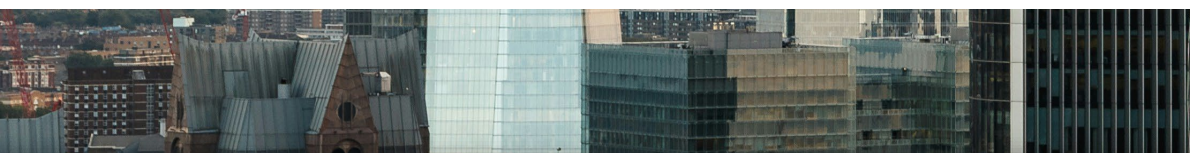




State of the Workplace: What Experience Drivers are Accelerating the Office Comeback

A Resonate commissioned Market Study | UK 2024



AGENDA

Growth focused CX insights

Top reasons employees choose to work in office

What drives the choice of each office setup (traditional, hybrid, flexible, remote)?

What do workers value most in their workplace or mix-used precincts?

What are the friction points and churn factors related to office employees' experiences in different areas of the office?

What are the dream office experiences that would increase attendance?

Which experiences turn workers into advocates?



The Customer



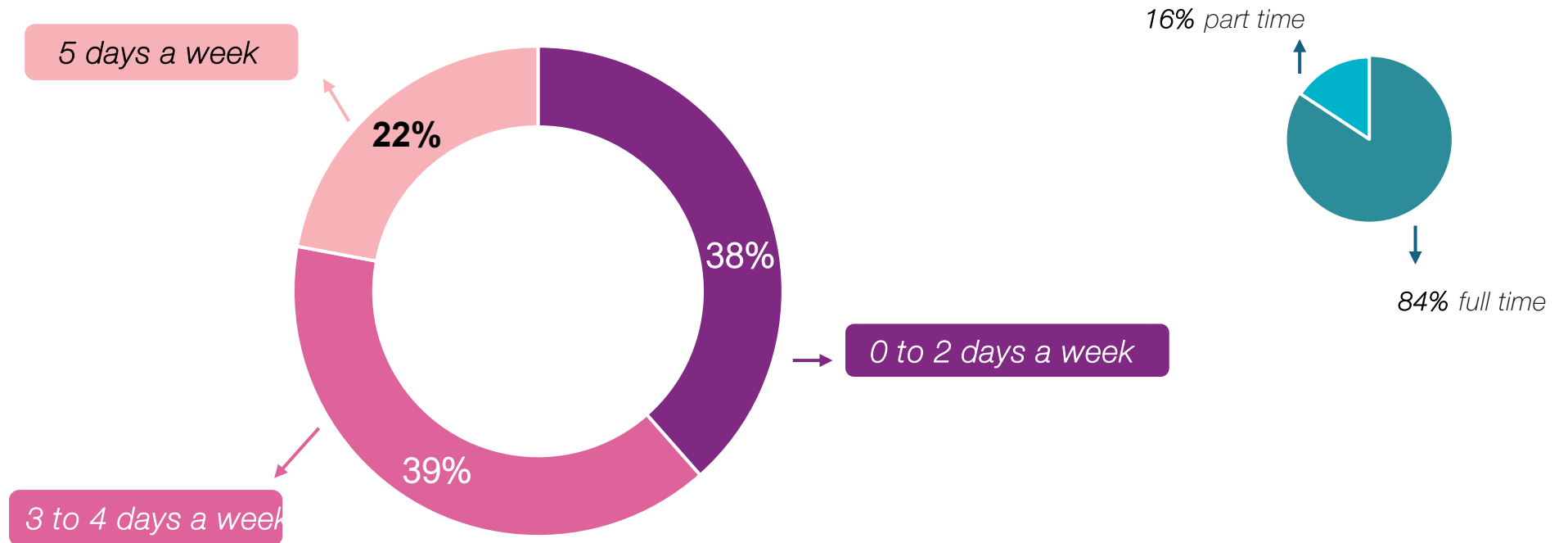
PART 1

Current occupier office usage motivations

- ✓ Office attendance patterns post-COVID
- ✓ Market distribution based on office setup
- ✓ Key motivations for office attendance and what would increase frequency
 - Importance of amenities
 - Importance of team presence

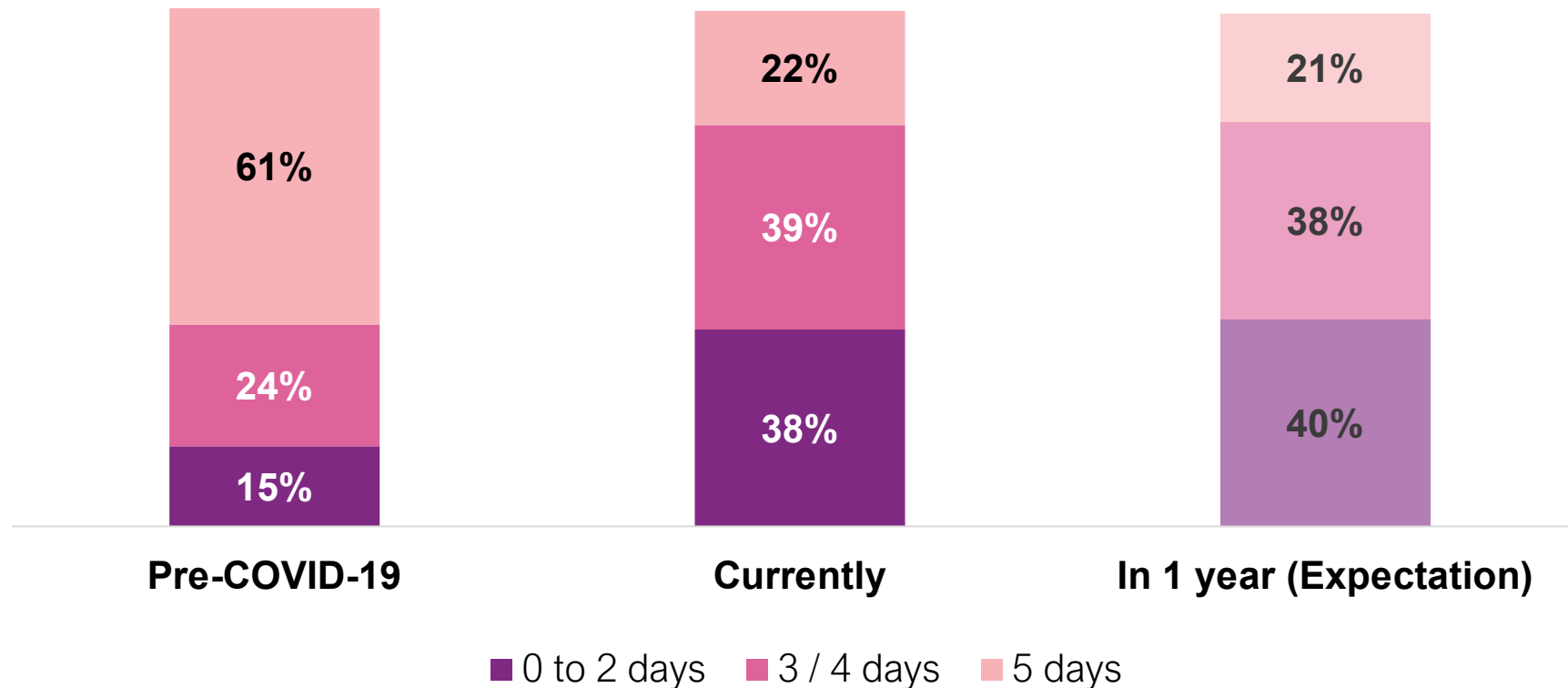
Current occupier usage patterns

Currently, about 40% of the market is working in the office for zero to two days a week. This group still makes up a significant portion of the market. However, there's promising progress: another 40% has now returned to working three to four days a week. Additionally, we have a 22% segment that is back in the office full-time, five days a week. This last group is particularly important, as we're closely tracking how this trend is evolving over time.



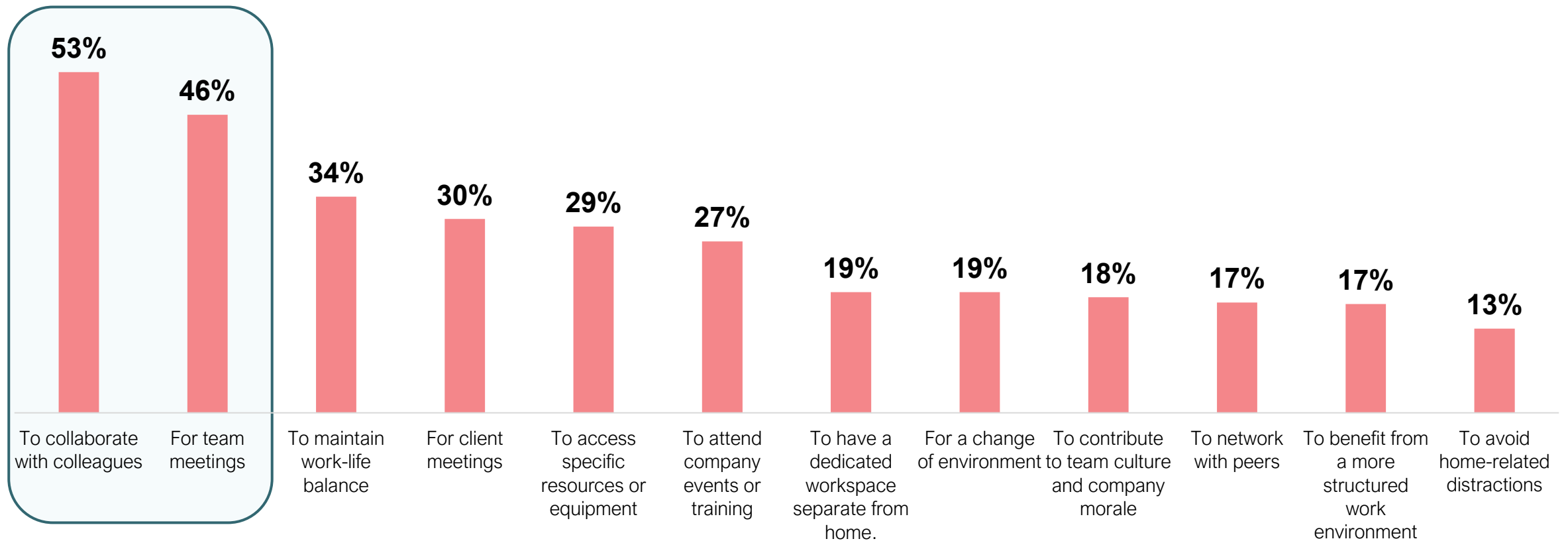
How office usage has changed (and future expectations)

Before COVID, 61% worked in the office five days a week, but this has shifted significantly. Most workers now attend three to four days, and the number working zero to two days is expected to decrease. Interestingly, workers largely believe that nothing will change in the next year and are content with the current arrangement, though leaders may have different perspectives.



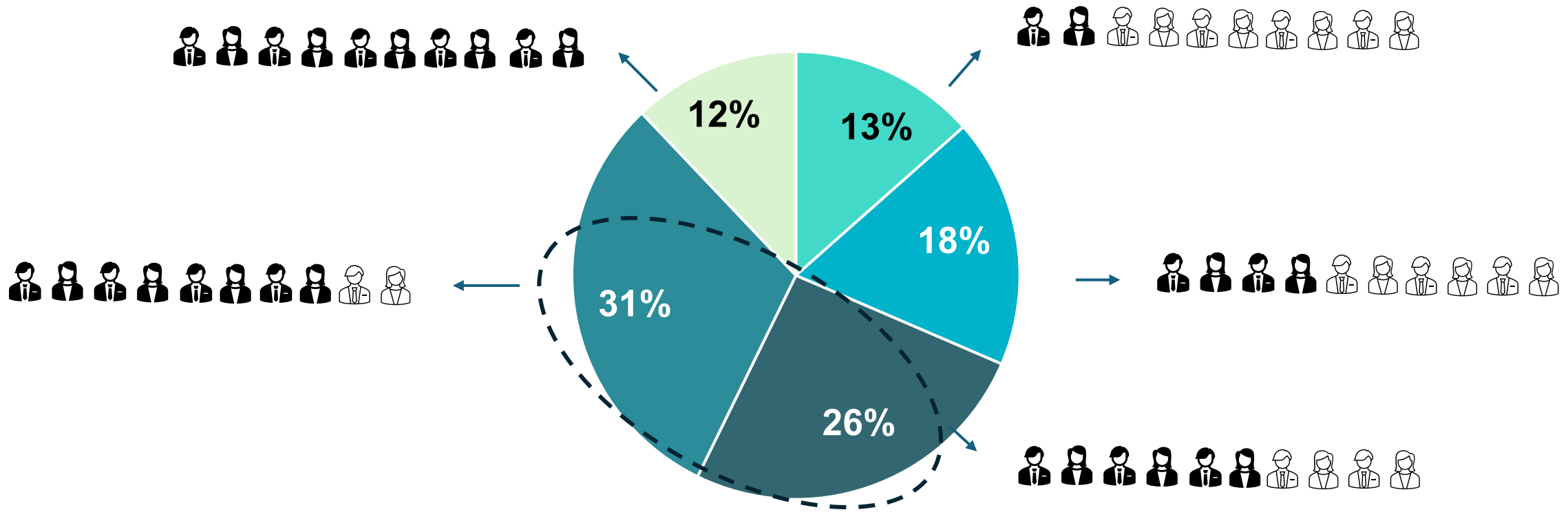
Key reasons for going to the office

The main reasons for coming into the office are collaboration and team meetings. This emphasizes the importance of creating spaces that foster productive collaboration. The data shows that beyond rent, what matters to employees is the opportunity for meaningful teamwork, which is crucial across industries.



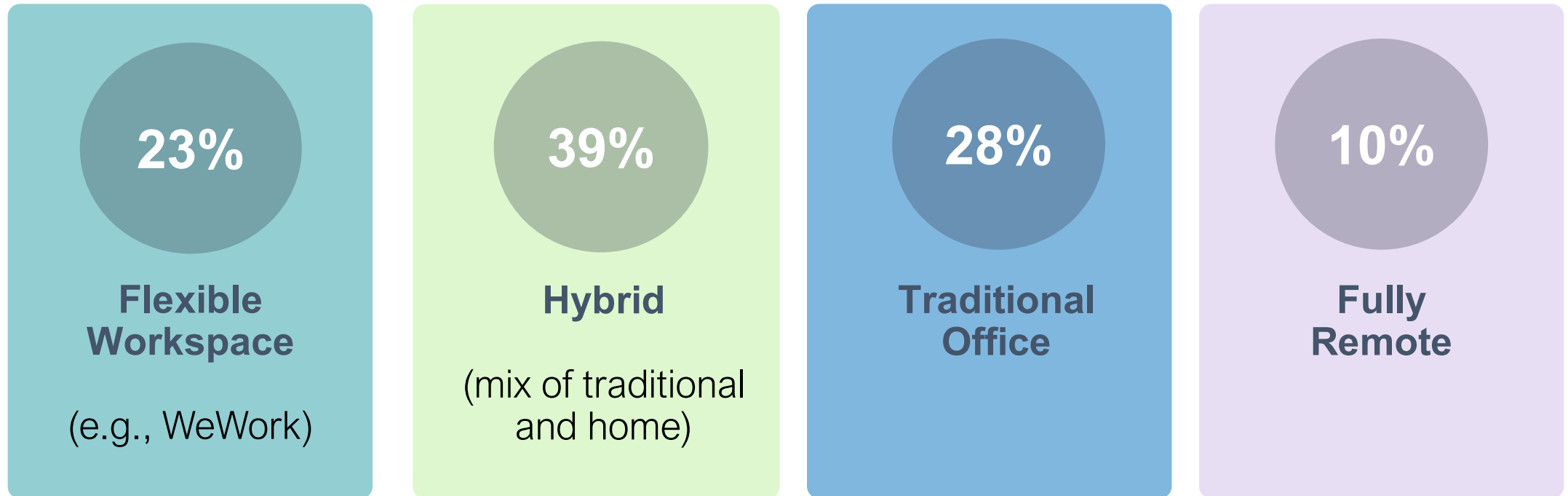
Optimal team presence – the tipping point

A tipping point occurs when enough people are in the office for others to find it worthwhile. When 60-70% of staff are present, around 90% find value in being there. Moving from 40% to 70% attendance is challenging, but once reached, it encourages more employees to come in for collaboration and to avoid missing out. For commercial property operators, focusing on reaching this 60-70% attendance is key.



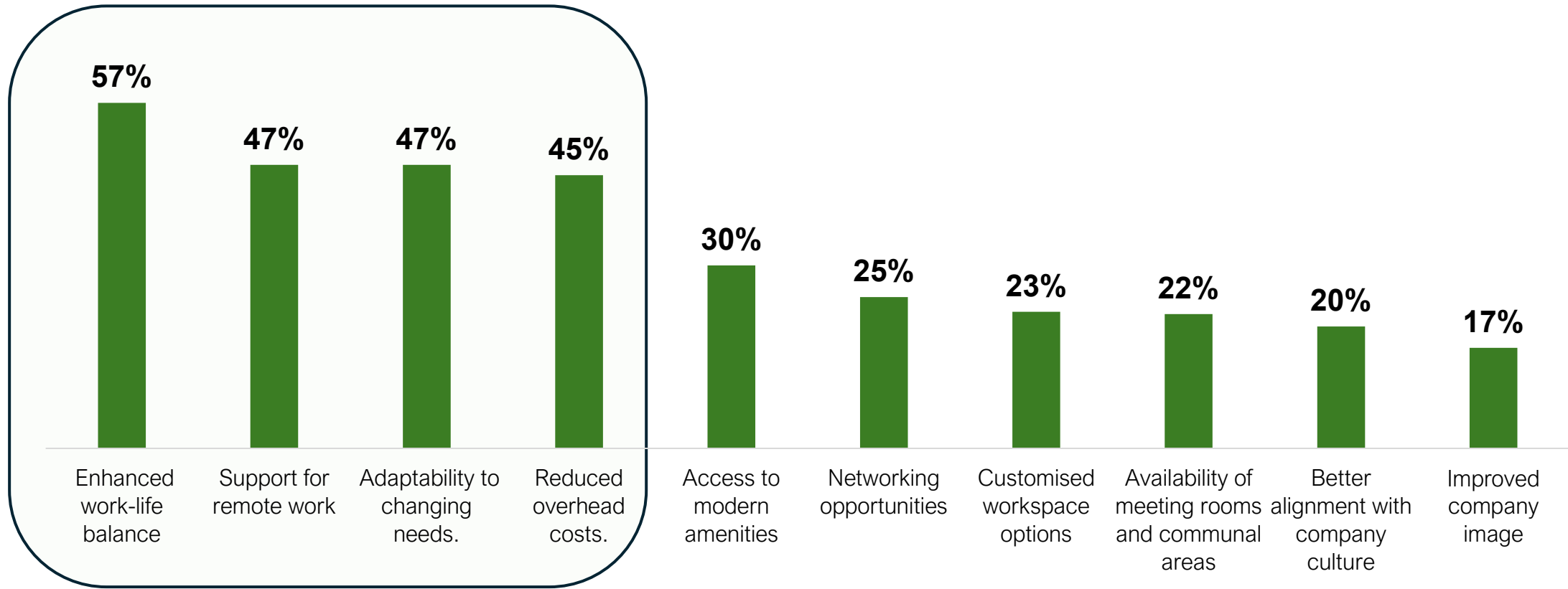
Market distribution by preferred office style

Regarding office space use, 23% of the market prefers flexible workspaces, while others follow a hybrid model that combines working from home and traditional office space. There is also a 10% segment that remains fully remote, although this report does not focus on them. The hope is that fully remote work will decrease over time, but some level may persist.



Why occupiers prefer a flexible workspace

The appeal of flexible workspaces lies in their support for remote work, adaptability to changing needs, and reduced overhead costs. Consumers recognize that their needs may evolve, and flexibility offers the ability to adjust accordingly, making it a key factor for many.



PART 2

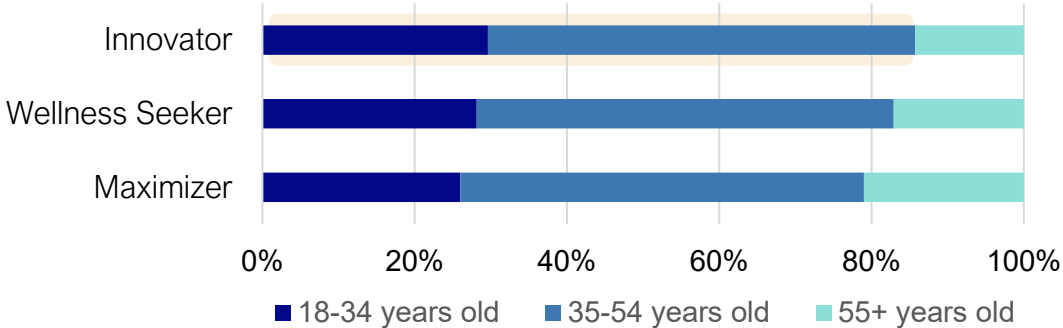
Understanding occupier personas and segments

- ✓ What are the emerging segments
 - How do current and future frequencies differ?
 - What amenities are valued enough to motivate an increase?
 - What are the risks and opportunities of each segment?

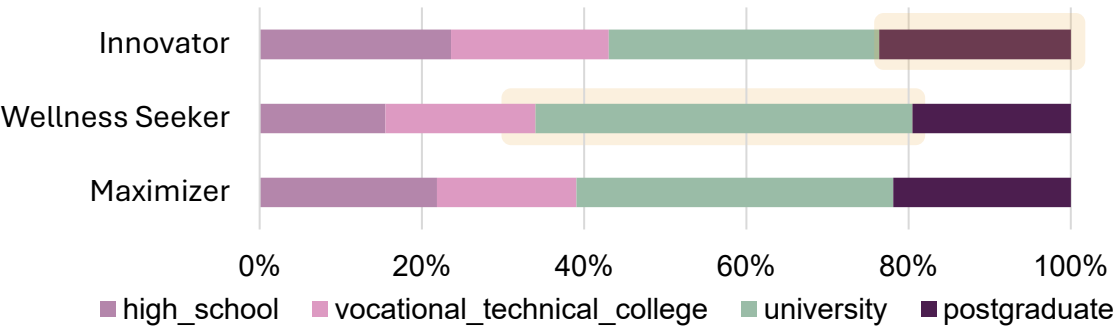
Demographic breakdown

There are notable differences among personas: **Innovators** tend to be younger, while **Maximizers** are older, though all personas include a wide range of ages. **Wellness Seekers** have the highest percentage of university degrees, and **Innovators** lead in level of income, often due to their roles related to technology. **Wellness Seekers** are more common in suburban areas, while **Innovators** and **Maximizers** are concentrated in metropolitan regions.

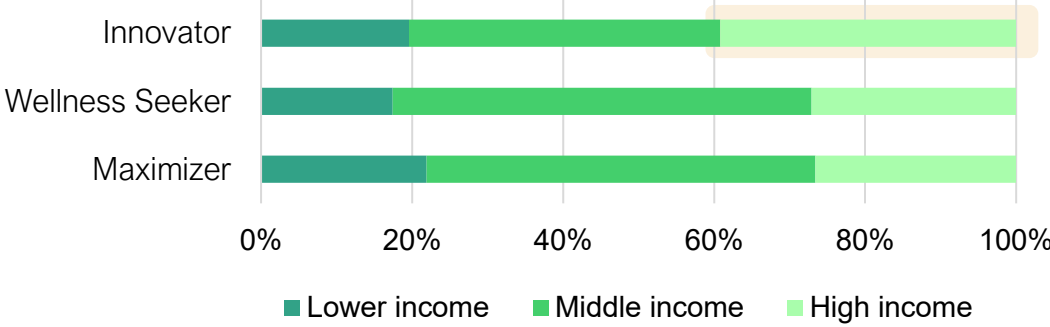
Age



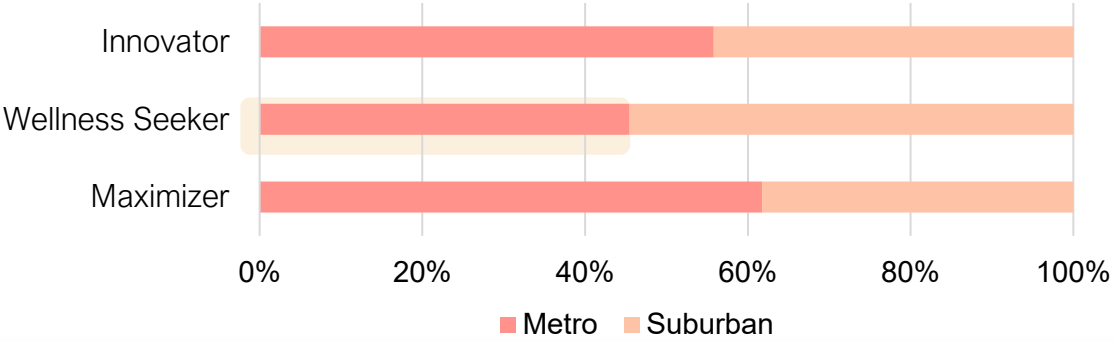
Education



Income



Region



Key Occupier Personas

Resonate CX has identified these groups, and this research aims to understand which strategies can encourage them to maximize their use of office spaces.



Innovator

Flexible workspace
(e.g., WeWork)



Office setup



Days per week

3/4 days in the office



Age

18 to 35 years old



Income

High Income/Metro



Education

University/Postgraduate



Primary
Roles

Creative/Design -
IT/Technical Support



Wellness Seeker

Hybrid

1 to 3 days in the office

25 to 44 years old

Mid income/Suburban

University/Postgraduate

Product Management -
Executive/Leadership -
Operations/Logistics



Maximizer

Traditional office

4/5 days a week

45 + years old

Mid income/Metro

University/High School

Administrative/Clerical -
Finance/Accounting - Customer
Service/Support - HR

The market mindsets

23%

Innovator

Seeks change, advanced technology, and flexible spaces that foster creativity.

39%

Wellness Seeker

Prioritizes well-being, healthy environments, and a positive work-life balance.

28%

Maximizer

Focused on efficiency, values resources that optimize time and productivity.

10%

Fully Remote

Prefers the flexibility of remote work and seeks spaces that support virtual collaboration.

Opportunity

Highly collaborative persona that is high usage (3-4 days), high income. Needs flexibility and efficient high-tech infrastructure. Values specific spaces for both private and collaborative work.



INNOVATOR

23%

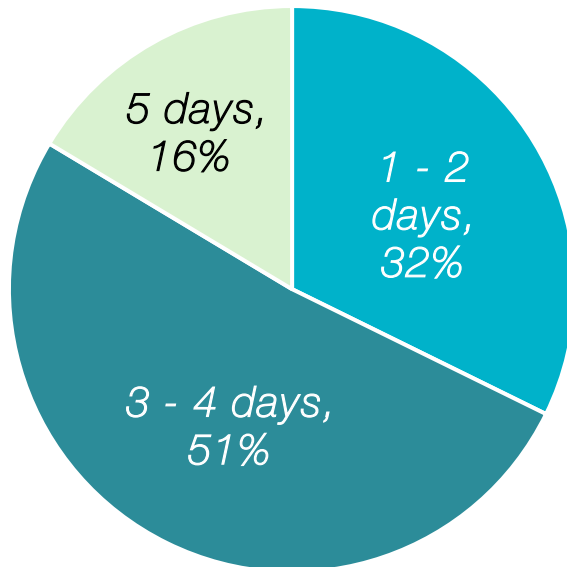
How office usage has changed



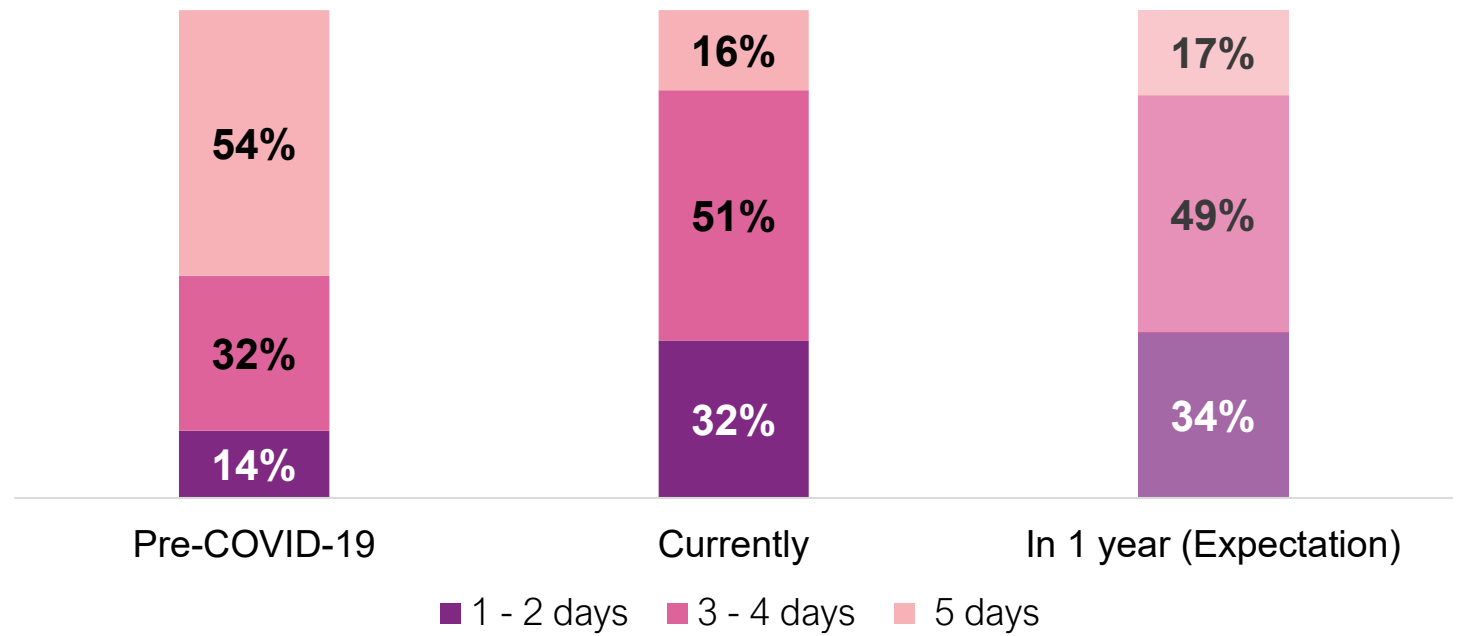
Innovator

Innovators are likely to increase their office days, aiming for more collaboration due to the nature of their industries. They may shift back to five days a week, driven by the need for teamwork. Although some are uncertain about future changes, many have reduced from five days to three or four rather than eliminating office attendance altogether, highlighting the importance of in-person collaboration.

Current attendance to the office



Trends in office attendance



Why Innovators prefer a flexible workspace

Innovators tend to prefer flexible working environments. They like reduced overhead costs, adaptability to changing needs. These are high-achieving, fast-rising individuals who value enhanced work-life balance.



Innovator

1

Reduced overhead costs

2

Adaptability to changing needs

3

Enhanced work-life balance

Motivations for office attendance

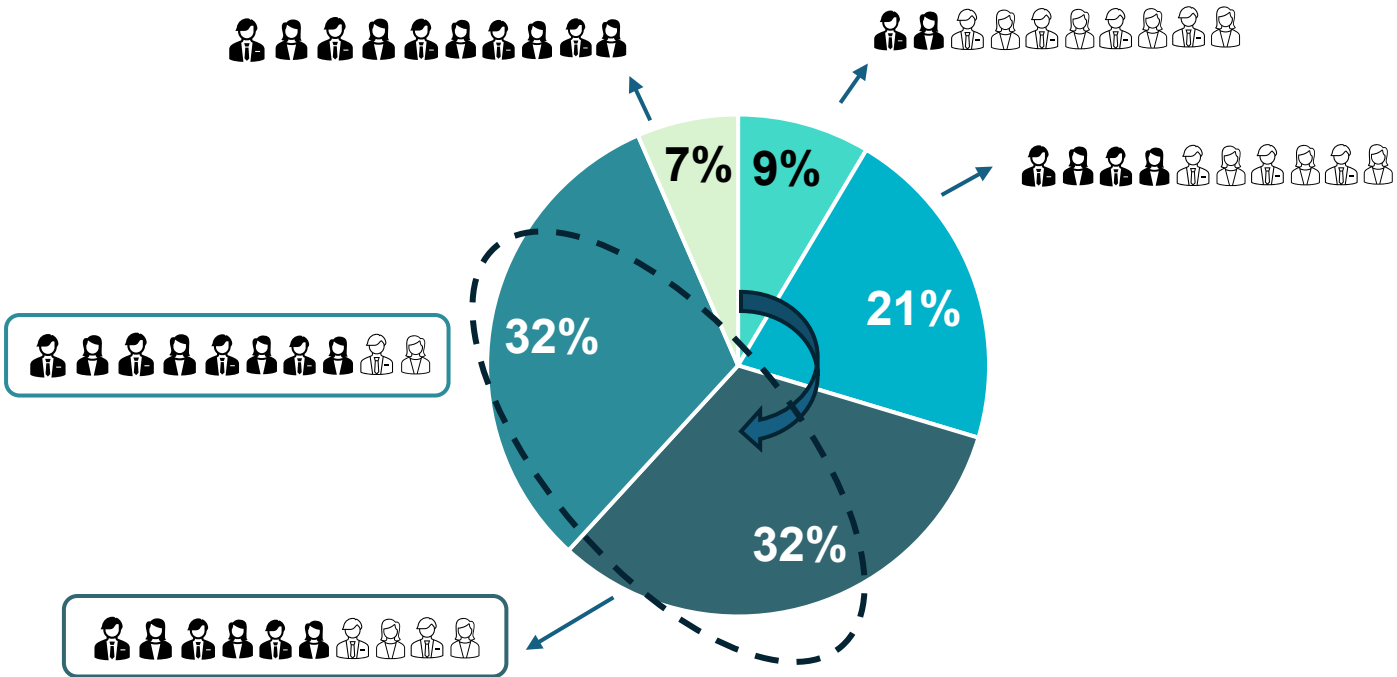


Innovator

Innovators highly value collaboration and will come in even if only 40% of their team is present. By 50-60% attendance, they are motivated to be in the office. Team meetings and collaboration are key reasons for coming in, reflecting their commitment to teamwork.

Key reasons for going to the office

- 1 For team meetings
- 2 To collaborate with colleagues
- 3 To maintain work-life balance






**Note: Each filled icon represents 10% of team members whose presence in the office makes it worthwhile for others to attend. Percentages should be read cumulatively.*

Must-have amenities to boost office comeback frequency

To attract Innovators, office spaces should focus on providing high-quality technology and equipment, privacy, noise control, and natural light. They value comfortable workspaces, free beverages, and high-speed internet, which are essential for supporting their productivity and well-being.



Innovators

-  **High-speed internet**
-  **Private offices**
-  **Better meeting rooms**

Personal Workspace

Most valued

Key Dislikes



Technology and equipment



Space constraints



Privacy and noise control



Access to natural light



Noise levels



Interactions / Interruptions

Kitchen or break space

Most valued

Key Dislikes



Free beverages available



Food and Drink Options



Comfortable seating



Healthy snacks



Cleanliness, Tidiness and Hygiene



Space / overcrowded

Opportunity Summary

Innovators are key occupiers of offices, attending the office 3 to 4 days a week with potential to increase attendance.



INNOVATOR

- *Improvements to encourage attendance: enhance technological infrastructure (e.g., high-speed internet).*
- *Provide private offices to reduce interruptions to allow for innovative work*
- *Optimize meeting rooms and ensure a comfortable, well-equipped environment to strengthen commitment.*

Opportunity –

A great proportion of the current occupiers and have seen the greatest drop in attendance post-COVID. Prioritize work-life balance and lowest users of the office space (1-2 days). Opportunity to increase usage by providing wellness-focused activities, health, and comfort.



WELLNESS SEEKER

39%

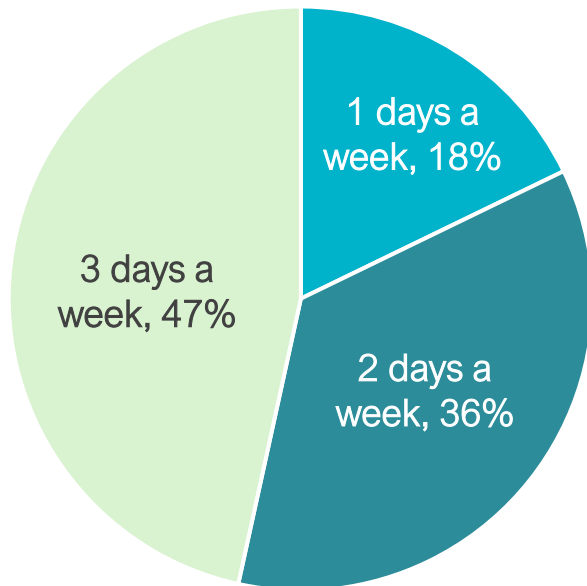
How office usage has changed



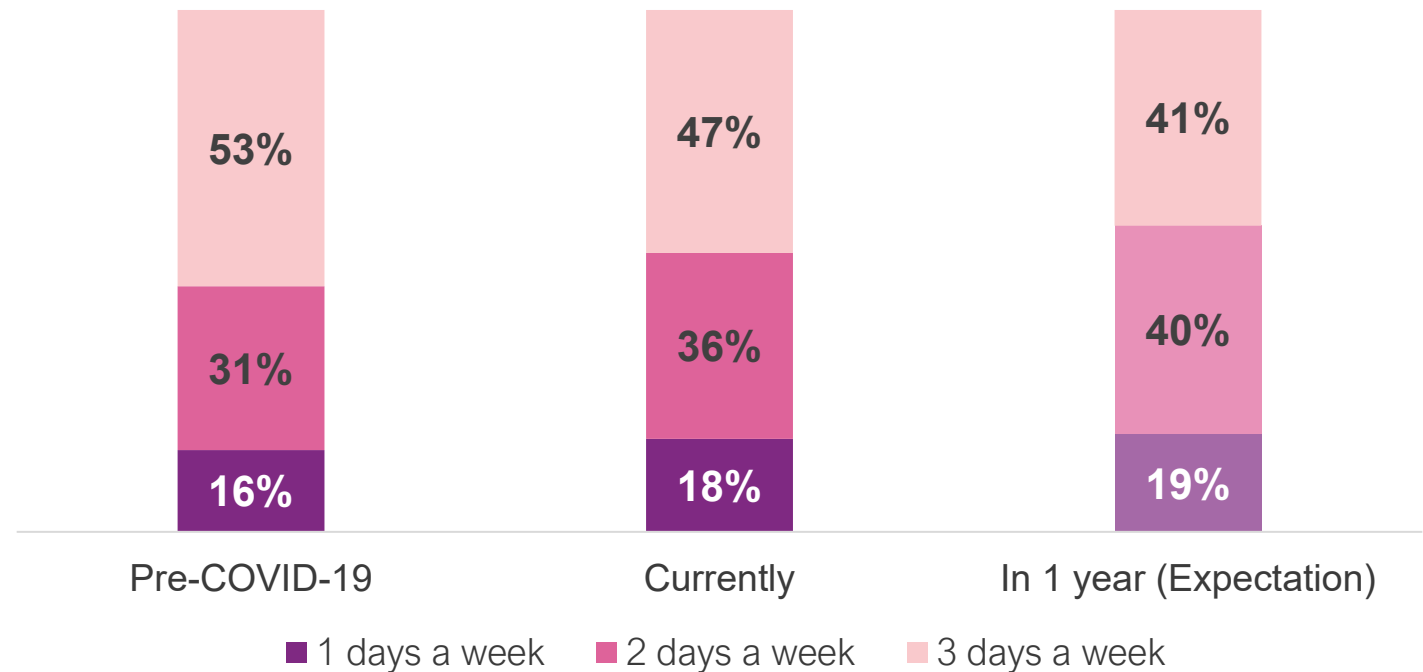
Wellness Seeker

Currently, some Wellness Seekers are coming in, but many still come in zero to one day a week. None are consistently coming in five days a week, highlighting a need to create environments that better attract consistent attendance.

Current attendance to the office



Trends in office attendance



Why do Wellness Seekers prefer a Hybrid model?

This persona prefer the hybrid model because it supports enhanced work-life balance, which is their top priority. They value flexibility, remote work support, and adaptability to changing needs. Creating environments that emphasize work-life balance can encourage more consistent office attendance among this group.



Wellness Seekers

68%

1

Enhanced work-life balance

2

Support for remote work

3

Adaptability to changing needs.

Motivations for office attendance

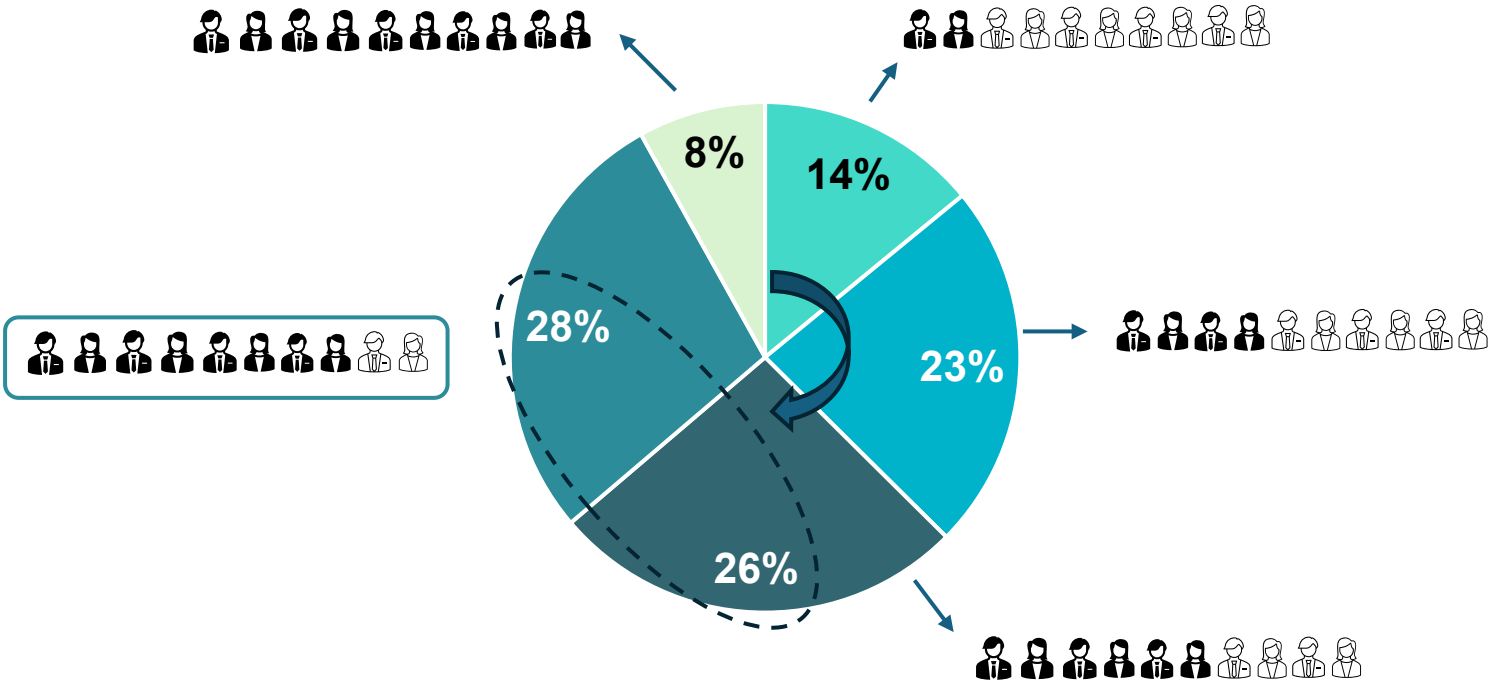


Wellness Seeker

Despite valuing work-life balance, Wellness Seekers recognize that in-person collaboration is crucial. They come into the office one to three days a week primarily for team meetings and collaboration. This shift from remote-only collaboration to in-person highlights the importance of creating opportunities that emphasize teamwork.

Key reasons for going to the office

- 1 To collaborate with colleagues
- 2 For team meetings
- 3 To maintain work-life balance



**Note: Each filled icon represents 10% of team members whose presence in the office makes it worthwhile for others to attend. Percentages should be read cumulatively.*

Must-have amenities to boost office comeback frequency

This persona values high-quality technology, high-speed internet, privacy, and noise control, which reflects their experience working from home. Personal desks, comfortable workspaces, and a clean kitchen environment are also priorities. Providing a sense of ownership and familiarity through dedicated workspaces, as well as emphasizing high-frequency cleaning, can make the office more appealing and encourage greater attendance.



Wellness Seekers

- 1 High-speed internet
- 2 Printing & copying services
- 3 Private offices

Personal workspace

Most valued

Key Dislikes



Technology and equipment



Space constraints



Privacy and noise control



Own desk



Noise levels



Work environment

Kitchen or break space

Most valued

Key Dislikes



High-frequency cleanliness and maintenance.



Space / overcrowded



Healthy snacks



Free beverages available



Cleanliness, Tidiness and Hygiene



Food and Drink Options

Opportunity Summary



WELLNESS SEEKER

- *This group intends to reduce office attendance if conditions do not improve.*
- *They represent almost 40% of the market, making them a significant risk.*
- *Their motivations for office attendance include collaboration, team meetings, and work-life balance.*
- *Key solutions: high-speed internet, private offices, printing and copying services.*
- *Address dislikes such as space constraints, noise levels, and improve maintenance to support their flexibility and comfort.*

Opportunity –

Maximizers value stability and structure, often working 4-5 days a week in traditional office settings. They prioritize consistency, efficiency, and a supportive work environment to maintain productivity in key financial, operations, and leadership roles.



MAXIMIZER

28%

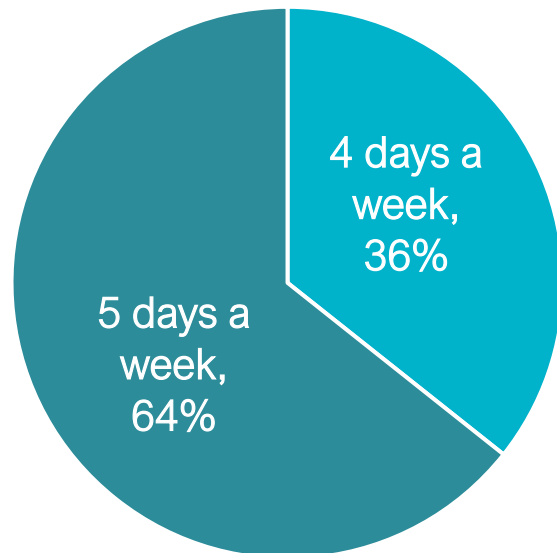
How office usage has changed



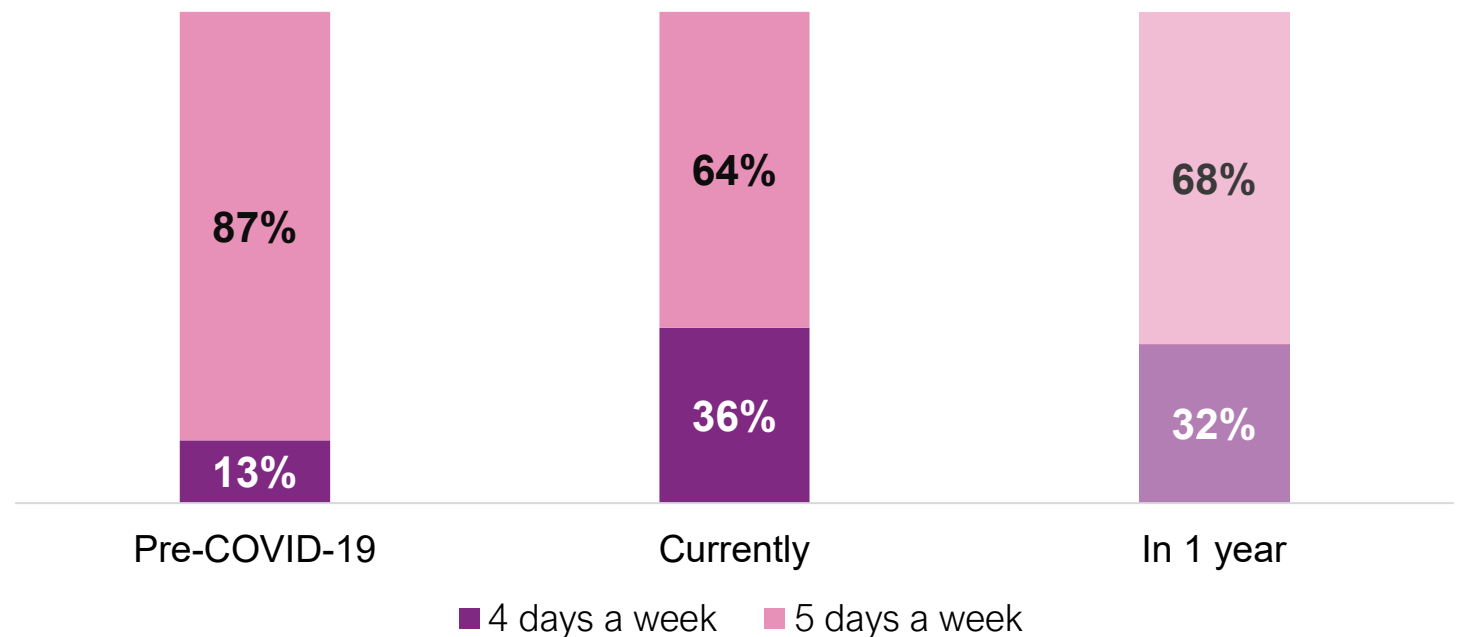
Maximizer

Before COVID, 87% of this segment worked in the office five days a week, but that number has now dropped to 64%. The rest are in four days a week, with no significant interest in reducing further. Many expect to increase their office attendance back to five days, driven by motivations to collaborate with colleagues and participate in team meetings. This group is 'seeing the light' and believes in the benefits of returning more often, showing optimism about the future and their increased engagement in the workplace. This trend suggests a readiness among this group to return to more frequent in-person work.

Current attendance to the office



Trends in office attendance



Motivations for office attendance

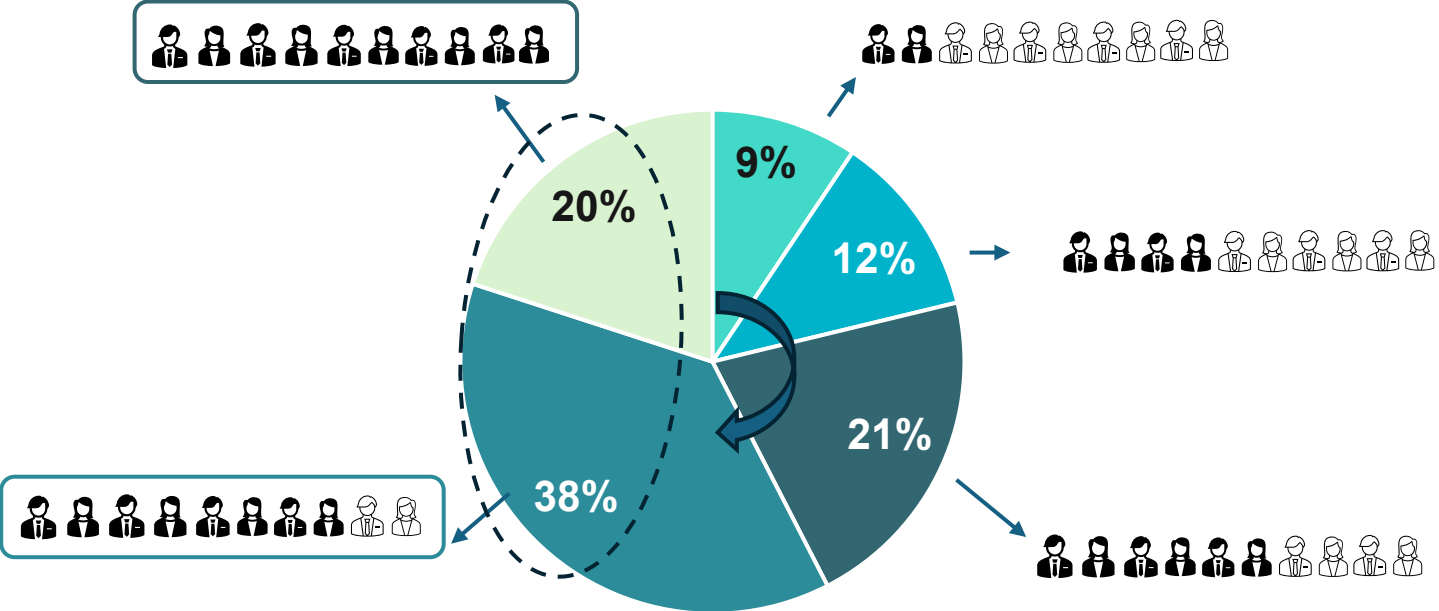


Maximizer

Across all personas, the belief that collaboration can happen just as effectively on Zoom is fading. Consumers have come to recognize that in-person collaboration is easier and more productive, making the office essential for team meetings and teamwork. This shift marks a significant win for office environments, as all three personas acknowledge the importance of being physically present. Commercial properties can leverage this insight to emphasize the value of collaborative spaces, ensuring these essential environments are preserved and enhanced.

Key reasons for going to the office

- 1 To collaborate with colleagues
- 2 For team meetings
- 3 To maintain work-life balance



**Note: Each filled icon represents 10% of team members whose presence in the office makes it worthwhile for others to attend. Percentages should be read cumulatively.*

Must-have amenities to boost office comeback frequency

Across all three personas, technology, high-speed internet, and efficient office environments are highly valued. Privacy, noise control, and high-frequency cleanliness—particularly in shared kitchen areas—are crucial for making office spaces more appealing. Overcrowded kitchens and hygiene issues are major dislikes that can deter attendance. Addressing these friction points, especially given heightened awareness of hygiene since COVID, can create a more comfortable and attractive work environment for everyone.



Maximizers



- 1 **High-speed internet**
- 2 **Printing and copying services**
- 3 **Private offices**

Personal Workspace

Most valued

Key Dislikes

Technology and equipment

Noise levels

Privacy and noise control

Own desk

Space constraints

Privacy

Kitchen or break space

Most valued

Key Dislikes

High-frequency cleanliness and maintenance.

Space / overcrowded

Free beverages available

Healthy snacks

Cleanliness, Tidiness and Hygiene

Lack of or Outdated Facilities and Equipment

Opportunity Summary

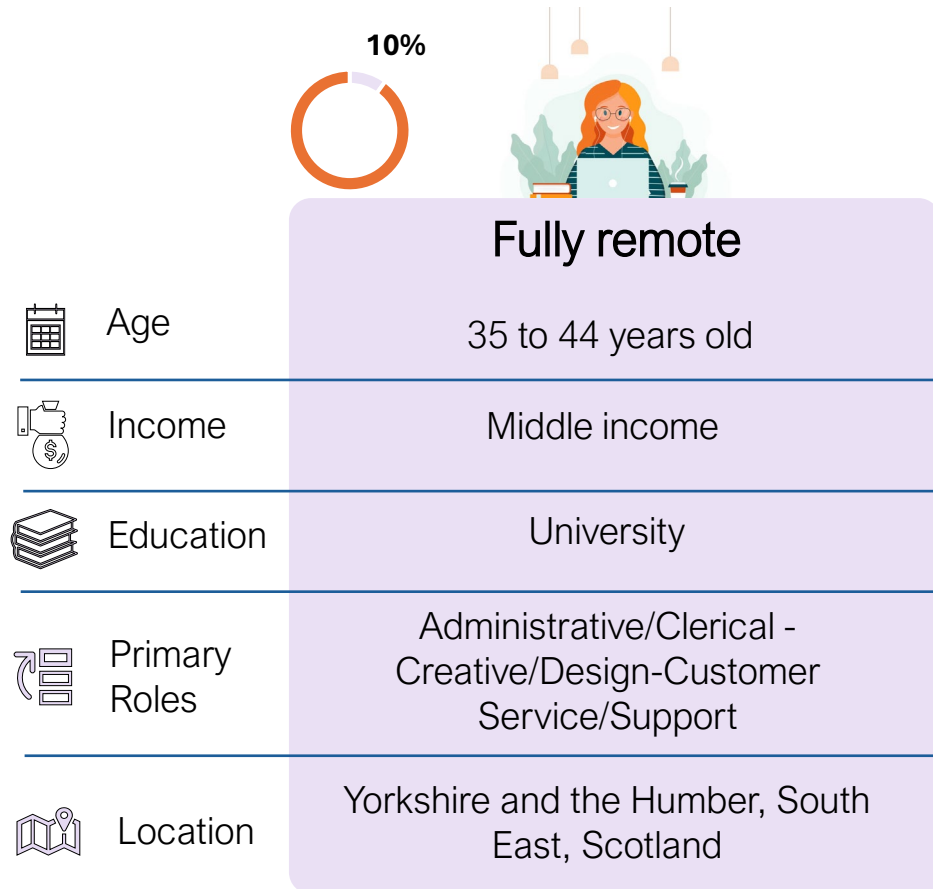


MAXIMIZER

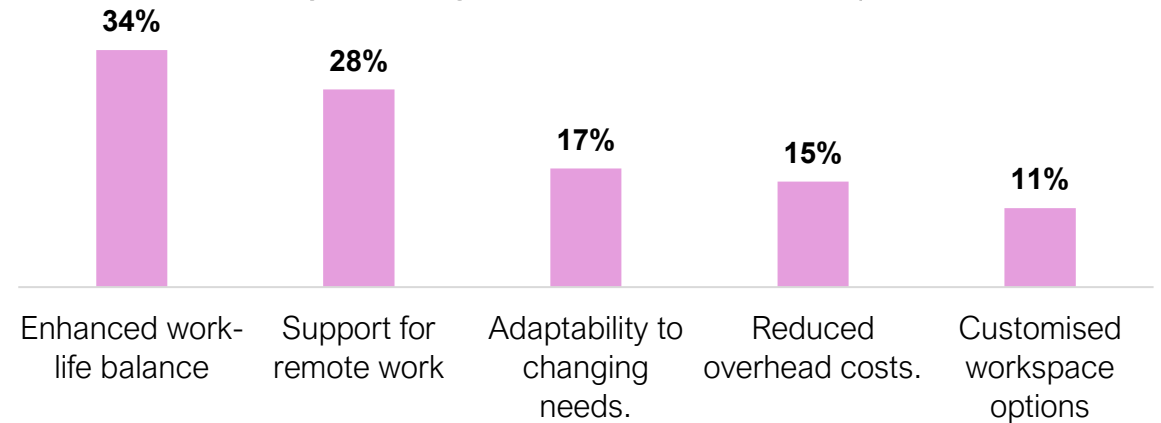
- ***Maximizers** are the most frequent and consistent office users, providing stability.*
- *Post-COVID, unresolved issues (e.g., noise levels, space constraints) may reduce their attendance.*
- *They value collaboration, team meetings, and a balanced work environment.*
- *Key amenities to retain them: high-speed internet, printing services, private offices.*
- *Addressing space and privacy concerns can help maintain their in-office commitment.*

Fully remote

For this workers, providing food and drinks, such as free lunch options, and access to nearby restaurants, can help attract them back for one or two days. They also value quiet spaces, relaxation areas, and recreational facilities. Highlighting these amenities can make the office more appealing for remote workers.



Why did they choose this work setup?



2 out of 3 remote workers mention possible improvements for their ideal office.

What does their ideal office look like?

- 1 Food and drinks services
- 2 Quiet and relaxation spaces
- 3 Recreational facilities

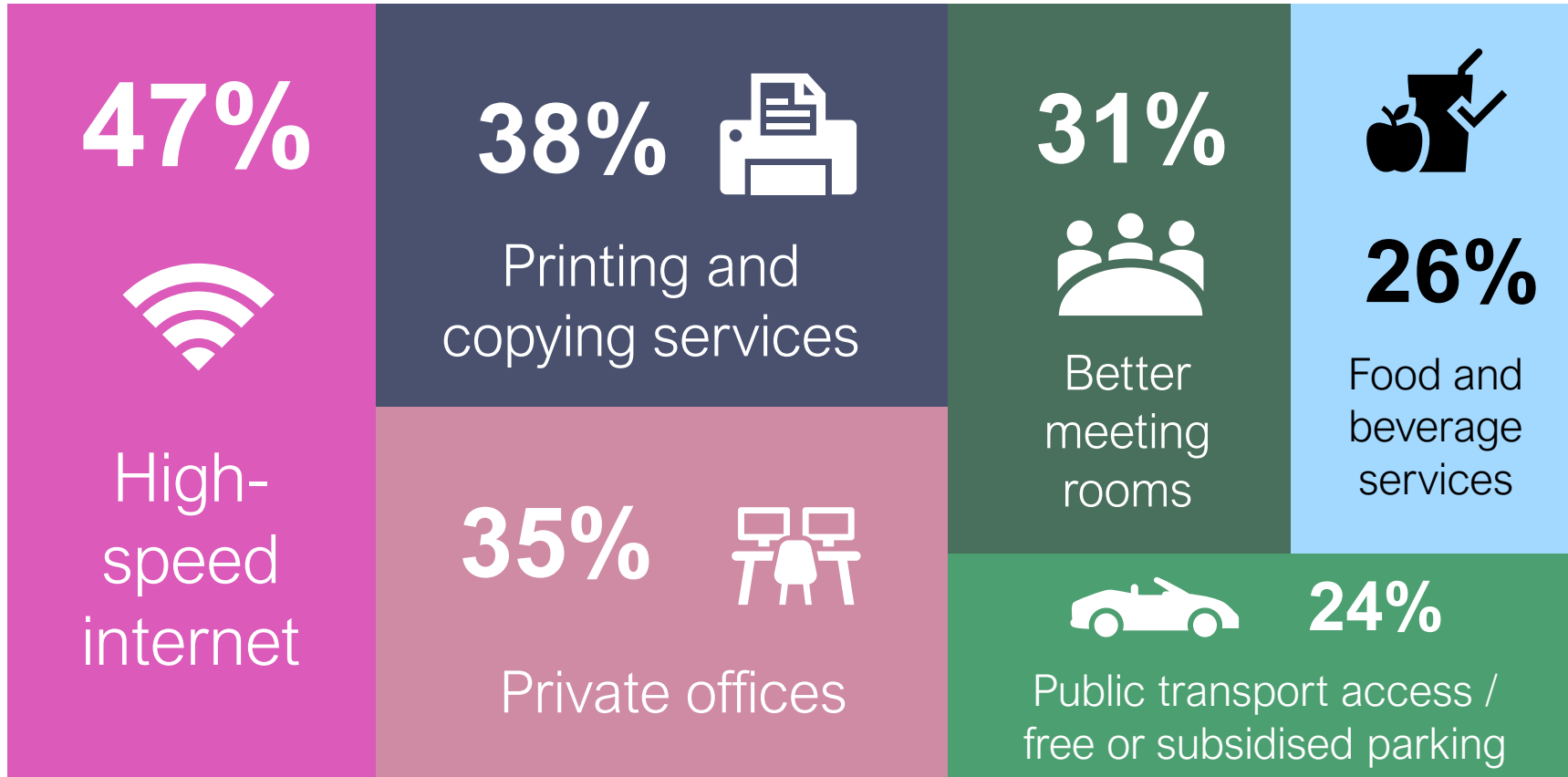
PART 3

Where to invest in key office spaces

- ✓ Top amenities that encourage more office visits.
- ✓ Likes and dislikes in personal workspace.
- ✓ Likes and dislikes in kitchen and break areas.
- ✓ Most valued functions in mixed-use office precincts
- ✓ Most attractive events in the office building.

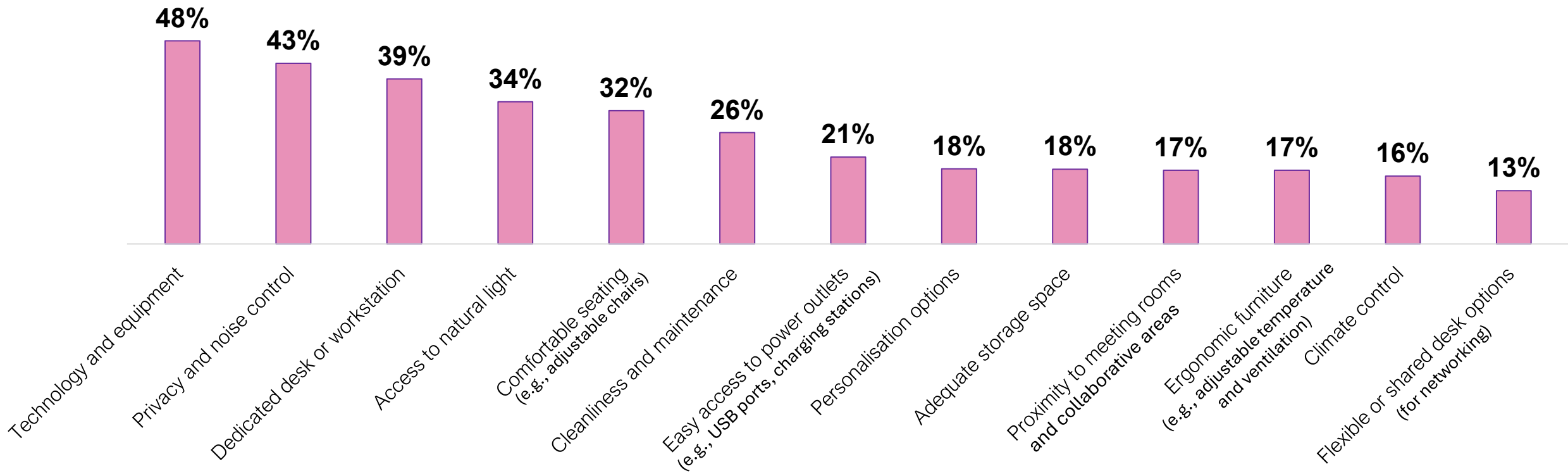
Top amenities that encourage more office usage

High-speed internet, printing and copying services, private offices, and better meeting rooms are the top amenities valued across personas. The demand for private offices has resurged, reflecting a transition from home offices back to work. Highlighting these features can help in attracting and retaining office-goers.



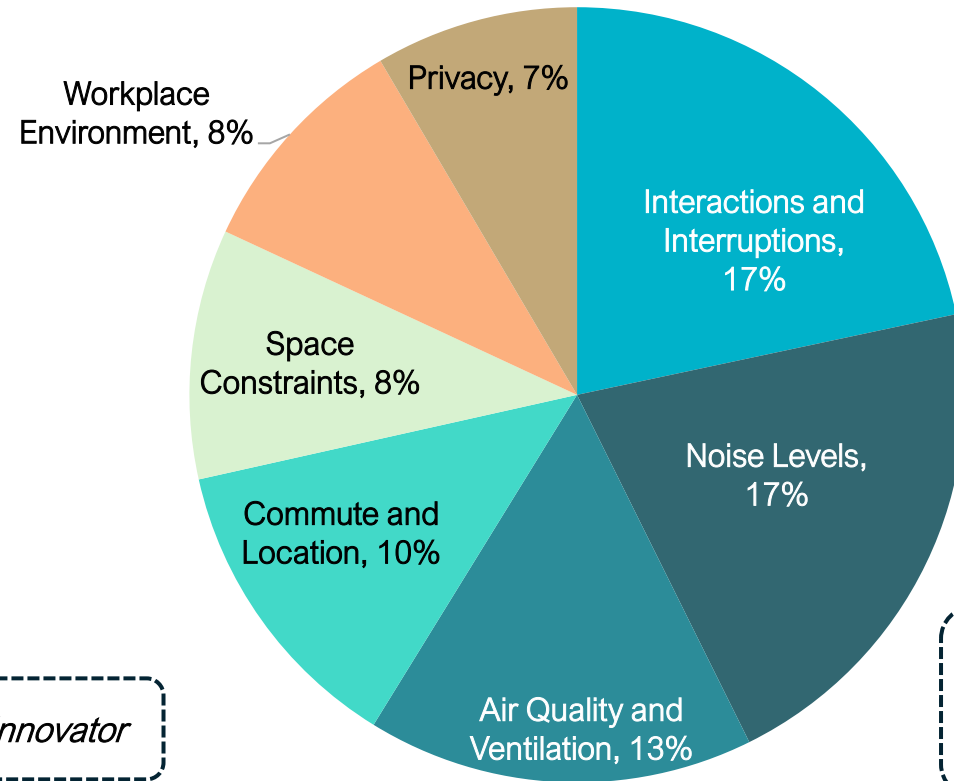
What employees value most in their individual workspace

Employees value technology and equipment in their individual workspaces. During COVID, there was a significant investment in home office setups, and now employees expect a similar level of technology in the workplace. Privacy, noise control, and dedicated desks are also highly valued. People want an environment that mirrors the comfort and efficiency of their home offices. Although other amenities like storage and ergonomic furniture are mentioned, they are less significant compared to technology and noise control.



Identifying pain points in individual workspaces

A significant pain point for employees is interruptions and noise levels in their workspaces. Many desire more privacy, dedicated desks, and quieter environments to work effectively. The demand for private spaces reflects the need for reducing noise and avoiding distractions—something that was not as emphasized in traditional office settings before the pandemic.



“It can be **noisy** if everyone is in. Sometimes the temperature is **too cold** for me.”
Wellness Seeker

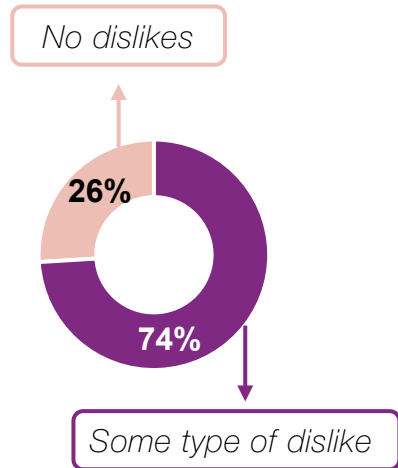
“**Inadequate internet** connectivity”
Wellness Seeker

“It’s good but **more privacy** would be amazing”
Innovator

“Gets **too noisy** and **busy**” Maximizer

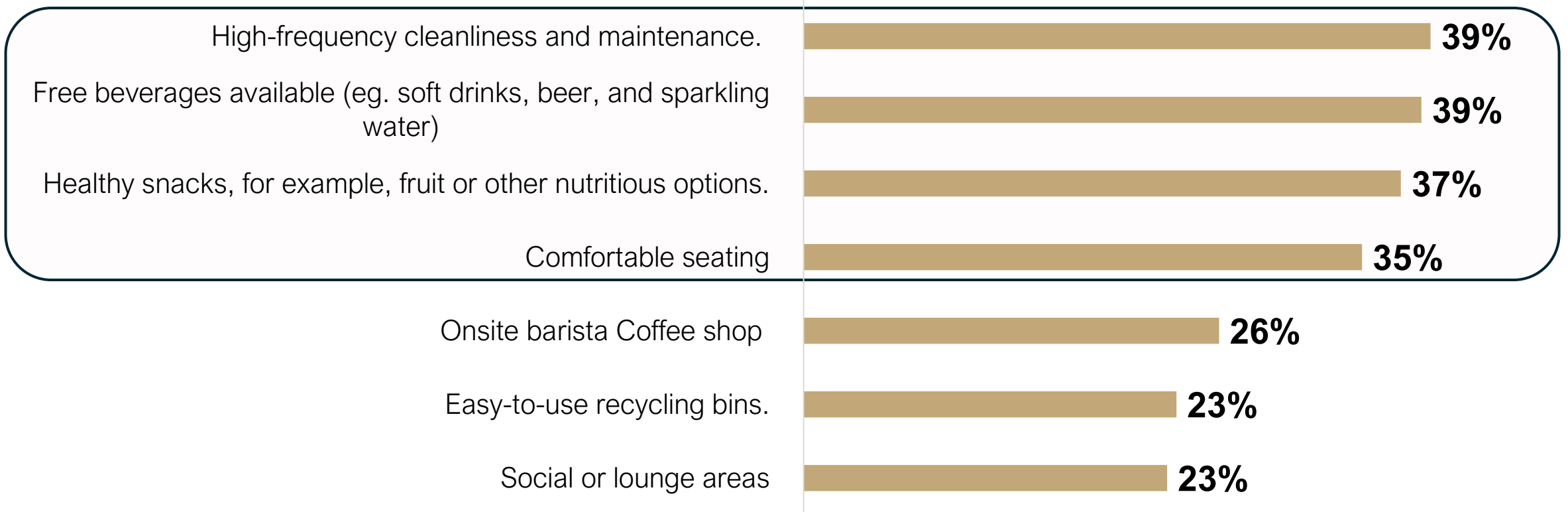
“**No parking**” Maximizer

“The windows don’t open too much, we get a **limited** amount of **air**, this is painful in the summer especially in hot conditions”
Innovator



Favorite features in office kitchen and break spaces

In office kitchens and breakout areas, high-frequency cleanliness and maintenance are top priorities. Employees have a low tolerance for untidy kitchen spaces. Access to free beverages, healthy snacks, and comfortable seating also stands out. Providing a clean, well-maintained kitchen area that aligns with wellness trends is essential for making the office environment more inviting.



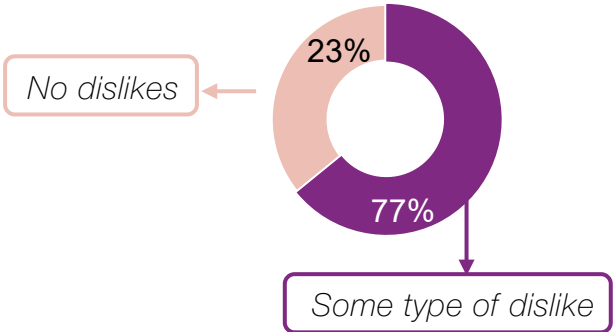
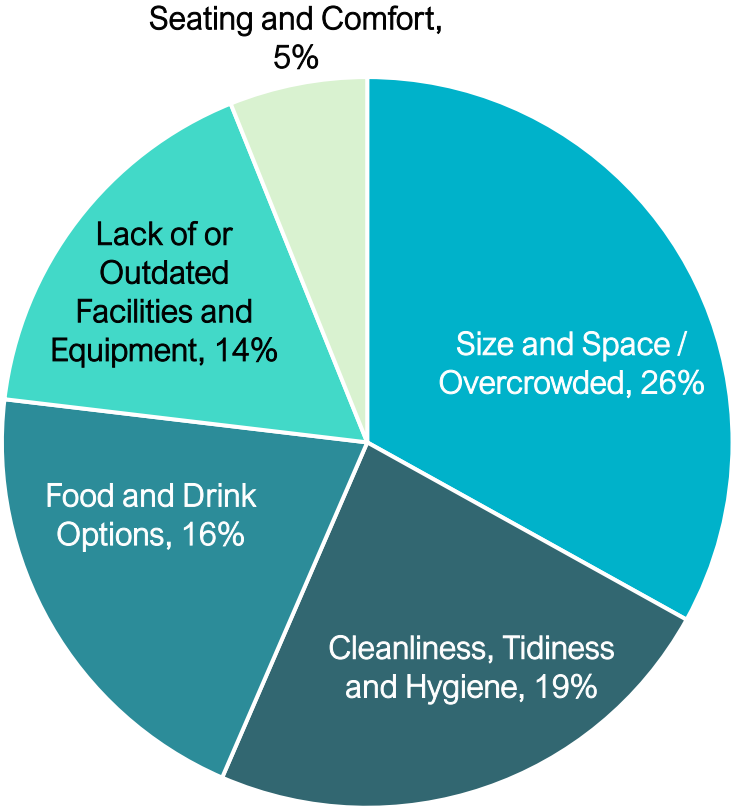
What makes the office kitchen frustrating for occupiers

In office kitchens and breakout areas, high-frequency cleanliness and maintenance are top priorities. Employees dislike overcrowded and untidy kitchens, which can drive them away from these spaces and even from the office. Access to free beverages, healthy snacks, and comfortable seating also stands out. Providing a clean, well-maintained kitchen area that aligns with wellness trends is essential for making the office environment more inviting.

“Not always stocked with coffee/tea and milk and the cups can be chipped or unclean” Wellness Seeker

“It’s literally a fridge and a microwave. But that’s been true for 90% of the jobs I’ve done. The kitchen is just supremely uninspiring in that respect. Just enough to keep packed lunches fresh, or offering a chance to heat up some canned ravioli.” Innovator

“People don’t clean up after themselves, so it is always dirty” Maximizer

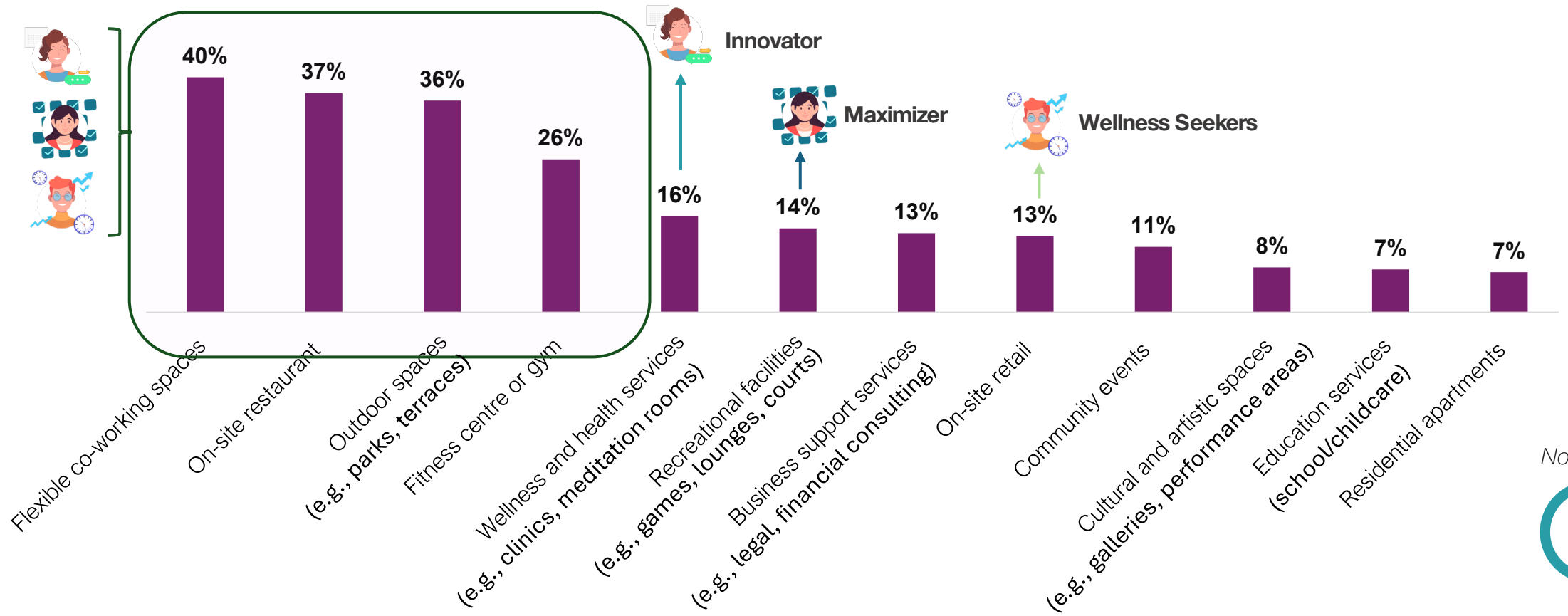


“Too small for too many people, outdated appliances, lack of free or healthy snacks” Innovator

“We have a hot tap only, I would prefer some sort of coffee pod machine. I would also prefer increased fridge space and more access to informal seating.” Wellness Seeker

Most valuable functions in mixed-use office precincts

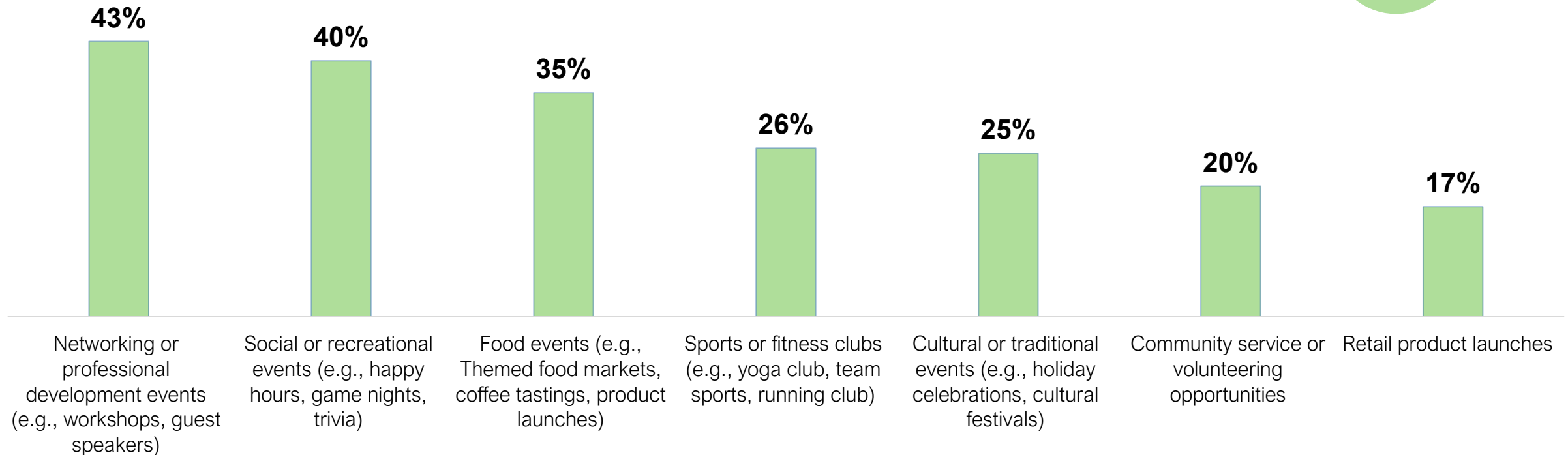
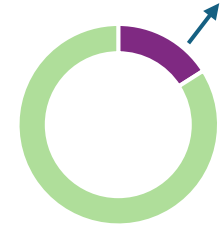
Employees value mixed-use office precincts with flexible coworking spaces, on-site restaurants, and outdoor areas. These features create an engaging environment for both work and leisure. Innovators value health services, Wellness Seekers appreciate on-site retail, and Maximizers prioritize recreational facilities. A diverse and attractive environment can help draw more employees back to the office.



What is valued in community activations and events

Companies have invested in customer experience activations and events to reinvigorate office spaces. The most valued events are networking and professional development, which were missed during remote work and are crucial for career growth. Social and recreational events, as well as food events, are also popular. Only 22% of employees prefer not to attend any events, indicating strong overall interest in these activations.

Prefer not to attend events/ activities. **22%**



The do's and don'ts of office building community events

Persona breakdown

If we break down by persona, we see that Innovators prioritize social or recreational events and sports or fitness clubs more than other personas, for whom networking, professional development, and food events are still the primary preferences.



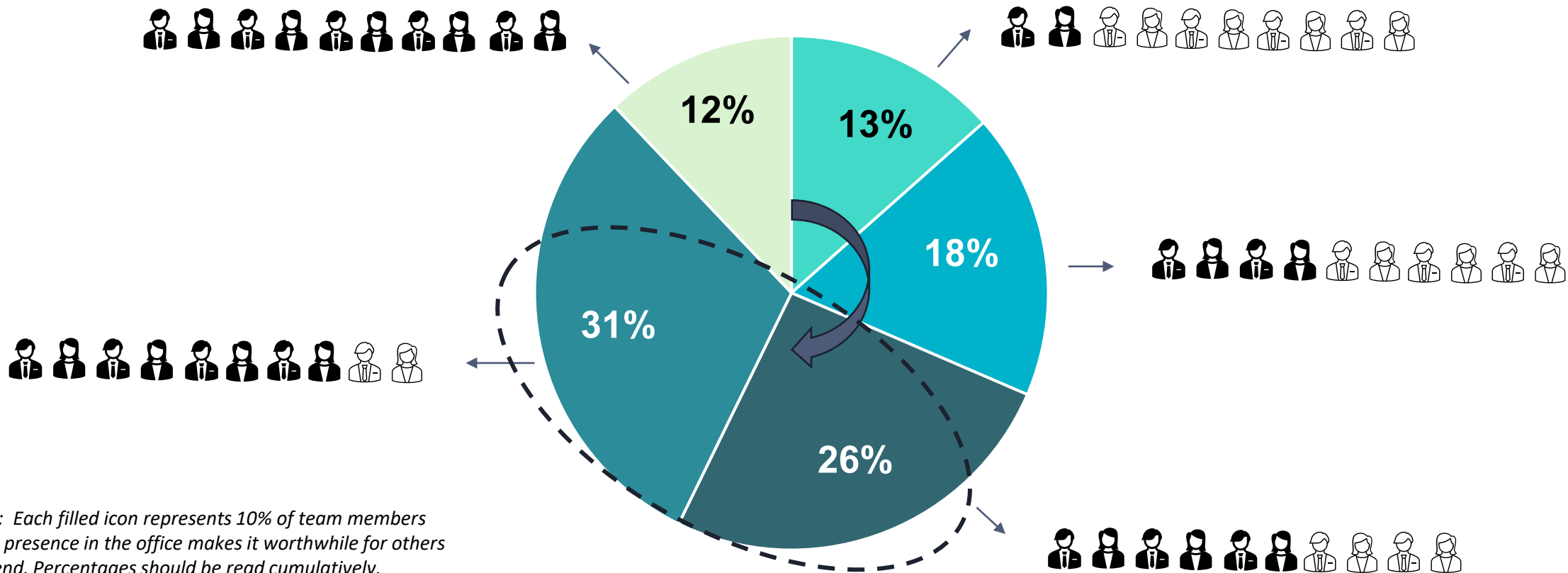
PART 4

Driving advocacy-based pull back to office

- ✓ Understanding current office experience advocacy
 - Would office occupiers currently recommend their office experience
 - Which personas are creating a pull in which direction
 - NPS score variations by region.

Optimal team presence – the tipping point

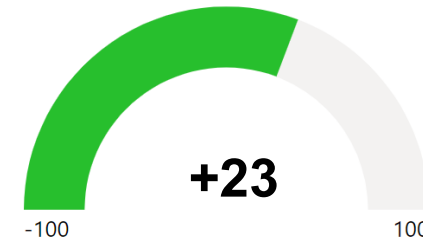
Remember, reaching the tipping point is key. If one colleague starts coming in, others are likely to follow. It's not just about landlords or management—encouraging colleagues to advocate for office attendance can create a powerful flywheel effect that drives more people back.



***Note:** Each filled icon represents 10% of team members whose presence in the office makes it worthwhile for others to attend. Percentages should be read cumulatively.

Likelihood of recommending current office CX to colleagues

Overall Industry NPS



CX Focused Providers
*Resonate Customer

NPS persona breakdown

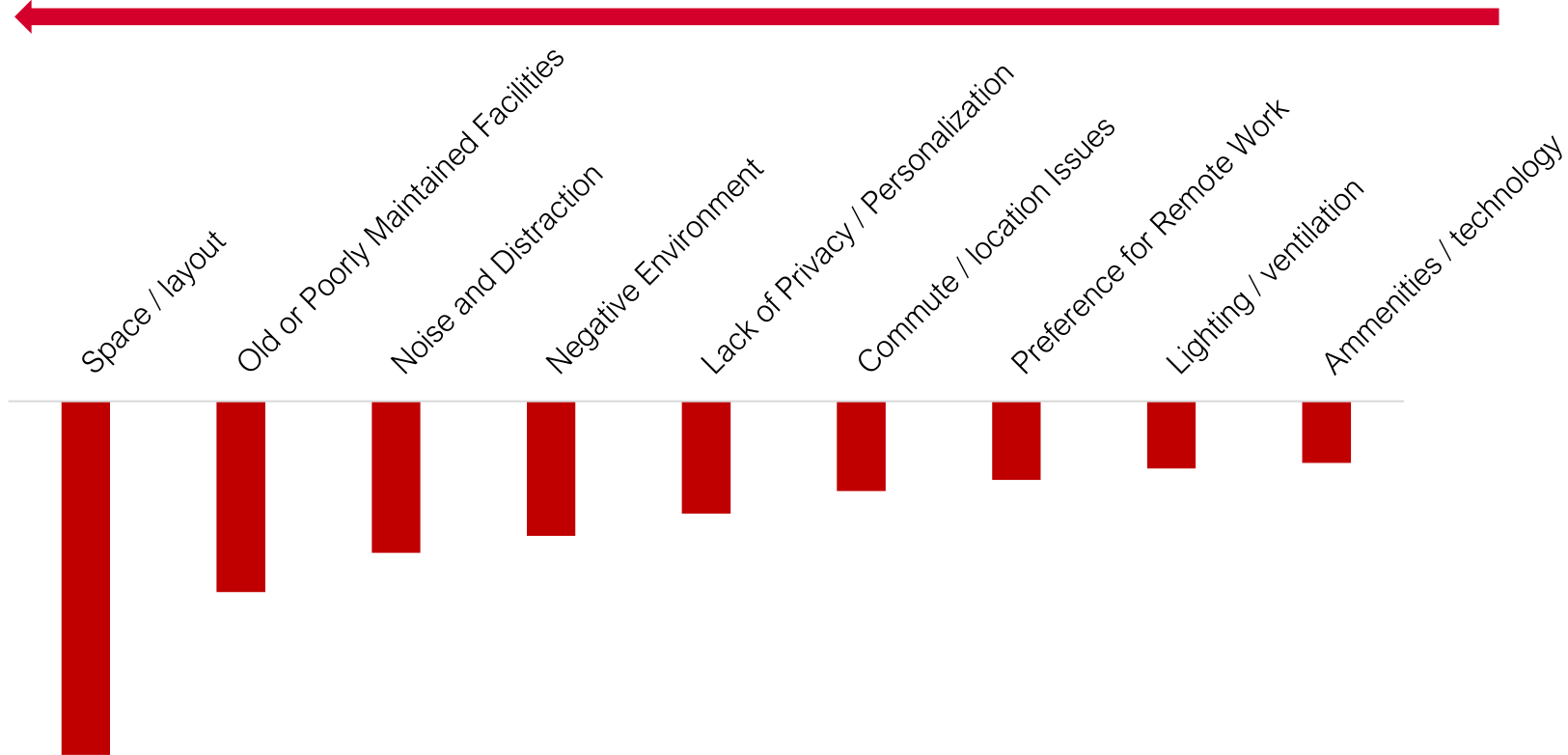


The advocacy for office spaces in the UK is low, with an NPS of -32. Most respondents would not recommend their office, indicating many unsuitable spaces. This presents an opportunity for better office spaces to capture market share. Satisfaction varies greatly, with some workplaces achieving high NPS scores while others struggle. Even high-income Innovators expect more from their offices. Low NPS scores suggest market share is up for grabs, as people are willing to move for better environments.

Key concerns raised by non-promoters

Those that are not happy mentions mainly include space layout, poorly maintained facilities, noise, distractions, negative environments, and lack of privacy—some of the themes discussed by persona.

← **More mentioned by Non-Promoters**



“I dislike the hot desks. I like the open plan”

“We have to book a desk in work which can cause problems when you book someone else's who normally sits there”

“It's a terrible 1970s building which is boiling in the summer and freezing in the winter”

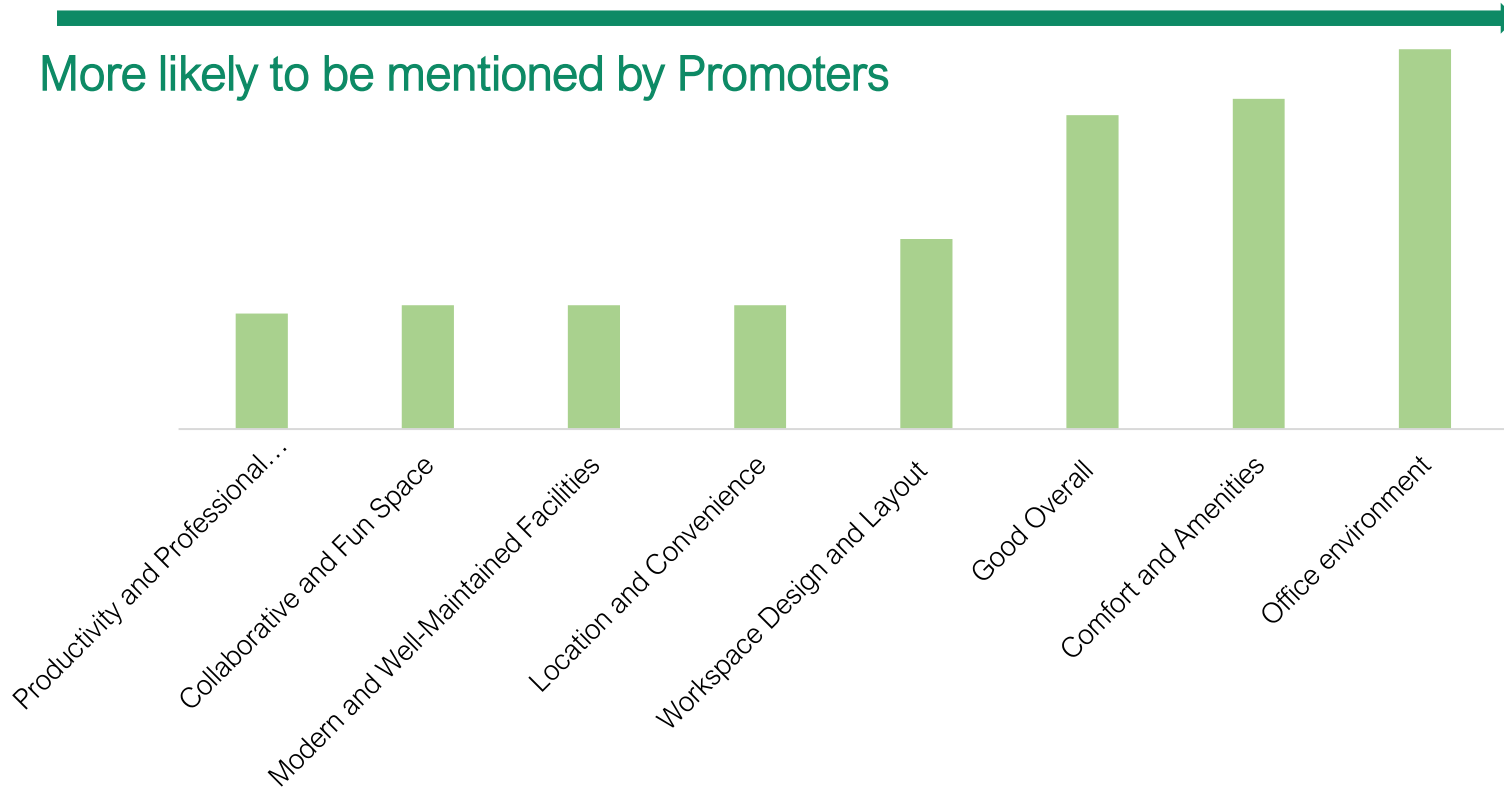
“I think non-availability of proper cabins, untidy kitchen space and unfollowing of rules and regulations.”

“Damaged equipment or facilities are not repaired in time, affecting work efficiency and comfort”

Top reasons promoters recommend the office

People who love their offices appreciate the comfort, amenities, and well-designed layout. Suddenly in the last two or three years, this is of value because the alternative is home. The biggest competitor is not other office spaces, but rather the home environment.

More likely to be mentioned by Promoters



“My office space is properly **designed**, everything designed to taste and its very **comfortable**”

“It's important to have a **good sized** office that let's lots of **light** through that will boost morale”

“The ideal office space should make me look forward to driving in, avoiding that soulless corporate feel you get with most buildings. There's enough **amenities** and bonuses to make me not resent the time spent commuting in, and provide the **collaborative space** that is missing in my home office.”

“Comfortable, clean and functional”

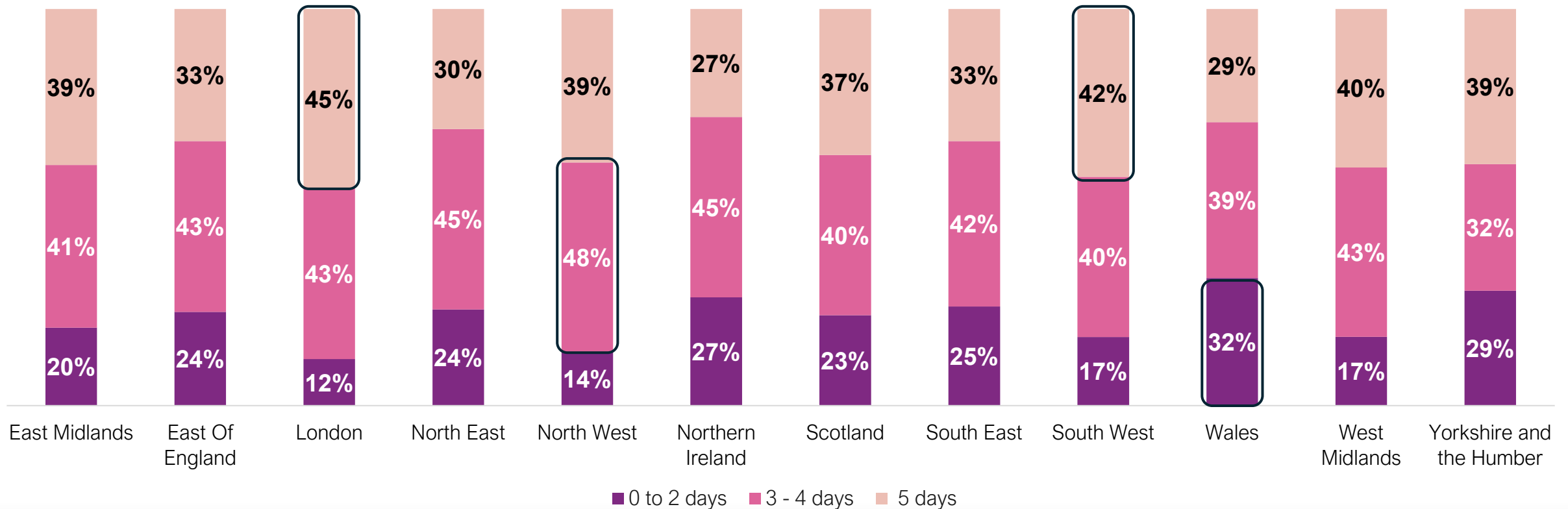
PART 5

Regional variations and opportunities

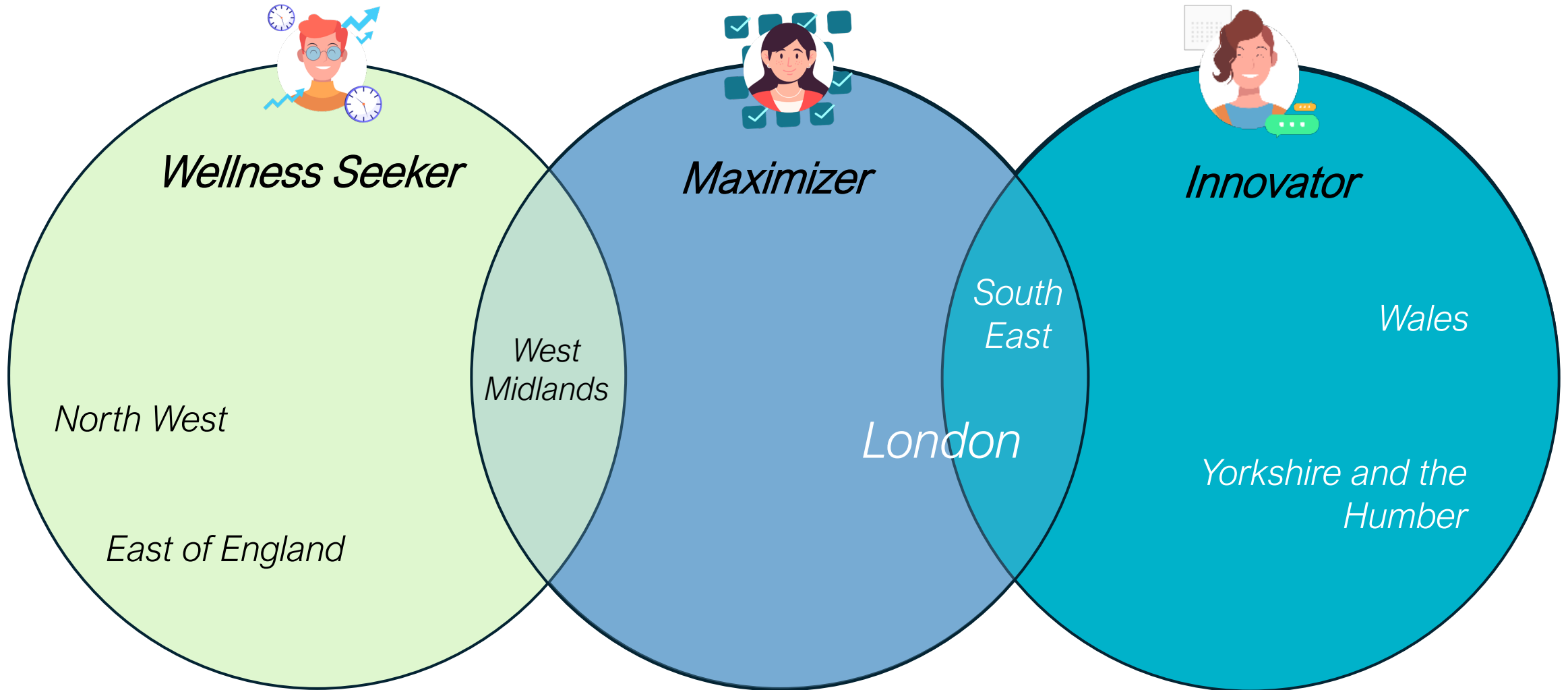
- ✓ Understanding regional differences:
 - Frequency of attendance.
 - Which amenities are most valued in each region?
 - NPS score variations by region.

Regional breakdown – Office attendance

Certain regions have different office usage patterns. In London and the South West, office usage is higher, with more people returning to work compared to other regions where remote or hybrid work remains more common. In London, 45% of people now say they come into the office five days a week, and 43% say they come in three to four days a week, with very few saying they come in zero days. This is likely influenced by the high cost of living in London, motivating individuals to maximize the use of their office environments.



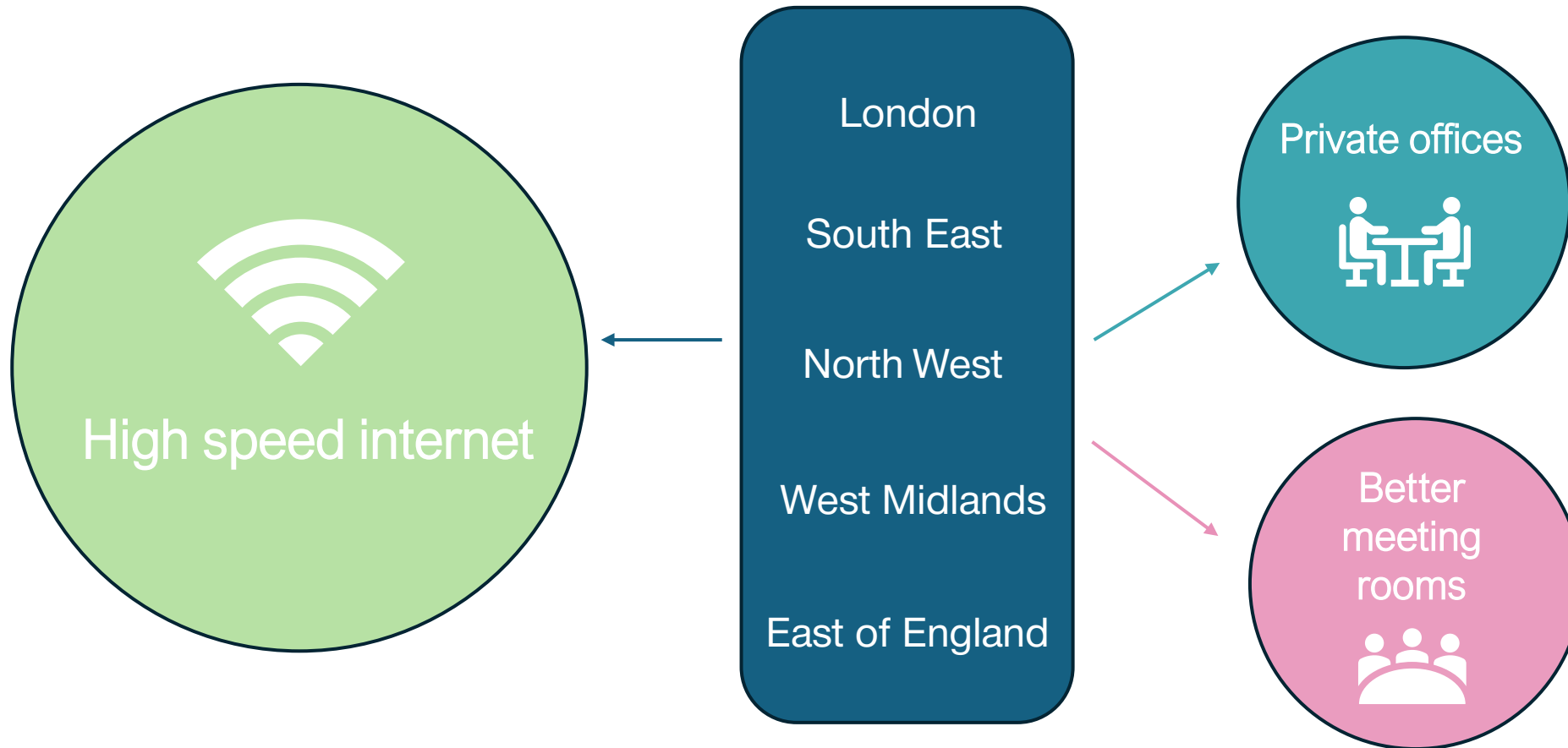
Regional breakdown - Persona Overview



Regional breakdown – Overview

What people value is high-speed internet, private offices, and better meeting rooms. If you want to go after these markets, this is it.

Top 5 regions by Population



Regional breakdown - Detail

1

East Midlands

High-speed Internet



East of England

High-speed Internet



London

High-speed Internet



North West

High-speed Internet



North East

Better Meeting Rooms



Scotland

High-speed Internet



South East

High-speed Internet



South West

Printing/Copying



West Midlands

High-speed Internet



Yorkshire & the Humber

Printing/Copying



2

Food and Beverages Services



Printing/Copying



Private Offices



Better Meeting Rooms



Private Offices



Printing/Copying



Private Offices



Private Offices



Printing/Copying



High-speed Internet



3

Printing/Copying



Food and Beverages Services



Better Meeting Rooms



Private Offices



Printing/Copying



Private Offices



Printing/Copying



High-speed Internet



Private Offices

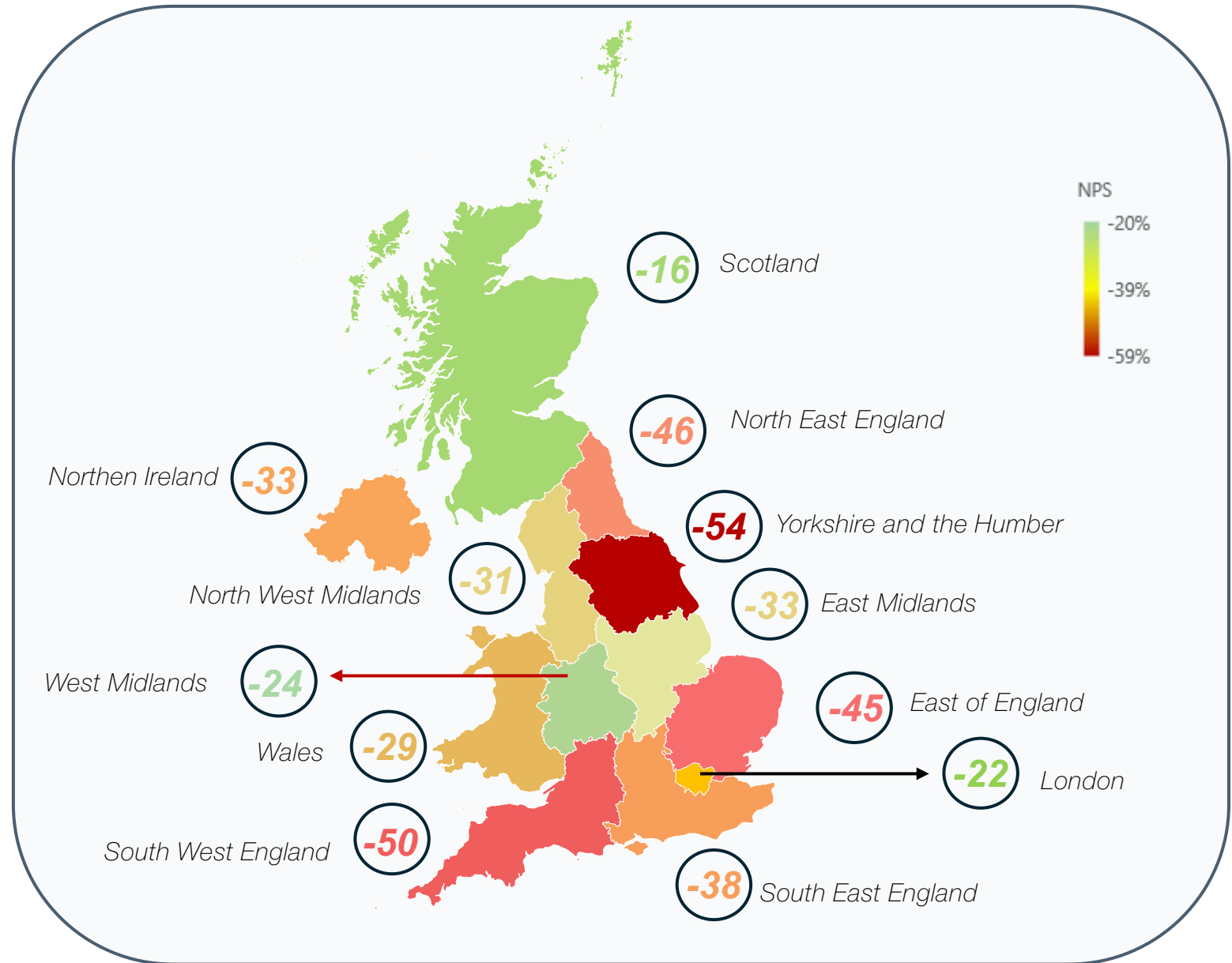


Private Offices



NPS regional breakdown

If you're looking for office spaces, certain regions have very low NPS scores. Some areas, like Yorkshire and Humber, have an NPS of -54, reflecting a significant level of dissatisfaction among office workers who do not enjoy their office spaces. In contrast, London is leading with better office satisfaction, while Scotland, although still negative at -16, shows comparatively higher satisfaction levels. There are office spaces with positive advocacy that are well-positioned to capture market share due to the widespread dissatisfaction in many regions. Workers in these dissatisfied regions are vocal about their negative experiences, which indicates a substantial opportunity for quality office spaces that meet employee needs and expectations.



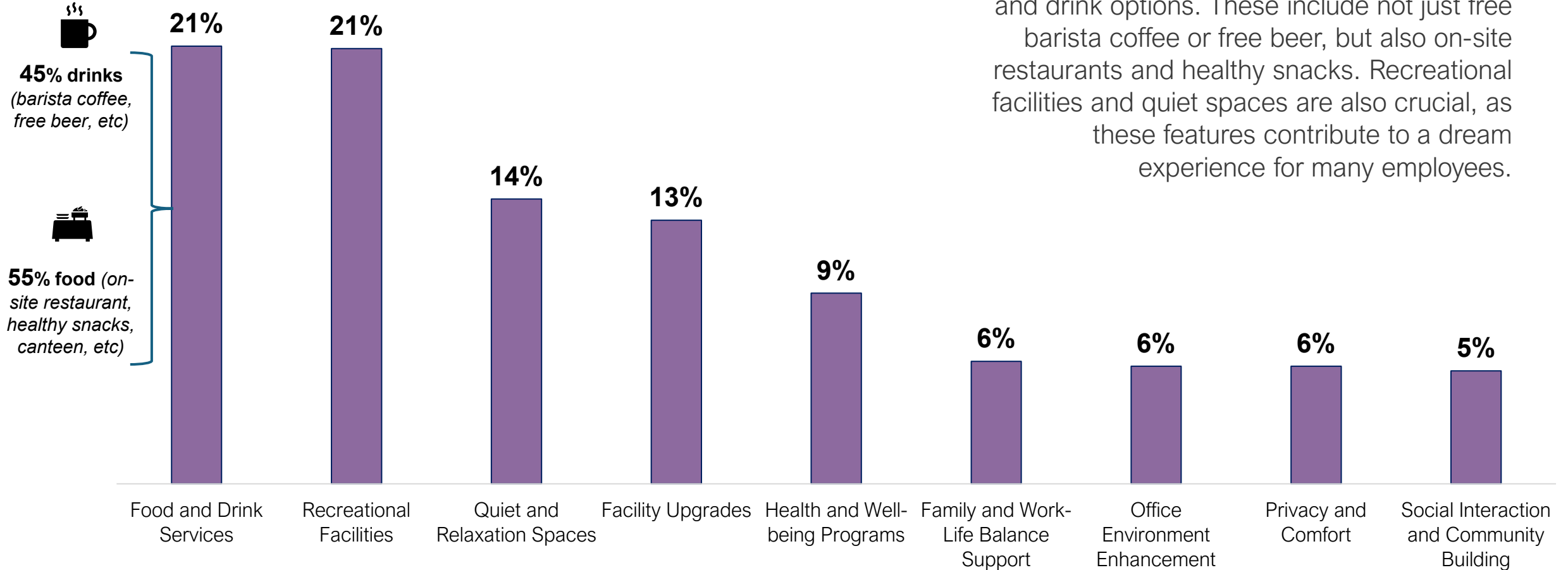
PART 6

Dream Experience that drive increase in usage

- ✓ Ideal office setup for each persona.
- ✓ What boosts attendance, increase willingness to travel, and secure longer-term agreements?

Creating the perfect workplace

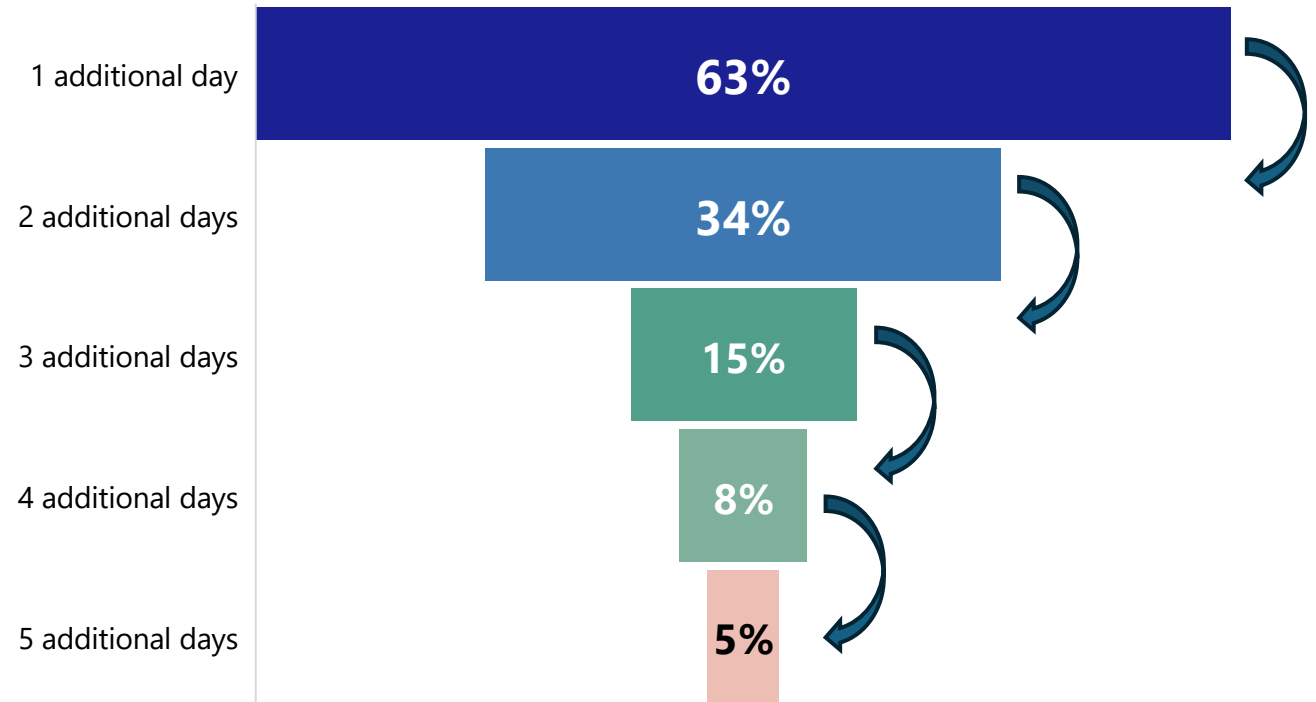
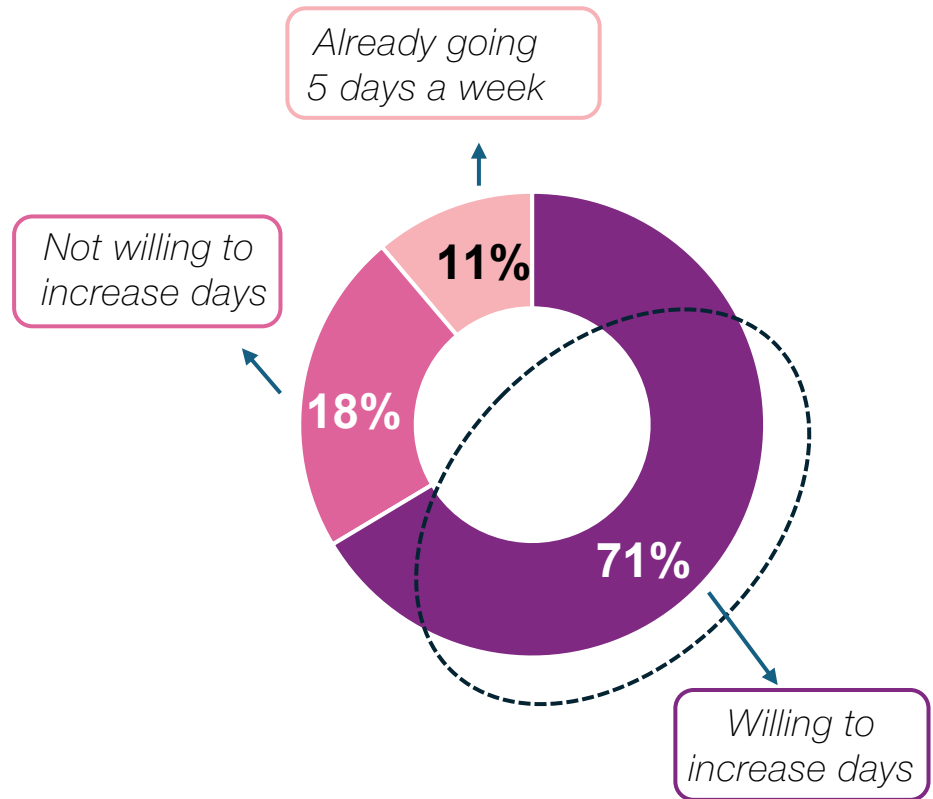
Desired amenities and services



Creating the perfect workspace means focusing on desired amenities, especially food and drink options. These include not just free barista coffee or free beer, but also on-site restaurants and healthy snacks. Recreational facilities and quiet spaces are also crucial, as these features contribute to a dream experience for many employees.

Dream experience – Willingness to increase frequency

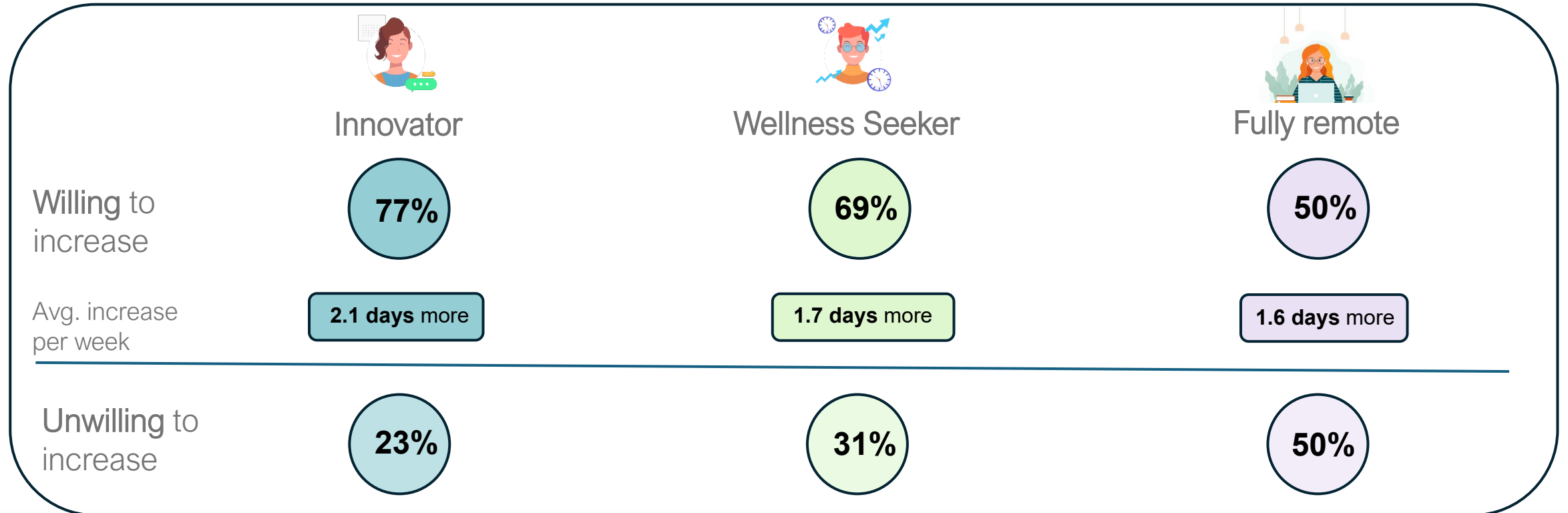
Good news is that 71% of employees would increase their office days if given an ideal work environment. Amenities like food options, quiet spaces, or better technology could motivate them. Specifically, 63% would come in for an additional day, and 34% would add two more days. A smaller portion mentioned increasing by four days, showing that a truly ideal office experience could significantly change behavior.



Dream experience – Willingness to increase frequency

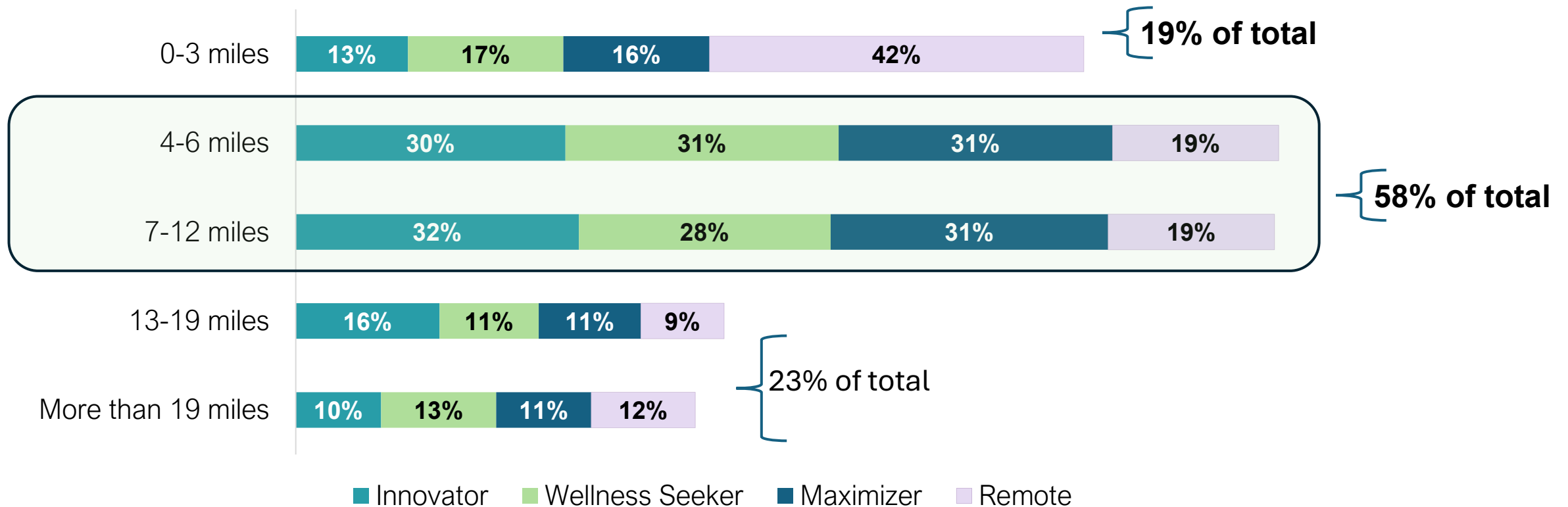
Persona breakdown

The Innovator, typically high-income and well-educated, would increase their office days to up to five if their ideal experience is delivered. Similarly, 69% of Wellness Seekers, despite preferring hybrid work, would raise their in-office days if their expectations are met. Interestingly, 50% of fully remote workers are willing to come into the office one to two days a week if the right amenities are provided. These insights highlight key opportunities for commercial real estate to attract different personas by addressing friction points in the office experience.



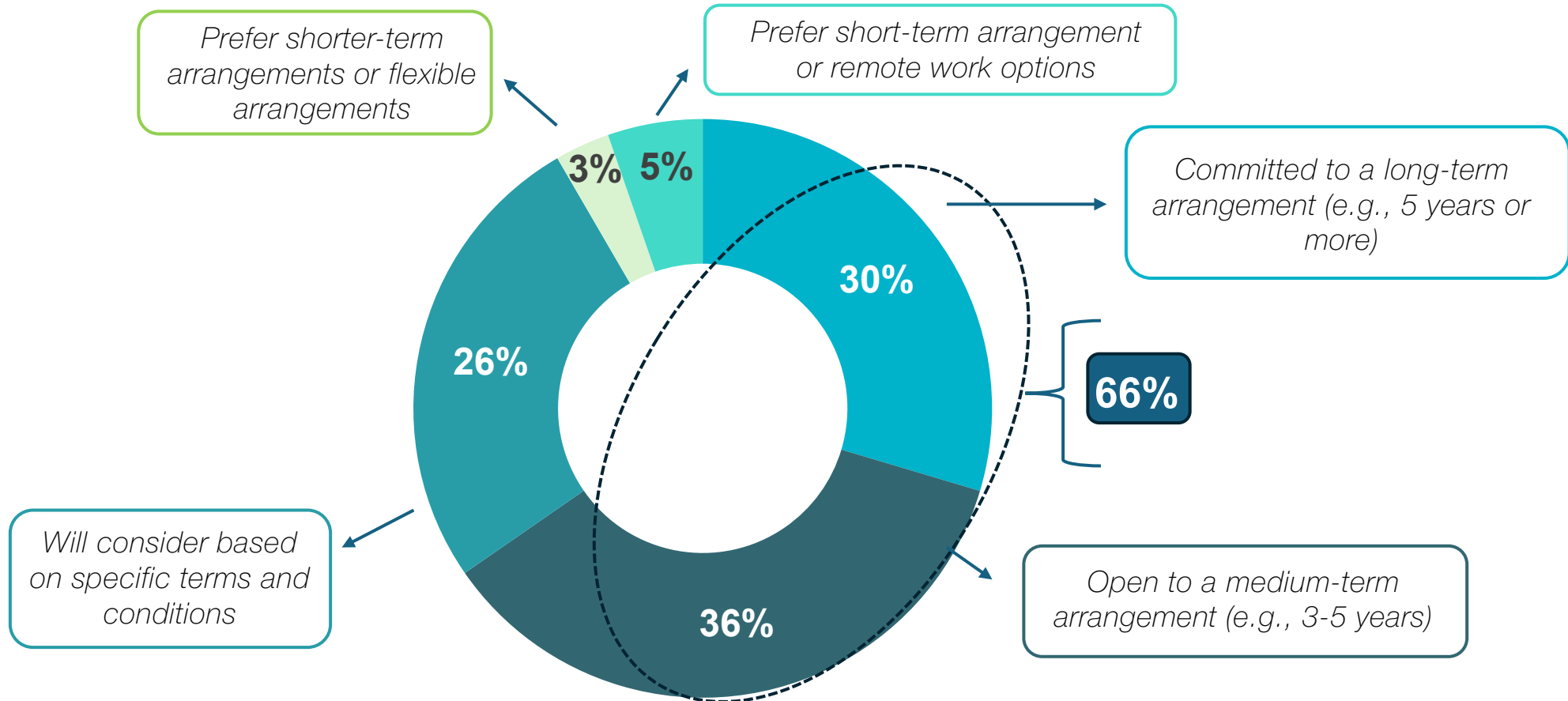
Dream experience – Willingness to travel

A significant portion of employees are willing to travel up to 12 miles to access their ideal office amenities. Innovators are particularly flexible, with 32% willing to make this commute, while Wellness Seekers and even fully remote workers show interest in coming to the office more often if it meets their needs. This suggests that distance is less of a barrier when workplaces provide desirable features, highlighting a substantial opportunity to attract employees by offering quality amenities.



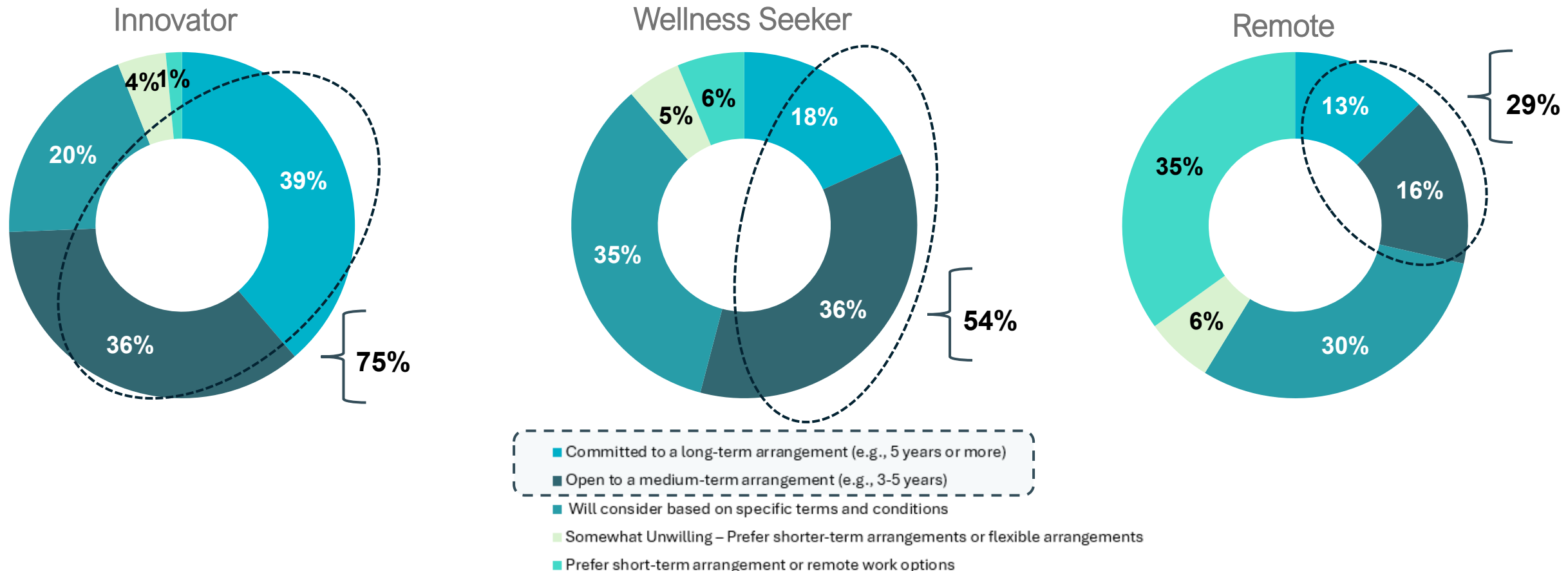
Willingness to commit to a long-term arrangement

Employees are willing to commit to long-term leases or employment contracts if their ideal work environment is guaranteed. 66% would extend contracts if amenities like high-speed internet and other key features are provided, showing that they value a consistent, quality office experience over temporary perks.



Willingness to commit to a long-term arrangement

Additionally, Wellness Seekers, who prefer a hybrid model, are also willing to commit long-term if their dream experiences are provided. In fact, 50% of them would enter long-term working arrangements under these conditions, indicating that the right office environment can motivate even those favoring flexibility.



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