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The state of RTO: enterprise wins, fails, and lessons learned.

A deep dive into real-world RTO case studies
—what's working and what's not.



The office as we knew it is dead. Yet its future state is still uncertain for many organizations.

Employees expect flexibility, GMs seek productivity, CFOs are on the hunt for cost reductions and CEOs want resolution on a debate that has simmered for 5 years. Pity the CRE leaders, stuck in this crossfire.

The result?

Contentious RTO policies, disengaged employees and millions wasted on underutilized real estate.

Yet a new model has emerged—and its proponents are slashing costs and boosting productivity.

Can you really have both?

Yes.

And the proof is in the case studies.

The pitfalls of rigid RTO mandates.

Some of the world's biggest companies tried to strong-arm employees back to the office—it didn't go well.

JPMorgan Chase

The overcrowding debacle.

Mandate:

After the company enforced a five-day office return for senior leaders and pushed for broader in-office attendance.

What went wrong?

Employees walked into packed offices with no space to work and no clear purpose for being there. The mandate ignored evolving work patterns, leaving employees battling noise, and struggling with unreliable Wi-Fi.

The fallout:

- Lack of space: Desk shortages led to employees arriving hours early or "reserving" spots with makeshift signs.
- Disruptions: Loud open offices, limited meeting spaces, and unreliable Wi-Fi.
- Employee backlash: Frustration skyrocketed, leading to attrition and unionization efforts.

Disney

The employee backlash.

Mandate:

Disney reversed flexible work policies, requiring employees to be in-office four days a week.

What went wrong?

Employees reoriented their lives—commutes were longer, disruptions were greater, and morale plummeted. Over 2,300 employees signed a petition warning of resignations, lost institutional knowledge, and declining productivity.

The fallout:

- Loss of talent: Many employees left rather than return to a rigid office model.
- Productivity myths: Flexibility fueled output; mandates did not.
- Cultural damage: Internal unrest, loss of goodwill, and frustrated creative teams.



Key Lessons

- ✓ Top-down mandates = resistance. Employees expect a say in how they work.
- ✓ Showing up isn't the same as working. Requiring attendance without a clear purpose always backfires.
- ✓ Rigid policies alienate talent. The best employees will simply leave.
- ✓ Trust beats tracking. If you need surveillance to enforce RTO, you've already lost.

X

Mass exodus of leadership.

Mandate:

Employees were required to return to the office five days a week—or quit. Exceptions had to be personally approved by Elon Musk. One high-ranking official reportedly told staff, 'If you can physically make it to an office and you don't show up, resignation accepted.'

What went wrong?

Senior employees saw the mandate as a non-starter. X's approach—threatening termination, ignoring preferences, and centralized decision-making—was perceived as punitive.

The fallout:

- Resignations: Experienced leaders opted to leave rather than comply.
- Brain drain: The loss of senior talent weakened institutional knowledge.
- Employee distrust: Morale plummeted under rigid control.

Vodafone

The bonus penalty backfire.

Mandate:

Employees required in-office 2–3 times a week (8 days per month) or risk losing bonuses and facing disciplinary action.

What went wrong?

Vodafone escalated RTO by tying compliance to financial penalties and warnings while reducing office space, leading to seating shortages. Employees spent much of their time on video calls with remote colleagues, limiting meaningful collaboration.

The fallout:

- Inefficiencies: Employees struggled to find meeting rooms and desks.
- Employee resentment: The threat of financial penalties created resistance.
- Retention risks: Vodafone's stricter enforcement increased attrition risk—particularly among senior talent.



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The strategies that worked.

Some companies have rewritten the playbook—ditching rigid mandates in favor of smart, strategic approaches that balance savings and flexibility.

T-Mobile

The cost reduction playbook.

Strategy:

Closed underutilized offices, replacing them with a flexible hub-and-spoke model—regional office hubs combined with access to thousands of on-demand workspaces.

Why it worked:

Employees gained choice, real estate costs dropped by 80%, and collaboration significantly improved. By replacing underused regional offices with access to a vast network of on-demand workspace options, employees were empowered to work where it works best for them.

The outcome:

Real-time data helped T-Mobile right-size its national real estate portfolio. They saved 80% in annual costs, and increased workplace flexibility, all within only a few months.

Spotify

The destination office.

Strategy:

Implemented a work from anywhere policy, making offices hubs for connection and collaboration—not required attendance.

Why it worked:

Offices became magnetic, not mandatory—boosting engagement and cutting attrition by 15%. Employees voluntarily gathered for in-person collaboration, and events, choosing when and where to work based on their actual needs.

The outcome:

Spotify's chief human resources officer Katarina Berg said: "You can't spend a lot of time hiring grownups and then treat them like children." Employee satisfaction dramatically increased, and office utilization improved as teams used the space intentionally rather than being forced in by mandates.



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Key Lessons

- ✓ Flexibility wins. Choice leads to higher engagement and retention.
- ✓ Hybrid beats rigid. Combining remote and in-office work intentionally creates better outcomes.
- ✓ Shrinking fixed office footprints and leveraging flexible spaces drive efficiency.
- ✓ The office should serve a purpose. If employees come in, make it worth their while.

Airbnb

The gathering week model.

Strategy:

Airbnb has rejected mandates and instead encourages employees to work remotely, as long as they meet up regularly. This policy is called "Live and Work Anywhere".

Why it worked:

Focused on meaningful collaboration, not outdated presenteeism. This model was particularly effective for brainstorming, planning, and alignment sessions.

The outcome:

According to CEO Brian Chesky, this model has fueled both performance and output. "If you want a team to work harder, don't make them come to the office. Give them a crazy deadline and check on their progress every week." The result? Stronger team cohesion, higher engagement, and improved alignment—all while reducing Airbnb's office footprint.

Allstate

The optimization masterclass.

Strategy:

Allstate shrunk their overall corporate real estate footprint from 12M to 4M sq. ft., shifting 25% of their total workforce to coworking spaces and flexible office space solutions.

Why it worked:

Allstate avoided the trap of underutilized office real estate and instead invested in demand-driven workspace allocation. Employees had access to a vast network of nearby workspaces without the need for a fixed desk at a central HQ.

The outcome:

Annual office expenses plummeted from \$382M in 2020 to \$138M in 2024, saving over \$244M per year, all while maintaining peak employee productivity, collaboration, and satisfaction.



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A pattern has emerged. Winning companies are using this playbook.

Big moves. Bigger impact. Leading enterprises like T-Mobile, Airbnb, Allstate, and Spotify are rewriting the workplace playbook—and the patterns are clear:

- They put employees first, offering choice instead of forcing rigid, one-size-fits-all mandates.
- They let data lead, using real-world utilization insights, not assumptions, to shape strategy.
- They cut the deadweight, shifting from bloated, long-term leases to flexible, on-demand solutions.
- They optimize relentlessly, refining space allocation and negotiating smarter real estate terms.
- They reinvest strategically, directing savings into M&A, shareholder returns, and revenue-driving teams.

This isn't luck. It's a playbook. A repeatable, strategic approach that aligns leadership priorities and unlocks The Hybrid Dividend—driving both workplace engagement and cost savings.

Want the blueprint? Download our RTO: making it work guide—your step-by-step playbook for workplace transformation.

Get the Playbook →



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RTO: making it work.

The playbook to enterprise real estate
strategies with flexibility built-in.



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The future of work is forward.

The companies that adapt now will dominate the future of work.

The rest? They'll be left behind. Which side are you on?

The time to act is now.

Talk with a workplace planning expert today! →