Quorum

REPORT

2025
U.S. Lobbying Trends Report



2025 U.S. Lobbying Trends Report

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2025 U.S. Lobbying Trends Report

In 2025, lobbying in the United States continues to surge, with spending on track to set new records. Major shifts in Washington, including a new presidential administration and partisan control changes, have redefined influence strategies on K Street. Through the first quarter of 2025, federal lobbying expenditures exceeded **$1.17 billion**, pushing the year **to surpass 2024's record outlay**. The **influence industry** is buoyed by heightened activity in technology, healthcare, and energy sectors, as companies and trade groups scramble to shape policy in a rapidly changing landscape.

Top lobbying firms are reporting unprecedented revenues, and the ranks of lobbyists include hundreds of former public officials. Meanwhile, emerging tools, from **AI-driven policy intelligence to digitally enabled grassroots campaigns, are transforming advocacy.**

This report provides an overview of 2025's key lobbying trends across eight focus areas, from spending patterns and sectoral breakdowns to major policy battles at the federal and state levels. And, we consider what these trends portend for public affairs professionals heading into 2026.

Note: ***All monetary figures are U.S. dollars***

Lobbying Spending & Industry Breakdown

Record-High Influence Spending

Lobbying expenditures in the U.S. federal sphere have reached all-time highs. **2024 set a new record with about $4.5 billion spent** influencing Congress and federal agencies, continuing an unbroken growth trend since the late 2010s. Pre-2020 benchmarks: For context, annual lobbying outlays hovered around $3.5–$3.6 billion in the late 2010s. This means today's spending is roughly 30% higher than the pre-pandemic norm – a striking rise attributed to massive legislative packages and regulatory fights in the 2020–2024. **Figure 1** illustrates the steady climb in federal lobbying dollars over the past decade, with particularly sharp increases post-2021 as industry sought to shape pandemic relief, infrastructure, and tech policy.

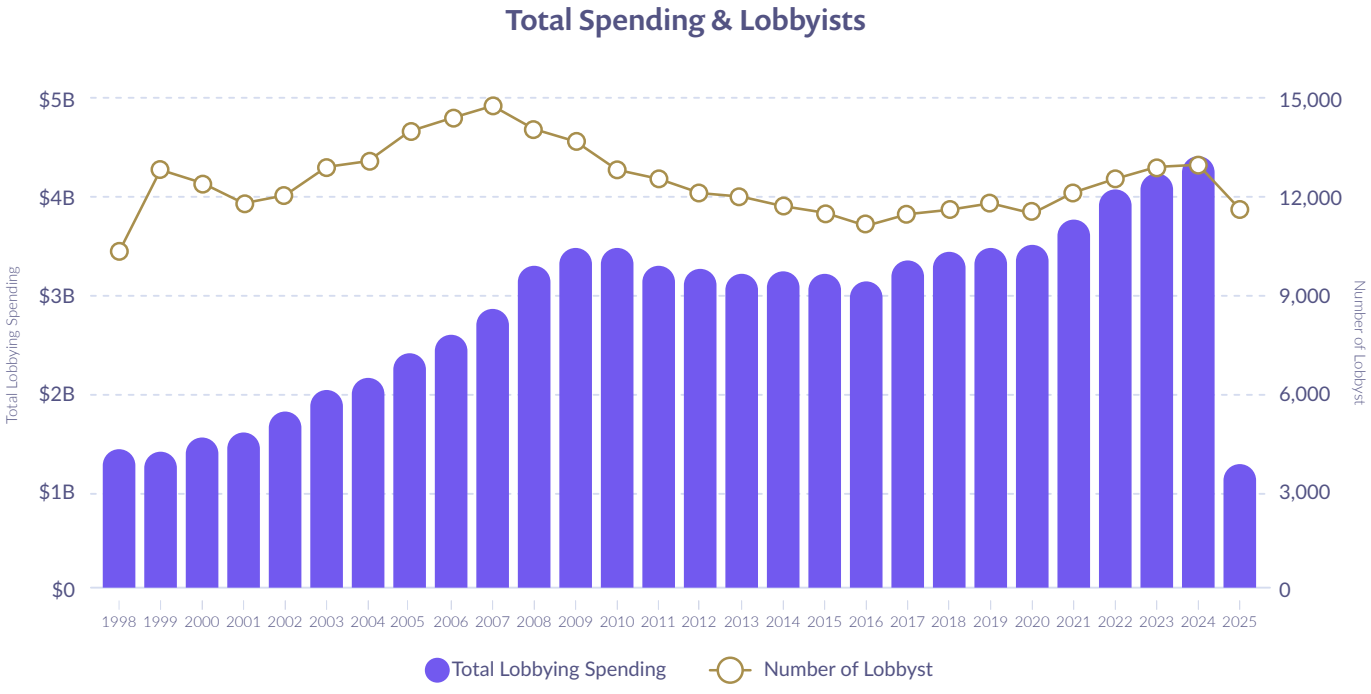


Figure 1: Total federal lobbying spending by year (2014–2024). After plateauing around $3.5 billion pre-2020, lobbying surged to an estimated $4.53 billion in 2024, the second straight year above $4 billion. The upward trajectory reflects intensified advocacy around major legislation and regulatory initiatives. Source: OpenSecrets

2025 Year-to-Date Pace

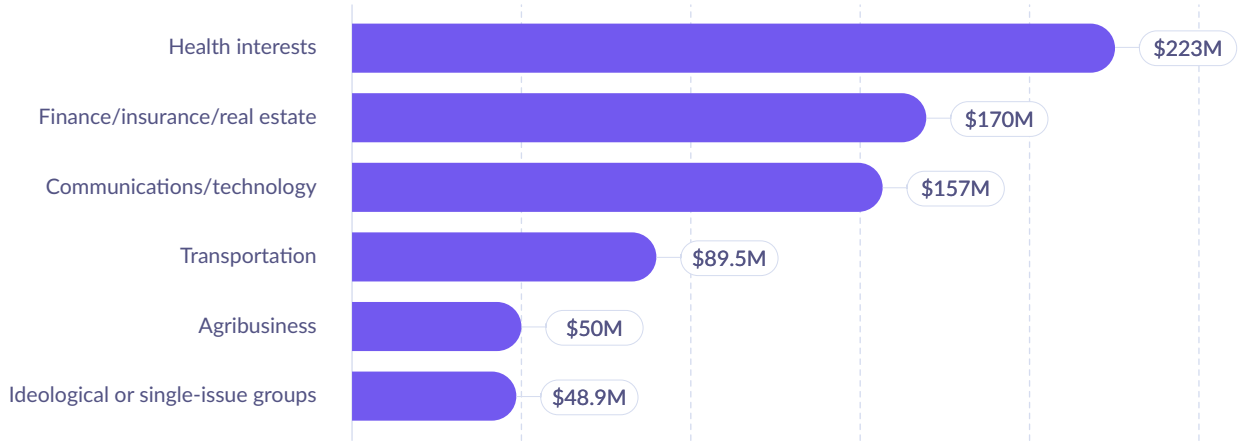
Through the first quarter of 2025, lobbying spending remained elevated. OpenSecrets data (capturing filings from January 1–March 31, 2025) shows **$1.17 billion** spent in Q1 alone when summing across all sectors (Table 1). This is slightly ahead of the ~$1.13 billion spent in Q1 of the prior year, indicating 2025 is on track to meet or exceed last year's total. The influx is driven in part by a changed political context with one party now holding unified control of the White House and Congress, which has prompted many industries to double down on Washington advocacy and the rapid pace of the Trump administration's executive orders.

Sector Breakdown

Lobbying firepower remains concentrated in a few key sectors; health-related industries, financial services, energy and technology.

Q1 2025

- Health interests led at $223 million
- Finance/insurance/real estate followed at $170 million
- Communications/technology totaled $157 million



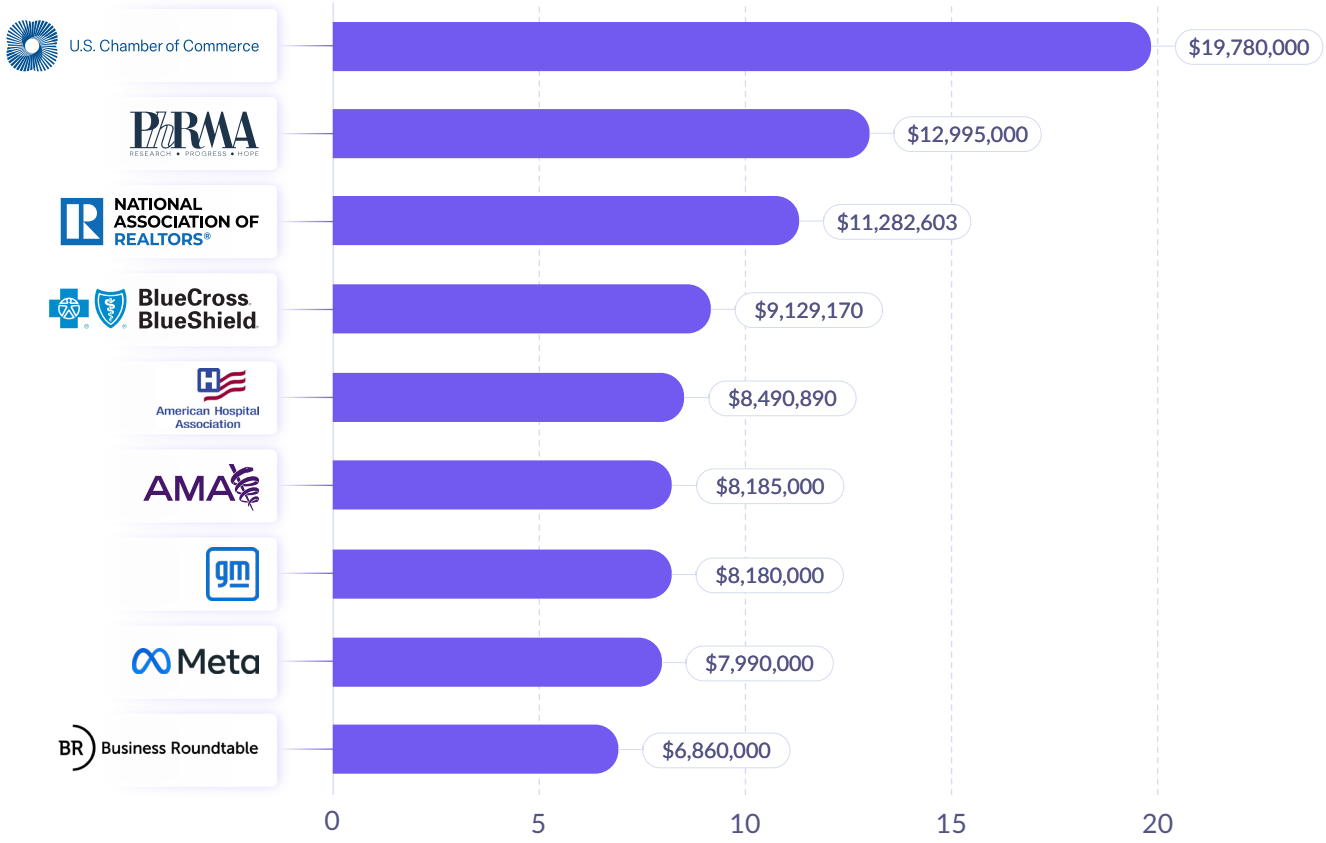
Other notable sectors included transportation ($89.5M), agribusiness ($50M), and ideological or single-issue groups ($48.9M). **Healthcare is the heavyweight industry of 2025**, followed closely by finance and broad business coalitions, underscoring which policy areas (e.g. drug pricing, Medicare, digital regulation, tax/financial rules) are generating the most lobbying activity.

These patterns continue trends from 2023

Total federal lobbying hit **$4.2+ billion in 2023**, with **pharmaceutical and health products industries leading all others in spending**. That year saw **record influence spending** fueled by major legislation (e.g. infrastructure, semiconductor funding) and regulatory proposals (such as climate disclosure rules), and 2024 only raised the bar further. The sustained increase into 2025 indicates that **companies view lobbying as more critical than ever** to protect their interests amid an active government agenda.

Top-Spenders

Trade associations and big corporations continue to spend the most on lobbying. Year-to-date 2025, the single largest spender is the **U.S. Chamber of Commerce**, which poured **$19.78 million in Q1 2025** alone. (The Chamber consistently ranks #1 annually; it ultimately spent about $80 million in 2024.)



Other major spenders in early 2025 included the **Pharmaceutical Research & Manufacturers of America (PhRMA) with $12.99M** and the **National Association of Realtors with $11.3M** in the first quarter. Health and insurance groups were prominent: **Blue Cross/Blue Shield ($9.13M), American Hospital Association ($8.49M)**, and American Medical Association ($8.19M) all ranked in the top 10. This reflects intense health policy lobbying (drug pricing, Medicare Advantage, hospital payments, etc., discussed later). **General Motors** was a top individual corporate spender with **$8.18M** in Q1, likely lobbying on electric vehicle credits and industrial policy. **Meta (Facebook)** spent **$7.99M** as it fights various tech regulations, and **Amazon.com** spent **$4.63M** (Amazon's full-year spend often tops $20M, especially on antitrust and labor issues). Rounding out the leading clients were influential umbrella groups like the **Business Roundtable ($6.86M)** and seniors' lobby **AARP ($6.63M).**

It's noteworthy that **trade associations and coalitions frequently outspend any single corporation**, because they aggregate industry resources. For example, the pharmaceutical lobby's trade groups (PhRMA, Biotechnology Innovation Organization, etc.) together far exceed any one pharma company's spend. In 2023, PhRMA alone spent **$27.6 million** on federal lobbying reflecting the high stakes of drug pricing policy. The

tech industry similarly leverages both individual company efforts and collective groups (e.g. NetChoice, CCIA) to influence policy debates.

Bottom line

The **market for influence is robust**. Major K Street firms are **posting double-digit revenue growth** and hiring aggressively to meet demand. Trade groups and Fortune 500 companies are budgeting tens of millions annually for lobbying, undeterred by public scrutiny. The start of 2025 has reinforced that who holds power in D.C. drives *who gets paid on K Street*. *Firms with the right connections* (e.g., alumni of the current administration or congressional majority) are booming. This competitive, resource-intensive environment sets the stage for the policy battles.

Republicans vs. Democrats

Firms perceived as having connections to the new regime have surged. Ballard Partners' rise is an example of a firm that added **130+ new clients** after the 2024 election, including blue-chip companies like JPMorgan Chase, Chevron, Netflix, and even the Business Roundtable. All seeking insight or access to the incoming administration. Several former Ballard lobbyists joined the Trump administration (e.g., a former partner became Attorney General, the White House chief of staff is a Ballard alum), further boosting the firm's cachet. Meanwhile, **other Trump-connected consultancies** (Miller Strategies, Mercury Public Affairs, Michael Best Strategies, etc.) have also seen a **"tsunami of new business"** in early 2025.

Conversely, firms more aligned with the prior administration or Democratic causes are adjusting. Many remain among the top earners Brownstein and Akin Gump are bipartisan behemoths, but some K Street shops that thrived under Biden are now leveraging different strengths. For instance, Brownstein Hyatt (which led Q4 2024) cited **higher education clients** driving its work in Q1 2025, as universities grappled with new executive orders from Trump targeting campus speech and funding. The firm logged **$16.8M in Q1 2025** (a modest 3.5% uptick year-over-year) and noted that its team's understanding of the "new administration's executive orders" helped attract these clients.

Overall, **Washington's top 10 lobbying firms in 2025** (by revenue) include a mix of lobbying-only boutiques and large law firms with lobbying practices. They dominate the market and often set trends in pricing and tactics. A notable consolidation trend in recent years is big law firms acquiring or expanding lobbying teams – e.g., Holland & Knight's growth (now regularly in the top 10) and others like Kirkland & Ellis dabbling in lobbying for defensive reasons. No major mergers between lobbying firms have been reported in 2025, but competition is fierce: new entrants with specialized niches (e.g. tech policy, ESG consulting) are vying for clients alongside the stalwarts.



Policy Hot Zones: Issues Driving the Most Lobbying Activity

Certain **policy areas in 2025 have become "hot zones" of lobbying**, attracting outsized attention from companies, coalitions, and advocacy groups.

All About AI

Artificial Intelligence (AI) Regulation

Few topics have exploded onto the lobbying scene like AI. Amid rapid advances in generative AI and growing calls for oversight, the number of entities lobbying on AI surged in 2024–2025. According to **TechCrunch**, 648 companies reported lobbying on AI issues in 2024. That's up **141%** from 458 companies the year before. Tech firms in particular dramatically increased spending: **OpenAI** (the maker of ChatGPT) boosted its lobbying from $260,000 in 2023 to $1.76 million in 2024. Its close rival **Anthropic** more than doubled from $280k to $720k in the same period, and newer AI startups like Cohere also ramped up efforts. They advocated on bills like the **CREATE AI Act** (to fund AI system benchmarking) and an AI **Advancement and Reliability Act** (to create a government AI research center), which they supported as ways to guide reasonable regulation.

Traditional tech giants are likewise deeply engaged. Microsoft, Google, Meta, and Amazon, all major AI players, folded AI messaging into their broader lobbying. (Tech industry combined lobbying is addressed in section 3d, but Big Tech spent **$61.5M on lobbying in 2024**, a record sum, and much of that touched on AI and data issues.) Companies and trade groups formed new alliances, such as the Partnership on AI, and funded think tanks to educate policymakers on AI's benefits.

Meanwhile, concerns about AI's risks (to privacy, jobs, public safety) brought out civil rights groups and labor unions, adding to the lobbying hustle. By mid-2024, Congress had introduced **90+ AI-related bills**. The debate in Washington is at a formative stage. Trump has indicated he intends to deregulate AI, viewing too much regulation as a roadblock to U.S. tech dominance. This stance has divided industry lobbying strategies:

some firms continue pushing for light-touch federal standards (to preempt stricter rules elsewhere), while others are content to let the administration hold back formal regs. At the same time, state governments have charged ahead – over 700 AI-related bills were proposed in state legislatures in just the first half of 2024.

ESG & Climate

Corporate **ESG (Environmental, Social, Governance) reporting**, especially climate-related disclosures, has been another battleground. In 2022, the SEC (under the prior administration) proposed a landmark rule requiring publicly traded companies to **disclose their greenhouse gas emissions and climate risks** in detail. Industry's lobbying response was fierce: businesses and trade groups flooded the SEC with **thousands of comments** opposing various aspects. The **oil & gas, agriculture, and manufacturing lobbies** argued that the rule would impose crushing costs.

Through heavy advocacy, they achieved a partial win even before finalization – the **SEC's final rule in 2024 dropped the requirement to disclose Scope 3 (supply-chain) emissions**, a provision business groups like the **National Association of Manufacturers (NAM)** opposed. NAM touted its "extensive advocacy" for getting Scope 3 out.

Looking ahead

Lobbying around ESG will intensify in regulatory agencies (where rules on human capital reporting, board diversity, etc., could emerge) and on Capitol Hill (House Republicans in 2023-25 have held hearings denouncing "woke capitalism," while some Democrats push bills to mandate ESG disclosures). In short, ESG is both a lobbying subject and influences the practice of lobbying.

Healthcare

Pricing and Drug Cost Reforms

The arena of **healthcare pricing**, particularly prescription drug pricing, remains one of Washington's fiercest lobbying contests. *Major developments*: In 2022, the Inflation Reduction Act (IRA) authorized Medicare to negotiate prices for a selection of high-cost drugs for the first time, a policy Big Pharma had long resisted. That set off a **whirlwind of lobbying by pharmaceutical companies and their allies** to influence how the negotiation program would be implemented – and, ultimately, to roll it back. **PhRMA** spent nearly **$28 million in 2023** lobbying on this and related issues, the most of any single trade association after the Chamber of Commerce. Individual drugmakers like Pfizer, Amgen, and Johnson & Johnson also ratcheted up lobbying, often into the $8–$12M/year range each, largely to combat price controls.

By 2025, drug negotiation had entered a critical phase (the first drugs for negotiation were identified, with prices to take effect in 2026). The pharma industry's lobbying objectives were twofold: **legislative and administrative.** Legislatively, *pharma lobbyists converged* on Capitol Hill to argue for "fixes" to the IRA, effectively diluting or delaying the negotiation provisions. At the beginning of 2025, **PhRMA's CEO and top drug company chiefs secured a meeting with President Trump** to press for exactly that. According to reports,

their ask was to adjust certain IRA provisions deemed most onerous. One prime target is what PhRMA calls the IRA's "**pill penalty**" – the fact that small-molecule drugs (pills) get only 9 years on the market before being subject to negotiation, versus 13 years for biologic drugs. PhRMA wants the administration's support to extend or eliminate this differential. They are also lobbying to prevent any expansion of the negotiation program beyond what's already in law.

Administratively, drug companies are engaging with HHS and CMS on how the rules are written. There's a subtler lobbying campaign at the agency level: seeking favorable definitions of what constitutes a "fair" price, lengthy exemptions for certain drug uses, and generous implementation timelines. Some companies also chose the litigation route by mid-2023, at least eight lawsuits (from Merck, the U.S. Chamber, etc.) were filed attacking the Medicare negotiation provision on constitutional grounds. This legal front complements K Street lobbying by raising the pressure on policymakers to possibly revisit the policy.

Outside of Medicare negotiation, other healthcare pricing fights persist. Insulin pricing was a hot topic, though major insulin manufacturers announced in 2023 they would voluntarily cut insulin list prices (a response to political pressure and impending price caps), the insulin lobby and patient advocacy groups continue to push for broader caps.

Big Tech

Technology Regulation

The tech sector is grappling with an onslaught of regulatory proposals and responding with an **unprecedented lobbying blitz**. In 2024, as noted, six of the biggest tech and social media companies (Meta, Alphabet/Google, Microsoft, ByteDance/TikTok, X/Twitter, and Snap) spent a combined $61.5 million on federal lobbying, **with several hitting record highs**. These firms employed nearly 300 lobbyists, roughly "one lobbyist for every two members of Congress," illustrating the sheer scale of their influence apparatus. The spending surge coincided with debates over how to protect kids online, enact data privacy safeguards, and address national security concerns about

The digital platform regulation space is one of the fiercest lobbying contests. Tech firms have poured money into Washington at record levels, **and they have largely succeeded in delaying or defeating major legislation that threatened their business models** – from social media liability reforms (Section 230 changes, which fizzled) to kids' safety and privacy laws. At the same time, national security concerns (like TikTok) and bipartisan tech skepticism mean the pressure will continue. Going forward, we might see narrower compromises – e.g., a slim federal privacy law, or an age verification requirement – but any such effort will prompt **millions more in lobbying and ad spending** from the affected companies. Notably, Big Tech's charm offensive around the new administration (contributing to Trump's inaugural, tech CEOs literally at the inauguration) signals how they are hedging their bets to maintain influence no matter who is in power. And in the states, tech firms are now permanently engaged to counter state regulations (as seen by NetChoice suing California over an age-appropriate design code law). Simply put, tech policy is now one of the busiest fronts for lobbyists in D.C. and beyond, rivaling healthcare and finance.

Bills or Regulations with Big Coalitions

A few notable items attracted unusually large coalitions of lobbyists:

The 2023 Farm Bill (an every-5-year law) **saw hundreds of entities** lobbying – from agribusiness to food aid charities – though its passage was delayed into 2024/2025. The annual National Defense Authorization Act (NDAA) is always huge, with defense contractors, tech companies (5G, AI for defense), and even universities lobbying. In 2024, the Kids Online Safety Act (mentioned) had a pro-coalition of child safety groups and parent organizations. However, the tech industry coalition opposing it (or watering it down) proved stronger in the House.

Another example: a proposed **ban on stock trading by members of Congress** (for ethics) got attention in 2023; while not a typical economic issue, it triggered behind-the-scenes lobbying from interests who feared losing influence (Wall Street, etc.), and it stalled. And not to be overlooked: abortion policy at the federal level (like attempts at a national 15-week ban or conversely codifying Roe) drew intense lobbying from advocacy groups on both sides in 2023. However, no new federal law was passed – those energies shifted to the states.

The policy hot zones of 2025 span technology, climate, healthcare, and security and all are areas of extraordinary lobbying campaigns. There's no off-season anymore on K Street. Whether it's deciphering a new Trump executive order or quietly inserting a clause into an omnibus bill, lobbying around these issues is fast-paced and data-driven.





State-Level Trends and Decentralized Policy Battles

Lobbying is not just a Beltway game, state capitols have become critical battlegrounds for many policy issues in 2025. With federal policy often gridlocked or left to broad frameworks, interest groups are increasingly turning to the states to advance their agendas or halt opponents'. This section highlights trends in key states and issues, and how lobbying is playing out at the state level.

State Lobbying by the Numbers

While comprehensive data is hard to obtain (only 19 states make meaningful lobbying disclosure data readily available), those that do reveal substantial spending. California, Texas, New York, Florida, and Illinois typically see the highest state lobbying expenditures, tracking their large economies and active legislatures. For example, in California, reported lobbying expenses often exceed $350 million per two-year session (covering state and local); Texas regularly sees heavy spending during its biennial sessions, especially on energy and social issues.

Issues Driving State Lobbying in 2025

Climate and Environmental Regulations

With federal climate legislation largely settled in the IRA, the action shifted to implementation and state initiatives. Many states are setting their own **renewable energy mandates, electric vehicle (EV) requirements, building codes, and even carbon pricing schemes.** For example, California has led with aggressive policies (100% clean power by 2045, a planned phase-out of gasoline car sales by 2035, etc.), and industry lobbies respond in force. Oil companies and the Western States Petroleum Association famously lobby Sacramento hard – in one recent year, **oil & gas interests spent over $20 million in California lobbying** trying to dilute a bill banning new oil wells near homes (they were partly successful, as enforcement was delayed). Conversely, environmental groups like the Sierra Club, and increasingly **tech and clean energy companies,** lobby in favor of strict climate rules in states, seeing them as markets for their products (EV makers supporting mandates, solar companies pushing for net-metering policies, etc.). States like **New York and Massachusetts** have seen contentious lobbying over proposals to ban natural gas hookups in new buildings (gas utility companies vs electrification advocates). Another front is **anti-ESG laws at state**

level: e.g., Texas passed laws in 2021 and doubled down in 2023 restricting state contracts with firms that "discriminate" against fossil fuels or firearms – banks like JPMorgan and BlackRock quietly lobbied (directly or through associations) for amendments to make those laws less stringent (with some success in carving out exceptions) after initially being shut out of state business. That saga shows how *niche state policies can rope in Fortune 500 companies to lobby obscure state committees.*

Technology and Data at the State Level

In the absence of comprehensive federal rules, states became innovators or battlegrounds for tech policy. **Privacy Laws** – California's CCPA/CPRA (first-in-nation comprehensive privacy law) inspired a dozen states to pass their own versions by 2025. Tech companies lobbied each one, aiming for business-friendly provisions. They had a significant victory in **Virginia's law (2021),** which industry found more palatable, and used that model to advocate in other states. **Content moderation and social media law**s – states like Texas and Florida passed laws in 2021 limiting social media content moderation (to stop perceived censorship of conservatives). Tech trade groups (NetChoice and CCIA) not only lobbied against them in those legislatures but then sued to block them (the legal fight went to the Supreme Court). Similarly, **children's online safety laws** (like California's Age-Appropriate Design Code Act of 2022) met stiff opposition from tech – NetChoice filed suit, while simultaneously lobbying Congress to preempt such state laws.

Another emerging area

AI governance at the state level. As noted earlier, over **700 AI-related bills** were introduced in states in the first half of 2024. These range from task forces to actual regulations (e.g., requiring AI hiring tools to be audited for bias). **Tech companies and their lobbyists are now active in statehouses** where they had little presence previously. For instance, **Tennessee's voice cloning protection law** (the first of its kind, protecting voice actors from having their voice replicated without consent) likely saw entertainment and tech lobby input. **Colorado's 2023 AI accountability law** (risk tiers for AI in government use) was shaped with consultation from industry and academic experts (some effectively lobbying via testimony). In **California's 2023 AI bills**, trade groups like TechNet and Chamber of Progress lobbied to tweak language, and they rejoiced when the most sweeping bill was vetoed after an outcry about stifling innovation – an outcry they helped stoke.

Energy (Oil & Gas vs Renewables) in States

In energy-rich states like Texas, **oil and gas companies maintain enormous influence.** For example, Texas in 2023 considered (but eventually did not pass) a bill to revoke subsidies for renewable energy; oil and gas interests lobbied in favor, while tech companies (like Tesla and big tech data centers that use renewables) and environmental groups lobbied against. Texas also passed laws shielding its industry from ESG influences (e.g., banning cities from banning gas hookups, as a preemption against "green" local policies). At the same time, **blue states like New York and Illinois** passed ambitious climate legislation (e.g., NY's ban on gas in new buildings by 2027), which gas utilities and building trade lobbyists opposed but could not fully stop – though they did secure longer timelines and carve-outs.

Cross-State Patterns

Many interest groups now coordinate multi-state strategies. Organizations like **American Legislative Exchange Council (ALEC)** on the right and the **State Innovation Exchange (SiX)** on the left produce model bills and help state legislators connect with lobbyists and experts. Corporations often rely on national trade associations to assist in state lobbying (since a company may not have personnel in every state, they leverage associations or contract lobbying firms in those capitals). For example, the **Pharmaceutical Care Management Association (PCMA)**, representing PBMs, might hire local lobbyists in multiple states where PBM regulations are under consideration, ensuring consistent messaging.

States to Watch

California

With its vast economy and trendsetting policies, California is a magnet for lobbying. Big Tech (headquartered there) keeps a close lobbying presence in Sacramento on issues from privacy to labor (the gig economy law AB5 was a huge lobbying fight in 2019–20, for instance, with Uber/Lyft spending heavily to undo it via a ballot proposition). In 2025, CA's implementation of a 2035 gas car sales ban, its new regulations on plastics and packaging, and possibly healthcare reforms (like exploring single-payer) are all areas drawing intense lobbying. The state's **CAL-ACCESS** system provides detailed info on lobbyist registrations, showing hundreds of clients from Amazon to Zillow lobbying the legislature.

Texas

As mentioned, energy, tech (with Austin booming), and social issues make Texas a hotspot. The **Texas Ethics Commission** records show high spending particularly by energy companies, utilities, and trial lawyers/defense groups (on tort reform). In 2025, Texas considered tax incentives to attract semiconductor fabs (following the CHIPS Act) – major chip companies lobbied for reinstating a tax break program. Additionally, the school voucher debate in Texas (education reform) saw huge lobbying from both school choice advocates (some funded by national orgs) and public school associations.

New York

A leader in financial regulation and now climate laws, NY sees Wall Street firms lobbying state regulators and lawmakers (e.g., on cryptocurrency rules or stock transfer tax proposals). The state's Climate Leadership and Community Protection Act set bold climate goals, and now industries (utilities, real estate, automakers) are lobbying intensively on the how – e.g., rules to electrify buildings or require zero-emission cars by dates certain. Also, New York's heavy **healthcare industry presence** means big lobbying around Medicaid, hospital regulations, etc., often paralleling federal health debates at the state level.

Emerging states

Ohio and **Arizona** have become swing policy labs where both sides invest. Ohio had a major energy bribery scandal (FirstEnergy in 2020), underscoring the stakes of statehouse lobbying (that scandal involved $60M in bribes to pass a nuclear bailout – an extreme case). In 2023, Ohio's ballot measure on abortion rights (and another on recreational marijuana) drew national money. Arizona, with its changing politics, sees lobbying on election laws, water management, and tech (TSMC building a big chip fab there meant lots of lobbying on water use and tax credits).

In summary, state-level lobbying is more important than ever. For many issues – from reproductive rights to AI governance – the real action (and outcomes affecting people's lives) is happening in state legislatures and agencies. Public affairs professionals must adopt a **federal-state integrated approach**: what can't be won in Congress might be winnable in a state (or vice versa). However, the patchwork of 50 states means complexity: a victory in one state can be offset by a loss in another, leading to inconsistent rules that companies then have to navigate (which often brings them back to lobbying Congress for a single federal standard).

One overarching trend is the **decentralization of policy**: interest groups no longer concentrate only in D.C. They are building strong presence in state capitals and even city halls (e.g., Airbnb and Uber famously lobbied city councils across the country for favorable ordinances). The profession of lobbying has thus expanded geographically, and the "laboratory of democracy" that is the states is buzzing with well-funded advocates on all sides.

Tech-Driven Advocacy: AI, Data & Digital Grassroots in Lobbying

Lobbying in 2025 will not just target tech policy but also harness technology in how influence is wielded. The influence industry has increasingly turned to AI, data analytics, and digital campaigning tools to enhance traditional lobbying.

AI-Powered Policy Intelligence

The days of lobbyists poring over stacks of paper bills are fading. Now, firms leverage sophisticated platforms – many infused with AI – to track and analyze legislation at lightning speed. Tools like Quorum offer tools that automatically monitor thousands of bills and regulations, flag those of interest, and introduce "**Quorum Copilot**," an AI assistant that can **analyze complex legislation and draft personalized outreach** messages. This dramatically cuts down research time. AI summarization means a 300-page bill can be distilled in seconds to key points and even tailored talking points for a client's perspective.

Use Case: Suppose a last-minute amendment is added to a budget that could harm a client, AI tools can alert the lobbyist that the language appeared, summarize its effect, and even suggest which legislators might be behind it based on pattern recognition. The lobbyist can then swiftly mobilize a response, perhaps using the draft talking points generated by the system.

Targeting

Modern lobbying campaigns increasingly resemble political campaigns in their use of data. Lobbying firms now employ data scientists to crunch voting records and constituency demographics to identify which lawmakers might be persuadable and what messages will resonate. Additionally, **micro-targeting** technology (borrowed from elections) is used in issue advocacy. Sophisticated databases allow lobbyists to pinpoint key influencers in a lawmaker's district, for instance, a small business owner or local official whose opinion the lawmaker values. Lobbyists then facilitate **grasstops outreach**, where those influencers convey the desired message. This is often orchestrated via digital means, like targeted LinkedIn or Facebook outreach to specific community leaders.

Digital Grassroots

On the grassroots side, digital platforms have revolutionized how constituents are mobilized to support or oppose policies. **Advocacy software** (like Quorum Grassroots) enables organizations to blast out action alerts to thousands of supporters, who can then, with one click, send a form email or tweet to their representative. In 2025, these tools are often deployed in tandem with traditional lobbying, essentially as a force multiplier. For example, if a coalition is lobbying for AI legislation, they might simultaneously run a digital campaign prompting tech employees in targeted districts to email Congress about the bill's importance. The result can be hundreds of constituent contacts per lawmaker, manufactured in a matter of days, something not possible a decade ago at this scale.

Social Media & Narrative Shaping: Lobbyists today don't ignore the court of public opinion – they actively try to shape it using digital media. It's common for lobbying firms to have an in-house communications or digital strategy team. They run **targeted ad campaigns on Twitter, Facebook, and Google** aimed at both the public and policymakers. Programmatic ad buying allows advocacy groups to use "geofenced" ads that only show within certain areas, meaning when a congressional staffer scrolls their phone, they see a message tailored to them ("Support veterans – vote yes on H.R. ____"). This hyper-targeting is a new frontier that blurs the line between lobbying and marketing.

Additionally, **AI-generated content** is starting to appear in issue advocacy. Some organizations use AI to create convincing op-eds or blog posts in support of their position, which are then placed in local media or content platforms.

Deepfake concerns haven't hit lobbying, but regulators are wary – which is itself becoming a policy issue (AI in political ads, etc., being debated).

Lobbyist Workflows & Efficiency

Technology has changed day-to-day work within lobbying firms. Routine tasks like scheduling Hill meetings or tracking legislative markups can be automated or at least streamlined by platforms. Many lobbyists use mobile apps to get real-time alerts when a bill they track is amended or when a lawmaker tweets about their issue. The increased use of collaboration tools and stakeholder management means a multi-member lobbying team (often spread across DC and states now due to remote work) can coordinate instantly when breaking news hits.

Furthermore, **Generative AI** is being adopted for drafting. Need a quick first draft of a one-pager on why a policy is bad for jobs? An AI can produce a credible draft in seconds, which the lobbyist then refines and fills with specific data and citations.

This speeds up the preparation of materials (though firms are careful, AI can make errors, and confidentiality is a concern, so it's often used only with non-sensitive info). Still, the productivity boost means a leaner team can handle more issues, potentially reducing the need for large junior staff pools. Some senior lobbyists have expressed concern that automation might disrupt the entry-level pipeline– if AI can do grunt bill-reading, will fewer young associates be hired? This is a developing story, but it's on the radar.

The **modern lobbyist's toolkit looks very different from a decade ago.** While the core of lobbying, building relationships, and trust with policymakers remains, it is now augmented by powerful AI and data capabilities. Legislative intelligence platforms help lobbyists see around corners, predictive data helps them *sharpen their strategy*, and digital platforms enable them to *mobilize voices at scale*. The marriage of technology and advocacy is yielding results: faster responses, broader reach, and often, more effective influence. Public affairs professionals must thus be as adept at using a dashboard as they are at drafting a memo, and as comfortable navigating social media campaigns as they are walking the halls of Congress.





Looking Ahead: What Will Matter in 2026?

Several emergent trends suggest how lobbying might further evolve and what issues will dominate in 2026:

Mid-Term Election Year Dynamics

Typically, major legislative pushes slow down as Congress turns to campaigning. This often shifts lobbying focus to regulatory agencies and appropriations. We expect **lobbying on appropriations (spending bills) to spike** in late 2025 and 2026, as industries try to secure last-minute riders or funding plus-ups in must-pass bills before the election. If the current administration remains, regulatory implementation of 2025 enacted policies (or rollbacks) will continue, drawing attention. If economic conditions change (say a recession), we could see emergency lobbying for stimulus or bailouts.

AI and Tech Governance Global Angle

By 2026, the EU's AI Act will likely be in force, and other countries will have AI rules. The U.S. industry might shift from blocking to shaping, perhaps pushing for a federal AI law that preempts tougher state and foreign rules. So lobbying could pivot to "let's pass a light federal AI framework" in 2026, which Big Tech would support. That means tech companies might go on offense legislatively (much like how they eventually supported a federal privacy law to override California's).

Healthcare and Aging Policy

2026 is when the first negotiated Medicare drug prices (from the IRA's negotiation) are set to take effect (Jan 1, 2026). That will be a headline issue. Pharma lobbying will either have defanged it by then or, if not, we may see a **major post-2026 election battle** to repeal/modify it, making healthcare a top issue. Also, 2026 is when the expansion of ACA subsidies expires if not extended, expect heavy lobbying from health insurers

and patient groups to extend them (like we saw in 2021-22). The looming insolvency of the Medicare Part A trust fund in the late 2020s could spur interest groups to position themselves on potential reforms (providers vs payers, etc.).

Defense and Geopolitics

If international conflicts persist (Ukraine, Iran, Israel, and Taiwan concerns), defense lobbying might be even more intense by 2026. Big defense contractors could push for long-term appropriations or supply chain decoupling measures, bringing in tech and manufacturing lobbies allied with them. Also, if any arms control or tech export treaties arise, those spark lobbying from industry and human rights groups.

State Policy Diffusion

We'll likely see **more policy diffusion from states to the federal level** or vice versa. For example, if states continue to legalize cannabis, the industry will by 2026 lobby Congress to finally legalize federally, a big potential lobbying fight brewing (banks, cannabis cos, public health groups will all weigh in). Similarly, trends like sports betting could push for a federal framework by 2026 if the state patchwork gets too messy, gaming lobbyists would then engage in D.C. (some are already laying groundwork).

In short, **2026 will likely bring continuity in high lobbying spending and activity**, with some issue focus shifts driven by external events (economy, global crises, technological breakthroughs). Public affairs professionals should prepare for an environment where **policy windows can open suddenly** (like a sudden bipartisan drive for AI rules if an AI-related incident occurs, or renewed financial regulation if a crisis hits) – having groundwork laid with data and relationships now will pay off. The continued trend of **fragmented governance (state vs federal)** means dual-track lobbying strategies remain crucial.

As we move toward 2026, one thing is clear: the influence industry is not abating, it's adapting. Those who stay informed, transparent, and innovative in their advocacy approaches will thrive in whatever political climate emerges. For C-suite decision-makers and government relations strategists, understanding these 2025 trends is key to anticipating and shaping the policy environment in 2026 and beyond.

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