

National Risk Study 2025: Changing Landscapes in State Emergency Management

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INTRODUCTION

Background:

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 occur. However, agencies operate within limited budgets, requiring decisions and tradeoffs between acute needs and longer-term resilience.

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

Study Objective:

Evaluate the emerging trends of emergency management and its impact on practice and community to uncover insights of increasingly complex practical environment of practice.

Study Design:

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 10 Federal Emergency Management (FEMA) regions in a mixed-methods approach and parallel design.

10

FEMA regions represented

55

States and territories engaged

42

Survey responses received

12

Stakeholder interviews completed

Interview Snapshots (Expressed in NEMA Study Report):

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

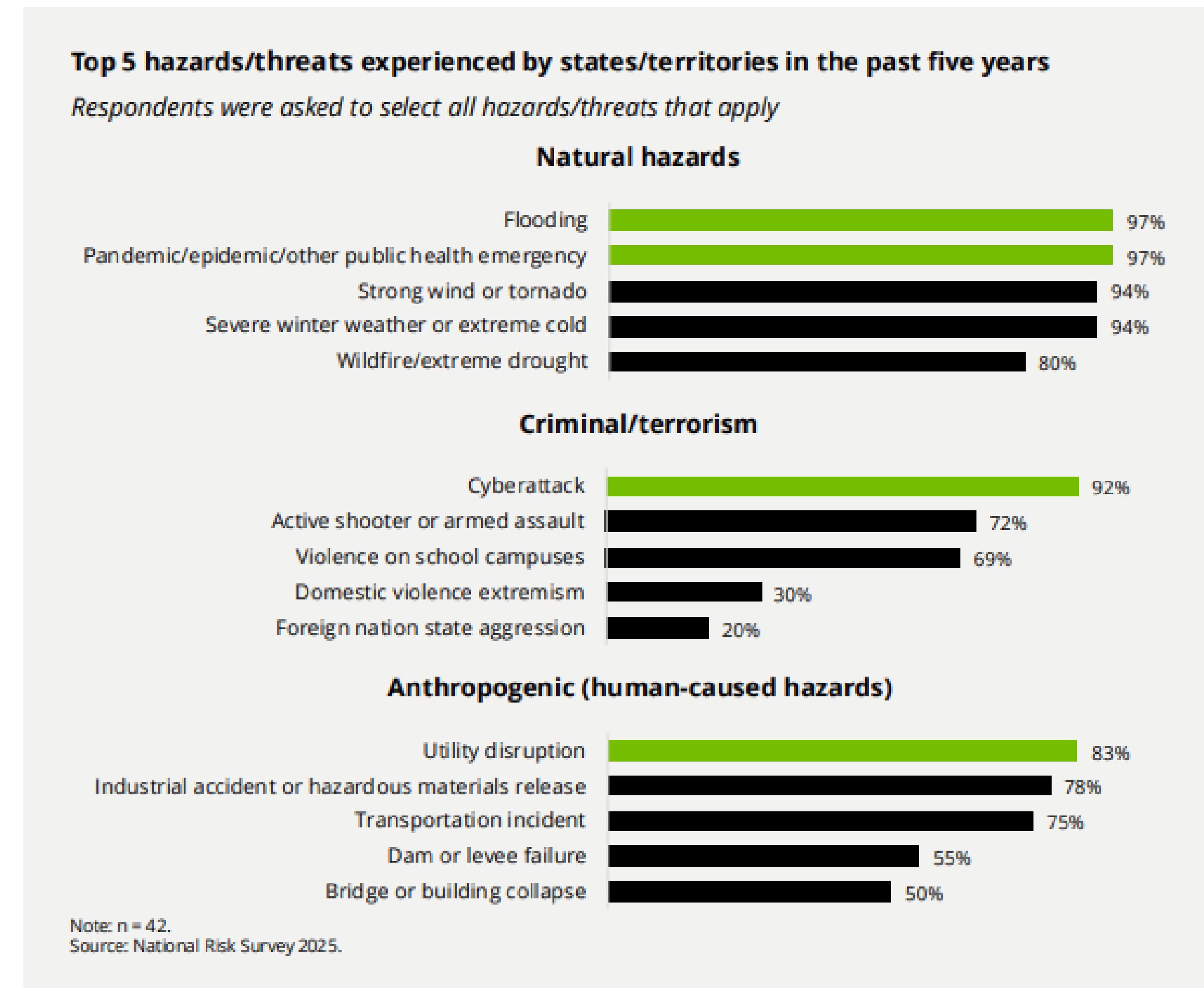
"We're constantly jumping from disaster to disaster, and things continue to be more frequent and more costly."

"...we're still trying to figure out how to even use AI, and there is hesitation because the state legislature is still figuring out parameters for how we can even use AI."

COMPLETED EFFORTS

Findings:

- State Emergency management agencies are responsible for managing a wide and expanding range of threats far beyond traditional disasters.
- In recent years incidents such as cyberattacks, active shooter events, utility disruptions, industrial accidents, and bridge collapses have been responded to by Emergency Managers alongside floods, fire, and tornados.
- Survey responses indicate that these threats are not one-off anomalies but rather have been experienced in recent years, which contributes to agencies feeling they are asked to do more with less.



Is your state/territory currently investing financial resources in state-run programs not funded by federal sources?



Findings Continued:

- While states have invested in state-run programs, many believe that they could do more; potentially necessitating substantial policy changes.
- Many states are tapping into their own resources to fund their emergency management needs.
- Interview respondents noted that these state-run programs often face funding limitations, competing budgetary priorities, and policy barriers that may constrain their efficacy and impact.
- 100% of states and territories rely on federal funding for critical activities, such as preparedness funded through federal emergency management performance grants.

Key insights

• Funding is a top concern of state emergency directors

64% of responders named **Funding** of the emergency management lifecycle as their most significant challenge, above workforce limitations, policy changes, and technology.

• Agencies face expanding mandates

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

• The benefits of advanced technology have largely not been realized

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

• Time is not currently allocated to preferred activities

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

• Agencies struggle to recruit and retain workforce

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

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Applications

- Potential applications of this research shares insights from a national perspective for emergency management leaders on five key insights for the profession.
- Evidence to support issues at the local level of practice in which can support the change, evaluation, or evolution on policy and practice for navigating barriers.
- Informed priority alignment highlighting critical infrastructure resilience funding and requirements and how the trending issues are being approached and navigated.

The Full Report titled "Deloitte-NEMA National Risk Study 2025: Changing landscapes in state emergency management" can be reviewed from Deloitte Government and Public Services

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