

CHIEF INFORMATION / DIGITAL OFFICER

A market intelligence brief for
technology leaders in Travel & Leisure

August 2026

**BLACKLINE
CONSULTING**

A HIGHER STANDARD

THE BLACKLINE RADAR SERIES

The Radar series is a set of role-based briefings for executives in Travel & Leisure, designed to be read in minutes and discussed for longer. Each Radar takes a single seat at the executive table and asks one question: *what should this leader have on their screen for the year ahead?*

Every Radar is structured around five lenses:

- > **THE BRIEF:** The mandate for the role this year, stated plainly. What the organisation is asking of this executive, and how that ask differs across sub-sectors
- > **HEADWINDS:** The forces working against the role. Market conditions, cost pressures, regulatory constraints and structural shifts that make the mandate harder to deliver.
- > **TAILWINDS:** The forces working in the role's favour. Capabilities, market dynamics and tools that, used well, give the executive room to move.
- > **BLIND SPOTS:** The areas where visibility of risk is limited. Not the known problems, but the places where the data, the reporting or the operating model may be quietly masking an issue.
- > **EXECUTIVE TENSIONS:** Where interests may align or diverge. The points of natural tension and natural partnership across the executive team, and where the CIO/CDO's agenda intersects with that of the CEO, COO, CFO and CMO. Knowing where interests align is often the difference between a mandate that gets delivered and one that stalls.

This edition focuses on the Chief Information / Digital Officer: *build the unified data and technology foundation that powers personalised, AI-enabled guest experiences across every channel, while safeguarding that same infrastructure against the regulatory, commercial, and distribution risks it inevitably creates.*



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Agentic AI is rewriting the distribution model that UK travel and leisure has built its strategy around, faster than most leadership teams have priced in. Through 2026, AI agents will increasingly handle discovery, comparison, booking and service on travellers behalf, often before a human reaches a brand's site. For the CIO/ CDO, the year is about rethinking the operating model to enable AI and automation, while navigating a CMA probe into whether algorithmic pricing tools amount to anti-competitive coordination. Urgency varies; OTA dependent hotels and attractions face the most immediate disintermediation risk, airlines' direct booking relationships offers limited breathing room.

HEADWINDS

Agentic AI is disintermediating brand discovery

→ As AI agents increasingly search, compare and book on travellers' behalf, the traditional marketing funnel weakens, brand's risk becoming invisible if their offers aren't machine-readable.

Algorithmic pricing tools face regulatory scrutiny

→ The CMA's probe into hotel chains potentially exchanging sensitive pricing data via shared analytics tools puts widely used commercial software in a compliance grey zone.

OTA dominance persists despite direct-booking investment

→ OTAs still dominate search and booking through scale and price transparency, so direct-channel investment competes against entrenched consumer habits.

BLIND SPOTS

Whether pricing tools carry undisclosed competition risk

→ Shared analytics and dynamic pricing platforms are under direct CMA scrutiny; exposure through vendor relationships is often unclear until questioned.

Readiness for agent-led discovery

→ Modernising for agentic AI is an organisational shift, not a marketing campaign; few have honestly assessed how fit-for-purpose their operating models are.

TAILWINDS

A real opportunity to win the agentic layer

→ Businesses that modernise data architecture and make offers, availability and pricing machine-readable now can secure structural advantage before competitors catch up.

Measurable returns from AI personalisation

→ ML-based forecasting is meaningfully improving revenue metrics, and AI chatbots are lifting satisfaction; a credible, quantifiable investment case.

Legacy compatible deployment

→ Modern AI and orchestration tools now integrate with older hotel and venue tech stacks, lowering the adoption barrier across the sector's legacy estate.

First-party data quality behind personalisation

→ AI personalisation is only as good as the underlying guest data; whether it's complete, current and rights-cleared is rarely tested until a campaign underperforms.

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The CIO/ CDO faces two patterns of tension: alignment through shared infrastructure, and divergence through hidden exposure. With the CMO, CFO, and COO, personalisation, infrastructure investment, and AI-enabled service all depend on the same data and systems the CIO/ CDO owns, making joint delivery essential. By contrast, decisions that look purely technical often carry risk elsewhere; vendor choices can trigger CMA scrutiny, agentic AI bets test the CEO's discipline around proven versus promised returns, and direct channel ambitions clash with OTA partners invested in the status quo.

WHERE INTERESTS MAY ALIGN

The alignment here is natural - invest, & build on it...

On Customer Experience Strategy

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→ Personalisation, brand trust and pricing transparency all depend on shared data and a common understanding of the guest journey; digital and customer experience strategy must be built together.

On Infrastructure & AI Investment

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→ A partner in building the investment case for data and pricing infrastructure in terms that connect to both margin and regulatory risk.

On AI-enabled Service

CHIEF OPERATING OFFICER

→ Delivery of AI-enabled guest service and operational efficiency depends on the same data and systems infrastructure the CIO/CDO owns.

WHERE INTERESTS MAY DIVERGE

These tensions are structural - navigate them openly...

On Vendors & Platforms

REGULATORS

→ Vendor and platform choices that seemed purely commercial are now potential competition-law exposure; the CIO/CDO must keep pricing technology decisions visible to compliance, not siloed within IT.

On AI Readiness

CHIEF EXECUTIVE OFFICER

→ Committing to agentic-AI readiness ahead of proven returns is a real bet; the CIO/CDO must keep leadership honest about what's proven versus promised.

On Channel Strategy

ONLINE TRAVEL AGENTS & DISTRIBUTION PARTNERS

→ Much of the booking relationship still runs through platforms the company doesn't control; the CIO/CDO's direct-channel ambitions are in direct tension with partners whose interests diverge.



BLACKLINE CONSULTING

A H I G H E R S T A N D A R D

Founded in 2013, Blackline Consulting is a multidisciplinary boutique advisory and execution firm operating across the UK and North America. We help organisations define strategy, enhance operations, drive transformation, and manage change

A higher standard, delivered quietly by people who care

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