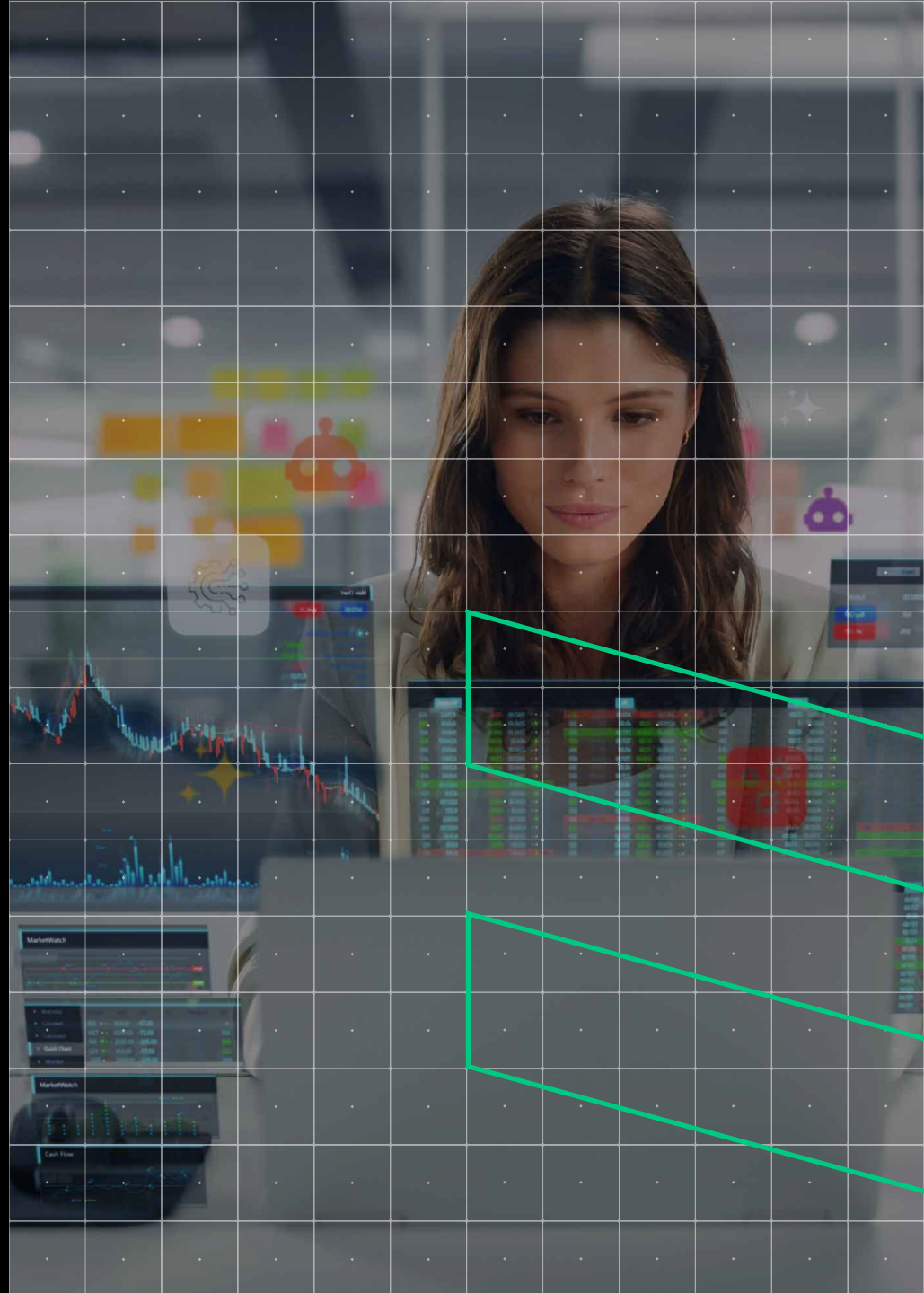
The AI-Ready Enterprise: Building the Right Foundations for Success in 2025

An ADAPT research report in partnership with Nexon and Microsoft.



Executive summary

Australian organisations are at a crucial juncture in their AI journey, with data maturity and infrastructure modernisation emerging as the main enablers of AI success. This research, drawing from comprehensive surveys of Australian CIOs, CDAOs, and infrastructure leaders, reveals significant shifts in AI readiness and highlights the fundamental importance of strong data foundations.

ADAPT's key findings highlight a significant evolution in AI readiness in the Australian marketplace, with organisations moving from cautious observation to strategic implementation. While only 9% felt prepared for AI at the beginning of the year, this increased to 30% by the end of 2024, reflecting growing confidence and a clearer understanding of AI's business value.

In 2025, SMBs and mid-market companies will find themselves at a pivotal moment in their AI journey. To capitalise on AI's transformative potential, it is essential to focus on building strong data foundations, modernising infrastructure, and developing the necessary skills and capabilities.

The research finds 3 interconnected pillars of AI success:

Data maturity: While 54% of CDAOs are confident in delivering their 2024 financial year data strategies, significant gaps remain in advanced data capabilities crucial for AI.

Infrastructure modernisation: Organisations with high modernisation maturity demonstrate higher AI readiness.

Skills and capabilities: Critical shortages exist across the data value chain.

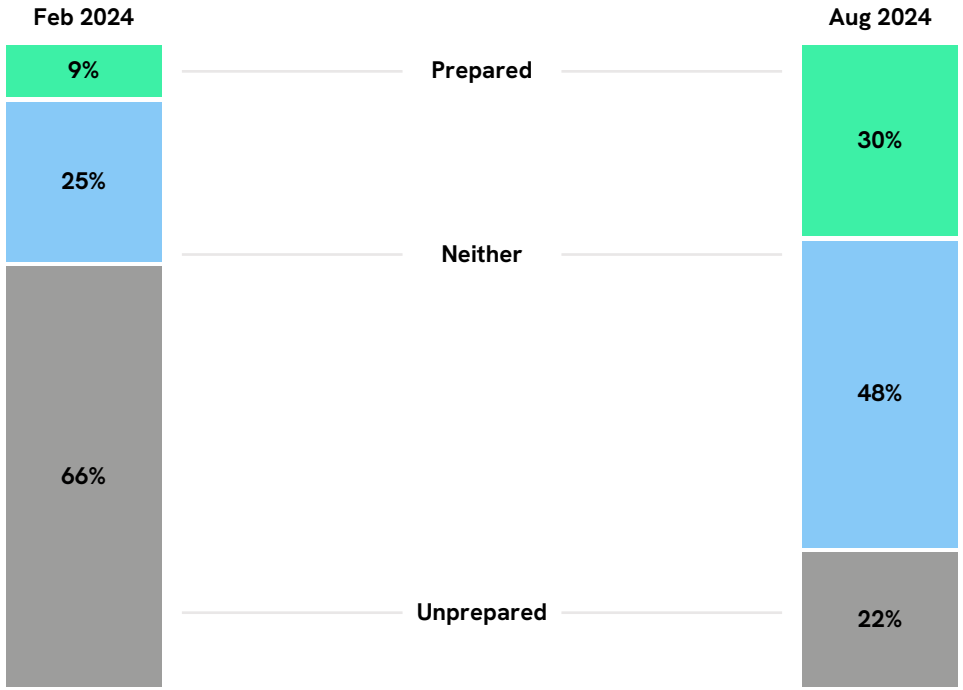
The research also highlights a clear preference for pragmatic AI adoption approaches, with 60% of organisations planning to consume AI through cloud-based services rather than building in-house capabilities. To stay competitive in 2025, SMBs and mid-market organisations must prioritise infrastructure modernisation. Adopt cloud-based solutions and integrated platforms like Microsoft Fabric to enhance operational efficiency and agility. This will enable organisations to quickly adapt to market changes and leverage AI technologies effectively.

Australia's evolving enterprise AI landscape

The promise of AI has captured the attention of Australian business leaders, driven by its potential to revolutionise operations, enhance decision-making, and transform customer experiences.

The transformation in Australian organisations' AI readiness throughout 2024 tells a compelling story about how rapidly market sentiment can shift when technology moves from theoretical to practical.

How ready is your organisation to truly harness AI in the next 12 months? [1]



1. ADAPT CIO Edge Surveys in Feb and Aug 2024. Sample size: 290 Australian CIOs

From cautious observation to strategic intent

Early 2024 painted a picture of an Australian market still in observation mode. Leaders were largely taking a wait-and-see approach, with 66% feeling unprepared for AI adoption. This cautious stance wasn't surprising. The generative AI revolution and ‘Hype’ was still being processed, and many organisations were struggling to understand its implications rather than actively planning implementation.

By the end of 2024, the landscape had changed dramatically. The shift wasn't just about improved confidence—it marked a fundamental change in how organisations viewed AI. The significant drop in "unprepared" responses (22%) indicates that organisations had moved from asking "if" they should adopt AI to focusing on "how" they would implement it.

This shift can be attributed to several key factors:

Real-world use cases are becoming more visible and tangible.

Early adopters are demonstrating practical benefits.

The market is moving from AI speculation to implementation.

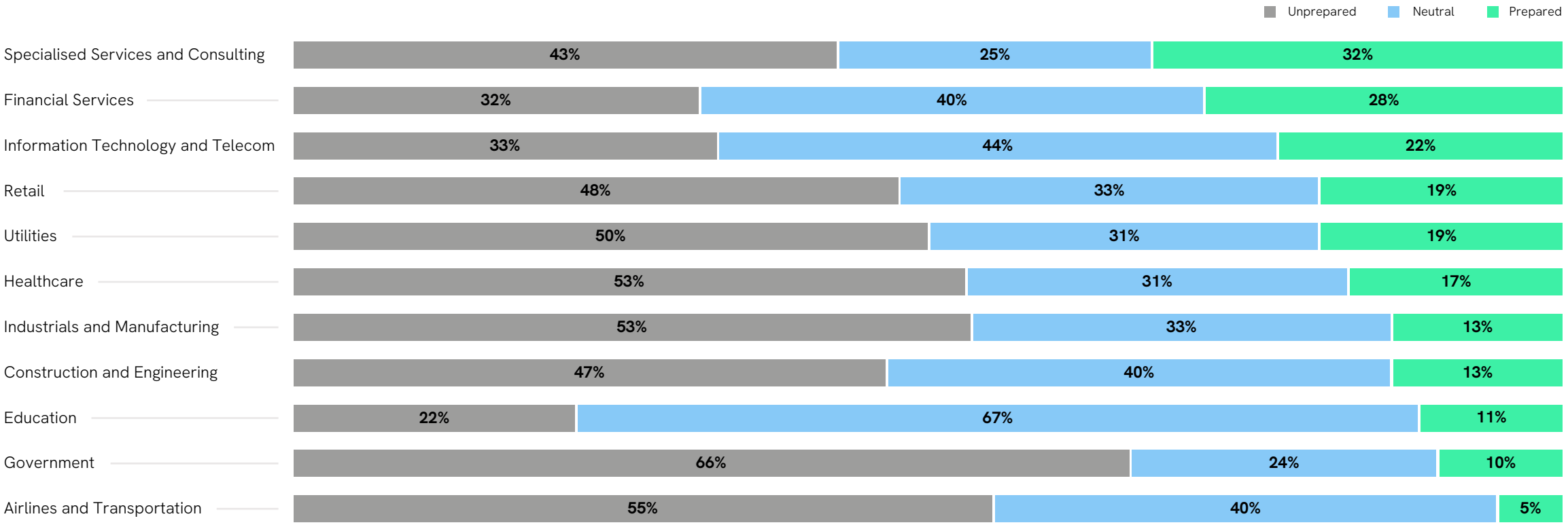
Growing awareness that AI adoption isn't optional for maintaining competitiveness.

The AI adoption story:

Why some industries lead while others follow

The varying levels of AI readiness across Australian industries reveal a fascinating story about how different sectors approach technological transformation.

Australian CIO's AI Readiness by Industry [2]



2. ADAPT CIO Edge Survey in Feb 2024 and Aug 2024. Sample size: 290 Australian CIOs

Specialised services and consulting: The AI frontrunners

The consulting sector's leadership in AI readiness (32%) isn't merely about technical capability, it's about business necessity. These firms face a dual imperative: they must implement AI internally and develop AI expertise to serve their clients. This creates a unique "learn by doing" environment where AI adoption directly translates to market competitiveness. Moreover, their project-based business model allows them to experiment with AI in controlled environments, learning from each engagement while minimising organisational risk.

Financial services: The regulated innovators

The financial sector's strong showing in AI readiness reflects a delicate balance between innovation pressure and regulatory constraint. Banks and financial institutions face intense competition from fintech disruptors, compelling them to embrace AI for everything from risk assessment to customer service. However, regulation, often seen as an innovation barrier, has actually helped create a structured framework for AI adoption. The sector's experience with strict data governance and compliance requirements means they're better prepared for the systematic approach AI deployment demands.

Retail: The digital divide

The retail sector's AI readiness levels (19%), reveal an industry in transition. The interesting story here isn't just about the overall readiness numbers; it's about the growing divide between digital-native retailers and traditional retailers trying to transform. The moderate readiness levels suggest many retailers understand AI's importance, particularly for inventory management and customer experience, but are struggling with the fundamental data infrastructure needed to support AI initiatives. The challenge isn't just adopting AI; it's transforming decades of legacy systems and processes while maintaining daily operations.

Healthcare: The cautious transformers

Healthcare's position in the middle of the pack, with 17% of organisations indicating AI readiness, reflects an industry facing immense potential and significant constraints. This relatively moderate AI readiness isn't about lack of opportunity. Healthcare has some of the most compelling AI use cases, from diagnostic assistance to personalised medicine. Instead, it reflects an industry where the stakes for error are extraordinarily high and where patient trust is paramount. The cautious approach to AI adoption isn't a sign of resistance but of necessary diligence in an industry where "move fast and break things" isn't an acceptable method.

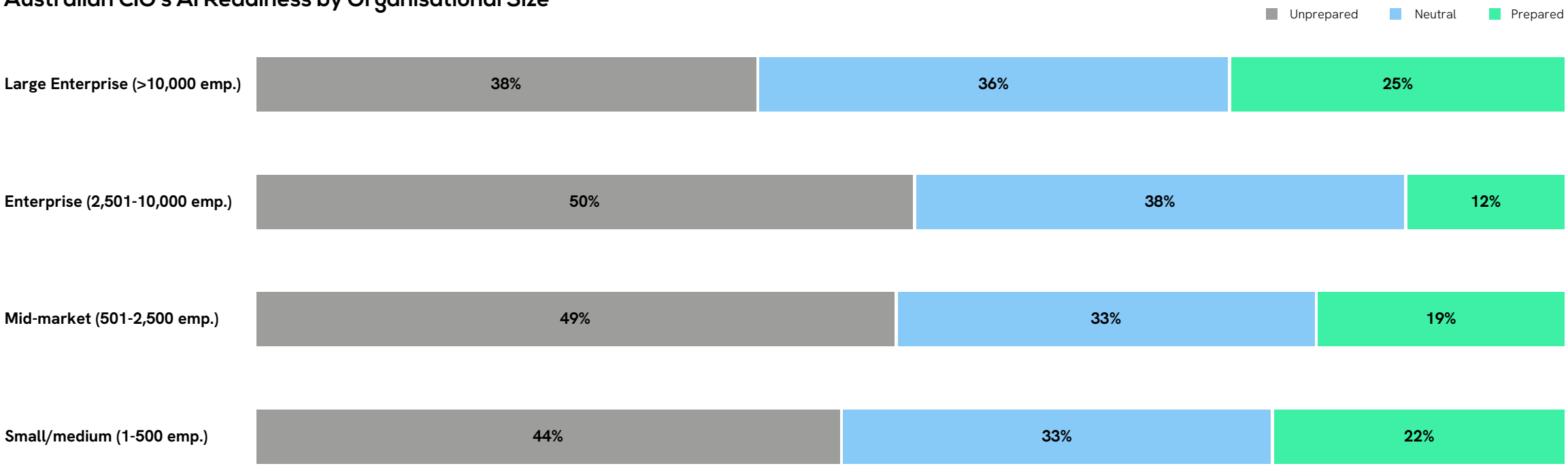
Government: The complex challenge

The government sector's position in AI readiness tells a story that's more nuanced than the numbers might suggest. The lower readiness levels (10%) don't necessarily reflect a lack of understanding about AI's importance but rather the unique challenges of public sector innovation. Government agencies must balance innovation with public accountability, data privacy, and equitable service delivery. Their AI initiatives must work for everyone, not just early adopters or tech-savvy users. Add in procurement complexities, legacy tech and years of technical debt along with the need for cross-agency coordination, and the path to AI readiness becomes significantly more complex.

Understanding AI barriers across organisational size

While the research data provides clear metrics on AI readiness across different organisational sizes, the underlying story of why these barriers emerge reveals fascinating patterns about digital transformation in Australian organisations.

Australian CIO's AI Readiness by Organisational Size [3]



3. ADAPT CIO Edge Survey in Feb 2024 and Aug 2024. Sample size: 290 Australian CIOs

Large enterprises

Large enterprises face a unique paradox. Their substantial resources should make them AI leaders, yet they grapple with data quality and governance challenges that smaller organisations rarely encounter. This is unsurprising, as operating at massive scale causes even minor data quality issues to compound exponentially. The emergence of stringent governance requirements and ethical concerns as top barriers reflects the increased scrutiny and risk these organisations face.

Top 5 AI Technical Barriers

1. Data quality issues
2. Stringent governance requirements
3. Lack of data skills
4. Data security issues
5. Lack of clearly defined use cases

Top 5 AI Cultural Barriers

1. Adverse culture and user resistance
2. Lack of data skills
3. Stringent regulatory requirements
4. Ethical concerns
5. Lack of funding

What's particularly telling is how cultural resistance manifests in these organisations. Unlike smaller organisations where resistance might stem from unfamiliarity, large enterprise resistance often comes from embedded processes and established ways of working. The appearance of ethical concerns and regulatory requirements as primary barriers suggests these organisations are already deep in AI implementation. They're hitting the complex challenges that only appear at scale.

Enterprise

Enterprise organisations face what might be called 'complexity barriers.' Their technical challenges reflect organisations dealing with multiple systems, diverse data sources, and competing priorities. What's particularly noteworthy is how their cultural barriers evolve. While they share the common challenge of user resistance, their concerns about AI unknowns often stem from complexity rather than unfamiliarity.

Top 5 AI Technical Barriers

1. Lack of data skills
2. Data quality issues
3. Lack of funding
4. Data security issues
5. Legacy systems and technical debt

Top 5 AI Cultural Barriers

1. Adverse culture and user resistance
2. Fear about the unknowns with AI
3. Lack of data skills
4. Stringent regulatory requirements
5. Lack of understanding and knowledge of AI

Mid-market

Mid-market organisations find themselves at a critical inflection point. Their funding challenges top the technical barriers list not because they lack resources entirely, but because they're hitting the point where informal or small-scale data practices no longer suffice. The emergence of legacy systems as a key barrier suggests these organisations are discovering that their earlier digital solutions aren't scaling well with their growth.

Top 5 AI Technical Barriers

1. Lack of funding
2. Lack of data skills
3. Data quality issues
4. Stringent governance requirements
5. Legacy systems and technical debt

Top 5 AI Cultural Barriers

1. Adverse culture and user resistance
2. Lack of clearly defined use cases
3. Fear about the unknowns with AI
4. Lack of funding
5. Insufficient executive prioritisation

Their cultural barriers tell a story of organisations in transition. They're large enough to need formal AI strategies but still working to build the executive alignment and organisational culture to support them. This explains why insufficient executive prioritisation appears as a significant barrier - they're competing with numerous other scaling priorities.

Small/medium organisations

SMBs tell a different story. Their primary challenge with data skills underscores a market reality: technical talent tends to gravitate toward larger organisations with bigger budgets and more sophisticated projects. Yet paradoxically, their smaller size and simpler data environments might make them better positioned for AI adoption if they can overcome these initial hurdles.

Top 5 AI Technical Barriers

1. Lack of data skills
2. Data quality issues
3. Big data (unstructured, high volume, variety and speed)
4. Data security issues
5. Organisational readiness

Top 5 AI Cultural Barriers

1. Adverse culture and user resistance
2. Lack of clearly defined use cases
3. Fear about the unknowns with AI
4. Insufficient executive prioritisation
5. Insufficient digital literacy

The appearance of digital literacy as a unique barrier for SMBs is particularly interesting. It suggests these organisations are facing challenges not only in specialised AI skills, but with other digital transformation challenges as well. Their cultural barriers reflect this. The fear of AI unknowns often stems from a broader uncertainty about digital transformation itself.

How evolving challenges shape strategic growth

The key insights go beyond simply identifying barriers; they emphasise understanding how these barriers evolve as organisations grow—an essential perspective for effective strategic planning.

The path forward isn't about eliminating these barriers; it’s about understanding how they evolve with organisational scale and developing strategies to transform these challenges into opportunities for differentiation.

Small organisation CIOs should focus on building foundational capabilities while leveraging their agility.

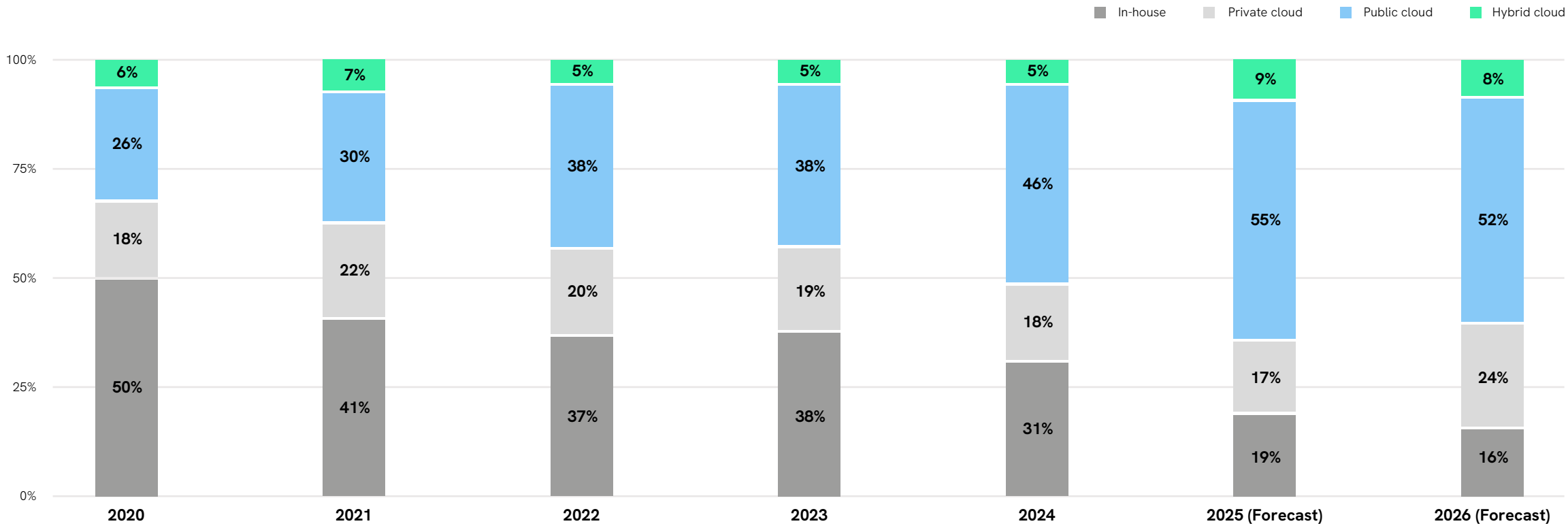
Mid-market CIOs need to plan for scalability from the start, avoiding the technical debt that plagues larger organisations.

Enterprise CIOs should look for ways to combine the governance requirements of large organisations with the agility of smaller ones.

Large enterprise CIOs need to focus on creating frameworks that balance innovation with governance.

The business value of modernisation

Looking at Australia's cloud adoption trajectory from 2020 to the present tells an interesting story. The dramatic decrease in in-house infrastructure isn't just about cost savings; it represents a shift in how organisations perceive technology capabilities. The rise in public cloud adoption, forecast to reach over 50% by 2026, reflects growing confidence in cloud platforms as the foundation for modern business operations.

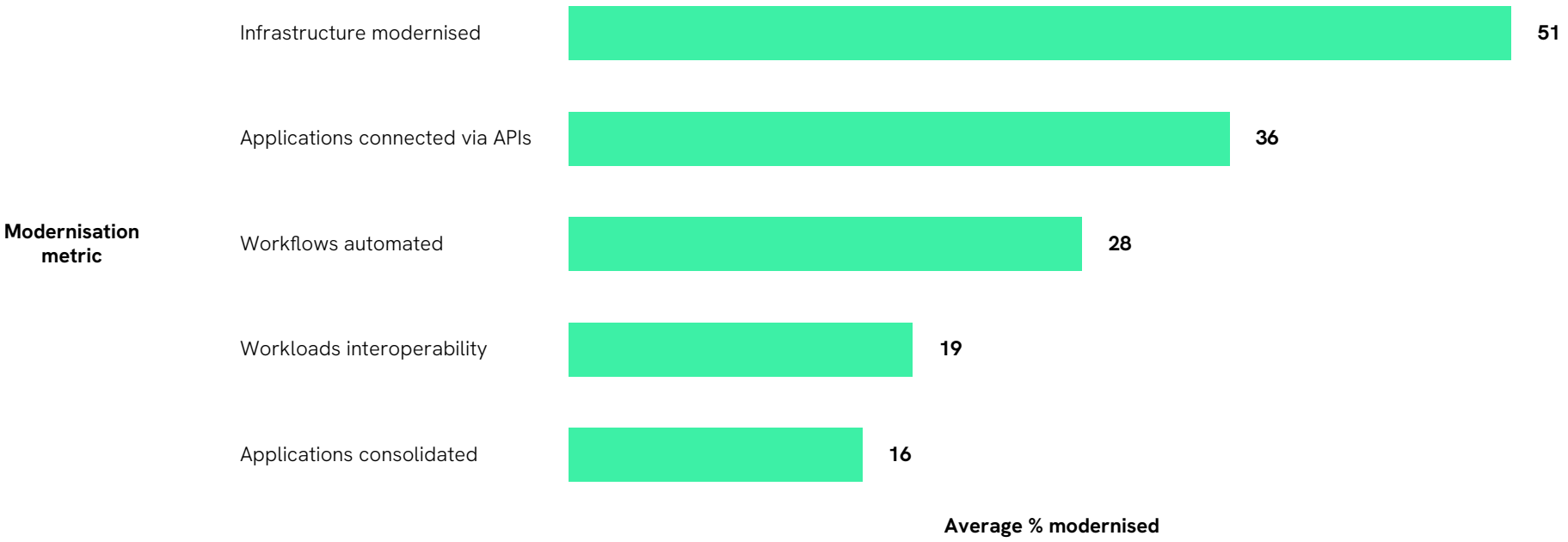


But what's particularly interesting is the emerging sophistication in cloud strategies. The steady presence of hybrid cloud and the growing adoption of multi-cloud approaches suggests organisations are moving beyond simple cloud migration to more nuanced, workload-optimised approaches.

The state of modernisation

While basic infrastructure modernisation shows strong progress, there's a noticeable drop-off when it comes to more advanced capabilities like API connectivity and workflow automation. This isn't a failure of execution rather a reflection of the complexity involved in deep organisational transformation.

In modernising the organisation, roughly how much progress have you made in:

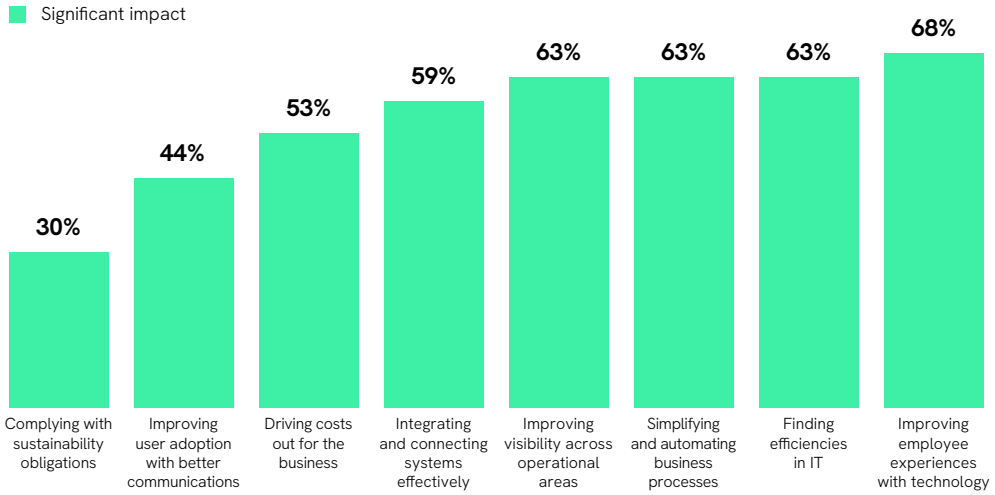


The integration challenge is particularly revealing. The relatively lower levels of application consolidation and workload interoperability suggest many organisations are still coping with the complexity of legacy systems and siloed applications. This creates a critical bottleneck for future innovation, particularly in areas like AI adoption.

On the horizon

Looking ahead to the next 12 months, the expected business impact of modernisation reveals some fascinating insights. The high emphasis on employee experience improvements (68%) suggests organisations are finally recognising that technological modernisation directly affects workforce effectiveness. This isn't just about providing better tools; it's about creating an environment that attracts and retains talent in a competitive market.

In the coming 12 months, in your view, how much impact will modernising IT have on the following areas?



63% say modernisation is a purely an IT cost optimisation play. Just 53% see it driving costs out for the business more broadly.

- And while 68% expect it to uplift EX, just 44% predict it will drive the adoption needed for EX.
- Achieving greater costs out and user affinity can come from better app connectivity and seamless processes. 63% and 59% see modernisation benefiting these areas.
- In all these things - and compliance - greater visibility is needed. And so, its positive that 63% see modernisation improving visibility.

But perhaps the most telling insight is the divergence between IT cost optimisation and broader business value. While 63% view modernisation as an IT cost play, 53% now recognise its potential as a driver of broader business cost efficiencies. This reflects a growing understanding that modernisation can enable business transformation, though there is still an opportunity for organisations to fully embrace its strategic benefits.

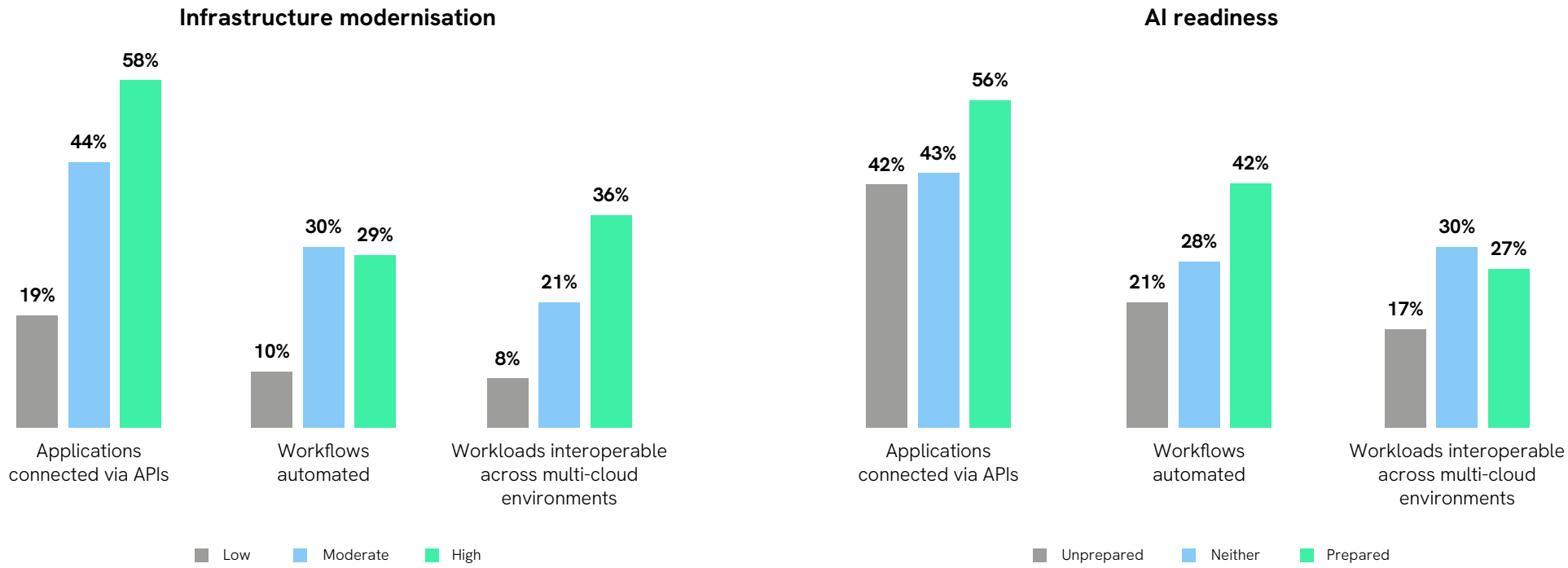
The operational impacts are equally significant. The high expectations for improved visibility (63%) and process simplification (63%) point to a growing recognition that modernisation isn't just about updated technology. Creating the operational agility businesses need to compete effectively is crucial.

The AI readiness connection

Perhaps the most compelling reason for modernisation comes from its strong correlation with AI readiness. The data shows a clear pattern: organisations with higher levels of infrastructure modernisation consistently demonstrate greater AI readiness across all key metrics.

This isn't coincidental. The same foundational capabilities that characterise a modern infrastructure—API connectivity, workflow automation, and workload interoperability—are precisely the capabilities needed to effectively implement and scale AI solutions.

Organisations with high modernisation maturity show significantly higher capabilities in these areas, positioning them better for AI adoption.



The path forward for modernisation

Think beyond migration

- Move past simple cloud adoption to focus on creating truly modern, integrated environments.
- Prioritise API connectivity and workflow automation as key enablers of future capabilities.
- Focus on breaking down silos that could impede future innovation.

Connect to business value

- Frame modernisation initiatives in terms of business outcomes, not just IT metrics.
- Focus on creating the operational agility businesses need to compete effectively.
- Build the foundation for future innovation, particularly in AI.

Build for the future

- Consider AI readiness in modernisation planning.
- Focus on creating the integrated, automated environments AI will require.
- Think about data flows and accessibility as key design principles.

The critical role of data foundations

As organisations race toward AI adoption, a critical truth is emerging: the success of AI initiatives depends far more on data maturity than on AI technology itself. For SMBs and mid-market companies, achieving data maturity is crucial. Focus on building robust data governance frameworks and investing in scalable data management solutions. This will ensure data is reliable and accessible, laying the foundation for successful AI initiatives in 2025.

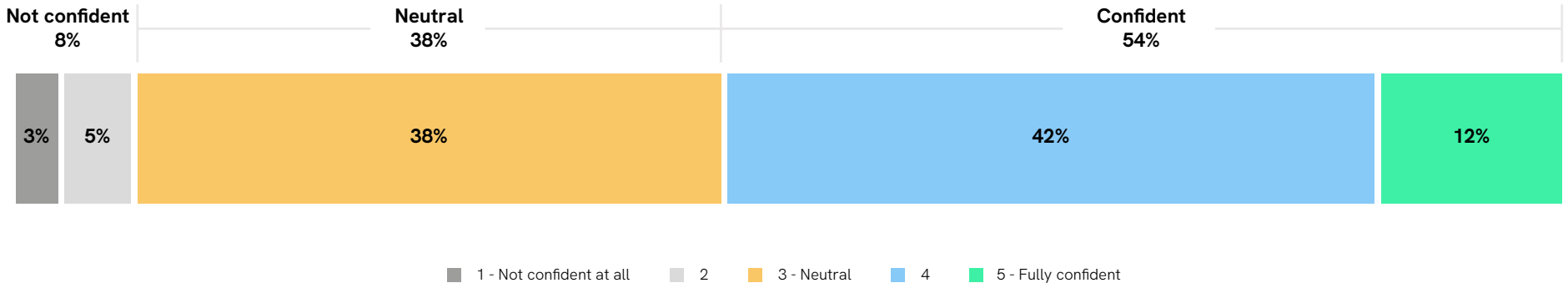
While Australian business leaders show growing confidence in their data strategies, the underlying data maturity metrics tell a more complex story about readiness for the AI age.

Confidence vs. capability

The rising confidence among CIOs and Data Leaders in delivering their data strategies is encouraging, but it masks a deeper challenge. Despite concerns about achieving their long-term data vision, CDAOs show cautious optimism regarding their data strategy, with 54% expressing confidence (42% becoming confident and 12% fully confident), 38% remaining neutral, and only 8% reporting a lack of confidence.

While short-term confidence has grown significantly since 2022, organisations still struggle with fundamental data capabilities. This dichotomy suggests leaders understand what needs to be done but face significant hurdles in execution.

Honestly, how confident are you about successfully delivering on your FY 2024 data strategy?



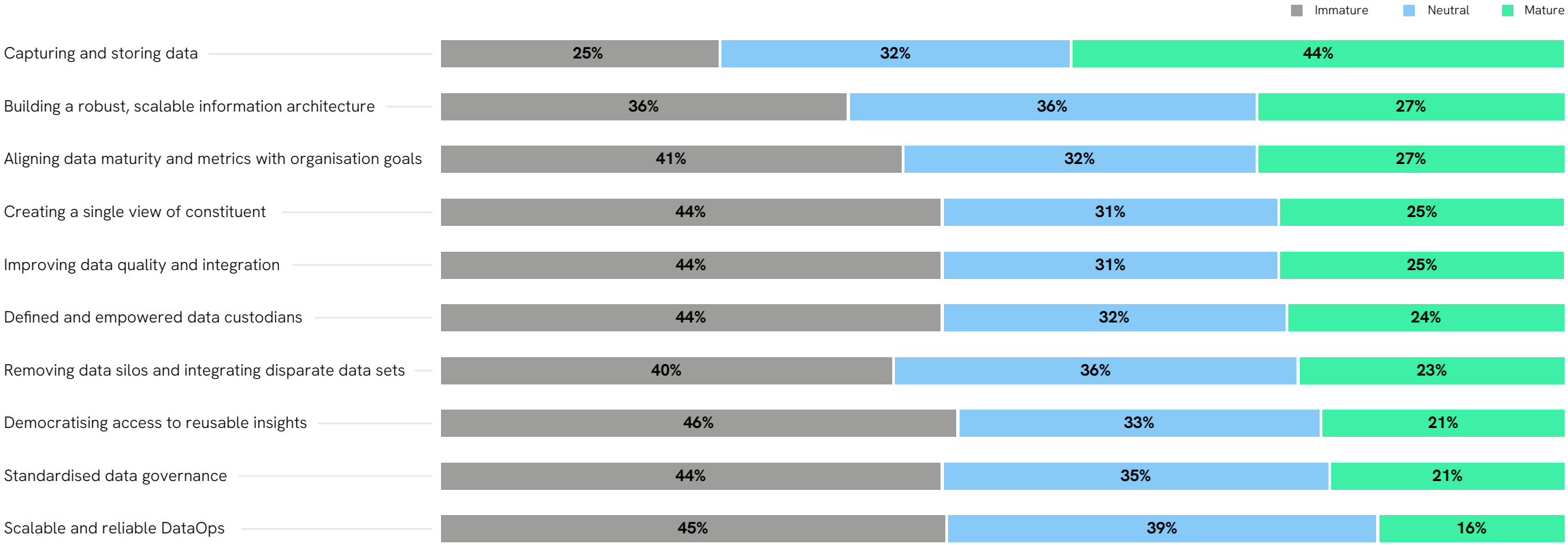
The real story isn't about the confidence levels themselves, but in what they reveal about organisational priorities. As we move into 2025, mid-market leaders must balance pragmatic, short-term goals with a long-term vision for AI-driven transformation. While growing confidence reflects a focus on achievable outcomes, this approach risks constraining the broader potential of AI by sidelining strategic investments in foundational data maturity and innovation.

Leaders should consider how today's efforts can not only deliver immediate value but also build the capabilities needed for sustainable, transformative growth in the years ahead.

The foundation gap

While basic data capture and storage show reasonable maturity, more sophisticated capabilities—crucial for AI success—lag significantly behind. The sharp drop in maturity levels from basic data capture to more advanced capabilities like standardised governance and scalable DataOps isn't just a technology issue, it also reflects an important challenge in how organisations approach data.

How mature is your organisation in the following data Foundations: [4]



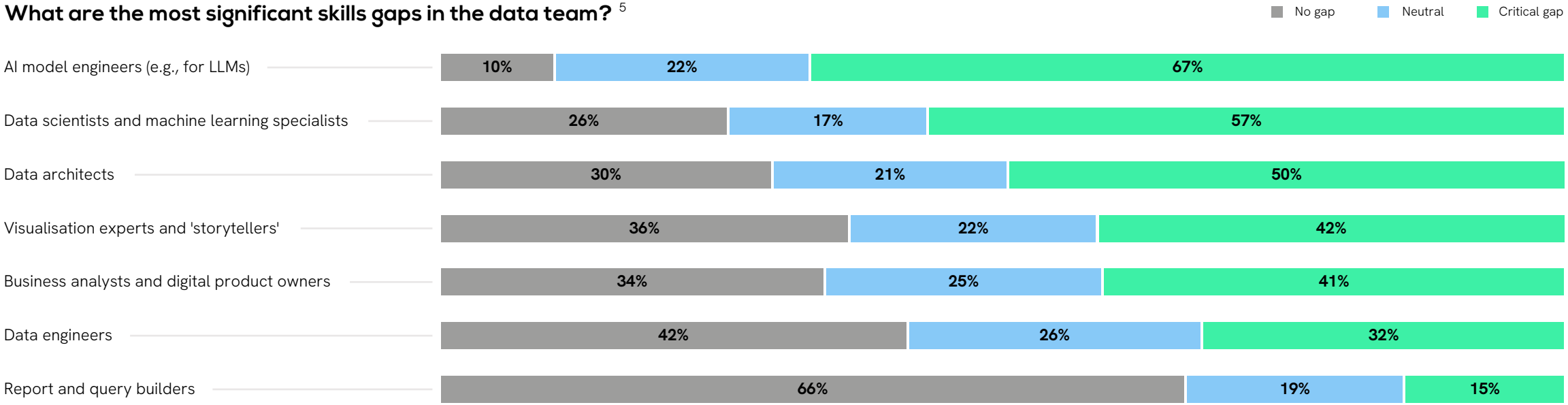
4. ADAPT Data and AI Edge Survey in May 2024. Sample size: 136 Australian CDAOs

This "foundation gap" becomes particularly critical when we consider AI ambitions. The areas showing the lowest maturity—democratising access to insights, standardised governance, and scalable operations—are precisely the capabilities needed for successful AI implementation. It's not just about having data; it's about having data that's accessible, trustworthy, and operationally sound.

Perhaps addressing skills gaps is essential for SMBs and mid-market companies. Partner with managed service providers (MSPs) and strategic experts who can bridge the gap in AI and data science capabilities. These partners offer the expertise and tools to accelerate your AI and digital transformation goals without the need for costly in-house training programs or complex partnerships with educational institutions. Leveraging external expertise ensures you stay competitive and agile in 2025.

The pronounced shortage of AI model engineers and data scientists isn't just a hiring challenge—it's a strategic barrier to AI adoption. But the more revealing insight is the breadth of skills gaps across the entire data function. From architects to visualisation experts, the shortages span the entire data value chain.

What are the most significant skills gaps in the data team? [5]



5. ADAPT Data and AI Edge Survey in May 2024. Sample size: 115 Australian CDAOs

This comprehensive skills gap suggests organisations need to think beyond just hiring AI specialists. Success requires building balanced teams that can handle everything from data architecture to business translation. The high demand for visualisation experts and business analysts shows a growing recognition that data value comes from interpretation and application, not just technical capability.

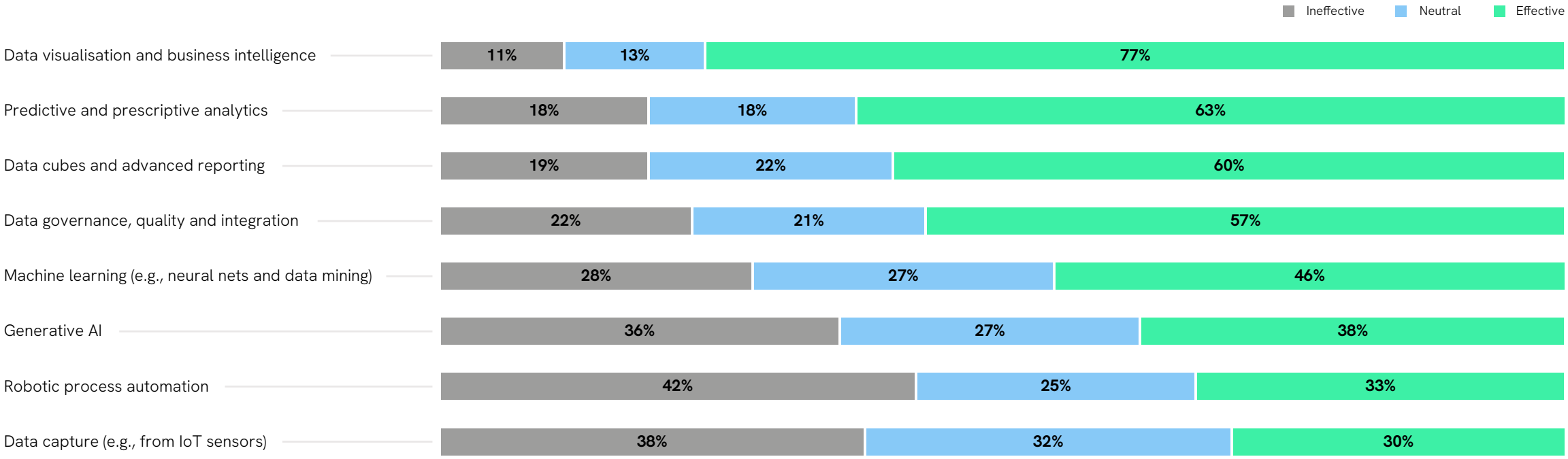
This is a key opportunity for organisations to leverage strong partnerships and the latest tools from major software providers, like Microsoft, to drive AI innovation, safeguard data, ensure governance, and achieve their strategic vision. By collaborating with the right partners, organisations can bridge capability gaps and unlock new opportunities for growth and transformation.

Solutions such as Azure AI and Microsoft Fabric empower organisations to unlock the value of their data and deliver AI microservices. For those lacking in-house expertise, partnering with a trusted digital advisor can bridge the gap, enabling organisations to realise their goals and maximise the potential of their data investments.

Tools and technology

The effectiveness ratings of various data tools reveal an interesting pattern about how organisations are creating value from data. The high effectiveness of visualisation and business intelligence tools isn't just about technology preference—it reflects a growing understanding that data value comes from accessibility, interpretability and democratisation.

How effective are these tools in supporting your data strategy? [6]



The strong showing of predictive analytics and data cubes suggests organisations are moving beyond retrospective reporting to more forward-looking applications. However, the lower effectiveness ratings for more advanced technologies like machine learning and generative AI show many organisations are still working to build the foundations needed for these technologies.

6. ADAPT Data and AI Edge Survey in May 2024. Sample size: 111 Australian CDAOs

The vendor landscape

Microsoft's dominant position across visualisation, governance, quality, storage, and data capture isn't just about market presence—it reflects an underlying shift in how organisations are thinking about their data platforms.

Australian CDAOs' preferred vendors in these capabilities [7]

Data Visualisation

1	Microsoft
2	Tableau
3	In-house (bespoke)
4	Altis Consulting
5	AWS

Data Governance

1	Microsoft
2	Collibra
3	Alation
3	Informatica
5	In-house (bespoke)

Data Quality & Integration

1	Microsoft
2	Informatica
3	Boomi
4	Databricks
4	Multiple vendors

Data Storage & Platforms

1	Microsoft
2	Snowflake
3	AWS
4	Databricks
5	Google

Data Sensing & Capture

1	Microsoft
2	AWS
3	Multiple vendors
4	Snowflake
4	In-house (bespoke)

The launch of Microsoft Fabric is a strategic response to a critical market need: the desire for an integrated platform that can support the entire data lifecycle. This isn't just another tool but an acknowledgment that data maturity requires seamless integration across collection, storage, analysis, and deployment.

7. ADAPT Data and AI Edge Survey in May 2024. Sample size: 84 Australian CDAOs

Why this matters

The strong preference for integrated platforms makes sense when we consider the challenges organisations face. When data moves between disparate systems for storage, analytics, and AI applications, organisations face increased complexity, potential security gaps, and governance challenges.

An integrated platform aims to address these challenges by providing a unified environment for all data workloads. However, market data also highlights ongoing demand for specialised solutions in areas such as:

- data storage
- governance
- data quality and integration.

This hybrid approach suggests organisations understand that while integrated platforms provide the foundation, specialised tools still have their place in addressing specific needs or use cases.

The platform evolution

The ability to move seamlessly from data ingestion to analysis to AI model deployment within a single environment removes many of the technical barriers that currently impede AI adoption. This is especially crucial given the skills gaps organisations face. Integrated platforms can help streamline workflows and reduce the technical complexity teams need to manage.

Key insights and takeaways

As we approach 2025, mid-market leaders face a pivotal moment in harnessing the transformative potential of AI. Success in AI adoption requires more than technological investment. It demands strategic alignment with industry-specific challenges, a strong data foundation, and balanced capabilities across the organisation. Leaders must navigate the regulatory landscape, prioritise data governance, and adopt scalable architectures to unlock value while preparing for future AI ambitions.

By combining platform thinking with practical execution, mid-market organisations can balance the pursuit of innovation with delivering measurable outcomes today. This framework provides actionable insights to guide leaders in aligning AI initiatives, building robust foundations, and developing skills strategies that will drive sustained success.

1. Success hinges on alignment

- AI success is not solely about technological capability—it depends on aligning AI initiatives with industry-specific constraints and opportunities.
- Industry context often outweighs individual organisational capability in shaping the pace and pattern of AI adoption.
- The regulatory environment can accelerate or hinder adoption depending on how it is approached.

2. Foundations first

- Prioritise data governance and quality as essential enablers of AI success.
- Build robust data architectures that meet current needs and support future AI ambitions.
- Ensure data is accessible and trustworthy across the organisation.

3. Balanced capabilities

- Develop comprehensive skills strategies encompassing the entire data value chain.
- Strengthen both technical expertise and interpretive capabilities.
- Create clear pathways for upskilling existing talent to meet AI demands.

4. Platform thinking with practical execution

- Consider integrated platforms while staying open to best-of-breed solutions.
- Invest in tools that make data more accessible and actionable.
- Build toward advanced capabilities while delivering current value.

The bottom line

AI success will rely more on data maturity than on AI technology itself. Organisations that prioritise foundational investments in data quality, accessibility, and governance will be better positioned to capitalise on AI's transformative potential.

Partnerships like the one between Nexon and Microsoft highlight how organisations can accelerate their journey to AI readiness by leveraging proven expertise and robust cloud ecosystems. With a focus on building strong data foundations, these collaborations enable businesses to unlock the full potential of their data and prepare for the next wave of AI innovation.

Looking ahead, the rise of agentic AI—autonomous systems capable of reasoning and decision-making—will depend on advanced data architectures, sophisticated integration, and scalable AI solutions. Through systematic implementation and tailored tools, partnerships like this offer organisations the capability to evolve rapidly, setting the stage for transformative outcomes in AI-driven environments.

Conclusion

The research presents a clear message for Australian business leaders: successful AI adoption requires a holistic approach that prioritises data foundations, infrastructure modernisation, and skills development. The organisations leading in AI readiness aren't necessarily those with the largest budgets, but those that have systematically built strong data foundations and modern infrastructure.

Key recommendations for success

Prioritise data maturity as the foundation for AI success
Building AI success starts with strong data maturity. Organisations should focus on data governance, ensuring data quality, and making data accessible and trustworthy across the organisation. These foundational elements enable reliable insights and set the stage for advanced AI initiatives.

Approach infrastructure modernisation as a business transformation enabler
Infrastructure modernisation is more than a technical upgrade; it’s a critical enabler of business transformation. By aligning infrastructure investments with business goals, organisations can unlock efficiencies, improve scalability, and support the data and AI needs of the future.

Consider integrated platforms with flexibility for specialised tools
Integrated platforms offer a unified approach to managing the entire data-to-AI journey, streamlining processes and enhancing productivity. However, maintaining flexibility for specialised tools ensures organisations can adapt to specific requirements and leverage best-in-class capabilities as needed.

AI success in 2025 and beyond

The Australian market's rapid evolution in AI readiness suggests we're entering a critical phase where organisations that have built strong foundations will pull ahead. Success will depend not on who adopts AI first, but on who builds the strongest foundations to support sustainable AI innovation.

Those that recognise the fundamental importance of data maturity and take decisive action to build strong foundations will be best positioned to capitalise on AI's transformative potential in 2025 and beyond.

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1300 800 000
enquiries@corp.nexon.com.au
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