OMR REVIEWS

SaaS & AI
PRICING REPORT
2026

Dear **reader,**

I have been working intensively with pricing for almost 20 years – both as a consultant and in an operational capacity within companies. Pricing has always had an enormous impact: small adjustments, implemented correctly, can lead to great success. But small mistakes can also lead to significant missed opportunities.

There are currently many such opportunities, as markets revolutionized by AI are opening up completely new possibilities for exponential business growth. This applies not only to SaaS providers who are pioneering the integration of AI features into their existing solutions in order to offer their customers even greater added value and, of course, to monetize it. It also applies to developers of purely AI-based agents who are beginning to challenge the established SaaS market leaders.

Those who optimize not only their product but also their pricing will benefit from the growing potential. Unsurprisingly, the results of our survey show that the majority of SaaS experts surveyed plan to revise their pricing in the near future.

Sincerely,

Dr. Sebastian Voigt
Partner & Co-CEO, *hy*

Dear **reader,**

Pricing, or more precisely, pricing transparency, has been a constant theme throughout my professional career. After founding Preis.de 20 years ago and later driving market comparison in the consumer sector as Chief Revenue Officer at *idealo*, I am now fascinated by the question: How can we bring the same transparency to the often opaque world of the B2B software market? With *OMR Reviews*, we are doing just that – through authentic user reviews, detailed feature information, and insights into pricing.

This study, which we conducted together with our friends at the consultancy *hy*, takes the next decisive step. We analyzed over 4,000 software profiles to identify the latest trends in SaaS pricing and show which strategies are promising for providers today and in the future.

In a world where artificial intelligence is revolutionizing business models and the classic "per user" approach is reaching its limits, intelligent and fair pricing is becoming a decisive competitive advantage. This study is intended to provide you with inspiration and a reliable basis for making the right decisions in this dynamic environment.

I hope you find it insightful!

Sincerely,

Philipp Schrader
Managing Director, *OMR Reviews*

Meet *hy & OMR Reviews*

Dr. Sebastian Voigt
Partner & Co-CEO, *hy*

Nearly 20 years of experience in pricing and commercial excellence (including at *Bertelsmann, ProSiebenSat1, Axel Springer*), 100+ pricing projects

Charlotte Pohlmann
Principal, *hy*

Expert in go-to-market and monetization strategies for digital business models, with experience from start-ups and numerous consulting projects

Mariella Knospe
Senior Consultant, *hy*

Specialist in pricing strategies for digital businesses as well as the development and implementation of new business models

Marvin Müller
VP Marketing, *OMR Reviews*

Expert in marketing strategy and growth, with experience at *Google* and in-depth knowledge of performance marketing and search

Huge thank you also to all other contributors: Hendrik Weingarten, Lukas Drömann, Justus Schwarz, Franziska Wagner, Ann-Sophie Teckemeier.

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The findings in our report are based on *three different sources:*

We have analyzed the pricing from over *4,000* *OMR Reviews* profiles.
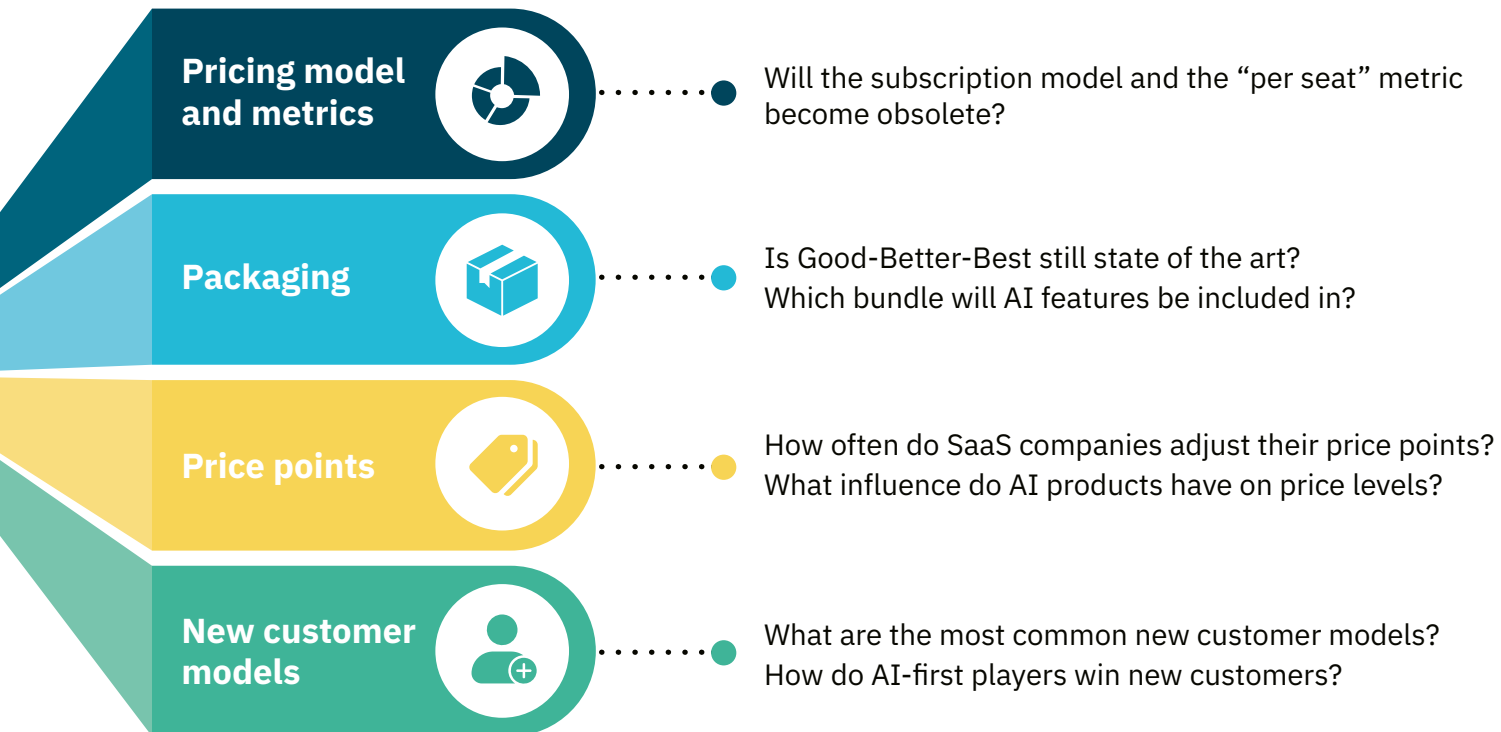

We received around *180* responses from SaaS companies in an online survey on AI pricing strategy.

Through discussions with *30* external and internal experts, we were able to gain in-depth insights into SaaS & state-of-the-art AI pricing models.

From this, we have derived *best practices and trends* for SaaS and AI pricing in 2026. Our focus is on four key pricing areas.

Pricing model and metrics

Will the subscription model and the "per seat" metric become obsolete?

Packaging

Is Good-Better-Best still state of the art?
Which bundle will AI features be included in?

Price points

How often do SaaS companies adjust their price points?
What influence do AI products have on price levels?

New customer models

What are the most common new customer models?
How do AI-first players win new customers?

No time to read the entire report?

Key findings from this report …

The golden age of high SaaS valuations is over, while AI adoption is advancing rapidly. This strategic turning point has a direct impact on pricing in both industries. Last year, over 75% of US companies adjusted their prices—a development we also expect to see in Germany.

The dominance of pure subscription models is waning. In the future, usage-based and hybrid pricing models will gain in importance, driven by the need to balance customer value and cost efficiency. Accordingly, the focus is shifting from the "per-seat" metric to usage-based metrics such as transactions or API calls. Currently, 37% of companies use usage-based models, and 69% plan to switch within two years.

Most SaaS companies continue to rely on a package structure with three or four pricing tiers in order to benefit from the psychological and financial advantages of a good-better-best approach. The integration of AI features into existing SaaS products is on the rise, with simple AI functions most commonly found in entry-level or free packages.

Over 50% of SaaS companies adjust their price levels annually. This is primarily done through price increases for existing products, but also through targeted price reductions to tap into new target groups. While free trials and freemium models dominate customer acquisition in the SaaS sector, product demos or pilot phases tend to be more effective for AI-native products with customer-specific applications.
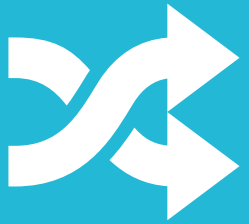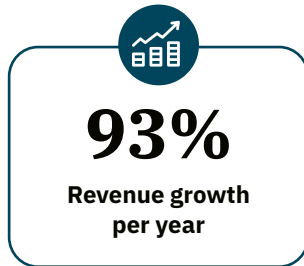
SaaS models are facing structural change

1

For a long time, SaaS companies were the epitome of a reliable investment case — with continuous growth, scalable user numbers, and attractive recurring revenues
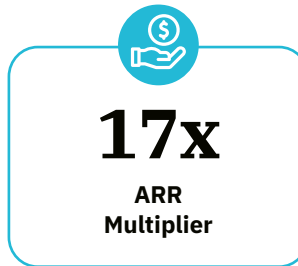
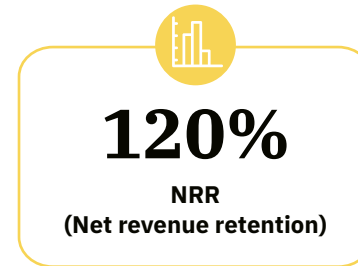**GOLDEN YEARS OF THE SAAS MODELS (2010-2021)**
Top quartiles & public SaaS benchmarks

93%
Revenue growth per year

Hypergrowth was the standard

17x
ARR Multiplier

Betting on unlimited growth

120%
NRR (Net revenue retention)

Customers have bought/ payed more every year

Source: Capchase: SaaS Company Benchmarks - Gross Margin; ChartMogul: SaaS Retention Report; Aventis Advisors: SaaS Valuation Multiples: 2015-2025, Statista: Software as a Service - Worldwide

„**Build once, sell millions.**
The perfect business model."

Marc Benioff, CEO, *Salesforce*

"*We are experiencing the end of the golden SaaS years. Customers today expect intelligent, adaptive systems instead of static software subscriptions. Companies must now switch to AI-powered, personalized solutions or will lose significant market share.*"
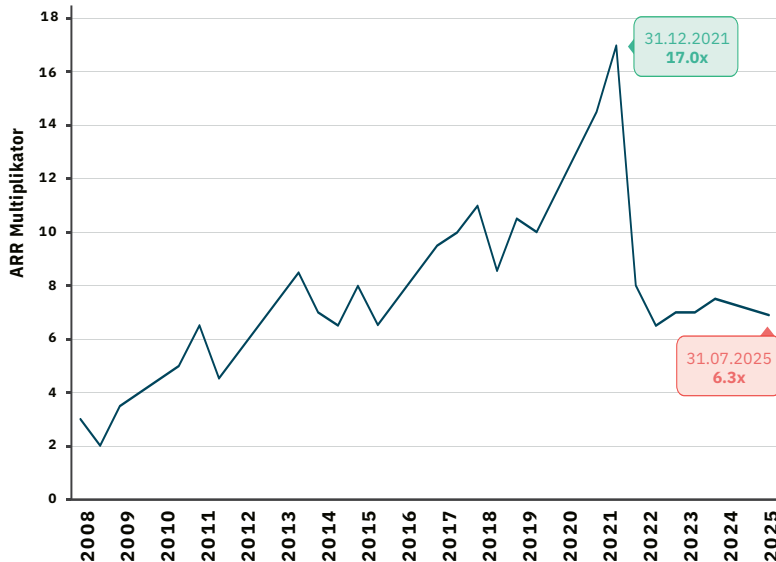
Christoph Jost, Founding & Managing Partner, *Flex Capital*

The end of the golden SaaS years: valuation multiples have fallen by 60% since the 2021 peak, forcing adjustments

THE NEW REALITY (2021-2025)
Valuation multiples of the SaaS Capital Index

31.12.2021
17.0x

31.07.2025
6.3x

SaaS valuations have fallen by 60% since their peak, since then they have stabilized at around 7 times the ARR (Source: SaaS Capital Index).

"The markets are adjusting their expectations: While traditional SaaS models are losing valuation premiums, AI is creating new narratives and growth fantasies."
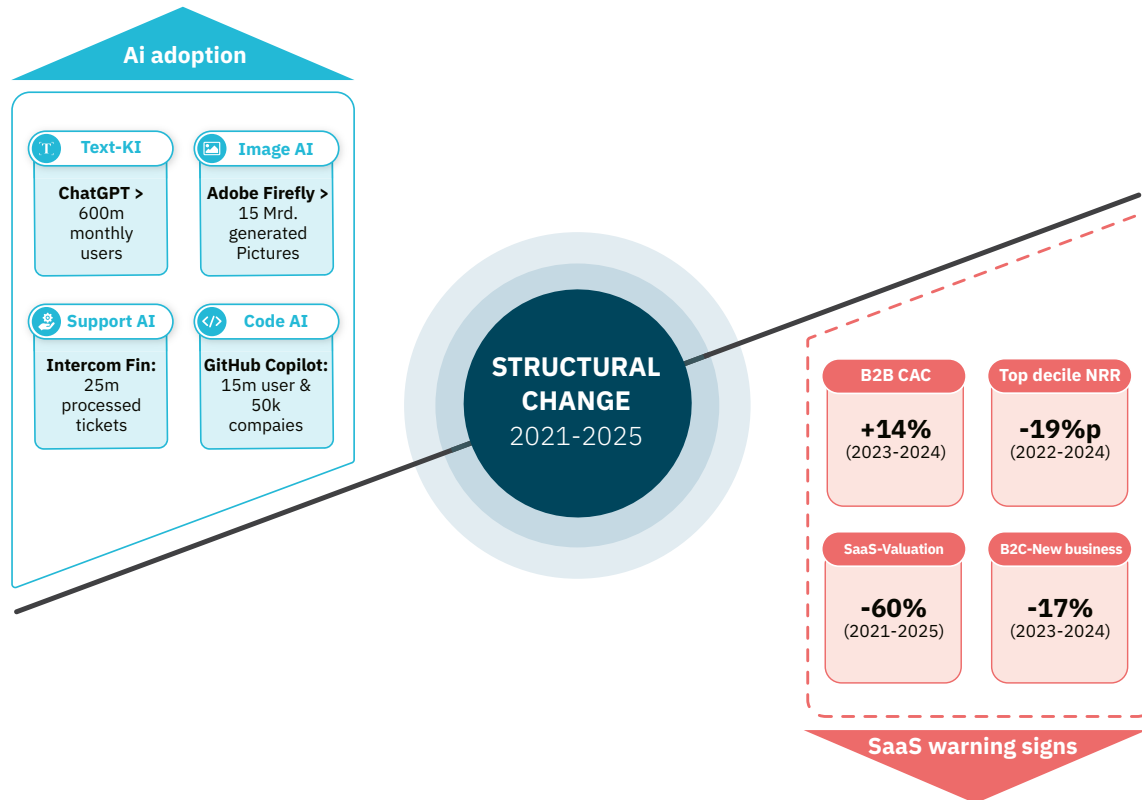
Christoph Röttgen,
Senior Vice President, *hy*

"We're also questioning whether we can still assume that the market will keep growing on its own, driven by digitalization and the rising demand for software. I don't believe so. Increasingly, we'll see clearer distinctions between companies, and only those truly willing and able to work closely with their customers and deliver real value will remain successful. Those who rely solely on overall market growth, however, may find themselves at a disadvantage in the future."

Frank Gehrig, Partner, *hy*

Strategic turning point: The stability of classic SaaS models is faltering, while AI is increasingly being adapted

Ai adoption

Text-KI
ChatGPT >
600m monthly users

Image AI
Adobe Firefly >
15 Mrd. generated Pictures

Support AI
Intercom Fin:
25m processed tickets

Code AI
GitHub Copilot:
15m user & 50k compaies

STRUCTURAL CHANGE
2021-2025

B2B CAC
+14%
(2023-2024)

Top decile NRR
-19%p
(2022-2024)

SaaS-Valuation
-60%
(2021-2025)

B2C-New business
-17%
(2023-2024)

SaaS warning signs

3 out of 4 software companies in the US have changed their pricing in the past year. *In Germany, we expect the same trend*

PRICE ADJUSTMENTS
Changes to the pricing model over the last 12 months

CHANGED PRICES AND PACKAGES — **50%**

ONLY PRICES CHANGED — **20%**

ONLY PACKAGES — **6%**

NO PRICE CHANGE — **24%**
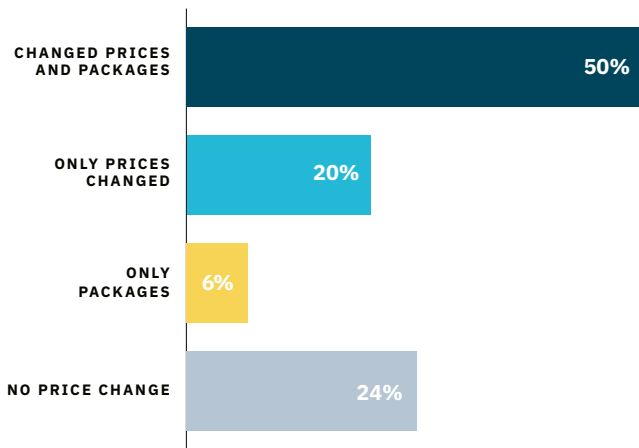
Source: Growth Unhinged

Three-quarters of US software companies adjusted their pricing last year. This clearly shows how much the SaaS market is changing under the influence of new technologies. **Similar dynamics** are also evident in **Germany**: more than half of the companies surveyed are currently making changes to their pricing structure. **50% are introducing new pricing models**, such as **usage- or transaction-based approaches** that better cater to **different customer segments.**

A **key driver of this development is the use of AI.** Only **24%** of companies are not currently planning any changes, which impressively confirms the central role of pricing as a control instrument in a technology-driven competitive environment.

"We are observing a development from user-based to usage-based pricing. Nevertheless, we believe that hybrid models will initially prevail, i.e. a combination of a fixed basic amount and variable components. Customers need planning security, while providers need reliable revenue. That's why not everyone will switch completely to pure usage-based pricing."

Benedikt Kordtomeikel, Managing Director, *PMI Advisory*

Pricing model and metrics

2

Before we dive in: What is a *price model*, and what is a *price metric?*

PRICE MODEL

A price model describes **how to charge for something,** for example via licenses, subscriptions, usage-based or result-based models. Different price metrics can be combined in order to make the sales logic flexible and customer-oriented.

PRICE METRICS

The price metric describes **what is charged**, i.e., which unit or reference value the customer pays, e.g., per user, per transaction or per usage unit. It determines the specific basis of assessment for the price within a price model.

We see three major price models dominating the market, with *the subscription model* in particular used by almost all providers

Price model
Which price models are you currently using? (Multiple answers possible)
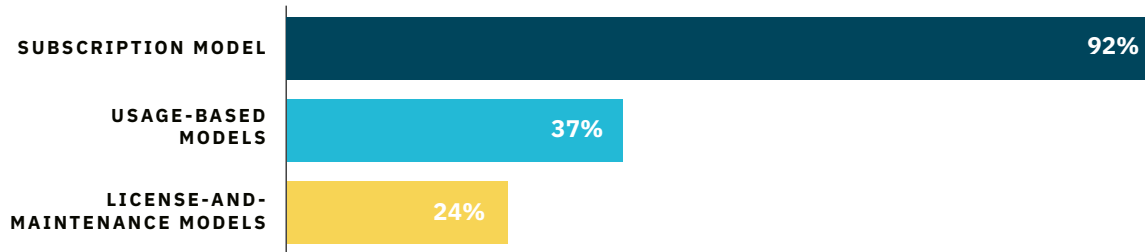
Model	%
SUBSCRIPTION MODEL	92%
USAGE-BASED MODELS	37%
LICENSE-AND-MAINTENANCE MODELS	24%

Source: *hy* survey on the monetization of AI agents and AI features in software companies, n = 180

The **subscription model** is the gold standard in today's software industry. With a **92% adoption rate, it shapes monetization practice** and is considered the industry benchmark for predictable, recurring revenue, ideal for products that deliver continuous value, such as SaaS solutions or digital platforms.

37% of providers also use usage-based models, where customers **pay only for what they actually consume**. These models are particularly **well-suited for fluctuating demand or** transaction-based services, offering fair and scalable pricing.
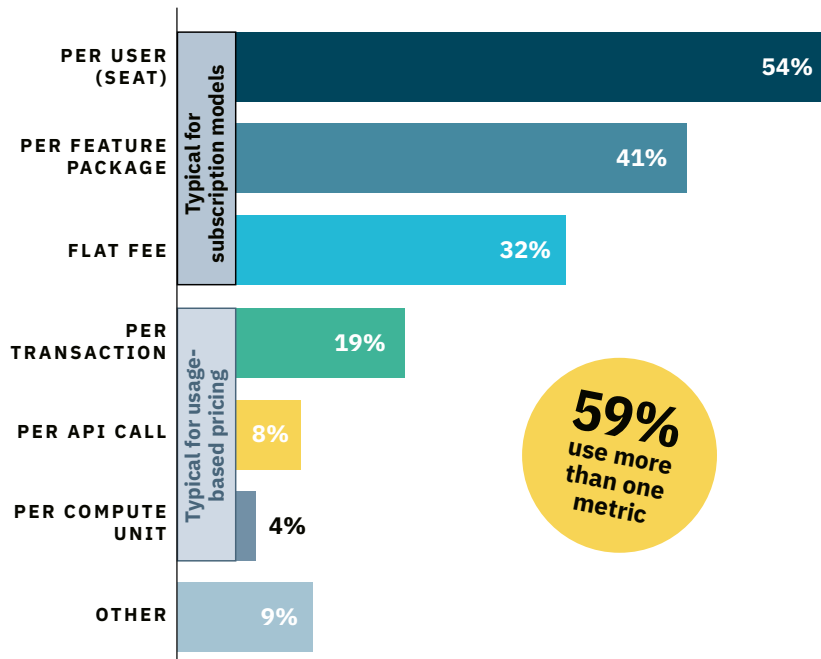
The **license-and-maintenance model is losing relevance**, with only 24% of providers still using it.

Overall, **the subscription model clearly remains dominant, but in practice, success often comes from finding the right combination** of different approaches.

Due to the widespread use of subscription models, pricing metrics such as *"per user"* or *"per feature package"* also dominate

What pricing method(s) do you use for your software solutions?

Typical for subscription models
- PER USER (SEAT): 54%
- PER FEATURE PACKAGE: 41%
- FLAT FEE: 32%

Typical for usage-based pricing
- PER TRANSACTION: 19%
- PER API CALL: 8%
- PER COMPUTE UNIT: 4%
- OTHER: 9%

59% use more than one metric

Source: *hy* survey on the monetization of AI agents and AI features in software companies, n = 180

Among the price metrics used, **two options currently dominate: 54% of providers charge per user, closely followed by 41% who price per feature package.** Both approaches are typical for the **subscription model** and reflect its strong presence in the market.

At the same time, **traditional models such as flat fees (32%) or transaction-based metrics (19%) remain relevant.**

A notable trend is the **rise of hybrid approaches: 59% of providers combine multiple pricing metrics,** for example, user-based billing with API volume or computing power. This **allows pricing to be more closely aligned with the actual value** delivered.
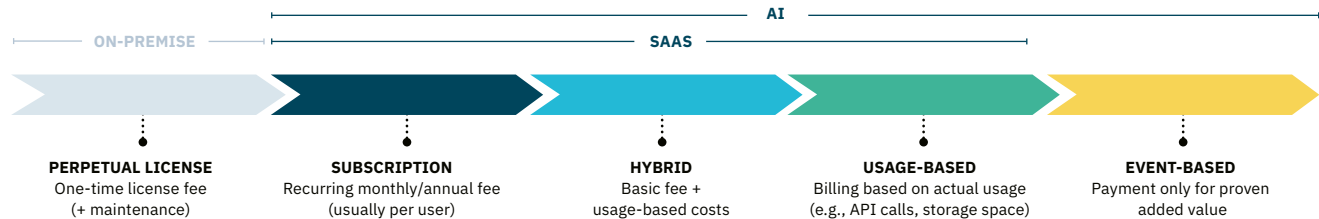
Choosing the right metric is not a technical detail, but a **strategic decision**. A **good price metric reflects the perceived value.** The more clearly it does so, the more it drives growth and long-term customer retention.

Technology and new software solutions are driving the shift from licensing and subscription models to *usage- and results-based price models*

Evolution of price models

ON-PREMISE	SAAS		AI	
PERPETUAL LICENSE	**SUBSCRIPTION**	**HYBRID**	**USAGE-BASED**	**EVENT-BASED**
One-time license fee (+ maintenance)	Recurring monthly/annual fee (usually per user)	Basic fee + usage-based costs	Billing based on actual usage (e.g., API calls, storage space)	Payment only for proven added value

In the past, **software** was sold through **perpetual licenses and installed locally.** With the advent of the cloud, the subscription era began, offering centralized delivery and recurring revenue.

Now, AI marks the next stage: usage can be measured in real time and priced based on consumption. Each prompt generates direct computing costs, especially for AI-native companies and large US players, who adapt their models accordingly.

Examples like **Claude AI** show how this works in practice: **billing is usage-based, calculated on processed tokens.** The more content created or analyzed, the higher the costs. **Adobe, for instance, has adapted its price model for AI features with Firefly, using credits for AI-generated images or text effects.**

The **market is clearly moving toward hybrid and value-based models**: more intelligent, adaptable, and aligned with the actual value delivered.
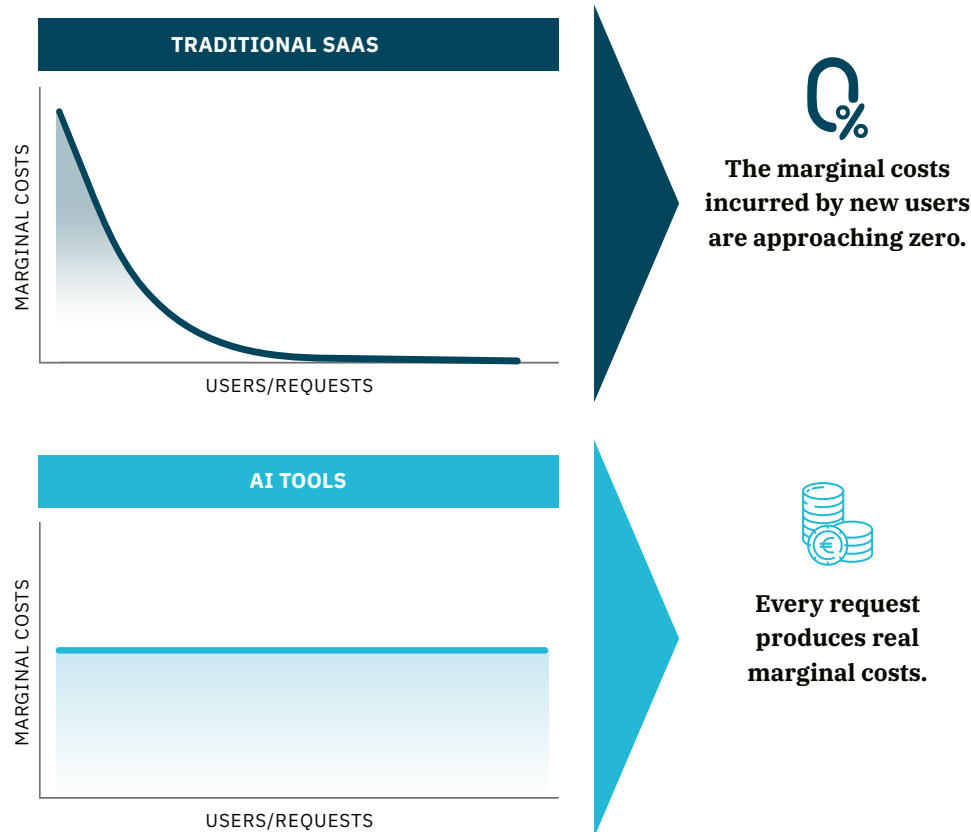
> "
> *"Currently, usage-based models make sense for AI companies because they often cannot yet assess how much their customers use the product and what added value it creates."*

Mickaël Bellaïche,
General Partner, *Redstone*

Variable GPU costs in AI tools are also forcing companies to *rethink their pricing models and metrics*

TRADITIONAL SAAS

MARGINAL COSTS

USERS/REQUESTS

The marginal costs incurred by new users are approaching zero.

AI TOOLS

MARGINAL COSTS

USERS/REQUESTS

Every request produces real marginal costs.

"Token-based AI pricing is not the holy grail, and I don't believe the future lies in selling API tokens with a simple markup. AI monetization is still in its early days, and in the long run, more differentiated models will be needed."
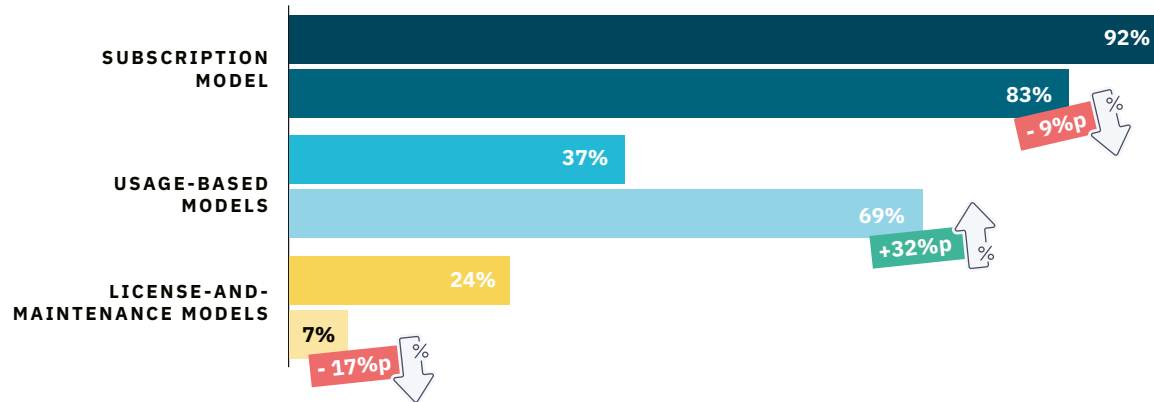
Tobias Hagenau, CEO, *awork*

In the coming years, many are therefore planning to switch to a *usage-based price model*

Price models for AI Software
Which pricing model would you choose if you were to add AI features to your product in the future?

SUBSCRIPTION MODEL
92%
83% - 9%p

USAGE-BASED MODELS
37%
69% +32%p

LICENSE-AND-MAINTENANCE MODELS
24%
7% - 17%p

Source: *hy* survey on the monetization of AI agents and AI features in software companies, n = 180; Growth Unhinged Report

Those who market AI features must also rethink their price models. While **92%** of traditional software is still sold via **subscriptions**, the share for **AI features** is only **83%. Usage-based models** are on the rise **(from 37% to 69%)**, while **license-and-maintenance models** have dropped to **7%.**
In the US, the shift goes even further: **60%** of providers rely on **hybrid or usage-based models**, while **classic subscription approaches** play a central role for only **32%** of them.

"We sell automation to our customer: everything we build ultimately reduces the need for additional staff on their side. This is why a pure 'per-user' metric would be problematic. Instead, we limit employee access within our packaging and use this as an upselling path into larger tiers."

Maurizio Blötscher, Director Operations, *Superchat*

The *three pricing models that will be most relevant* in the future are already widely used in AI software today

	HYBRID	USAGE-BASED MODELS	RESULTS-BASED MODELS
Price model	Combination of subscription model and usage limits	Billing according to actual usage (e.g. per computing unit)	Billing based on results achieved
Price metric	Basic fee + usage in credits	per token, per request	Per result, per conversion
Example	Frisbii · OpenAI · {moin}ai · INTERCOM	CleverReach · Brevo · GetResponse · ada	affilicon · Legalist · twilio

The three central price models for AI software are already gaining acceptance: Hybrid models combine predictability with scaling potential. Usage-based models create transparency, lower barriers to entry and enable precise billing. Result-based models are geared towards real added value and share opportunities and risks with the customer.

All three promote fair, flexible and growth-oriented monetization, in line with the dynamics of modern AI solutions.

> "We advise our portfolio companies to try out different models—seat-based, token-based, or usage-based. There is no one-size-fits-all solution for AI products. Dynamic pricing models are crucial for responding flexibly to costs. This is a very individual decision for each company."
>
> **Jörg Rheinboldt,** General Partner, *HEARTFELT_*

> "We offer a package with purely performance-based billing. For our customers, this is a no-brainer offer, which has enabled us to significantly increase our conversion rate."
>
> **Christoph Zöller,** CEO, *Instaffo*

We also see that market conditions and the necessary infrastructure are often lacking to enable event-based pricing

Especially in the field of AI, many providers face the challenge of developing an appropriate pricing model. Market standards often do not yet exist, and the necessary structures to accurately measure outcomes are not always in place. To still make well-founded decisions, a structured approach is essential.

A decision framework helps to systematically select the right model.

- If a headcount position is directly replaced, an **agent-based pricing model** is suitable, positioning the agent as a fractional FTE and targeting the headcount budget.
- If clear outcomes can be measured, an **outcome-based model** is recommended, where only results are priced and proof of value creation is required.
- When results are not clearly measurable, the question is whether task volumes vary significantly. If they do, a **usage-based model** is appropriate, operating as a consumption model that can evolve further.
- If task volumes are relatively stable, a **usage-based model** is preferable, charging "per process" and balancing simplicity with value creation.

"

"I believe outcome-based pricing is a very relevant pricing mechanism for providers who have a very repetitive and very clear value proposition. Otherwise, there is a risk that you, as a provider, will have to set a very high price because you have to price in many variable use cases. This leads to either the provider or the customer losing out."

Malte Kosub,
CEO & Co-Founder, *Parloa*

"

"My hypothesis is that outcome-based pricing is likely to disrupt the entire SaaS world over the next two to four years."

Nikolai Skatchkov,
Co-Founder & CEO, *circula*

Top 5 insights into pricing models and metrics

1 **Subscription models remain the industry standard for the time being**
Despite the growing variety of pricing models, subscriptions are still considered a stable and predictable standard—especially for recurring SaaS offerings. They offer predictability for providers and low barriers to entry for customers.

2 **Variable pricing models are becoming increasingly prevalent**
This is countered by the trend toward variable pricing models: More and more providers are switching to models that focus on actual usage or specific results achieved. They promise greater fairness, better margin control, and stronger customer loyalty through genuine value orientation.

3 **Outcome-based pricing is suitable for repetitive processes, but not otherwise**
In theory, outcome-based pricing is straightforward. However, there is often a lack of concrete details to fairly and realistically reflect both costs and added value. Especially for customer-specific use cases, outcome-based pricing can only be determined over longer test periods.

4 **Subscription metrics still dominate, but the variety of pricing metrics will grow**
Most providers continue to use established metrics such as "per seat" or "per package." These models are easy to communicate, sales-friendly, and deeply rooted in the market. The shift to variable prism models will lead to a significant increase in the variety of pricing metrics.

5 **AI costs do not offer economies of scale**
Unlike traditional software, AI products do not scale cost-effectively. The variable operating costs associated with GPUs and infrastructure require new pricing models that reflect actual costs and benefits, rather than imitating rigid flat rates.

Packaging

3

The technical flexibility of SaaS products has resulted in many different packaging options

($) **Bundling Options**

1. all-in-one package	**2.** Functional packages	**3.** Core product + add-ons	**4.** Good-Better-Best	**5.** Good-Better-Best + add-ons	**6.** Modular
	Use Case 1	Core product	Good Better Best	Good Better Best	
	Use Case 2				
	Use Case 3				
	Use Case 4				
An offer that includes all functions.	Product functionalities are divided into modules. Customers can select modules based on their needs and specific use cases.	The core product contains the most important components for all customers. Additional functions or packages can be added as needed.	The GBB bundling strategy pursues a transparent upselling approach and offers packages with different features.	The GBB packaging is extended with additional individual add-ons. This allows for a customized package.	A customized, modular product to which individual functions can be added according to customer requirements.

In the SaaS sector, there is a *clear trend* toward *three or four packages*—fewer or more packages are the exception, but can still be useful
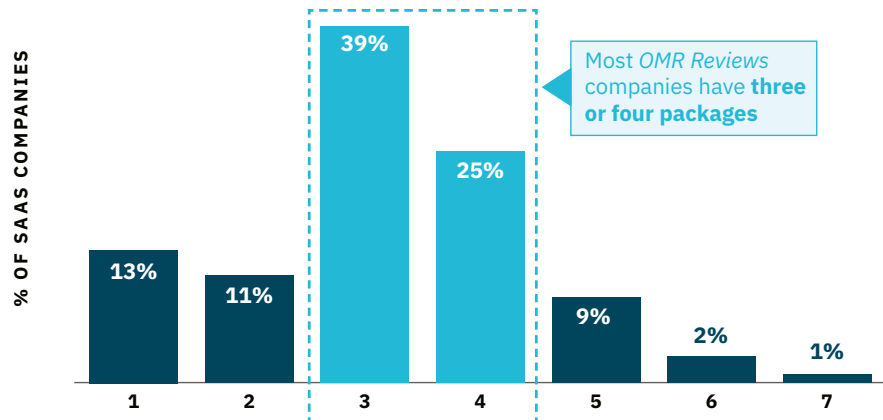
A look at the SaaS providers listed on *OMR Reviews* reveals a clear pattern: most offer three packages, and some offer four, typically using the proven good-better-best approach. This model provides a clear structure and makes navigation easier while creating comprehensible differences in performance.

Providers with more than four packages usually offer modular solutions with a focus on adaptability to customer-specific use cases. To communicate a clear value proposition to customers, it's important that the packages remain distinguishable and don't compete with each other, and that the selection process remains intuitive.

Packaging:
number of packages offered

% OF SAAS COMPANIES

- 1: 13%
- 2: 11%
- 3: 39%
- 4: 25%
- 5: 9%
- 6: 2%
- 7: 1%

Most *OMR Reviews* companies have **three or four packages**

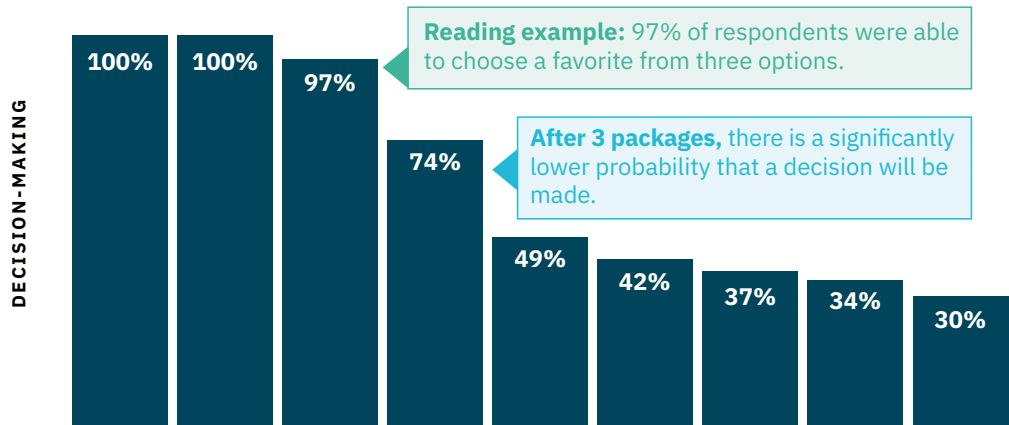Source: Analysis of the *OMR Reviews* profiles, n = 4197; as of June 30, 2025

> *"We want to offer a simple solution. A package is always easier to understand. However, we also want to be flexible and offer individual bundles that allow us to tailor add-ons and offers to customers' needs."*

Caroline Kues, Head of Business Development, *heyData*

From a psychological perspective, users prefer clarity: three packages are good, but after that, the willingness to make a decision decreases significantly ...

Decision-making readiness depending on the number of packages

DECISION-MAKING

100% | 100% | 97%

Reading example: 97% of respondents were able to choose a favorite from three options.

74%

After 3 packages, there is a significantly lower probability that a decision will be made.

49% | 42% | 37% | 34% | 30%

Source: *hy* survey: „At what number of packages do I feel overwhelmed by the offer?"

"

"Customers appreciate being able to choose between basic, mid-tier, and premium packages depending on their needs – for example, based on feature set, support level, or integration options. It is important that the differences between the tiers are clear and the added value tangible; otherwise uncertainty or overwhelm may quickly arise during the decision-making process."

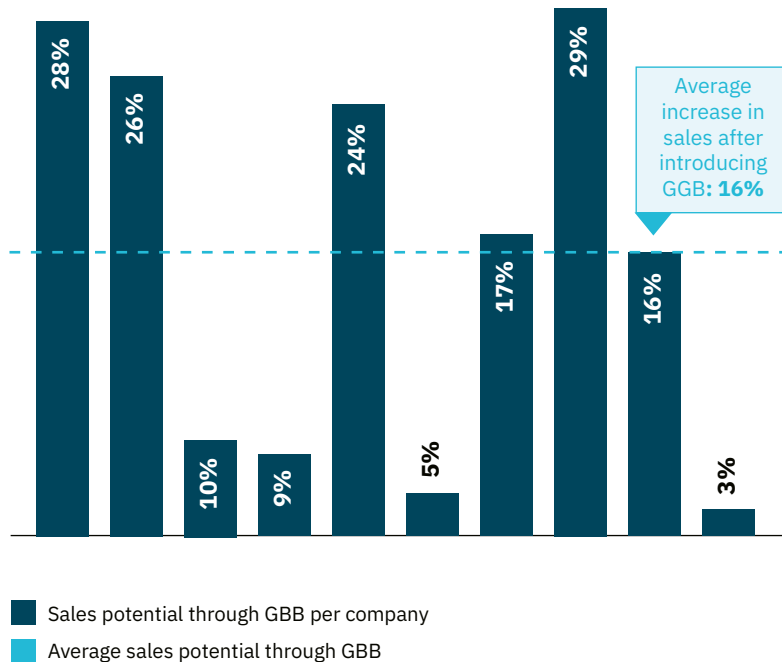**Katharina Van Meenen-Röhrig,** CEO, *GFOS Group*

When it comes to the number of price packages, less is more.

Our survey shows that **three options** provide the best framework for an efficient, targeted purchasing decision. Psychologically, **willingness to make a decision declines significantly with the fourth option**, as too many choices quickly become overwhelming. Too few options, on the other hand, carry the risk that potential customers will not find a suitable offer, particularly when targeting diverse groups.

Three clearly differentiated packages strike the optimal balance between variety and ease of decision-making.

...but the added value is also evident from a financial perspective: our projects demonstrate the significant revenue leverage achieved through the introduction of GBB

($) **Increased sales through conversion to Good Better Best packages**

28%
26%
10%
9%
24%
5%
17%
29%
16%
3%

Average increase in sales after introducing GGB: **16%**

■ Sales potential through GBB per company
■ Average sales potential through GBB

Source: Findings from *hy* projects, rounded values

Increased sales through switching to Good-Better-Best

Our analysis shows that companies that switch **to clearly structured Good-Better-Best models** significantly **increase their sales–by an average of 17%**, and in some cases by almost 30%.

The reason: **GBB packages provide guidance.** They help customers better understand the value of higher-priced options, thereby **increasing the likelihood that they will choose the most suitable package rather than the cheapest one**. The changeover does not require any new products–just clever packaging of existing services with clear differentiation.

> "*Good–Better–Best has worked very well for us from the start and continues to do so. Our packages are designed around different jobs-to-be-done, while at the same time offering a clear and transparent upsell path, with sevdesk supporting customers as their business grows.*"

Sven Ripper,
Chief Marketing Officer, *sevdesk*

For the Good-Better-Best model to work, the *product design* must also be geared towards it

PACKAGE L	BEST CHOICE	PACKAGE S
Ideal for individual requirements	PACKAGE M	Ideal for beginners
	Ideal for frequent user	
€176.19	€99.99	€86.39

50-100%   15-30%

1. **Clearly define added value**
Each package should offer recognizable added value over the smaller package. Customers need to understand for what they are paying more.

2. **Display packages in tables**
A comparison table makes differences easy to gras. The more structured it is, the easier it is to make a decision.

3. **Decide what you want to sell**
The medium package (M) should be the most frequently selected option and correspond to the focus. The S and L packages are used for positioning.

4. **Make M more attractive than S**
The M package must offer significantly more than the S package. The goal is to position S as entry-level, M as standard, and L as premium.
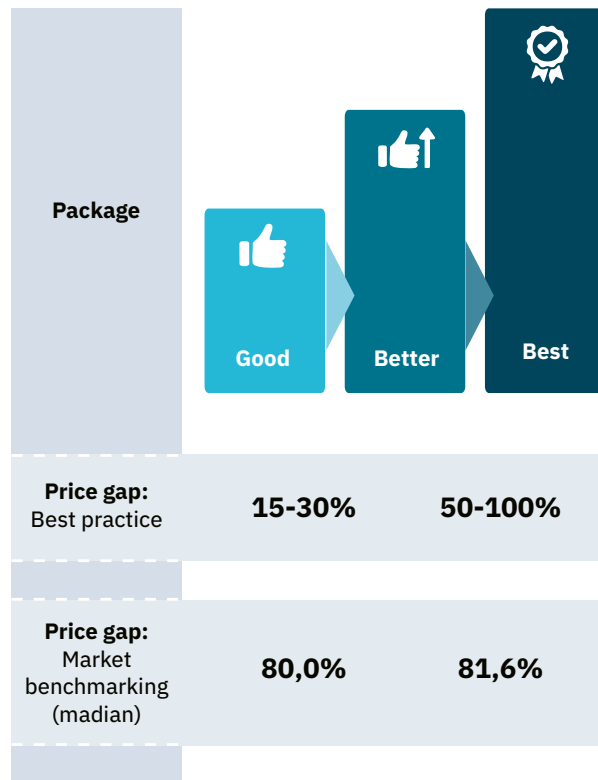
5. **Optimize price differences in a targeted manner**
Price differences influence decisions. A difference that is too small devalues M, while a difference that is too large deters customers. The steps should guide customers in a clear and understandable manner.

6. **Use psychological pricing**
Prices such as 49 instead of 50 appear more appealing. Threshold values and odd endings subtly increase the willingness to purchase.

The optimal price difference should be around 15% between "Good" and "Better" and 50% to "Best"

Package

	Good	Better	Best
Price gap: Best practice	15-30%	50-100%	
Price gap: Market benchmarking (madian)	80,0%	81,6%	

A **clear pricing structure** is crucial for SaaS providers to increase conversions and upgrades. Often, the gaps **between packages are too large,** making it difficult for customers to decide.

The price **jump between the entry-level and mid-range packages should be kept small (ideally 15-30%).** The jump to the premium package can be larger (50-100%). This strategy, in which the mid-range package offers the highest value, **leads to greater willingness to pay and higher conversion rates.**

Logical price scaling improves controllability and builds trust.

> *"Although around 60% of SaaS providers use tiered pricing, the gaps between packages are often too large and do not follow any clear logic. The price jump from the first to the second package is usually greater than that from the second to the third."*
>
> **Mariella Knospe,** Senior Consultant, *hy*

Source: Analysis of the *OMR Reviews* profiles, n = 100, as of June 30, 2025
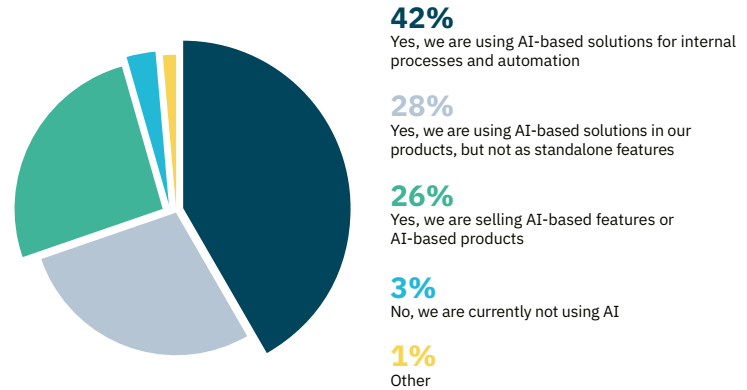
AI integration in the product landscape of SaaS companies is around 40%, both in the form of standalone products and AI-supported features

The survey results clearly show that the **use of AI in companies is now widespread.** At 42%, the majority use AI-supported solutions primarily to automate internal processes. This **focus on efficiency and operational optimization** illustrates that AI is primarily used where clear **economies of scale can be achieved**. At the same time, 28% of respondents say they use AI in their products—but not as a standalone feature. This suggests that **AI is increasingly being integrated into existing offerings, but often remains in the background and is not marketed as a differentiating feature.**

26% of companies already offer AI-supported features or standalone AI products, underscoring **the trend toward active productization of AI.** These companies are positioning themselves as significantly more innovative and are **using AI specifically to expand their range of services.**

This shows that AI is no longer seen as an option, but as a standard tool, both internally and in the market. Companies now use AI on several levels, from increasing internal efficiency to actively differentiating their products.

Application areas of AI in software companies

42%
Yes, we are using AI-based solutions for internal processes and automation

28%
Yes, we are using AI-based solutions in our products, but not as standalone features

26%
Yes, we are selling AI-based features or AI-based products

3%
No, we are currently not using AI

1%
Other

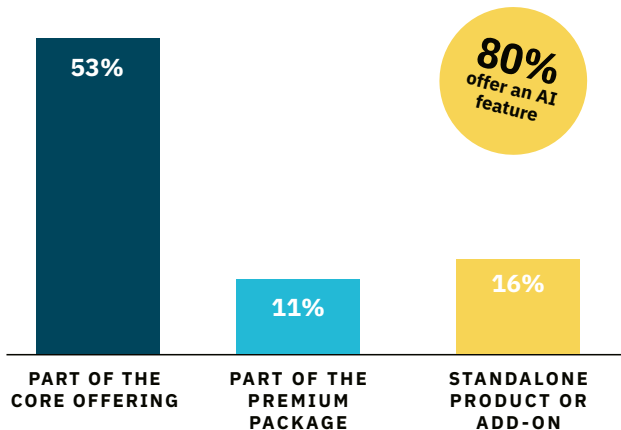Source: Analysis of the *OMR Reviews* profiles, n = 500, as of June 30, 2025

"When placing AI solutions, we take special care to integrate them into the packages in such a way that they offer the greatest added value for the customer."
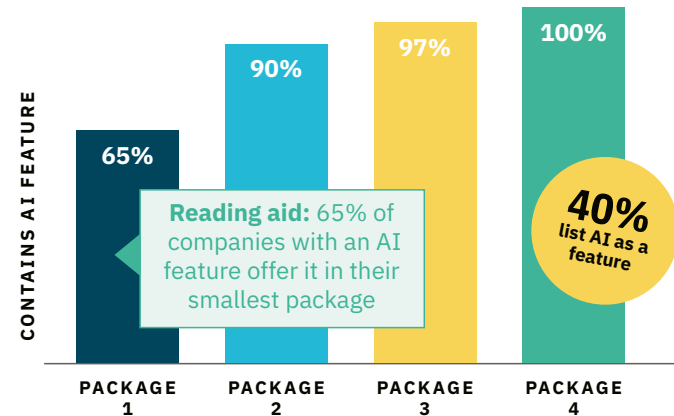
Boy Hengstmann, CEO, *evasys*

In both the U.S. and Germany, we see that AI features are now *considered a commodity* in the core offering

($) AI monetization in the US

53% — PART OF THE CORE OFFERING

11% — PART OF THE PREMIUM PACKAGE

16% — STANDALONE PRODUCT OR ADD-ON

80% offer an AI feature

($) Packages in which the AI feature can be used

CONTAINS AI FEATURE

65% — PACKAGE 1
90% — PACKAGE 2
97% — PACKAGE 3
100% — PACKAGE 4

Reading aid: 65% of companies with an AI feature offer it in their smallest package

40% list AI as a feature

Source: Analysis of the *OMR Reviews* profiles, n = 4197, as of June 30, 2025; Growth Unhinged Report

In the US, **only 20% of SaaS companies do not offer AI features.** More than half of all providers already integrate AI functions into the **standard version** of their product. A similar picture is increasingly emerging in Germany: although **only 40% of companies list an AI offering at all,** the market dynamics are comparable among those that do. **65% already provide AI features in their cheapest package,** and 90% of providers offer them in their second-cheapest package onwards. This signals that those who offer AI are quickly making it part of their core business, with clear implications for differentiation and monetization. Those who have an AI feature **use it as a flagship** and also want it to be used.

While SaaS players integrate their AI features into existing packages, new AI players first have to *prove their added value*

Many SaaS companies integrate their new **AI functionalities directly into the basic package.** For new customer business, this means that instead of monetizing AI features separately, **AI is used as a "wow factor" to secure the initial contract. Monetization then shifts to upgrades, usage volume, or AI-specific premium credits**—once customers have experienced the true added value in their everyday lives.

This makes it clear that **SaaS companies are using their market position and existing customer base to make AI part of their basic package as a growth driver.** The focus is not on the additional fee, but on increased conversion and customer loyalty.

"For our customer, automation is everything: they handle very large volumes with very few employees. Accordingly, AI is also a key focus for us in product development."

Moritz Drechsel, Managing Director, *4SELLERS*

SaaS players vs. AI-first players - customer access

	Existing SaaS players with AI features	AI First Player
Value proposition	**"AI as standard"** Differentiation from SaaS competitors	**"AI as a core innovation"** Alternative to traditional SaaS providers or new business models
Access to customers	Low barriers to entry and rapid trust through integration into core product, often at no additional cost	Demos and pilot phases to demonstrate benefits, reliability, and customizability

Companies gain competitive advantages when they make their software AI-capable and provide APIs that external AI agents can access

The **specific customer benefits and willingness to pay for AI products are still unclear in practice.** SaaS CXOs are currently responding cautiously and often integrating **AI features into basic offerings free of charge.**

At the same time, **investors and AI-native companies are experimenting intensively** to better understand the market, usage models, and willingness to pay.

Despite the uncertain future, **clear scenarios are emerging –** from deeply integrated AI to complete disruption. Instead of seeing AI agents as a threat, SaaS providers should view them as an integral part of their platforms.

The competitive advantage lies with those who **natively integrate AI functions and create interfaces for external agents.** Especially in specialized SaaS markets, agentic AI is increasingly becoming a value-adding additional service.

> "We offer our AI features within the core solution because they improve data quality. Our goal is also to first understand exactly what the benefits and added value are for our customers before we monetize AI features."
>
> **Vivian Seidel,** Chief Operating Officer, *SalesViewer*

> "Our core offering currently includes AI features at no additional cost. I believe this is the right approach at the moment, given that we're learning so much about how customers want to use this functionality, and discovering the impact that it has on their business. We are continuing to build out our AI-supported capabilities at pace, and will look into if and how these will be priced in the future based on the value that AI features deliver to customers. This could be via add-ons, usage-based pricing, or by making higher levels of AI functionality aligned with higher or premium product tiers."
>
> **Hanno Renner,** Co-Founder & CEO, *Personio*

> "Our AI features—especially the culture- and personality-based matching logic—are an integral part of our package structure. After all, only when AI systems are considered from the outset and integrated "by default" can they offer real added value over traditional solutions. With this in mind, we have made a conscious decision not to monetize AI features separately."
>
> **Maria Zerhusen,** Founders Associate, *Empion*

Top 5 insights on packaging

1

Three to four packages are standard in the market
Most SaaS companies work with a clear gradation into three to four price levels. This allows entry-level, upsell, and enterprise needs to be efficiently mapped.

2

Good-Better-Best remains the most popular package model
The classic three-tier model impresses with its simplicity and clarity. It helps users make decisions and deliberately steers them toward mid-range or higher price points.

3

Package design is more than just feature differentiation
A solid and well-structured feature differentiation is the foundation of a Good-Better-Best model. Equally important, however, are the right value proposition, appropriate price gaps between packages, and well-rounded price points.

4

Basic AI features are expected by customers
Basic AI features are no longer a differentiator.
Many customers now expect them as standard in basic functionalities.

5

**AI-enabled software creates competitive advantage**
Customer value and willingness to pay for AI remain unclear, leading many providers to act cautiously. The advantage lies with those who natively integrate AI and embed agents.

Price points

4

Most SaaS companies adjust their subscription prices regularly. Last year alone, approximately 54% of the companies analyzed changed their price points

28%
Price increase

54%
Price stable

18%
Price decrease
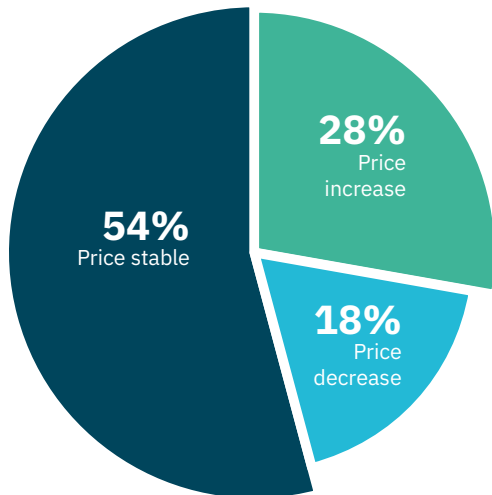
With the shift from license-based to subscription-based models, not only has the payment logic changed, but more importantly, the way price points are structured. While one-time purchase prices in the license business often remained unchanged for years, subscriptions allow for significantly greater flexibility at the price level.

Today, providers can adjust their prices with comparatively little effort. The reasons for this are manifold:

- **New features:** When additional functionalities are introduced, providers can increase the price level of a tier or introduce an additional package.
- **Inflation and rising operating costs:** Price levels can be gradually raised without having to restart the entire sales process.
- **Competitive dynamics:** Providers can react flexibly to price increases in the market by aligning their own tiers accordingly.

In the license model, this was impossible: customers made a one-time purchase, and updates or new versions were either included for free or had to be sold as an entirely new product generation. Active management of existing price levels essentially did not exist.
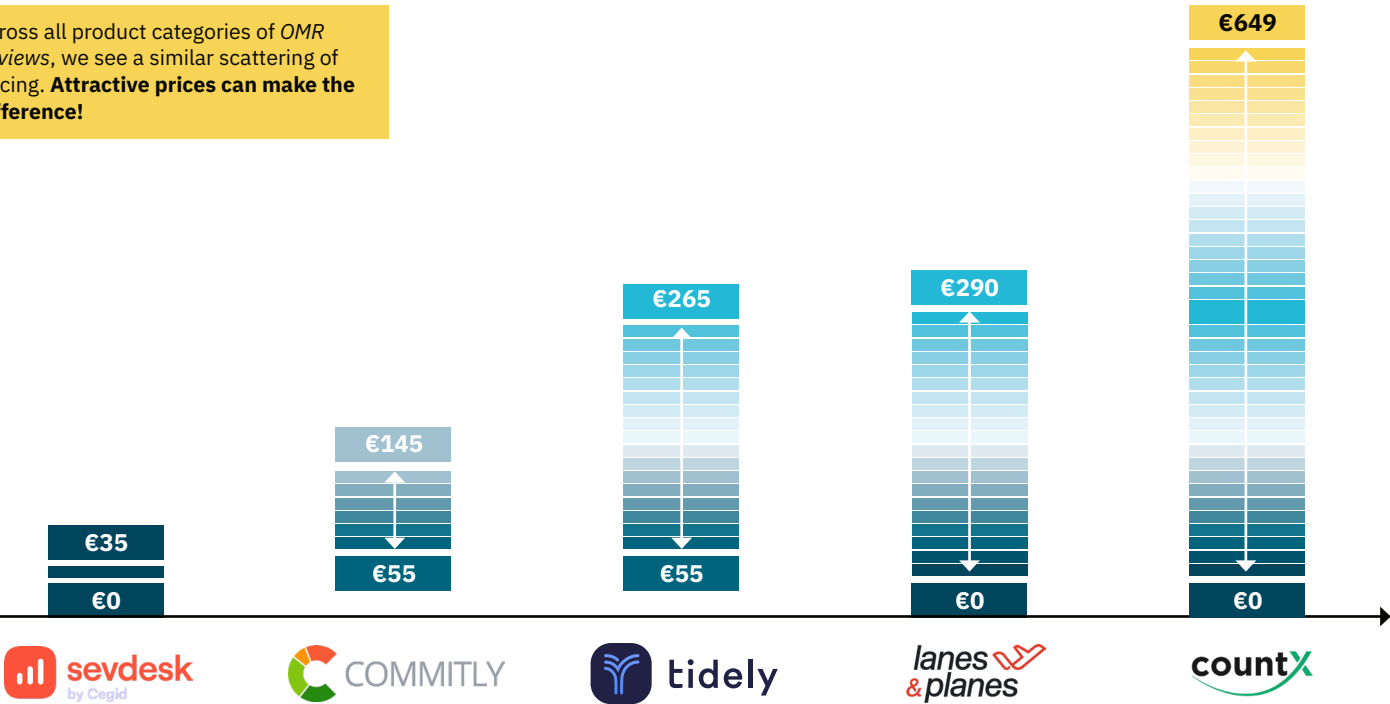
Today, the opposite is true. Subscription models make it possible to move existing customers into higher-priced tiers or periodically adjust base prices. Pricing has thus become a strategic lever to secure revenue growth and maintain stable margins—a key differentiator compared to the old world of license models.

Source: Analysis of the *OMR Reviews* profiles, n = 100, as of June 30, 2025

The result: SaaS price levels are *highly individual* and *vary greatly* even within the same product category
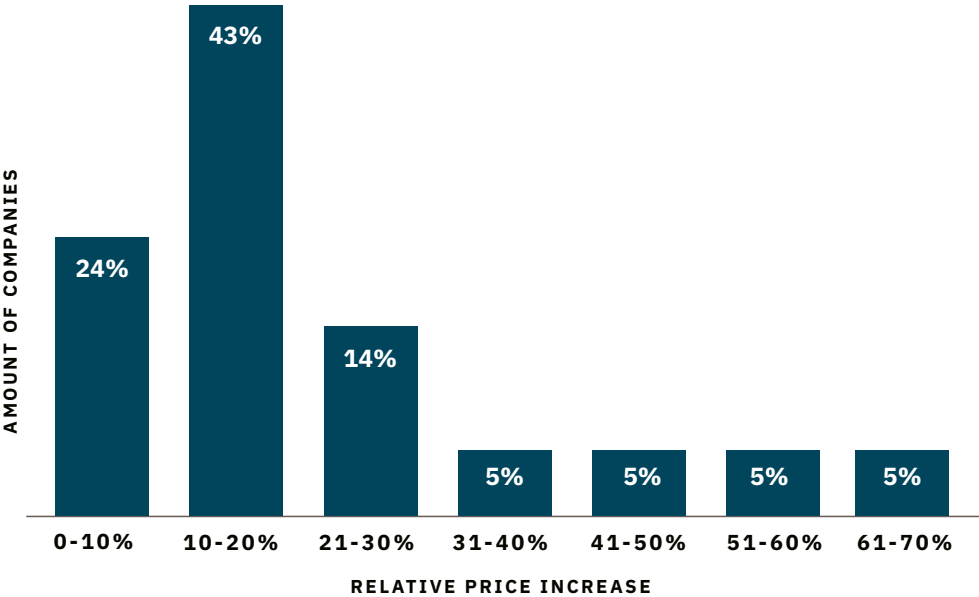
($) **Price levels for accounting & finance SaaS solutions**

Across all product categories of *OMR Reviews*, we see a similar scattering of pricing. **Attractive prices can make the difference!**

Company	Low	High
sevdesk by Cegid	€0	€35
COMMITLY	€55	€145
tidely	€55	€265
lanes & planes	€0	€290
countX	€0	€649

In the past year, companies offering three or four packages raised the price of their *cheapest offering by 10%*

($) Price increases in the SaaS market

Bar chart — AMOUNT OF COMPANIES (y-axis) vs RELATIVE PRICE INCREASE (x-axis):

- 0-10%: 24%
- 10-20%: 43%
- 21-30%: 14%
- 31-40%: 5%
- 41-50%: 5%
- 51-60%: 5%
- 61-70%: 5%

Price increases between 0-20% dominate: More than two-thirds of companies (67%) fall within this range. This indicates that these adjustments are standard practice in the market and **easiest to communicate.**

Significant adjustments are less common: Only 20% exceed a price increase of 30%. **Clear product improvements, increased costs, or a strong brand position often play a role here.**

Upward outliers: Around 15% of companies have implemented price jumps of over 30%. This is rather the exception and is likely to work primarily in cases with **high customer benefit, low price sensitivity, or a strong lock-in effect.**

We also see that *cheaper packages* are being added to reduce barriers to entry

More than one-third of providers have lowered the price of their cheapest non-free package

63%
price increased

37%
price reduced

38% - complete revision of packaging
31% - new "starter package"
13% - Change in the pricing model
18% - Other (e.g., incentives for longer contract terms)

Source: Analysis of the *OMR Reviews* profiles, n = 100, as of June 30, 2025
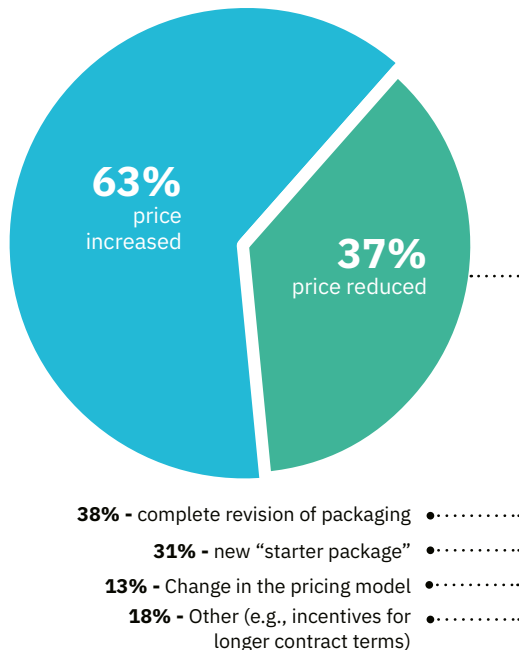
As expected, the majority of price changes (approx. 60%) are price increases. However, 37% of price changes are due to lower entry-level prices.

A more affordable entry-level package with limited functionality significantly **reduces the barrier to entry** for new customers. This makes it easier to get started with the product range, which promotes customer loyalty in the long term.

A **free basic version** can also be an effective lever for customer acquisition. This potential can be effectively monetized through **targeted upselling** strategies or the subsequent expiration of limited-time, free trial periods.

Last year alone, approximately 10% of the companies surveyed added a free version of their product to their portfolio.

The *communication of price points* also has a psychological component and offers potential when executed correctly

When does price transparency make sense?

Price transparency makes sense when the offering is clearly defined and standardized. Purchasing decisions are accelerated because prospective customers can immediately compare value and costs. At the same time, it highlights the competitive advantage and strengthens the confidence of self-service customers who want to make a purchase without a sales conversation.

When is "on request" preferable?

On Request is recommended for complex and individual projects where volume and specific requirements have a major impact on price. Price transparency allows strategic flexibility to be maintained and creates an opportunity to initiate a personal sales discussion.

16%
on request

46%
Fully transparent

38%
Semi-transparent
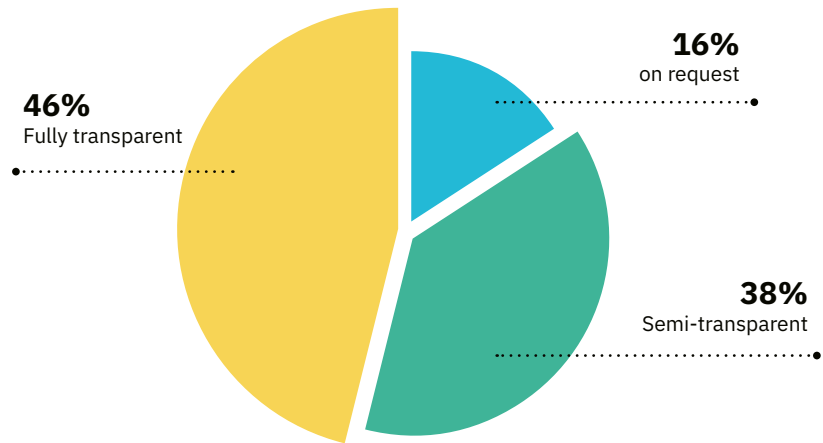
"I'm surprised that less than half of the tools we analyzed make their prices completely transparent. At the same time, I can understand the strategic approach behind this. Deliberately foregoing full transparency creates flexibility and opens the door for valuable sales discussions— a tactic that we at OMR Reviews also deliberately use in certain areas in order to better respond to individual customer needs."

Philipp Schrader, Managing Director, *OMR Reviews*

Source: Analysis of the *OMR Reviews* profiles, n = 4197, as of June 30, 2025

The same applies to price anchors and price rounding. Small adjustments can make a difference in the sales process

PRICE ANCHOR

How does anchoring work?

With price anchoring, a **deliberately high price** is set, for example, through an expensive package or an additional product. This price serves as a mental reference point. Customers unconsciously use it as a guide when evaluating other options. Even a **price that is actually high appears cheaper in comparison.** This **increases willingness to pay** without the need for discounts or real price changes.

The **high price point** of the L package is used as an anchor to evaluate the remaining price points

PACKAGE L

€1,300

BEST CHOICE

PACKAGE M

€329

PACKAGE S

€199

Less than **5%** of *OMR Reviews* customers use this form of price anchor.

PRICE ROUNDING

How are prices rounded correctly?

Price rounding subtly but effectively influences price perception. Smoothly rounded prices (e.g., €100) appear high-quality, professional, and trustworthy—especially for premium products or in a B2B environment. Odd prices (e.g., €99,90), on the other hand, signal a good deal and can promote sales among price-sensitive target groups. Depending on positioning and target group, rounding should be used strategically, as it influences purchasing behavior more than many people think.

For prices below €30, it is particularly advisable to use round euro amounts. They appear clear, facilitate quick purchasing decisions, and create a feeling of fairness. Above €30, endings with the number 9 are particularly effective. They take advantage of the threshold price effect, but should be tested against round endings such as 0 or 5, as these can convey a stronger premium character. As a general rule, price variants should always be tested using A/B testing to reliably measure their effects on conversion, margin, and returns.

($) **Decimal points for cent amounts (prices <€30)**

22%
Other (50, 90, 95)

6%
99

72%
00
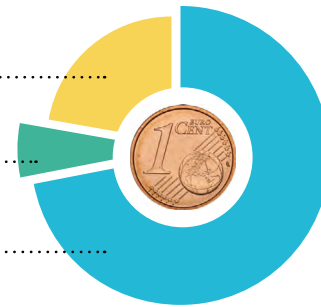
> **Reading example:**
> 72% of customers with a product cheaper than €30 round their price to ".00," e.g., €10.00.

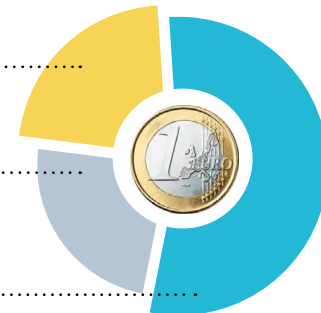($) **Endings of euro amounts (prices >€30)**

24%
Other

22%
0

54%
9

> **Example:** 54% of customers with a product costing more than €30 round the price up to the nearest €9, e.g., €39.

Will prices for software fall as a result of AI transformation, and will SaaS providers come under pressure?

In the past, software price levels, especially for SaaS products, were often high. Companies could charge premium prices because their solutions solved complex problems and delivered significant value. Lock-ins were strong, and customers could usually only exit their SaaS contracts at high switching costs.

The rapid rise of AI products, particularly standalone agents that access company data or publicly available information directly via APIs, is fundamentally reshaping this market. These solutions bypass traditional UI workflows, automate repetitive tasks, and make core functions of many SaaS tools accessible with far less effort. For customers, this creates a new basis of comparison: what used to be a feature of a SaaS product can now be performed by a standalone AI agent at a fraction of the price.

This generates pressure, on product, positioning, and pricing. We see that the majority of SaaS firms adjust their prices regularly by around 10%, often well above the inflation rate. Whether this room for maneuver will persist in an AI-driven competitive environment remains uncertain. Many of the SaaS experts we interviewed confirm that AI features are currently being integrated into the core offering rather than monetized separately.

Our hypothesis: providers are reluctant to fundamentally change their proven pricing models for now, instead using AI to legitimize existing price points and justify the next "learned and accepted" price increase.

In the long run, however, this approach will not be sufficient. As AI functionalities mature and become more differentiated, customer expectations will shift, and with them the entire pricing structure of the market.

> *"AI creates the opportunity to price differently. Suddenly, you can set a price you couldn't before – one that reflects value beyond pure usage."*
>
> **Dr. Oliver Pabst,** General Partner, *Redalpine*

Top 5 insights on price points

1

Affordable introductory offers lower the barrier to entry
An attractive introductory price or a basic offer facilitates initial use, accelerates conversion, and opens up access to price-sensitive target groups. But this is not the right approach for every product.

2

Personalized prices are gaining importance
Instead of rigid tariffs, the focus is shifting to flexible pricing models that are tailored to usage behavior, company size, or willingness to pay—data-driven and conversion-oriented.

3

AI products rely on individual pricing
With AI products in particular, perceived value depends heavily on the specific application. Dynamic pricing is therefore increasingly based on the benefit to the customer.

4

Price transparency is continuously increasing
Many providers rely on open pricing structures to build trust. However, in the case of complex or high-priced solutions, strategically deployed opacity can open up additional room for negotiation.

5

Price anchors and rounding increase sales
Psychological pricing works: well-set anchor prices and targeted rounding have a positive influence on purchasing decisions and increase willingness to pay and margins.
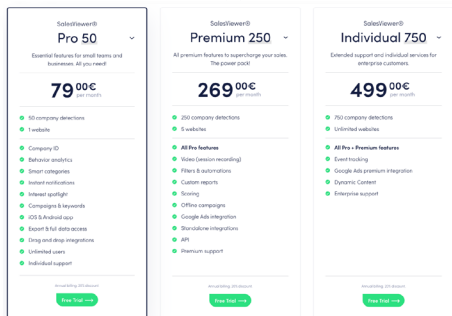
New customer models

5

Acquire More Customers with Smart Models: How *Free Trial, Freemium,* and *Reverse Trial* Simplify the Path to Paid Plans

1.
Free Trial

In the free trial model, customers' willingness to pay is tested early. To drive conversion, it is crucial that users experience the "Aha moment" during the trial period. If this doesn't happen, the likelihood of upgrading to a paid plan decreases significantly.

2.
Freemium

In the freemium model, the product can be used for free initially, giving users more time before they are asked to pay. The free version should provide enough value to spark interest but remain intentionally limited, so upgrading to the paid plan feels attractive and worthwhile.
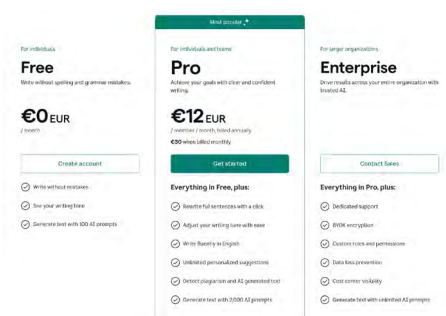
3.
Reverse Trial

In the reverse trial model, all users automatically start with full access to the Pro plan. After the trial period ends, they are seamlessly downgraded to a permanently free, limited version. This approach lets users fully experience the premium value upfront while taking on no risk when testing a paid package.

SalesViewer®

Free Trial available for all plans

grammarly

Freemium "Free" tier

toggl track
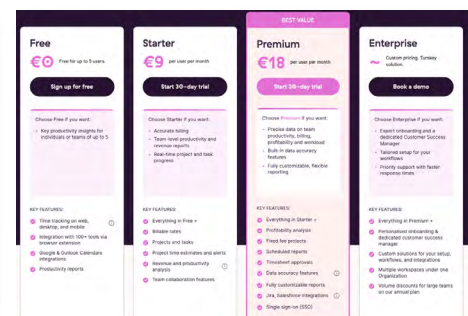
Reverse Trial - "no strings attached"

Source: *SalesViewer, Grammarly,* and *toggl* websites

Companies mainly offer free trials or freemium. Reverse trials are rarely used, even though they are a valuable tool for acquiring new customers

Freemium & Free Trial — 11 %
No entry-level offer — 44 %
Freemium — 12 %
Free Trial — 33 %
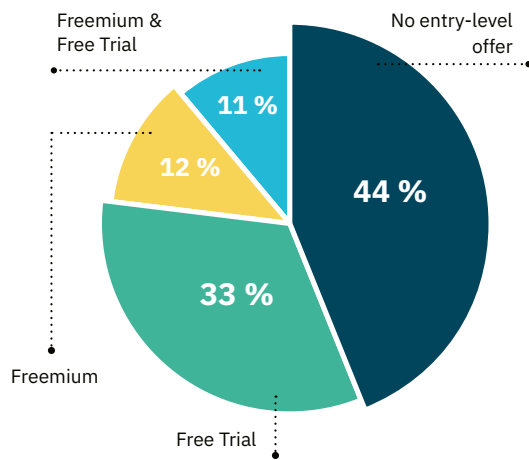
Source: Analysis of the *OMR Reviews* profiles, n = 100, as of June 30, 2025

The most common form of introductory offer in SaaS is the free trial period. Freemium models are also widespread, as is the combination of both models, which has established itself as a popular tool for acquiring new customers.

However, there are many SaaS companies that deliberately choose not to offer an introductory offer. There are several reasons for this:
• The most common form of introductory offer in SaaS is the free trial period
• Freemium models are also common
• The combination of both entry-level models has also become a popular way of acquiring new customers
• Nevertheless, there are many SaaS companies that do not have an introductory offer

"It makes a lot of sense for us to offer reverse trials and give the customer access to the full scope of the software, because that way they can see how great the product is."
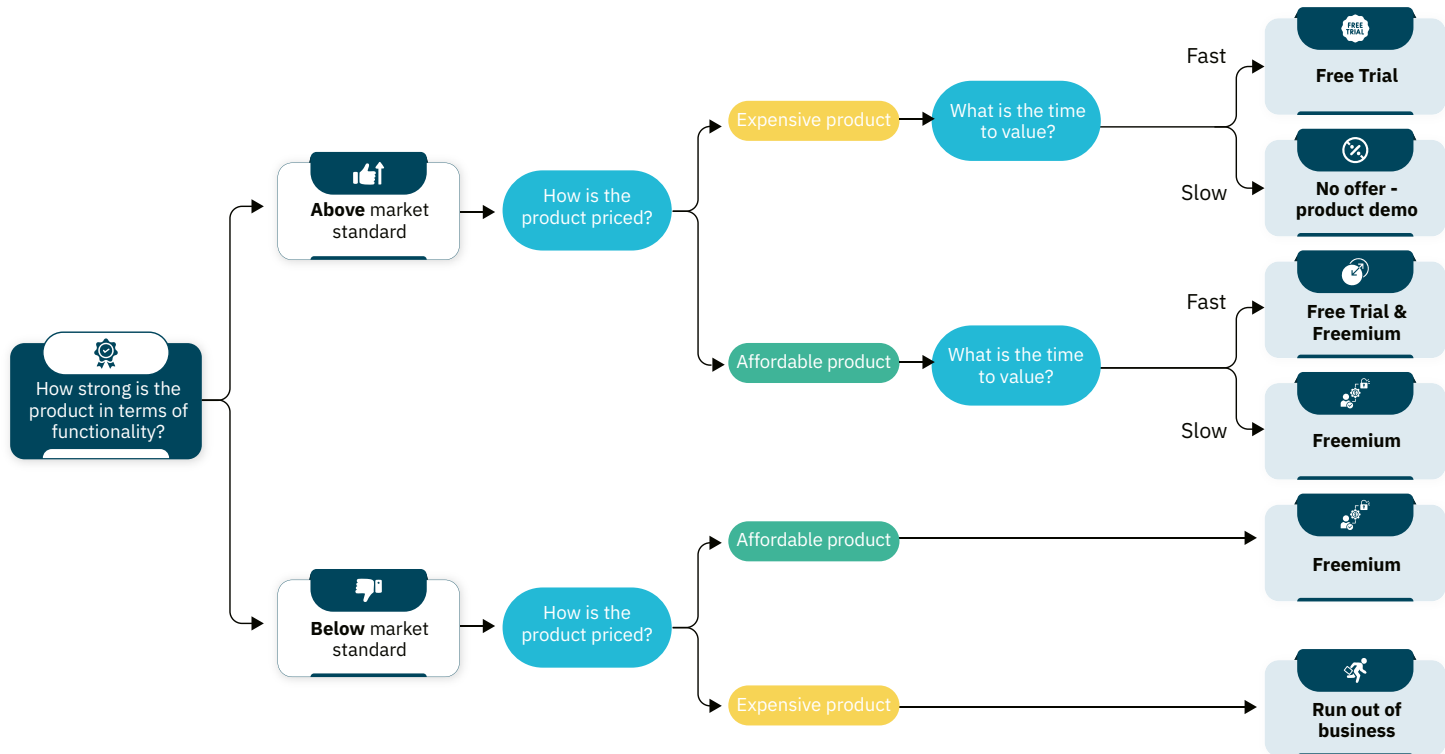
Sophie Genty, CEO, *compleet*

"Our software is very complex, which is why we now use product demos to clearly and understandably demonstrate the value to the customer."
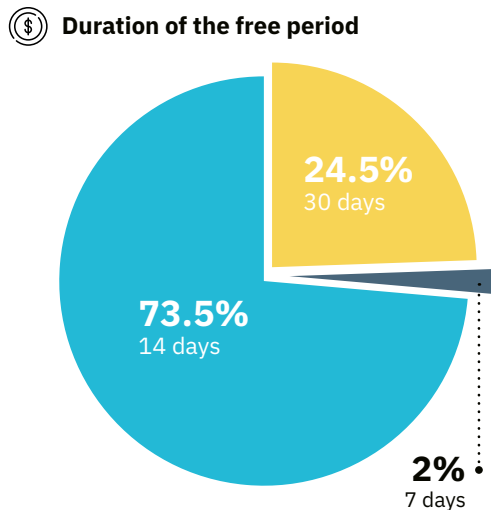
Maurice Gimbel, COO, *gastromatic*

Let's break it down: When does which new customer model make sense?

How strong is the product in terms of functionality?

Above market standard → How is the product priced?
- Expensive product → What is the time to value?
  - Fast → **Free Trial**
  - Slow → **No offer - product demo**
- Affordable product → What is the time to value?
  - Fast → **Free Trial & Freemium**
  - Slow → **Freemium**

Below market standard → How is the product priced?
- Affordable product → **Freemium**
- Expensive product → **Run out of business**

Source: Productled.com

Free trials typically last 14 or 30 days, and freemium models

⟣ Duration of the free period

24.5%
30 days

73.5%
14 days

2%
7 days

Source: Analysis of the *OMR Reviews* profiles, n = 4197, as of June 30, 2025

In the SaaS sector, free trial periods are standard practice when acquiring new customers. Our analysis shows a clear pattern in terms of duration: 14 days is the most common offer, with some providers offering 30 days, while very few offer a short 7-day trial period.

The logic behind this is clear
• 14 days is considered the optimal compromise between rapid conversion and sufficient time to recognize initial added value
• 30 days are mainly used where integration is more complex or trust needs to be built up
• 7 days are rare, as customers can hardly grasp the full benefits in such a short time; more useful for very self-explanatory products

This shows that the market has clearly settled on 14 days as the dominant standard. Longer trials are more suitable for solutions that require explanation, while short trial periods only work in niche models.

"

"We experimented with different trial periods: 7 days is too short to convey the value of the application, 30 days is too long, causing users to delay the trial too much. That's why we now offer 14 days."

Tobias Hagenau, CEO, *awork*

"

"Free trial periods have always worked very well for us! A period of 14 days has proven to be ideal for demonstrating the value of the product to the customer and optimizing the sales cycle."

Vivian Seidel, Chief Operating Officer, *SalesViewer*

The shift from generic software solutions to more personalized tech stacks through agentic AI is also changing how customers are acquired

SaaS companies rely on classic freemium models or free trial periods to attract new users. Free trials in particular are a key lever, as they allow products to be tested in a standardized way.

AI is changing this pattern. These models are only of limited use, especially for highly personalized, complex, or customer-specific use cases. Our expert interviews show that trust and reliability are crucial when it comes to new, highly innovative AI products. A short trial period is not enough to prove added value and stability.

Instead, product demos and pilot phases are coming to the fore. This allows companies to test how an AI system integrates into their processes and what concrete benefits it creates in realistic scenarios. This makes the introduction less superficial and more focused on real use cases.

The market is thus moving away from the pure freemium concept toward models based on trust, proof of concept, and co-creation. AI-native companies in particular rely on pilot projects to involve customers at an early stage and lay the foundation for long-term partnerships.

> *"Our product is highly specialized for the customer's specific application, which means that we also need to train the customer. These are costs and investments that we address with the customer during a pilot phase. Therefore, we do not offer free trials."*
>
> **Philipp Baumanns,** Co-Founder, *telli*

> *"AI will no longer be a standalone feature in the long run but will become an integral part of every standard solution. It can then no longer be marketed as a USP or additional value. This is exactly the direction we need to move in over the coming years."*
>
> **Tom Adebahr,** CRO, *DOCUFY*

Top 5 insights into new customer models

1

Free trials and freemium are common models for attracting new customers
Both models lower barriers to entry and enable risk-free product use—ideal for lead generation and building trust during initial contact.

2

Freemium for low-cost standard offers
For more complex or high-priced solutions, a time-limited trial is convincing because of the added value it offers. It helps to speed up purchasing decisions and generate qualified leads.

3

Free trial for expensive, high-quality products
Products with low entry complexity and a broad target audience benefit from freemium models. They promote viral growth and enable monetization through upselling.

4

Combination models offer additional use cases
In certain cases, a freemium tier followed by a trial of the premium features offers the best of both worlds: broad reach while strengthening conversion.

5

Product demos and pilot phases are a possible entry point for innovations such as AI products
The market is thus moving away from the pure freemium concept toward models based on trust, proof of concept, and co-creation. AI-native companies in particular are relying on pilot projects to involve customers at an early stage and lay the foundation for long-term partnerships.

So what?

So **what?**

Before I share my final thoughts, let me start with a thank you! Thank you for taking the time to read our first SaaS & AI Pricing Report all the way through. Clearly, your interest in the topic is as strong as ours. Yes, we all use AI tools daily. They simplify processes, save time, and – rumor has it – also played a small role in the creation of this report.

As pricing consultants, one question drives us most: How can AI – whether embedded in SaaS products or deployed as standalone agents – be monetized in a way that truly reflects its real value in pricing? The answer is rarely straightforward. A dominant model has yet to emerge. Subscription? Transactional? Outcome-based? The landscape is shifting, and that is exactly why solid guidance is needed.

I hope this report has provided just that: inspiration, best practices, and food for thought.

Finally, a big thank you to everyone who contributed: our team at *hy*, our friends at *OMR Reviews*, and the many founders and CXOs who openly shared their experiences.

If you feel your pricing is not yet where it should be, feel free to reach out at pricing@hy.co or connect with me directly on LinkedIn.

Best regards,

Dr. Sebastian Voigt
Partner & Co-CEO, *hy*

According to a survey of 2,280 executivesconducted by BrandEins and Statista in 2025, we are

Germany's #1 pricing consultancy

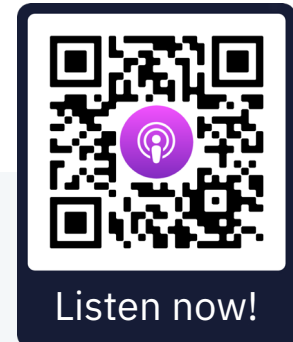| UNTERNEHMENSBERATUNG	KLIENTEN-BEURTEILUNG
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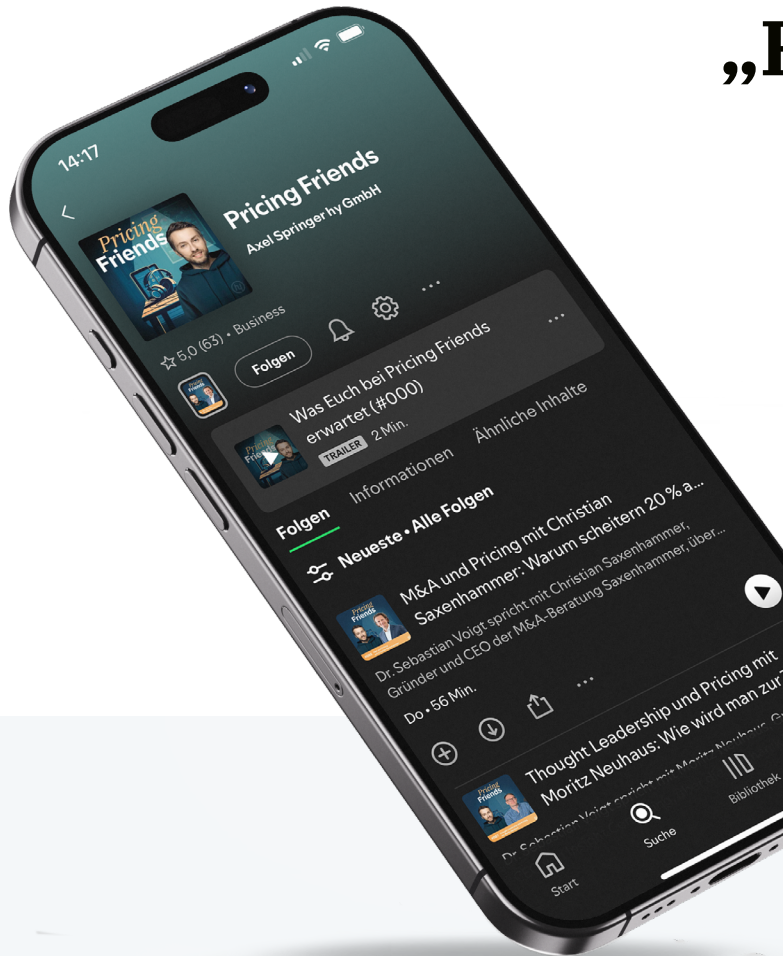
In our podcast

„Pricing Friends"

we talk (almost) every week
about SaaS and tech pricing.
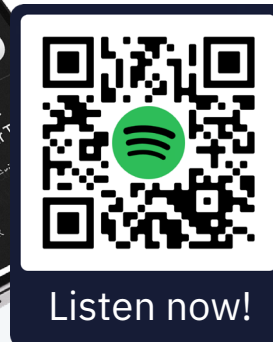
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Listen now!

May we introduce ourselves:
The Software Information Platform in DACH

OMR Reviews is the leading platform for software reviews and information in the German-speaking market. As part of the well-known *OMR* universe – recognized for the *OMR* Festival in Hamburg with up to 70,000 visitors, or the *OMR Podcast*, the largest business podcast in DACH – we connect software buyers and vendors.

Our mission is to bring more transparency to the software market. We achieve this with detailed information on more than 10,000 software products, including feature and pricing overviews, and over 70,000 authentic, verified user reviews. These business user experiences are the core of our platform, since genuine user-generated content creates transparency and serves as a critical guide for companies seeking the right software solution.

For software vendors, *OMR Reviews* is the most effective way to build trust and visibility with their target audience. Our value proposition:

Reach: With top-tier content and strong search engine rankings, we reach software decision-makers at every stage of the buying journey. Our expert articles, software categories, profiles, and thousands of reviews also ensure strong visibility in AI search models such as *Google AIO, ChatGPT,* and *Perplexity.*

Leverage the massive reach of the *OMR* brand to boost your visibility strategically.

Trust: Verified user reviews and *OMR Reviews* awards help you build trust with your target audience. These social proof elements are powerful levers that demonstrably increase conversion rates in your marketing and sales activities.

Performance: We provide valuable buying intent data and qualified leads. Identify which companies are actively searching for solutions in your category, and connect directly with purchase-ready prospects through our lead formats.

With us, you secure critical presence at every stage of the decision-making process and seamlessly guide your future customers throughout their entire journey. In short: *OMR Reviews* is not just a digital directory of B2B software, but your strategic partner to increase reach and awareness, build trust, and accelerate growth in the DACH market.

Feedback? Questions?
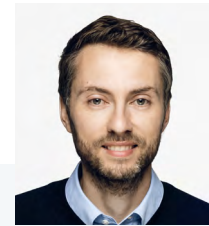# Ideas?

| Frank Gehrig | Mariella Knospe | Charlotte Pohlmann | Anne Ringbeck | Christoph Röttgen | Dr. Sebastian Voigt |

Let's talk - we're looking forward to hear from you.

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