the steakhouse down the street.
5. Wingstop is rolling out Tajín and Chamoy flavors as a limited-time offer, so let's keep an eye on guest reactions and consider whether a similar bold LTO could drive traffic and differentiate our wing program.

Sent by WAIOS | Willie's AI Operating System | Thursday, July 23, 2026

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