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Deloitte-NEMA National Risk Study 2025: Changing landscapes in state emergency management

**A nationwide survey reveals funding,
workforce, and technology challenges
shaping state emergency management today**



Introduction

Emergency management in the United States is evolving amid a confluence of trends such as intensifying natural disasters, evolving manmade threats, changing roles of state and federal government, and rising public expectations. Recent hurricanes, wildfires, and widespread flooding underscore the urgent need for well-funded organizations that embrace forward-thinking strategies and prioritize risk-based planning and preventative measures to protect communities before crises strike. However, agencies operate within limited budgets, requiring decisions and tradeoffs between acute needs and longer-term resilience.

To more effectively understand how state and territorial emergency management agencies are equipped to fulfill their missions, the Deloitte Center for Government Insights—working with the National Emergency Management Association (NEMA) and with consulting support from the National Center for Disaster Preparedness at Columbia University's Climate School—conducted a nationwide survey from late 2024 through early 2025. The survey engaged 55 state and territory emergency management agencies

across NEMA's membership and received 42 responses, including 14 stakeholder interviews, covering the 10 Federal Emergency Management Agency (FEMA) regions. The survey explores current priorities and capabilities, and it identifies challenges to help envision potential futures of emergency management.

The insights reveal a tight-knit community of emergency managers navigating an increasingly complex environment. It highlights their diverse priorities, workforce challenges, technological capabilities and needs, and funding requirements. Our analysis also identifies strategic questions that emergency managers may consider as they plan for the future.

The strength of the emergency management community lies in its tradition of partnership and collaboration. Continued collaboration between states, industry organizations, the private sector, and academia can provide valuable support as states evolve to meet today's evolving challenges and safeguard our communities.

10

*FEMA regions
represented*

55

*States and territories
engaged*

42

*Survey responses
received*

12

*Stakeholder
interviews completed*

Five key insights

Funding, an expanding mandate, and workforce issues are the leading challenges for states

1 Funding is the top concern of state emergency directors

64% of respondents named funding of the emergency management life cycle as their most significant challenge, above workforce limitations, policy changes, and technology.

2 Agencies face an expanding mandate

In addition to natural disasters like flooding, tornadoes, and wildfires, emergency managers find themselves involved in novel threats such as pandemics and potential cyberattacks.

3 Agencies struggle to recruit and retain their workforce

Budget constraints and a competitive job market compound the challenge to retain or recruit staff with the required skills and experience.

4 The benefits of advanced technology have not been realized

States currently exhibit intermediate technology maturity, with limited adoption of advanced technology despite strong interest and recognition of its potential value.

5 Time is not currently allocated to preferred activities

While most respondents would prefer to spend their time on mitigation, only 5% of their time is currently spent mitigating risks.

Source: National Risk Survey 2025.

1 Funding is the top concern of directors

“So, when do we invest in emergency management? The grants have been flat for years, and more and more is being put on us to handle.”

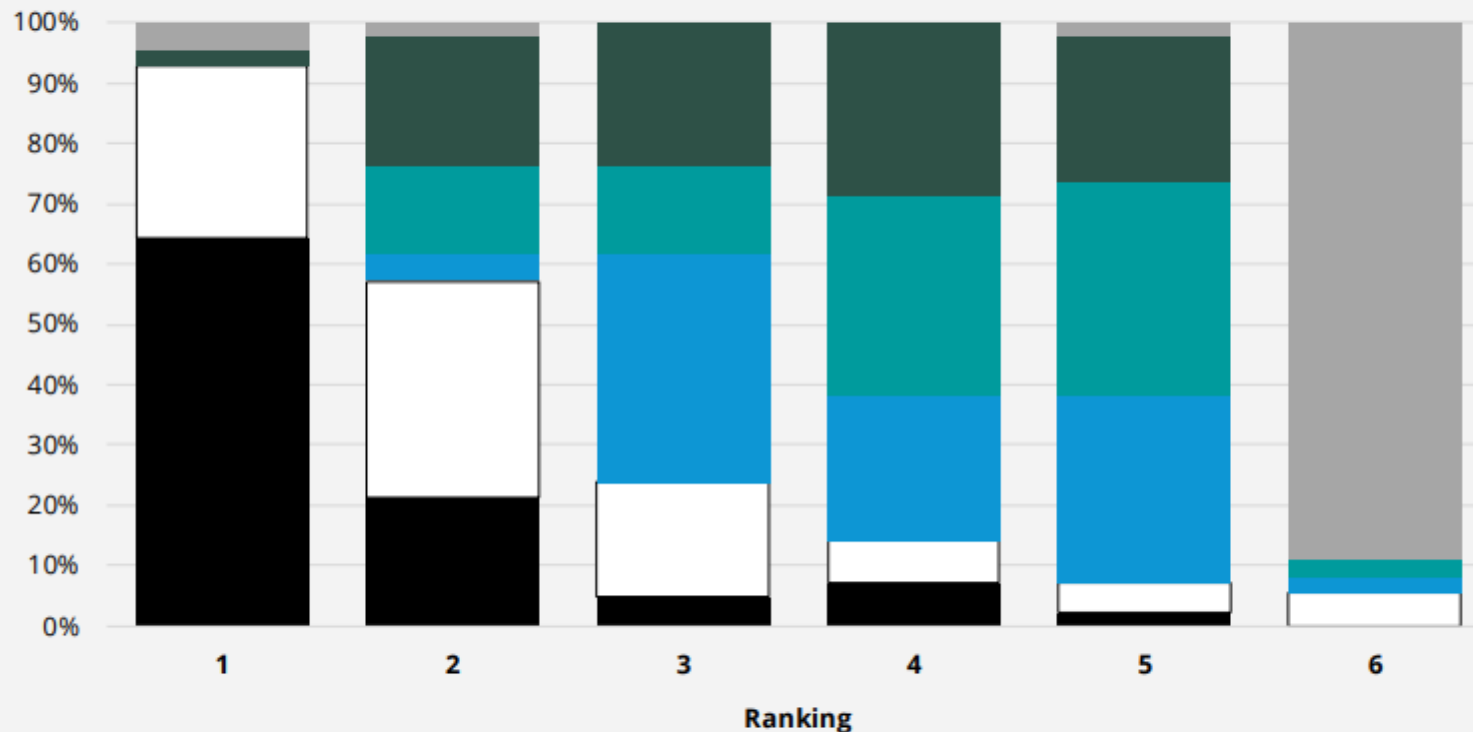
– A state emergency management director

1 Respondents named funding limitations as their top challenge

64%

Most challenging aspects of emergency management

- Funding
- Workforce
- Procedural
- Technology
- Policy
- Other



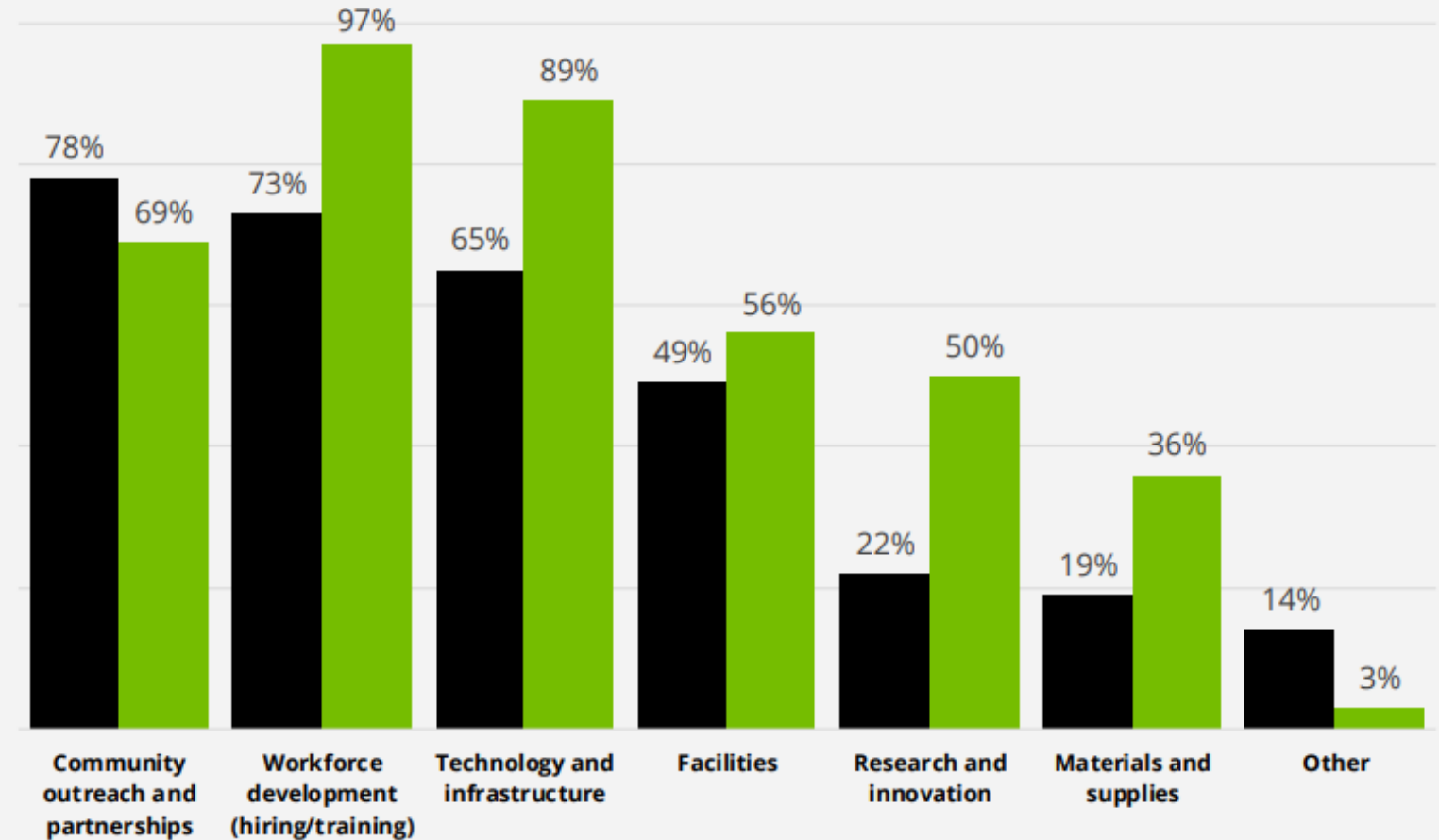
Note: n = 42. Funding: External conditions related to funding. Workforce: Difficulty in obtaining and retaining qualified staff. Procedural: Any process that limits your organization. Technology: Dated software or hardware, lack of access. Policy: Regulatory restrictions that impact operations. Other: Absence of nonfederal funding to support emergency management and limited authority over partner agencies for enterprise emergency management initiatives. Source: National Risk Survey 2025.

1 A majority would allocate additional funding to workforce development

97%

Current vs. additional funding investment capability development

● Currently investing ● Additional investment



Note: n = 37.
Source: National Risk Survey 2025.

2 Agencies face an expanding mandate

“We’re constantly jumping from disaster to disaster, and things continue to be more frequent and more costly.”

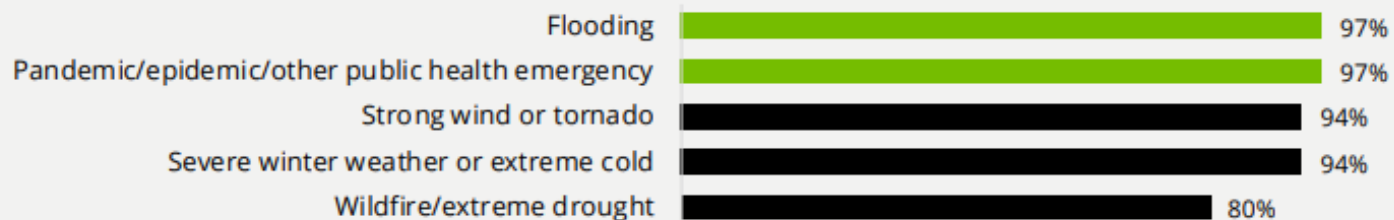
– A state emergency management director

2 An expanding array of threats, beyond natural disasters, have challenged agencies

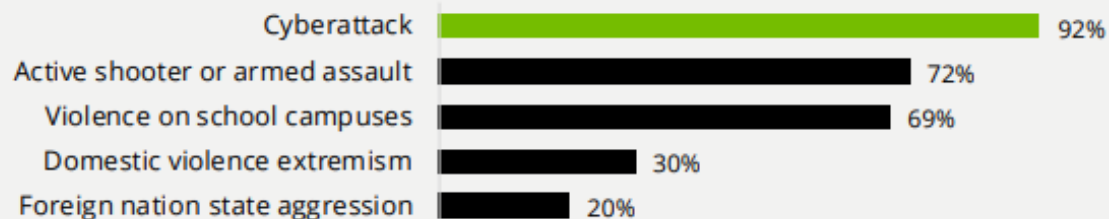
Top 5 hazards/threats experienced by states/territories in the past five years

Respondents were asked to select all hazards/threats that apply

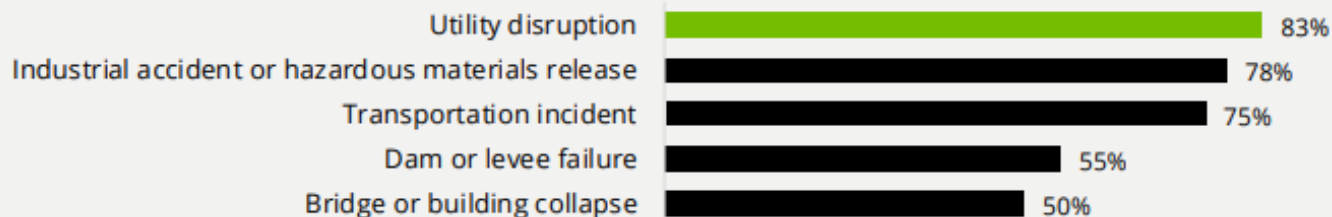
Natural hazards



Criminal/terrorism



Anthropogenic (human-caused hazards)



Note: n = 42.

Source: National Risk Survey 2025.

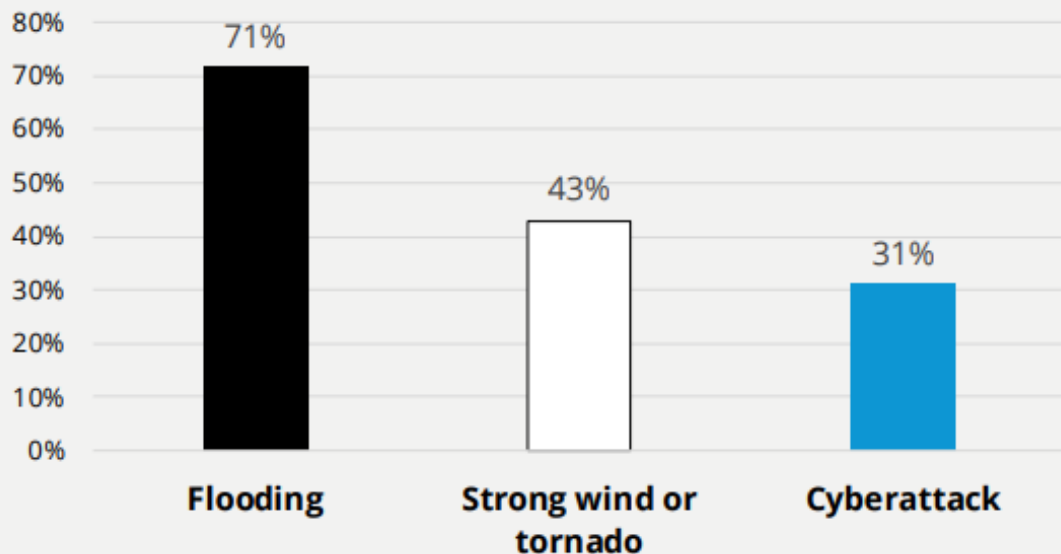
2 Cyberattack tops the list of threats for which states are least prepared

When asked to identify their top three threats, cyberattack was the only non-natural disaster to emerge in the top three. Agencies reported lower levels of confidence in protecting against a cyberattack compared to other top threats, which speaks to the challenge of integrating emergency management and cyber incident planning.¹

● Flooding ○ Strong wind or tornado ● Cyberattack

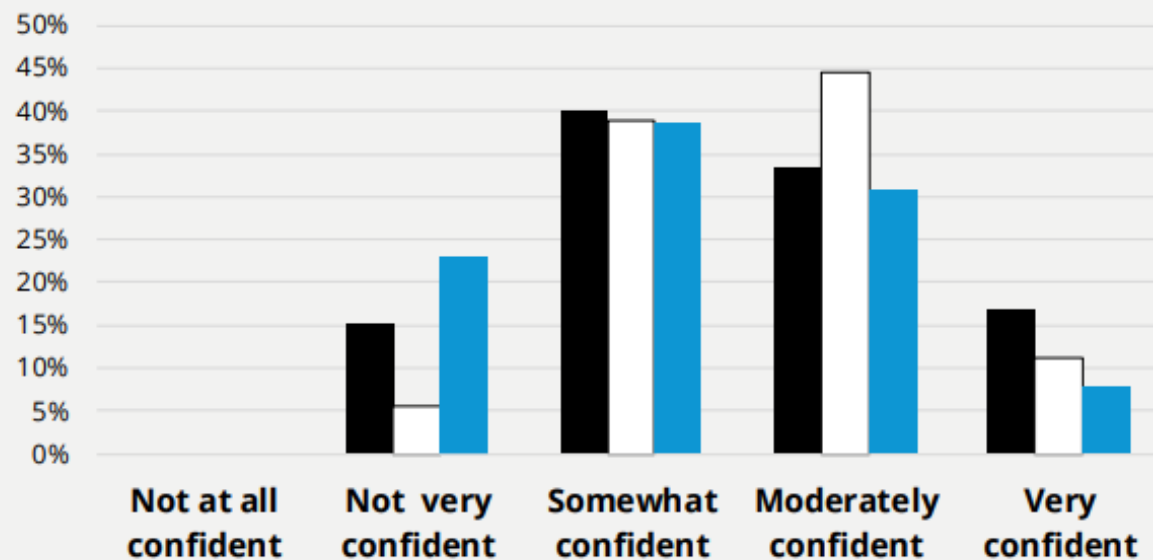
What are the top 3 concerns to the health, safety, and security of your communities? (Top 3 collective responses out of 20 options)

Respondents were asked to select their top three responses



Note: n = 42.
Source: National Risk Survey 2025.

How confident are you in your organization's ability to protect your communities against your top 3 identified risks?



Note: n = 42.
Source: National Risk Survey 2025.

3 Agencies struggle to recruit and retain their workforce

“Staffing is a continuing struggle without a clear clear solution—there is a need to attract new folks and retain mid-career individuals to continue building experience and capacity across all levels.”

– A state emergency management director

3 Agencies struggle to retain or recruit staff

81%

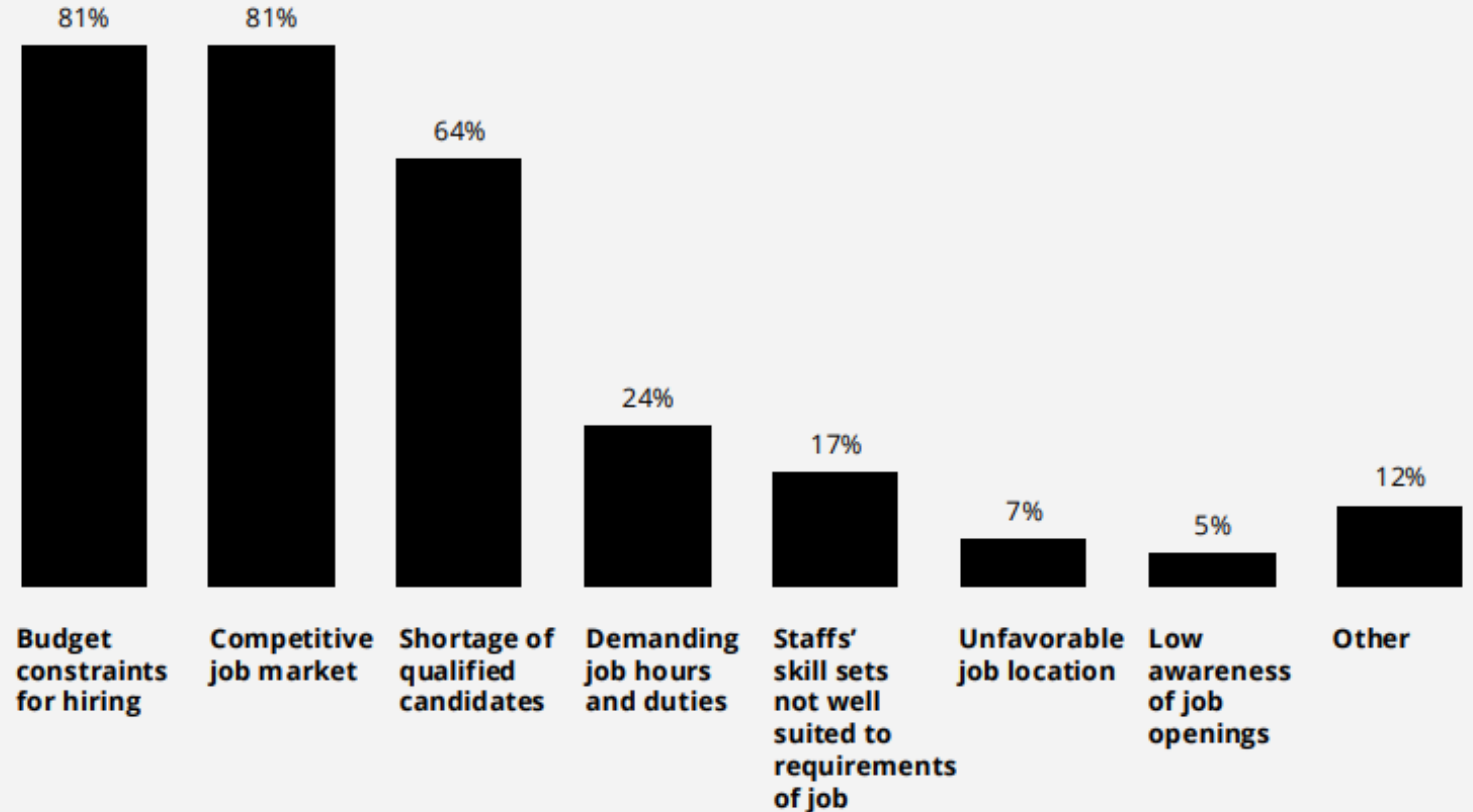
of respondents selected budget constraints and competitive job market, followed by shortage of qualified candidates (64%), as their top three workforce-related challenges.

Workforce and funding challenges are closely interrelated. If additional funds were available, most agencies reported a desire to prioritize workforce investment to enhance their capabilities. The increasing demand in emergency management intensifies competition for qualified candidates, making it essential for agencies to address budget and recruitment challenges effectively.

Key challenges in recruiting and retaining qualified staff

Respondents were asked to select all that apply

Percentage of respondents

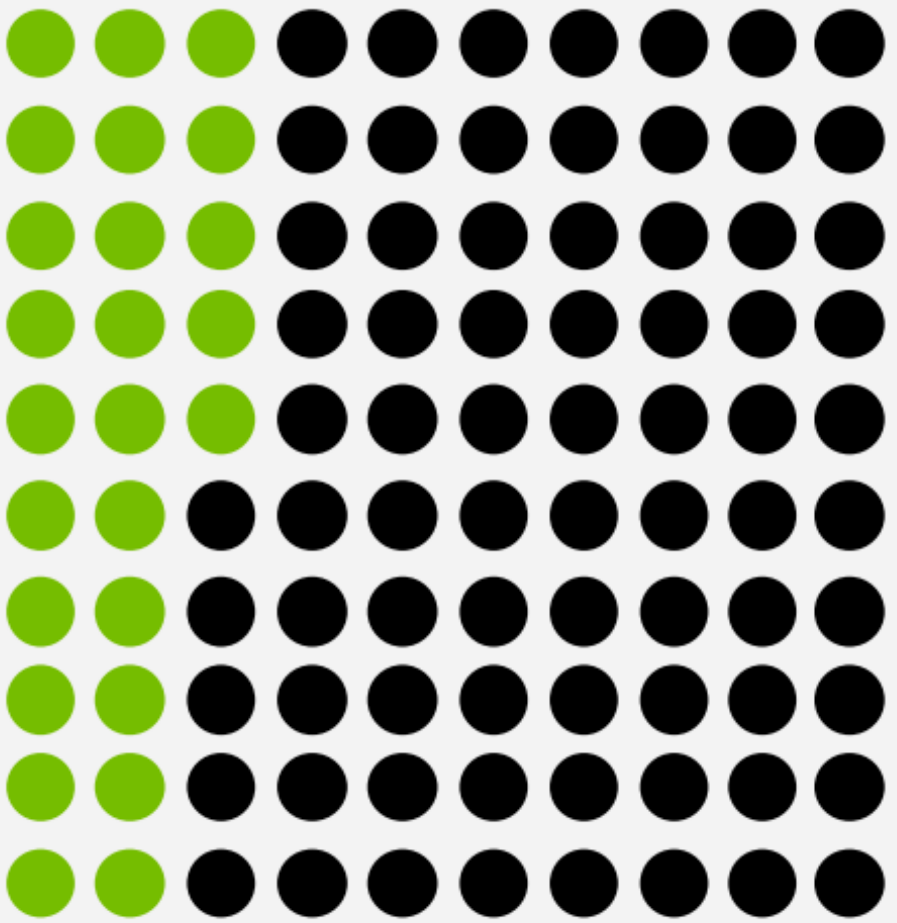


Notes: n = 42. "Other" includes low salary; civil services rules; lack of growth and promotion opportunities; and lack of full-time permanent positions and state funding.

Source: National Risk Survey 2025.

3 Of employees hired in the past five years, survey respondents indicate that half or fewer come with the skill sets and experience to perform the job

25% — of agencies report that employees have the necessary skills



Note: n = 36.
Source: National Risk Survey 2025.

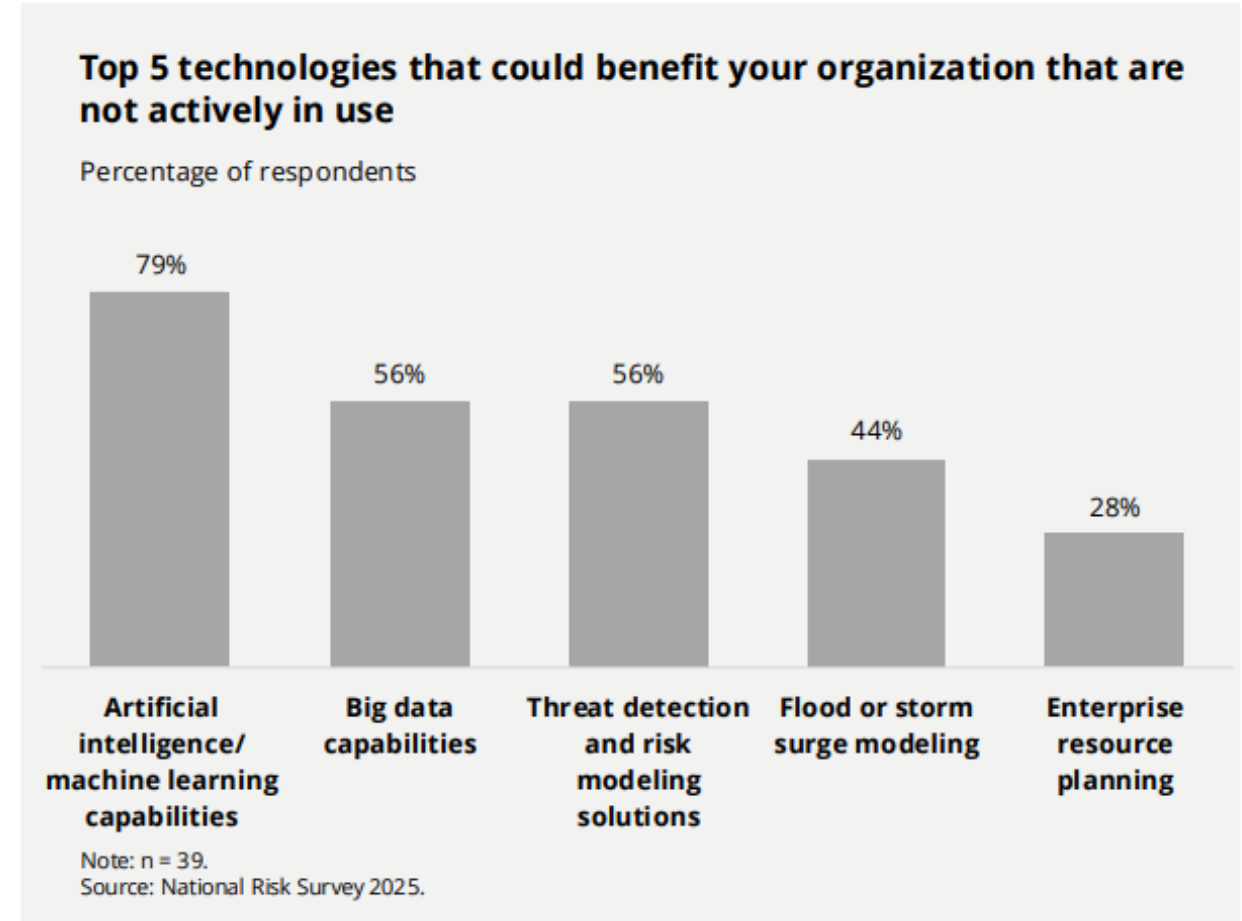
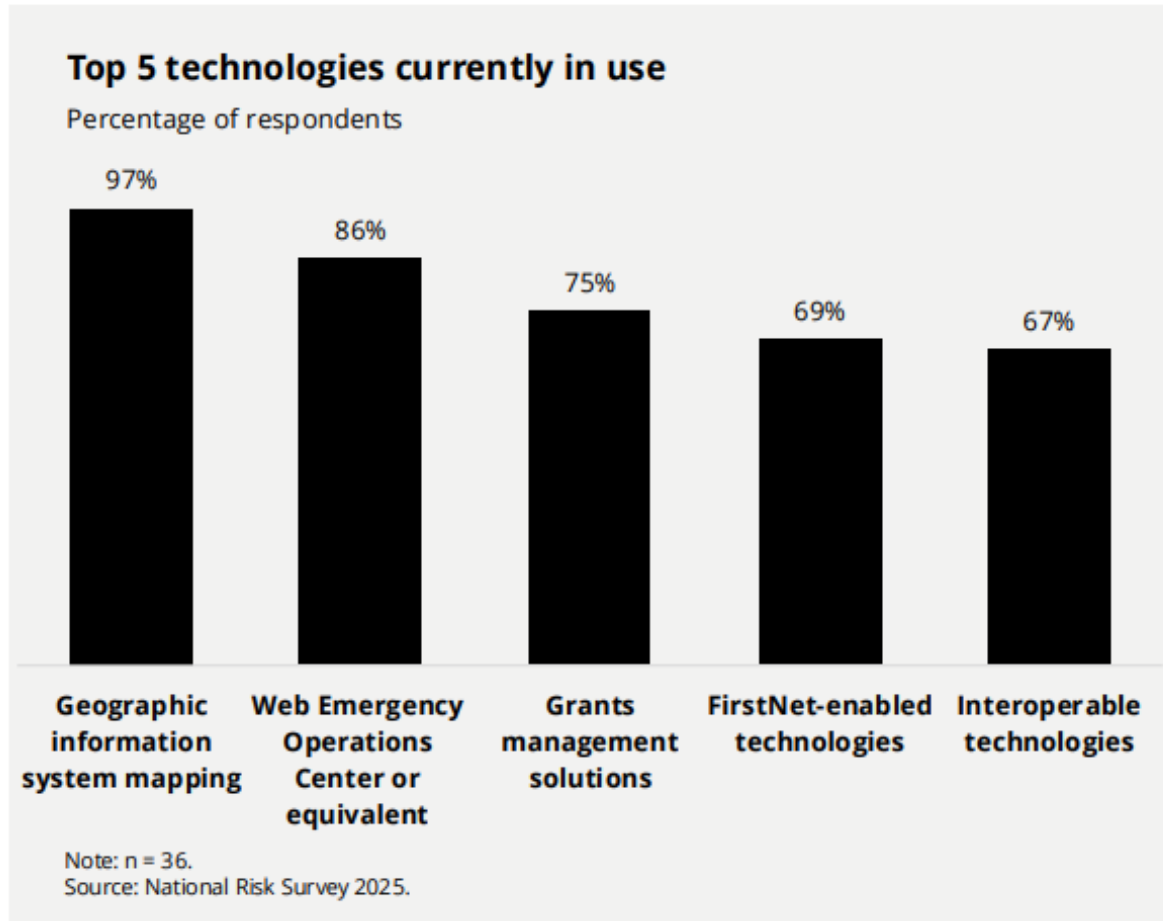
4 The benefits of advanced technology have not been realized

“At the state level, we’re still trying to figure out how to even use AI, and there’s hesitation because the state legislature is still figuring out the parameters for how we can even use AI.”

– A state emergency management director

4 There is a gap between the technologies currently in use and those that agencies would like to adopt

Survey respondents are interested in using AI and other technologies, but are not actively using them.



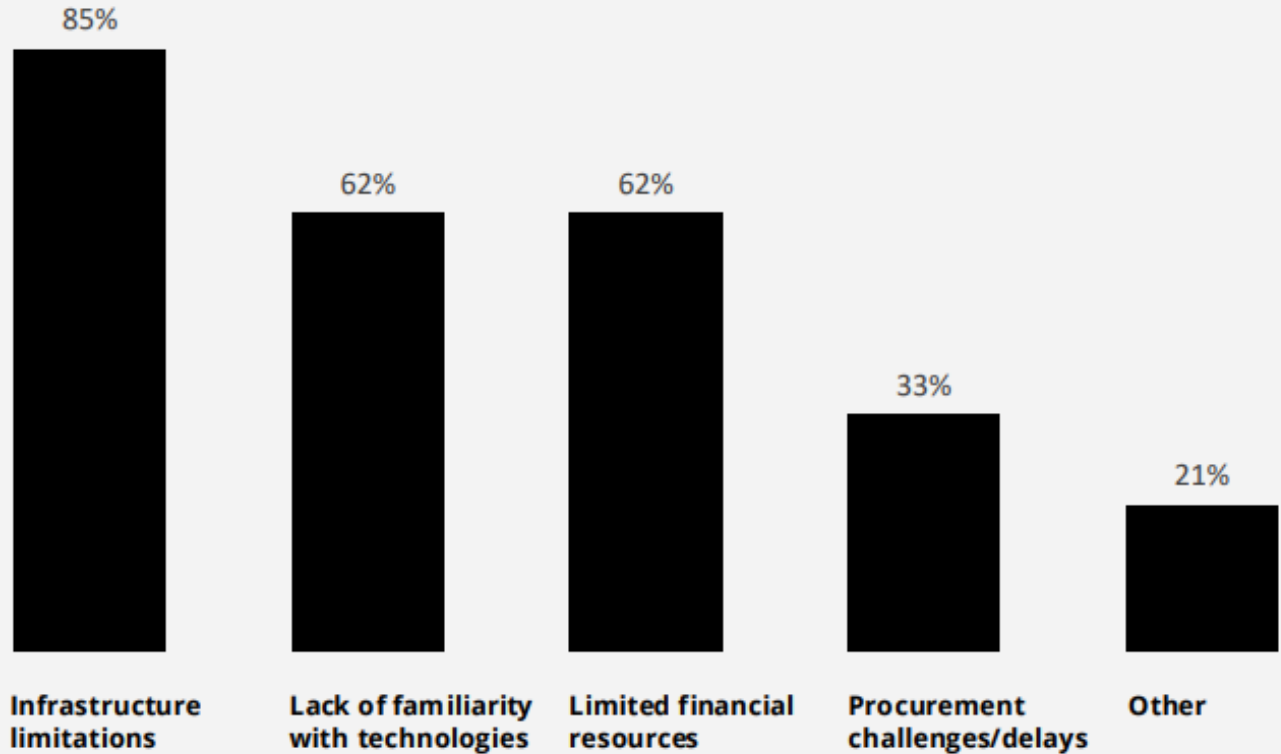
4 The majority of states want to invest more in technology, but lack the technical knowledge or budget

85%

Top 5 barriers to technology adoption for agencies

Respondents were asked to select all that apply

Percentage of respondents



Notes: n = 39. "Other" includes staff experience and understanding of technology adoption and use; lack of interoperability and the need for information to flow between the different programs used in emergency management; policy limitations at the state level; staff with the knowledge to leverage; IT security restrictions; skill gaps and specialized knowledge to implement and maintain innovative technologies; and resistance to change with concerns.

Source: National Risk Survey 2025.

5 Time is not currently allocated to preferred activities

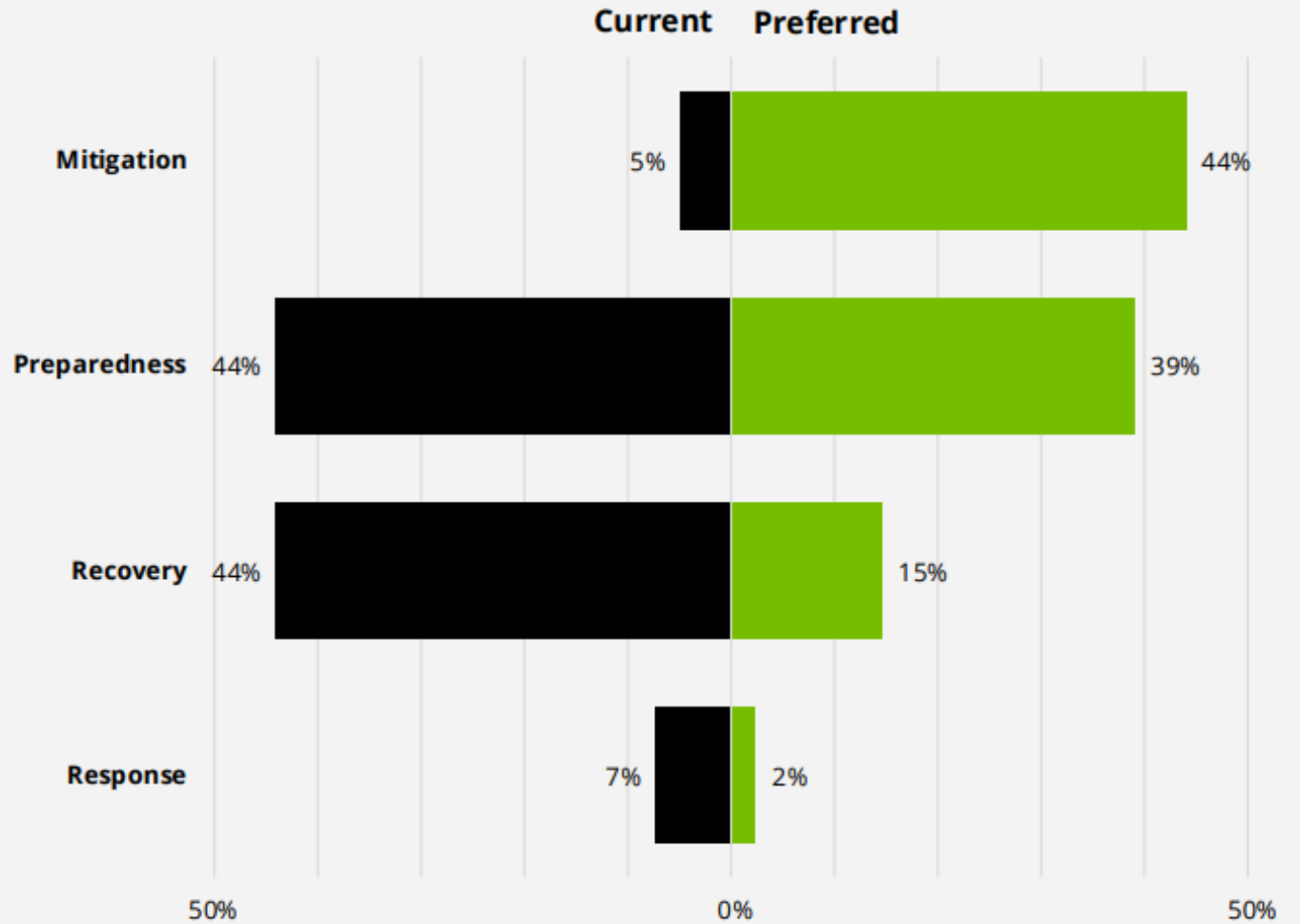
“That’s already right of boom—it’s already happened, but the question is how do we get left of boom.”

– A state emergency management director

5 Time is not currently allocated to preferred activities

While respondents would prefer to spend 44% of their time on mitigation, they currently spend 5%.

Current vs. preferred time allocation

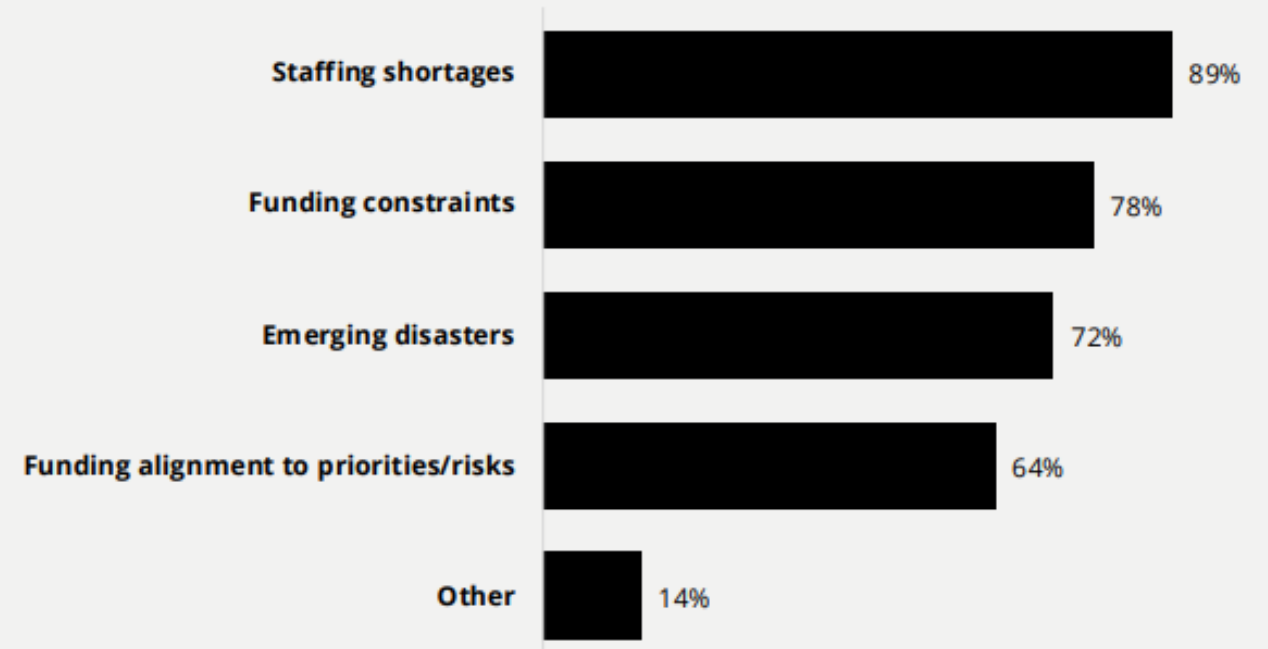


Note: n = 41.
Source: National Risk Survey 2025.

5 Top barriers to allocating time toward preferred activities include staffing shortages, funding constraints, and the impact of emerging disasters

What stops agencies from allocating more time to preferred activities?

Respondents were asked to select all that apply

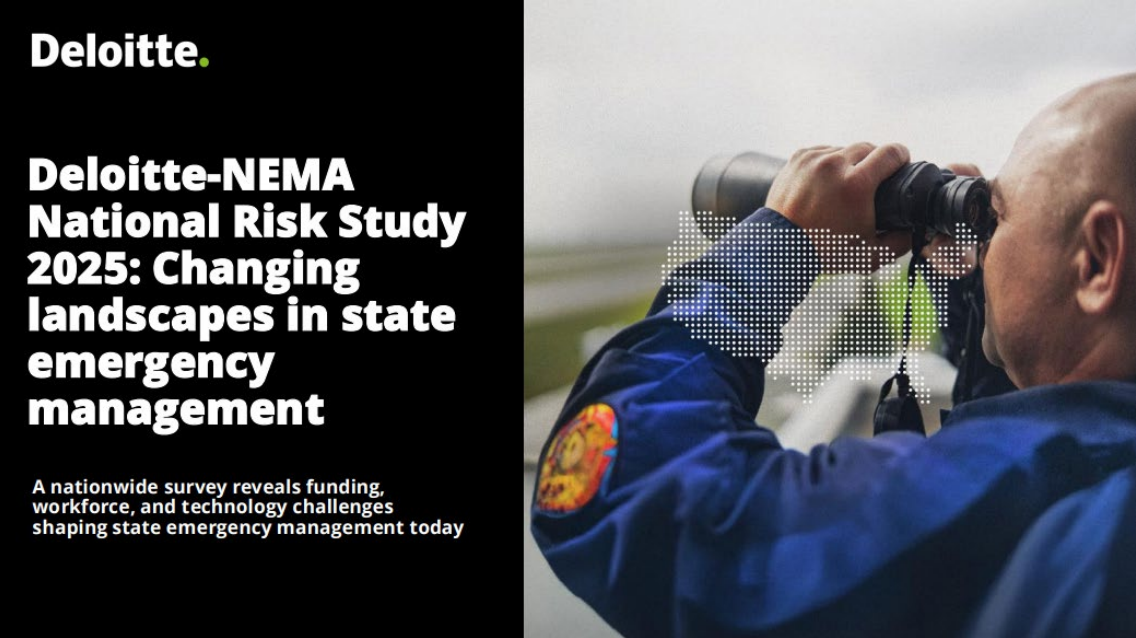


Note: n = 36. "Other" includes experience and tenure, inefficient recovery programs, dual responsibilities of staff impacting new projects and programs, and an active response schedule due to special events and other activities.

Source: National Risk Survey 2025.

Conclusion

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