EXECUTIVE SUMMARY

SaaS & AI Pricing Report 2027

How AI changes packaging, billing models and pricing metrics in software

hy x OMR REVIEWS x appinio

September 2026

The SaaS & AI Pricing Report 2027 analyzes how artificial intelligence changes what software companies sell, how they package it and what customers pay for. Its central finding: AI transforms not only software products but their entire monetization model. Pricing metrics are shifting from seats and technical usage to completed work and results, pure subscriptions are giving way to hybrid models, and AI search increasingly decides which vendors are found at all.

Key facts

Title	SaaS & AI Pricing Report 2027 (second edition)
Publisher	hy Consulting Group, together with OMR Reviews and Appinio
Published	September 2026
Data basis	Analysis of 4,400 software profiles on OMR Reviews; online survey of 153 SaaS and AI companies; 24 interviews with external and hy-internal experts
Topics	Product and packaging, billing models and pricing metrics, monetization of AI features, agents, workflows and AI infrastructure (MCP), buyer's journey and AI search
Authors	Dr. Sebastian Voigt (Partner & Co-CEO, hy Consulting Group), Charlotte Pohlmann (Vice President, hy), Mariella Knospe (Senior Consultant, hy), Felix Rahlmeyer (VP of Strategy, OMR Reviews)
Full report	Around 90 pages, 7 chapters, available as a free download

80%
of surveyed companies plan or evaluate a pricing change within 12 months

63%
expect hybrid billing to be the most relevant model in two years

21.2x
revenue multiple for AI-native software vs. 5.5x for legacy SaaS

25%
of software searchers in DACH start their research in AI search

What this summary covers

This summary contains the main findings and the most important figures of the report, each with sample size and source. It leaves out the case studies, price and rate card examples, the expert interviews and the step-by-step pricing process. Those are in the full report.

Download the full SaaS & AI Pricing Report 2027 (free):
https://hy.co/en/pricing-and-sales/saas-ai-pricing-report-2027/lp/

Key findings at a glance

Eight results from the survey of 153 SaaS and AI companies (unless stated otherwise), the OMR Reviews database and external studies.

80%

Pricing change is imminent. 80% of surveyed software and AI companies plan or evaluate a change to their pricing model within the next 12 months. The most frequently planned measure is the switch from a seat-based to a hybrid model, followed by price increases and new AI packages or add-ons.

63%

Hybrid billing becomes the standard. 63% expect hybrid models (fixed base fee plus variable usage) to be most relevant in two years, only 22% pure subscriptions. Today 40% use pure subscriptions as primary model (46% in 2025) and 34% use hybrid (27% in 2025).

-31 pp

The seat loses its dominance. The user/seat metric is expected to lose 31 percentage points as primary pricing metric. Outcome or result metrics gain 20 pp, credits and tokens 14 pp, API or consumption 9 pp, workflow or task 3 pp. 25% have not yet defined a target metric.

50%

AI is mostly a bundled feature. 50% of providers include AI in the core product at no extra charge and 22% do not monetize it at all. Paid add-ons (15%), credit models (5%), premium tiers (5%) and standalone AI products (4%) are still the exception.

21.2x

Investors reward AI-native architectures. Median EV/revenue multiples in VC rounds (Q1 2026): 21.2x for AI-native software, 8.5x for AI-enabled software, 5.5x for legacy SaaS platforms.

31%

Agent pricing comes before outcome pricing. 31% of providers bundle agents into existing tiers and 31% are unsure how to price them. Outcome-based pricing is used or expected by 8%. Pricing by task or workflow is establishing itself faster than pure outcome pricing.

41%

AI search changes software buying. 41% name LLM and AI-based search as the biggest change in software purchasing, and 76% are already adapting their go-to-market strategy because of AI.

92%

Discovery becomes the bottleneck. 92% of B2B buyers choose a product that was already on their initial shortlist (Google & Bain, 2022, US). 88% of interviewed providers rank AI visibility as top priority, none has a dedicated budget for it.

Source: SaaS & AI Pricing Report 2027 survey (n = 153; 2025 comparison n = 180, hy survey); Finro Q1 2026, Windsor Drake Q1 2026, Eqvista, Aventis Advisors; Google & Bain, 2022, US; OMR Reviews & duwerk 2026.

The new economics of AI software

For two decades software was sold as a product, with value delivered through features and revenue from per-user or per-company subscriptions, while low marginal costs allowed growth at almost no extra cost. Generative AI challenges these assumptions in four ways.

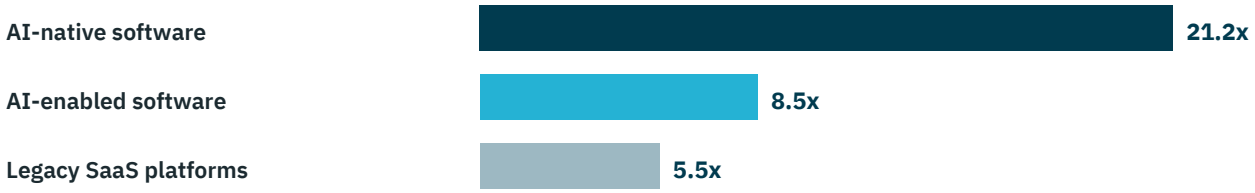
1 The product changes
Software evolves from features into assistants, agents and autonomous workflows.

2 The cost structure changes
Every AI interaction incurs real compute cost, unlike traditional SaaS with near-zero marginal cost.

3 Value creation changes
Customer benefit increasingly comes from work completed and results achieved, not from access.

4 The role of software changes
Users interact directly with ChatGPT, Claude or other LLMs. Software becomes background infrastructure.

Valuation: investors pay a premium for AI architectures



Source: VC private funding rounds, Q1 2026. Finro Q1 2026 (575 companies), Windsor Drake Q1 2026, Eqvista, Aventis Advisors; chart by SaasRise Research. AI-native software reaches nearly four times the multiple of legacy SaaS.

Urgency: 80% plan a pricing change

In the survey (n = 153), 80% plan or evaluate a pricing change in the next 12 months, 20% plan none. The five most frequently planned measures are: (1) switching from a seat-based to a hybrid model, (2) price increases, (3) new AI packages or add-ons, (4) simpler packaging, (5) introducing outcome-based pricing.

Packaging: three tiers remain the standard

Number of packages	1	2	3	4	5+
Share of software products 2025 (n = 4,197)	13%	11%	39%	25%	12%
Share of software products 2026 (n = 4,400)	14%	15%	38%	24%	9%

Source: OMR Reviews database 2025 and 2026. Three good-better-best tiers use price anchoring and upselling to capture willingness to pay across segments; the distribution is stable, with a slight trend toward one or two packages.

Where AI belongs in the portfolio

The report derives the role of an AI capability from two factors, adoption and customer value. **Core feature:** high adoption, low differentiation, included at no charge. **Package feature:** AI separates base from premium tier and creates an upgrade incentive. **Add-on:** high value for a limited user group, booked separately. **Experimental feature:** low adoption and value, tested as beta or pilot. **Agents and workflows** become standalone service units for tasks and processes.

In the full report: Chapter 1 shows the full adoption-versus-value decision matrix and how Google, Adobe, Notion, Salesforce and kore.ai package AI in practice.

Billing models and pricing metrics

The report separates two decisions: the billing model (how customers pay) and the pricing metric (the unit the price scales with). AI affects both, because usage drives cost.

Billing models: subscription declines, hybrid grows

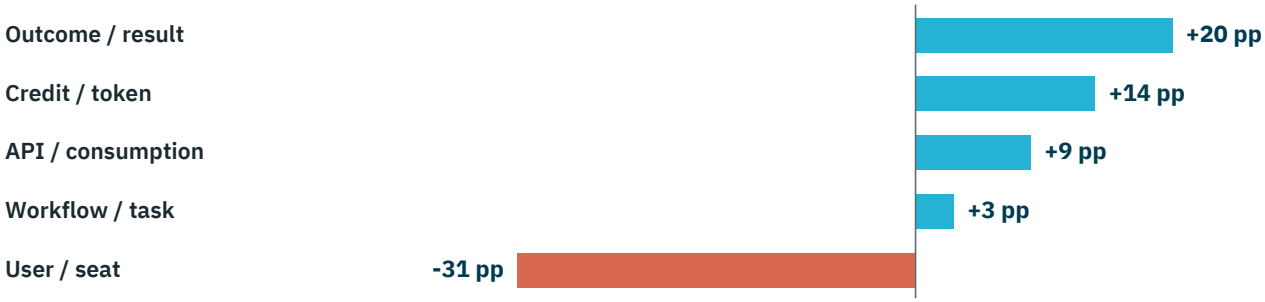
Primary billing model	2025 (n = 180)	2026 (n = 153)	Most relevant in 2 years (n = 153)
Subscription only	46%	40%	22%
Hybrid model (base fee + usage)	27%	34%	63%
Usage-based model	2%	4%	13%
Purchase (one-time)	25%	22%	3%

Source: hy Survey on the Monetization of AI Agents and AI Features in Software Companies 2025; SaaS & AI Pricing Report 2027 survey.

Four billing models differ mainly in the balance between predictability and cost risk. **Purchase** is a one-time payment. **Subscription** is a fixed recurring fee and gives providers high revenue predictability but exposes them to cost risk from heavy AI users. **Hybrid** combines a fixed base fee with variable usage and balances both sides. **Pay-as-you-go** ties the price fully to usage, which protects the provider's margin but makes revenue volatile and customer costs hard to plan.

Pricing metrics: from seats to credits and results

Expected change in share as primary pricing metric, today to future (percentage points)



Source: SaaS & AI Pricing Report 2027 survey, n = 153. 25% of participants have not yet defined a target metric.

A good pricing metric scores on three dimensions: customer fit (acceptance, perceived fairness), economic feasibility (stable revenue, alignment with variable infrastructure cost, scaling with growth) and operational feasibility (simple measurement and billing). A metric that is hard for customers to calculate before purchase slows sales, even if it is fair from a cost perspective.

Seats versus usage for AI features

A **per-seat surcharge** is familiar to B2B buyers and predictable, but creates margin risk with power users because LLM token costs rise with use. **Usage-based metrics** link revenue directly to infrastructure cost and keep the entry barrier low, but cause budget uncertainty and can make users hesitate to use AI. Per-seat fits daily co-pilots with predictable usage; usage-based metrics fit compute-intensive tasks such as video generation or batch processes.

Credits as a bridge

Credits translate technical cost units (text response, image, minute of audio, second of video) into one visible unit. They protect margins and lower the entry barrier. The main challenge is customer understanding, not technology. Providers reduce planning risk by combining credits with quotas or subscriptions: prepaid packages, quota with pay-as-you-go overage, or volume commitments.

> **In the full report:** Chapters 2 and 3 compare the four billing models by planning ability and cost risk for provider and customer, map pricing options to AI maturity, and show how Figma and Clay built their credit systems, including the effect on margin and retention.

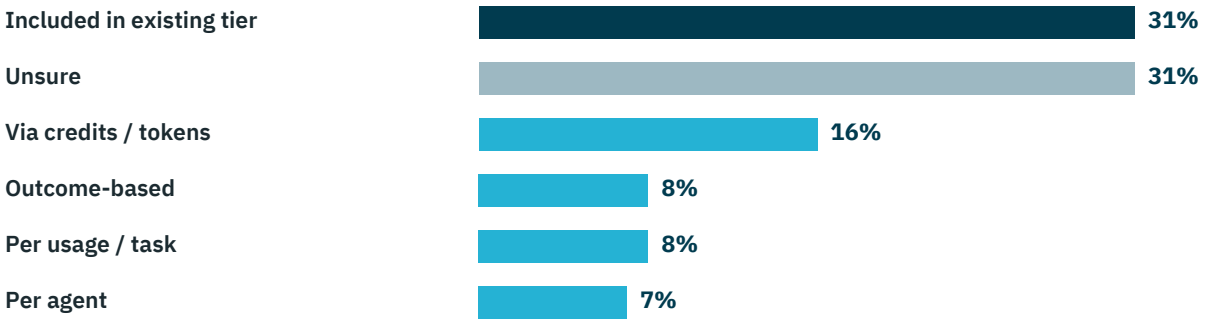
Agents, outcomes and AI infrastructure

The more autonomously AI works, the further the monetization logic moves from access to usage, work and finally results. A new infrastructure layer adds a further source of revenue.

Agents: priced against the personnel budget

Features compete for the software budget and are benchmarked against other software. Agents complete work independently and are benchmarked against human labor (FTE costs, daily rates). The price logic changes from the cost of efficiency gains to the cost of the work replaced.

How agents are monetized today or most likely in future (n = 153)



Source: SaaS & AI Pricing Report 2027 survey. 62% of providers bundle agents into existing packages or have no strategy yet; dedicated agent pricing is still the exception.

Four metrics are establishing themselves: **digital employee** (predictable capacity for a monthly fee, like a salary), **usage / credits** (technical consumption such as API calls or tokens), **task / action** (payment per completed process step) and **result** (payment for an achieved outcome such as a resolved customer inquiry). The first two are easy to measure but far from customer value, the last is close to customer value but hard to attribute. In practice the norm is a hybrid of a predictable base and a variable component.

Outcome-based pricing: powerful, but conditional

Outcome-based pricing makes the achieved result the price basis, for example a resolved support case, a qualified lead or a processed invoice. The report names three conditions: the result must be clearly measurable, the AI's contribution must be traceable, and both parties must see the economic value. Without clear definitions it creates disputes, as the example of Intercom's Fin ($0.99 per resolution) shows. Providers therefore add safeguards: a minimum purchase quantity, a cost ceiling for the customer, a parallel consumption track for services without a clear result, and an agreed definition of what counts as an outcome.

Infrastructure: a new layer of monetization

Users increasingly reach software through ChatGPT, Claude, Gemini or Copilot. The LLM handles the interaction, while APIs, MCP servers (Model Context Protocol), data, context, memory, orchestration and runtime provide functions in the background. Traditional monetization of access, usage, work and outcome is complemented by this infrastructure layer.

MCP access is usually included in the platform subscription when offered natively by a SaaS provider, while generic MCP platforms typically bill by API or tool calls. The report expects access via MCP to stay free in many cases, with revenue coming from the actions, memory, runtime and other infrastructure services that are actually used.

In the full report: Chapters 4 to 6 contain live price points and limits of 11x, Lindy, n8n and Intercom Fin, the Microsoft Copilot Credit rate card, the Intercom timeline with its lessons, Chargeflow's three parallel revenue models and the Salesforce Flex Credit rate card.

Buyer's journey: discovery is the new bottleneck

AI lowers the cost of building software, so supply grows while margins shrink. At the same time AI systems recommend only a few providers: Google shows thousands of results, LLMs name a handful and there is no page two.

41%
name LLM / AI search as the biggest change in software buying

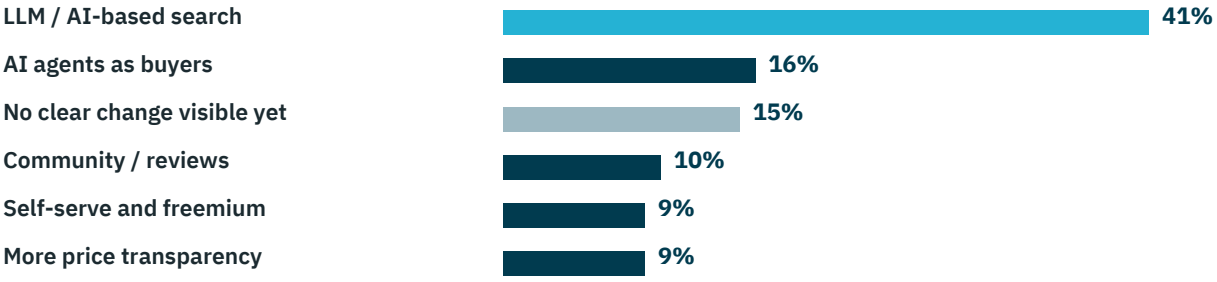
25%
of software searchers in DACH begin research with AI search

92%
of B2B buyers choose from their initial shortlist (Google & Bain, 2022, US)

88%
of interviewed providers rank AI visibility as top priority

Source: SaaS & AI Pricing Report 2027 survey (n = 153); OMR Reviews & CSE Advisory 2026 (DACH); Google & Bain, 2022, US; OMR Reviews & duwerk 2026.

What has the greatest impact on software buying?



Is AI changing your go-to-market strategy? 76% say yes (n = 153)



22% of software vendors name AI systems as a lead channel.

AI systems validate externally

93% of providers publish primarily on their own domain and only 22% on review platforms. AI systems, however, base recommendations on third-party sources: citations come mainly from YouTube, Reddit, press and review platforms. 95% of citations come from non-paid sources and 89% from earned media. According to AirOps, quoted in the report, brands are cited 6.5 times more often through external sources than through their own domain. Only 4% of surveyed providers use AI-optimized paid PR and only 4% optimize YouTube for AI.

Source: OMR Reviews & duwerk 2026; blinq 2026; Muck Rack 2025; SaaS & AI Pricing Report 2027 survey.

Machine-readable prices

Providers without structured, public price information either do not appear in AI comparisons or appear only with third-party data they cannot control. A page that says "Contact Sales" hands price communication to others. The report concludes that machine-readable pricing shifts from a marketing decision to a visibility requirement.

Four steps recommended by the report

1. Clarify ownership: a responsible person, measurable goals and a lead-source question in the contact form. **2. Build the data foundation:** a technically readable, structured website with prices published in machine-readable form. **3. Establish validation:** verified reviews, trade press, community and consistent messaging. **4. Measure continuously:** source patterns shift over months, not years.

Only 1 in 25 providers considers itself highly visible in AI systems, and none of the providers interviewed has a dedicated budget for it (OMR Reviews & duwerk 2026).

> **In the full report:** Chapter 7 covers the experiment in which an invented agency ranked third in ChatGPT recommendations within 14 days.

Six shifts expected in the next 12 months

The report concludes that there will be no universal AI pricing model. Successful companies will develop packaging and pricing together, combine subscription, usage and results, establish agents and infrastructure as new revenue sources, and keep adapting to product maturity and customer value.

Area	Expected shift
Product and packaging	Agents evolve from add-ons into standalone products and product lines, marketed as defined services for specific tasks and workflows.
Billing model	Hybrid pricing becomes the standard for AI in established software: a fixed base fee for predictability, variable components for actual AI usage.
Pricing metric	The seat loses its role as the dominant metric. By 2027 tasks, workflows and results are used much more widely for the variable component.
Agents and outcomes	Agent pricing establishes itself much faster than results-based pricing, which stays limited to cases with clear measurability and attribution.
AI infrastructure	MCP becomes the distribution standard. Access often stays free, revenue comes from executed actions, memory and runtime.
Price communication	Prices, metrics, entry-level prices and package logic are published in machine-readable formats so AI systems use provider data instead of third-party sources.

Methodology and limitations

The report combines an analysis of 4,400 software profiles on OMR Reviews, an online survey of 153 SaaS and AI companies conducted with Appinio, and 24 expert interviews. The data is a snapshot and does not cover every perspective. Interview content is an interpretation summarized for the report. hy Consulting Group maintains professional relationships with some of the surveyed companies. Valuation multiples and several buyer-behavior figures come from third-party sources named in each section.

How to cite

hy Consulting Group, OMR Reviews, Appinio (2026): SaaS & AI Pricing Report 2027. Executive Summary. Published September 2026.

What you get in the full report

This summary shows the direction. The full report shows the numbers behind it, the pricing examples of named companies and the decisions you can derive for your own product.

~90
pages of analysis, charts and frameworks

7
chapters from packaging to AI search

24
expert interviews with founders, CEOs and investors

15+
named pricing examples with prices and limits

Chapter	What only the full report contains
1 Product and packaging	Decision matrix for core feature, add-on, package feature and standalone AI product. Packaging examples from Google Workspace, Adobe, Notion, Salesforce and kore.ai.
2 Billing models and pricing metrics	Four billing models compared by planning ability and cost risk for provider and customer. Criteria for a good pricing metric. Pricing options for each stage of AI autonomy.
3 Monetization of AI features	Per-seat versus usage-based trade-offs, credit conversion logic, four billing mechanics for credits. Figma and Clay in detail.
4 Monetization of agents	Budget logic of agents versus features, four agent pricing metrics with live examples (11x, Lindy, n8n, Intercom Fin), Microsoft Copilot Credit rate card.
5 Monetization of AI workflows	Intercom Fin timeline and lessons, Chargeflow's three parallel revenue models, four safeguards that make outcome pricing workable, moves by Decagon, Sierra and Zendesk.
6 Monetization of AI infrastructure	How MCP servers, memory and runtime are priced, native versus generic MCP platforms, Salesforce Flex Credit rate card.
7 Buyer's journey and search behavior	Full survey data on AI search, the fictional agency that ranked third in ChatGPT recommendations within 14 days, and the action plan for AI visibility.
So what?	Six shifts for the next 12 months and an eight-step process for developing an AI pricing model, from strategic guidelines to price enforcement.

Expert perspectives in the report come from, among others, Parloa, Leapsome, Jamie, DN Capital, Bregal Unternehmerkapital, FLEX Capital, Carlsquare, Peec AI, Instaffo and OMR Reviews.

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