



# 2026 STATE OF SaaS PRICING REPORT:

## **Defaults vs. Deliberate Decisions**

10 takeaways unpacking the decisions that actually drive pricing performance



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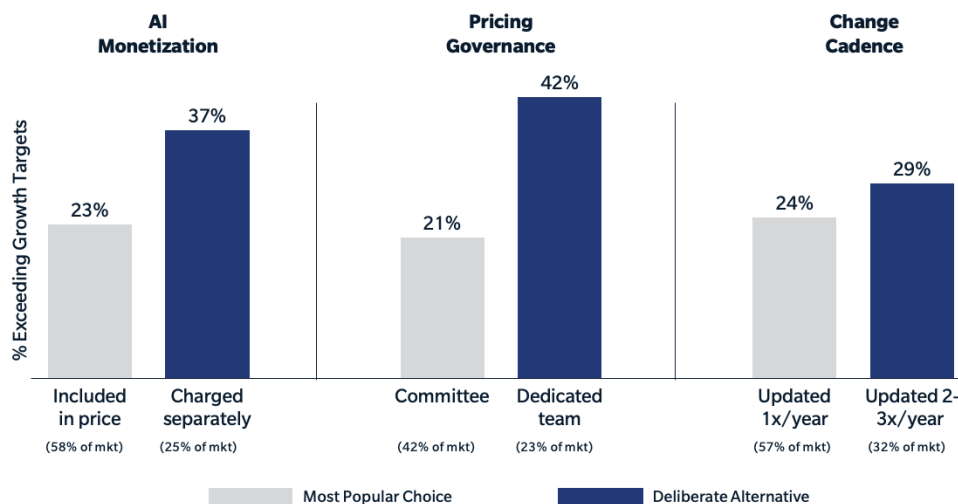
# SaaS Got the Product Decisions Right. Default Pricing Decisions Are Costing You.

SaaS has converged. 93% of companies have shipped AI. Two-thirds position as platforms rather than point solutions. Buyers across the market are evaluating products that look structurally similar, built on the same architectures, serving the same workflows, checking the same capability boxes. Some of that convergence is working. Platform positioning outperforms point solutions and AI is transforming how users operate. These structural decisions have been settled, and the market mostly got them right. However when the product stops being the differentiator, how you price it becomes the primary lever for capturing value – and most companies haven't treated it that way.

We surveyed 356 SaaS operators and executives who own or influence pricing decisions and found three areas where the most popular pricing choice - the default - is also the lowest-performing one:

- AI Monetization
- Pricing Governance
- Change Cadence

## The Most Popular Pricing Choices Often Underperform

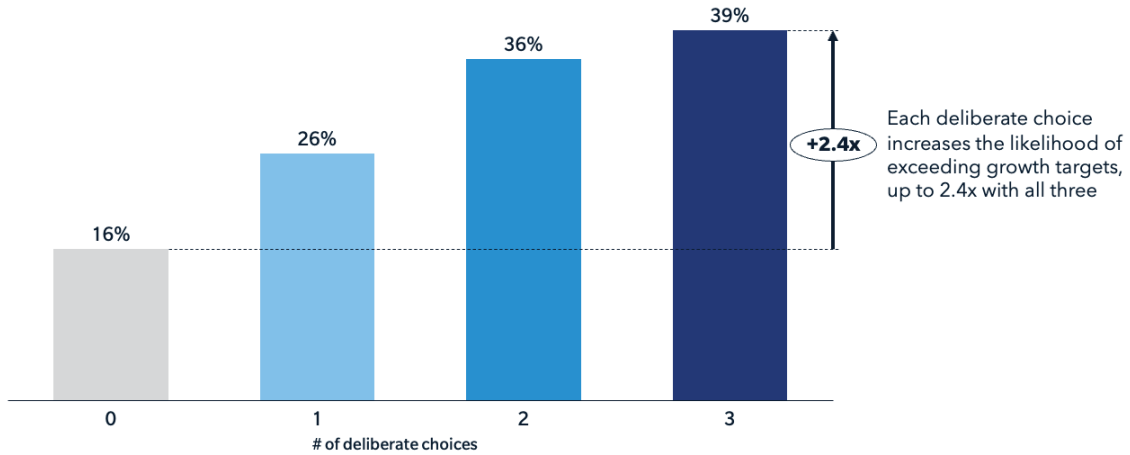


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Source: SBI 2026 State of SaaS Pricing Report

We scored companies on how many of these three default pricing decisions they've made vs. how many deliberate alternatives they've adopted. We found that each default decision reduces the probability of exceeding growth targets while each deliberate decision increases it.

## The Payoff of Deliberate Pricing



Conversely, each default behavior reduces the probability of exceeding growth targets. Companies with all three default behaviors are less than half as likely to exceed targets than those with none.

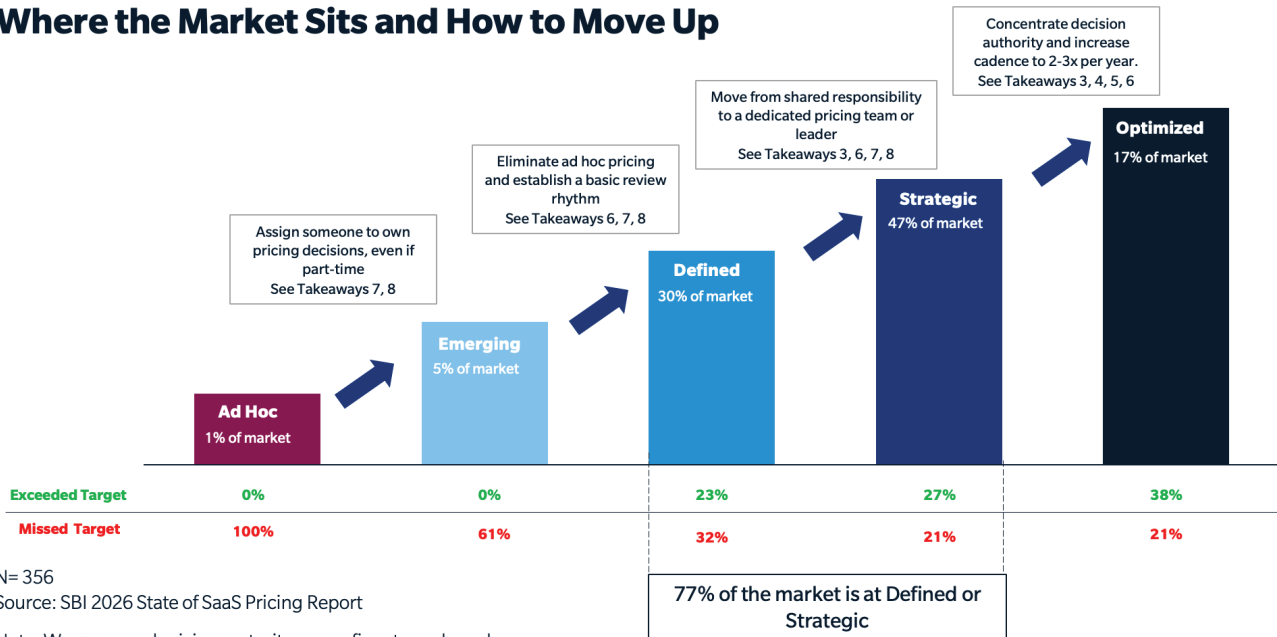
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Source: SBI 2026 State of SaaS Pricing Report

What the pattern doesn't show is how to turn the default settings off. That depends on how mature your pricing function is today. If you govern by committee with an annual review cadence, the dials exist. You just need to adjust the settings. If you have no pricing owner and no roadmap, you have no dials to turn.

The maturity levels below are your starting point. Find your stage, then focus on the findings in this report that apply to your next transition. Not every finding matters equally at every stage. An Emerging company spending excess cycles on AI token limits by tier is solving the wrong problem. A Defined company building robust metering infrastructure before building internal alignment on the pricing strategy they're going to meter against is putting the operational cart before the strategic horse. Your stage determines your priority.

## Pricing Maturity Staircase: Where the Market Sits and How to Move Up



N= 356

Source: SBI 2026 State of SaaS Pricing Report

Note: We measured pricing maturity across five stages based on respondents' rating of their own pricing sophistication on a five-point scale – from ad hoc on up to optimized. We mapped these to five maturity stages.

# ARC 1: THE LANDSCAPE HAS CONVERGED. PRICING HASN'T.

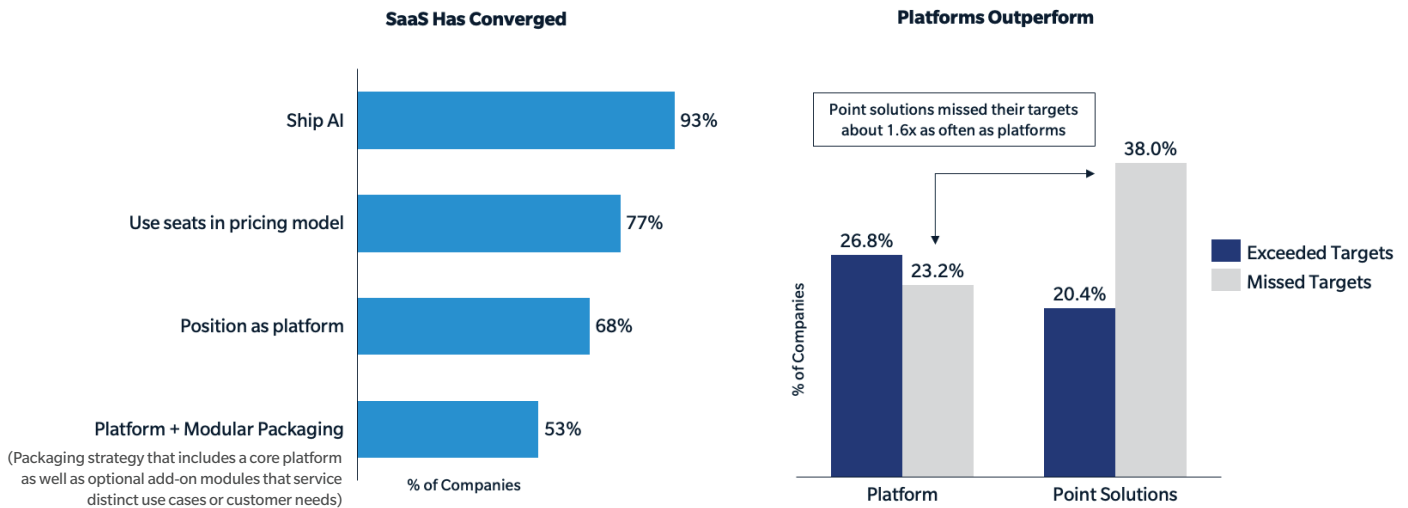
SaaS product architecture and AI adoption have narrowed to a shared set of structural decisions. The companies pulling ahead aren't winning on those structural choices. They're winning on pricing execution within that structure: governance, cadence, AI monetization, and GTM motion.

## 1 The Structural Decisions Have Been Settled. The Growth Gap Is in What Comes Next.

**TLDR:** SaaS architecture has converged: two-thirds of companies position as platforms instead of point solutions, 53% run Platform + Modular packaging, 93% have AI live in product, and 77% use seats in their pricing model. Platform companies outperform point solutions by roughly 6pp on growth and miss targets at about 60% the rate of point solutions. These structural choices have largely been settled, and the market got most of them right. **What drives the remaining variation in growth is pricing execution: who owns it, how often it changes, and how AI value gets captured.**

### RESEARCH HIGHLIGHTS

Some popular pricing choices are working. Platform positioning is the market default at two-thirds of respondents, and it performs. **Platform companies exceeded growth targets at 26.8% vs. 20.4% for point solutions. Point solutions missed their targets about 1.6x as often as platforms (38.0% vs. 23.2%).** If you're still positioning as a collection of independent point solutions, the growth data is working against you.



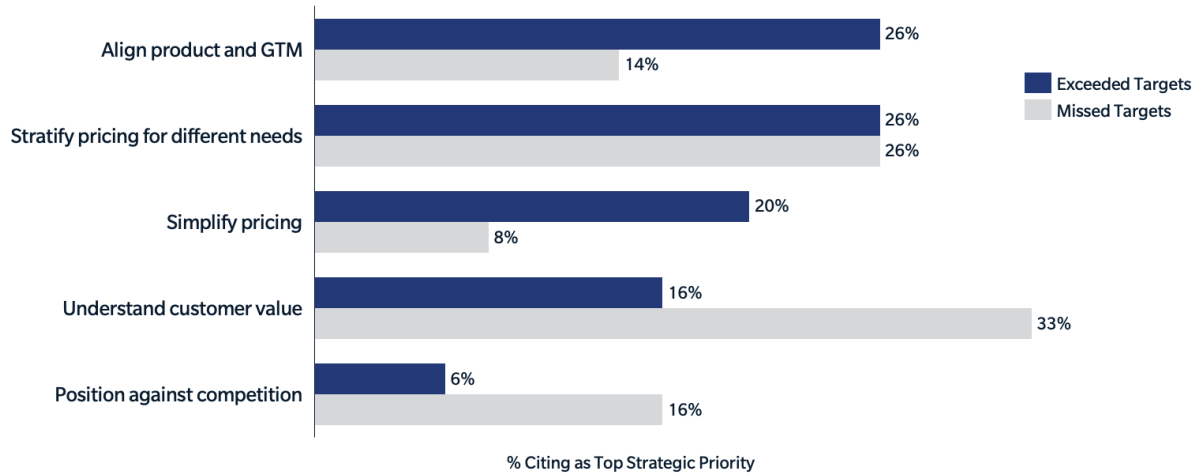
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Source: SBI 2026 State of SaaS Pricing Report

But with the architecture settled, the question shifts. When most of your competitors run the same packaging model, check the AI capabilities box, and price on some flavor of seats, the variables that separate growth from decline are pricing execution decisions: governance, cadence, AI monetization, and GTM motion. These execution levers shape how effectively your structural pricing decisions translate into growth. That's what the remaining findings in this report address.

Among Platform + Modular companies specifically, **the strategic priorities of outperformers and underperformers have already diverged**. Companies exceeding revenue targets prioritize product-GTM alignment (26%) and pricing simplification (20%). Companies missing targets are still focused on understanding customer value (33%) and competitive positioning (16%). The outperformers have moved past foundational questions and into execution.

### Among Platform + Modular Companies: What Outperformers Prioritize vs. Underperformers



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Source: SBI 2026 State of SaaS Pricing Report

### RECOMMENDATIONS

- **If your top strategic pricing priority is still “better understand customer value” or “better position against competition,” get the value mapping work done and shift focus to execution.** Value mapping doesn’t have to be a 6-month project (and shouldn’t be a one-off event). A focused sprint, structured customer interviews plus light willingness-to-pay analyses can start to close the gap in 4-6 weeks and provide the foundation for future updates and iteration.
- **Your buyers are telling you the problem.** The top two customer friction points reported by pricing operators were “too expensive” (24%) and “overly complex” (22%). Both are symptoms of packaging that has grown unchecked. Audit for SKU sprawl and pricing tiers that don’t map to distinct buyer needs nor carry meaningful revenue concentration.
- **If you’re winning with point solutions, lean into depth and best-of-breed positioning with a pricing posture to match.** If you’re not, the growth penalty for maintaining point solutions is measurable, and platform packaging and positioning should be on the roadmap - even if a cosmetic shift rather than infrastructural.

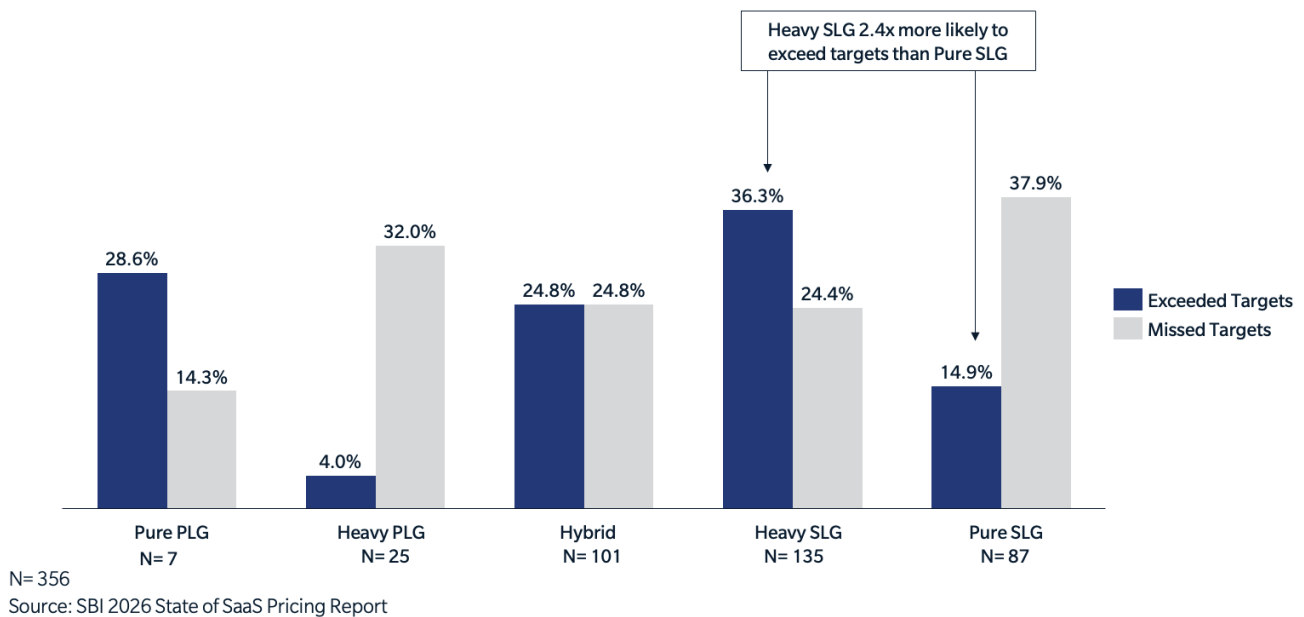
## 2 The Best-Performing GTM Motion Is Sales-Led with a Product-Led Front Door.

**TLDR:** Heavy sales-led (SLG) companies that maintain a product-led (PLG) evaluation channel are more than 2.4x more likely to exceed revenue targets than Pure SLG companies (36.3% vs. 14.9%). Pure motions, whether product-led or sales-led, produce the worst growth attainment of any cohort. **Removing the ability for buyers to evaluate your product before engaging sales carries a measurable growth penalty.**

### RESEARCH HIGHLIGHTS

GTM motions fall on a spectrum from purely product-led to purely sales-led. We segmented companies into five cohorts along that spectrum:

### Growth Attainment by GTM Motion

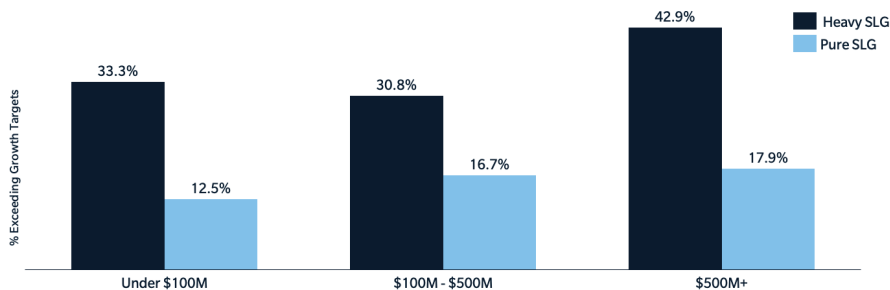


- **Heavy SLG** is the clear performance leader. These companies primarily drive revenue through sales but keep product as an evaluation, entry, and expansion channel - no other motion comes close on growth attainment. This aligns with broader market evidence that human-led sales motions retain an edge even as AI reshapes other GTM functions.
- **Pure SLG** companies remove all self-serve evaluation and expansion from the buyer journey. This group has the most volatile performance, with both the highest average revenue growth rate and the highest miss rate. This likely represents a small number of companies with very high growth rates while most struggle to reach targets.
- **Hybrid** companies land in the middle. Balanced but unremarkable, with significant upside from leaning into a stronger sales motion.

<sup>1</sup>Evaluation channels let buyers experience the product before engaging sales and can include self-serve trial, sandbox, freemium tier, interactive demos etc.

The pattern holds at scale. Among \$500M+ companies, Heavy SLG exceeded revenue growth targets at **42.9% with only a 7.1% miss rate**. Percentage of Pure SLG companies that exceeded targets at that same \$500M+ scale? Just 17.9%. Among sub-\$100M companies, the same separation exists: Heavy SLG over-performed at 33.3% vs. just 12.5% among Pure SLG.

### Heavy SLG Outperforms Pure SLG at Every Revenue Band

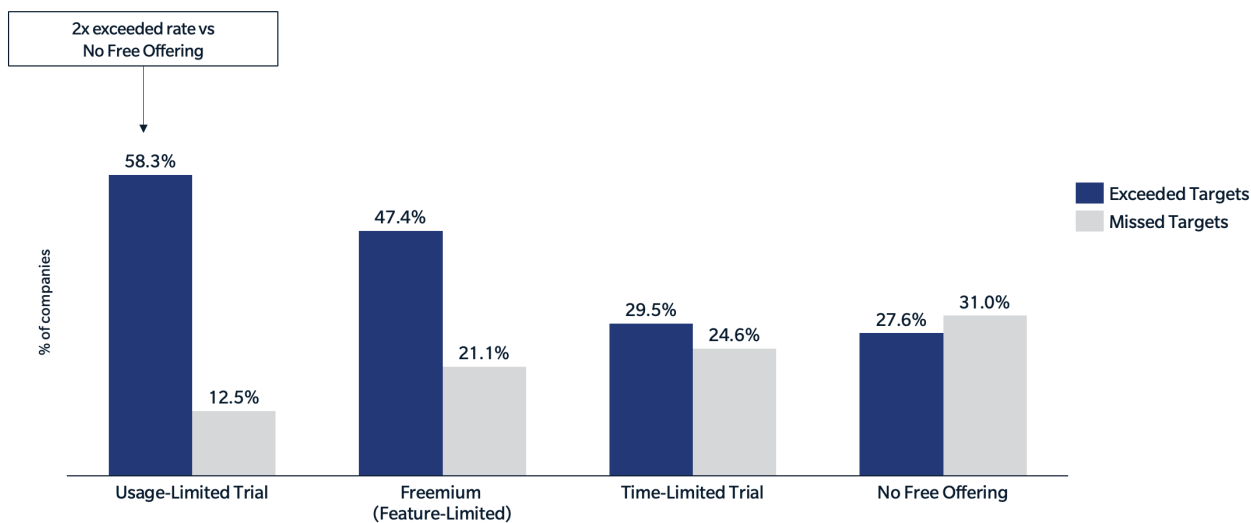


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Source: SBI 2026 State of SaaS Pricing Report

### The free strategy that makes Heavy SLG work

Heavy SLG outperforms in part because buyers don't necessarily need to interface with sales to experience the product and buy more. Free strategy dictates what that looks like at the point of initial conversion. Among Heavy SLG companies, usage-limited trials (trials capped by usage rather than feature access or time) produce 58.3% exceeded vs. 27.6% for those with no free offering. Time-limited trials perform significantly worse at 29.5% because they cut off access before buyers fully appreciate value. The pattern holds by ASP, even as you scale up into richer ASP bands for which 'free' wasn't historically an option. At \$50K-\$500K, usage-limited trials produce the highest exceeded rate at 48.1% – yet 41% of companies in that band offer nothing for free. If you run Heavy SLG without a free evaluation path, explore a usage-limited trial. For those buyers prone to sales-free product diligence, it will provide opportunity to make sure the product works - and it will give sellers signal as to when to start selling.

### Heavy SLG Companies: Growth Attainment by Free Strategy



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Source: SBI 2026 State of SaaS Pricing Report

## RECOMMENDATIONS

- **If you run Pure SLG:** As buyers engage vendors later and later in the buying process, add a product evaluation path before the sales engagement starts: a sandbox, a self-serve demo, or a usage-limited trial. Sales-led companies that add a usage-limited trial exceed targets at 58% vs. 16% for those offering nothing. The product-led entry point helps with new customer acquisition giving the sales team warmer buyers who already understand the product - and help sellers and CS identify expansion opportunities through solution usage later in the customer journey.
- **If you run a Hybrid model:** The upside is in leaning into sales, not balancing evenly. Add structured sales engagement at trial-to-paid conversion, at usage thresholds that signal expansion readiness, and at renewal. Hybrid companies that shift toward Heavy SLG move into the highest-performing cohort.
- **If you run Heavy PLG:** Your pricing needs to augment the sales motion you're underweighting. Published entry-level pricing plus a sales-engaged enterprise tier gives buyers both PLG and SLG entry points – enabling tiered acquisition, right-sized enterprise landing (without overloading an under-resourced sales team), and both product- and sales-led expansion paths after the fact.

## ARC 2: EVERYONE SHIPS AI. ALMOST NO ONE PRICES IT RIGHT.

Nearly every SaaS product now ships AI. The question is no longer whether to include it. It is how deeply AI is integrated into your product and whether your pricing captures value at that depth. The monetization decisions below show up in growth, margins, and forecast accuracy.

### 3 Nearly Every SaaS Company Ships AI. The Growth Gap Is in How You Monetize It.

**TLDR:** The share of SaaS companies shipping AI jumped from 70% to 93% in a single year. AI capability is now table stakes. The differentiator is how you monetize it across the integration spectrum, and most companies haven't built effective monetization there. 58% of the market includes AI in their package prices with no separate charge, and that group is twice as likely to miss growth targets compared to companies that embed AI in their core packages but charge for its usage separately.

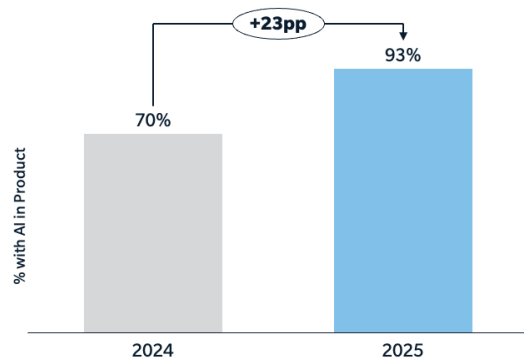
#### RESEARCH HIGHLIGHTS

AI is ubiquitous. In 2025, nearly all SaaS companies built in some level of AI functionality (and the 7% that didn't disproportionately underperformed).

The performance gap between AI monetization approaches is wide. Of the 25% of companies that embed AI in their core packages but charge for its usage separately, 37% exceed growth targets. Of the 58% that include AI at no separate charge, only 23% exceed (and they miss at twice the rate of their charge separately counterparts).

That gap holds up under scrutiny. When we control for pricing maturity, governance model, cadence, and company size, **AI monetization remains the single largest driver of growth attainment in this study, with a +12pp effect on the probability of exceeding targets.** No other pricing variable in this report has a larger or more statistically reliable effect. And while this is association, not proof of causation (e.g. those throttling on AI usage separately are likely sophisticated across other dimensions), the impact persisting well beyond those controls, explanations otherwise are few and the 'charge for usage or bust' insight can't be ignored.

#### AI in SaaS Products: Year-over-Year Increase

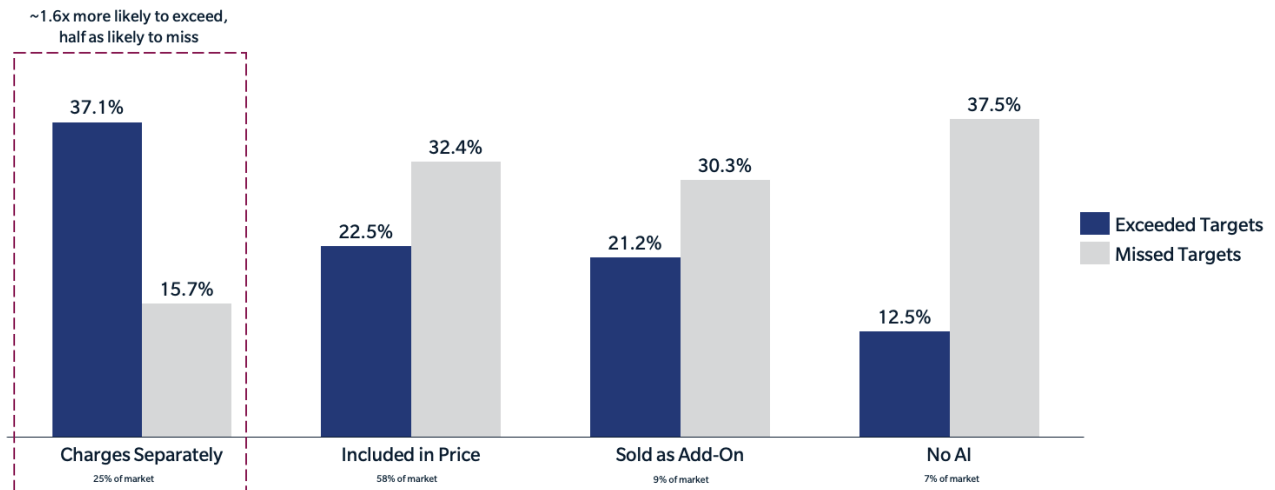


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Source: SBI 2026 State of SaaS Pricing Report

AI pricing is falling into the same trap as the operational defaults in governance and cadence: the most popular choice is the lowest-performing one. Most companies absorbed AI into existing prices without an intentional monetization strategy in mind. There is a case for absorbing AI costs to drive adoption, particularly for companies competing on network effects or data moats where early usage compounds. But the data suggests most companies giving AI away aren't making that bet deliberately – they're defaulting. The minority that made an active decision about how to charge for AI is outperforming on both growth and predictability.

## Revenue Growth Attainment by AI Monetization Approach



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Source: SBI 2026 State of SaaS Pricing Report

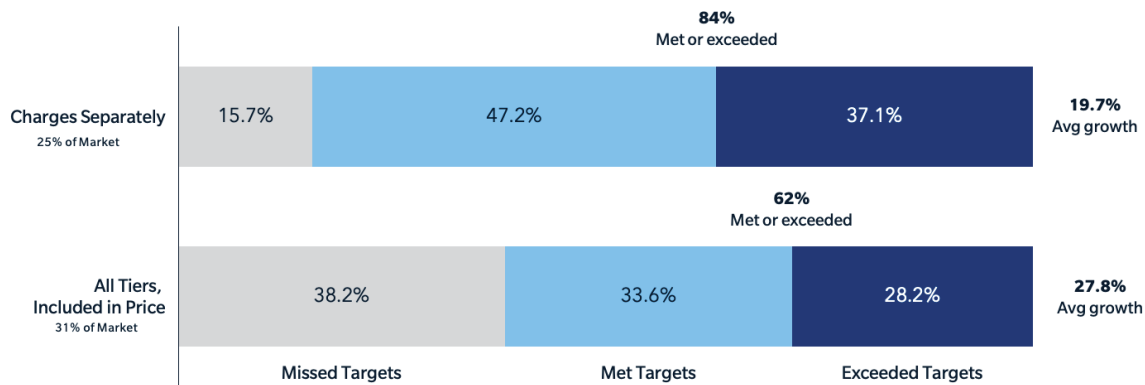
### RECOMMENDATIONS

- Identify which AI capabilities drive differentiated value for your customers and build a pricing mechanism that scales with that value.** Cost recovery matters, but it's the floor. AI infrastructure costs will come down over time. The companies winning on AI pricing are capturing value, not passing through costs. Start by separating commoditized AI (the compute costs of doing the job) from differentiated AI (capabilities built on that compute that your customers can't get elsewhere) and price accordingly.
- Treat AI monetization as a pricing strategy decision, not a product marketing afterthought.** The 25% of companies that charge separately didn't land there by default. They made a deliberate architectural choice: include AI functionality in core packages so customers adopt it, but meter and price usage as a distinct line item so the business captures value as usage scales. For a deeper look at how to structure the transition, see [The Great Unbundling](#) and [The Repricing Moment](#).

### What about giving AI away to drive adoption?

The instinct is understandable, and it does produce some of the fastest-growing companies in the dataset. But it comes at the cost of revenue predictability. Companies including AI at no separate charge report the highest average growth rate in the study (28%). However, they also report the highest miss rate (38%). More companies missed than beat their number. Companies that charge separately give up some of that upside ceiling in exchange for consistency: 84% met or exceeded growth targets vs. 62% of those that don't charge. If you're including AI in your package prices and your target attainment is volatile, AI pricing structure may be a cause. Test a usage-based AI pricing on a single segment before rolling it out broadly.

## The Variance Trade-Off: Charging Separately vs. Including AI in Price



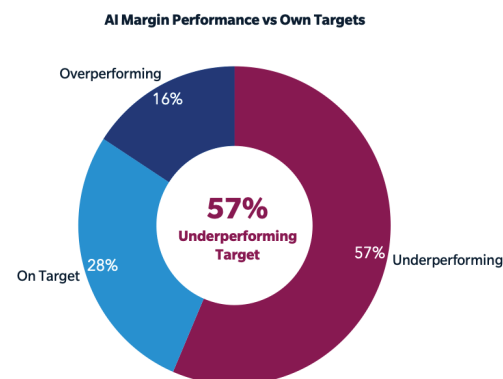
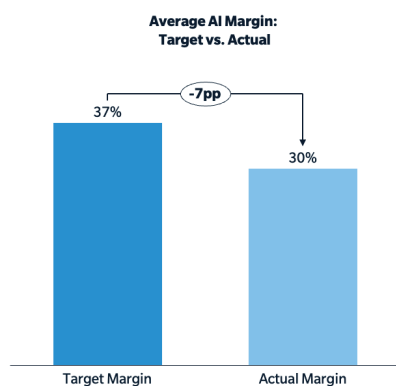
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Source: SBI 2026 State of SaaS Pricing Report

## 4 More Than Half the Market Is Missing Its Own AI Margin Targets, and the Fix Is a Two-Part Solution.

**TLDR:** Most of the market is subsidizing AI adoption without a clear path to margin recovery. **The average company targets 37% AI product gross margins and delivers 30%.** Pricing leaders knew AI would cause profitability problems, but the reality is worse than most thought with **57% underperforming their own margin targets.** Closing the gap is a two-part solution: you need a way to charge for AI and you need the pricing capability to do it well. Companies that have both **exceed growth targets at nearly 2x the rate of companies with neither.**

### RESEARCH HIGHLIGHTS

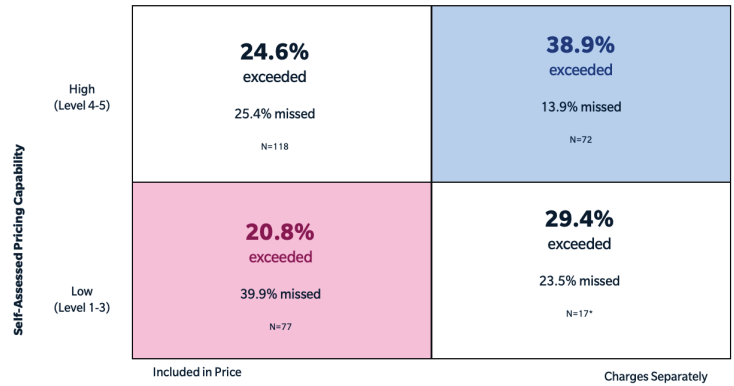
AI margins are worse than planned across the market. The average target is 37% - the average actual is 30%. That 37% target means the market has accepted dramatically lower margins than legacy SaaS and that -7pp gap between target and actual means most companies budgeted for profitable AI and are delivering something closer to break-even. Among companies tracking AI margins, **12% report negative AI margins** with no pricing mechanism to recapture the investment.



N= 258 (companies reporting both target and actual)  
Source: SBI 2026 State of SaaS Pricing Report  
Note: Does not equal 100% due to rounding

**Breaking down the two-part solution:** respondents rated their pricing sophistication on a five-point scale from reactive and ad hoc to proactive and optimized. When we combine that score with AI monetization approach, neither one alone gets you there. Charging for AI separately with low pricing maturity captures some of the upside. Strong pricing maturity while still including AI at no separate charge captures some, too. Companies with both pull away from the rest of the market.

### AI Monetization x Pricing Capability



N= 258 (companies reporting both target and actual)  
 Source: SBI 2026 State of SaaS Pricing Report  
 Note: \* indicates low n count

Charging for AI gets you part of the way. Pricing maturity is what makes it stick. Higher pricing maturity enables companies to set and enforce usage thresholds, capture overages, adjust pricing as AI value delivery and costs evolve, and make data-informed decisions about what’s working (and pivot away from what’s not). Without that infrastructure, a separate AI charge is a line item with no operating system or strategy behind it.

#### RECOMMENDATIONS

- **Benchmark your AI margins against this study:** the average target is 37%, the average actual is 30%, and 57% of companies underperform their own target. If you’re below 30%, you’re behind a market that’s already behind.
- **Closing that gap takes two moves.** First, build the pricing mechanism: meter AI usage and charge for it. Second, build the maturity to manage it: know-how, governance that supports change, and a cadence that keeps pricing aligned to customer value (with costs serving as your floor). Each move helps on its own. The full return comes from both working together.

## 5 Don't Abandon Seats Until Your Pricing Function Can Handle What Comes Next.

**TLDR:** AI is rewriting the rules of SaaS pricing, but moving away from seats before your pricing function is ready carries a significant growth penalty. At low pricing maturity, seat-dominant companies still exceed targets at 25.5% while seat-secondary companies crater at 13% exceeded, 47% missed. At high maturity, the seat model barely matters: all three configurations perform within 1pp of each other. **The companies in the worst position started the transition away from seats before their pricing function or their customers were ready for what comes next.**

## RESEARCH HIGHLIGHTS

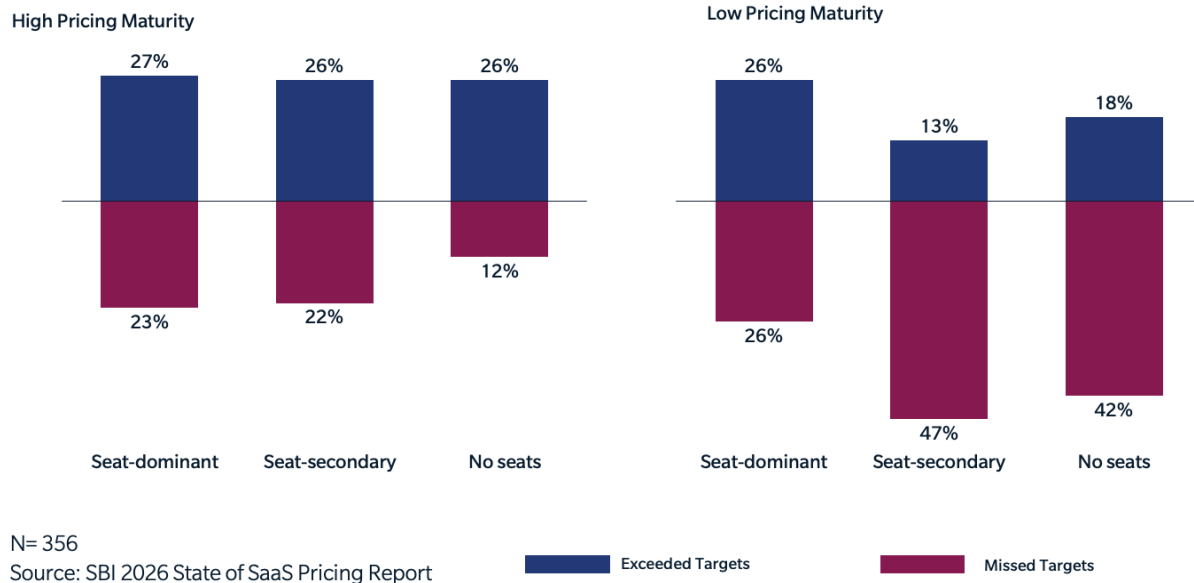
The rate of companies using some form of seat in their pricing model **held mostly flat at 77% (down just 1% year over year)** despite AI product penetration jumping nearly 25% – shifting the paradigm for how the market perceives seat value and the value potential generated by each seat. In aggregate, seat-dominant companies (companies where seats are the primary or only value metric) outperform growth targets at 31.5% vs. 19.6% for seat-secondary (companies where seats serve as a secondary or supporting value metric).

But seat-dominant companies also skew toward higher pricing maturity, more dedicated pricing teams, and higher-performing GTM motions. **When we control for pricing maturity, the gap disappears at the top. High-maturity companies exceed targets at 26-27% regardless of their model’s seat status.** These companies have the savvy, strategy, and infrastructure to identify and operationalize good-fit value metrics that low-maturity companies cannot.

At lower maturity, seat-secondary companies crater: 13.2% exceeded, 47.4% missed. Those companies are stuck in what our [Growth Durability research](#) calls “Swallowing the Fish 2.0”: an incomplete transition where the old model is partially dismantled and the new one isn’t generating enough revenue to replace it.

### Seat Model Performance Depends on Pricing Maturity

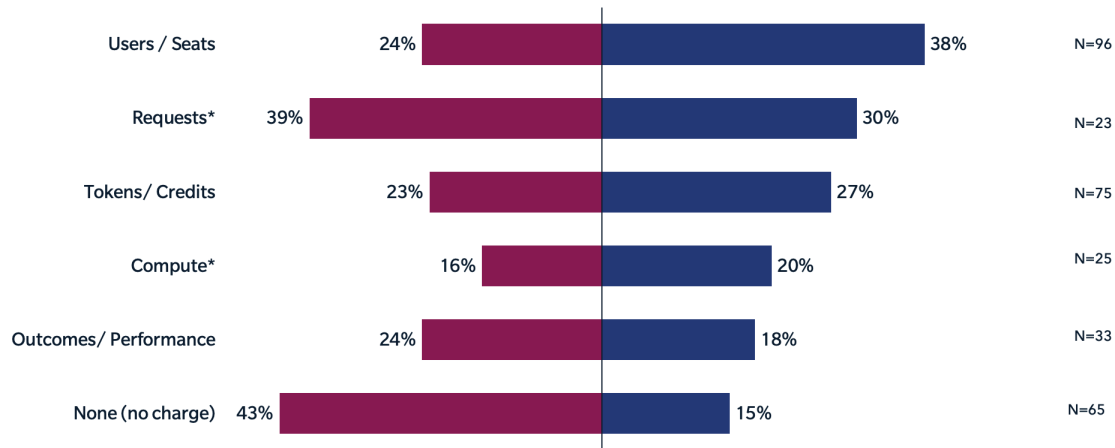
At high maturity, the seat model barely matters. At low maturity moving off seats early carries a steep penalty



The internal gap is only half the story. **Buyers aren’t ready either. ‘No seats’ companies hear “too expensive” at 2x the rate of seat-dominant companies (33% vs. 16%).** That complaint may have less to do with actual price levels and more to do with predictability or perception. Seats give buyers a familiar forecasting anchor: user headcount times price per seat equals a number they can budget around. Remove that anchor and buyers lose the ability to forecast their own spend. And “too expensive” often translates to “I don’t see the value.” Whether the perfect value proxy or not, buyers continue to accept seats as standard, even in 2026. **The same pattern holds for AI: among companies that charge for AI usage separately, those pricing AI on seats exceed at 38%, while outcomes-based AI pricing exceeds at just 18%.** Buyers will pay for AI on a so-so metric they understand before they’ll pay for a perfect one that they don’t.

## AI Pricing Metric and Growth Target Attainment

All companies with AI in product, by pricing metric used.



N= 317

Source: SBI 2026 State of SaaS Pricing Report

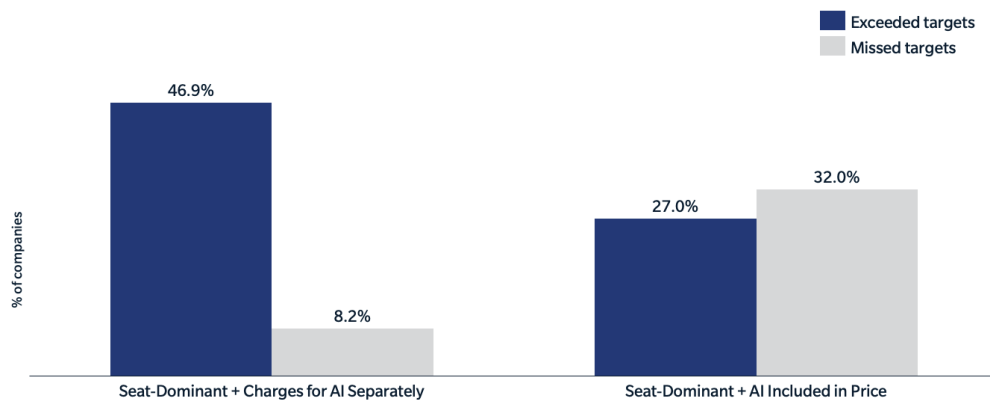
Note: \* indicates low n count

Exceeded Targets

Missed Targets

The best position today layers separate AI charges on top of a seat-dominant base: 46.9% exceeded, 8.2% missed. Seats keep the buyer's forecasting anchor. The AI charge throttles willingness to pay for AI value without forcing a full model change.

### The Compound Effect: Seat-Dominant Pricing + Separate AI Charges



N= 356

Source: SBI 2026 State of SaaS Pricing Report

### RECOMMENDATIONS

- **Build pricing maturity: before or in lockstep with transitioning the model.** High-maturity companies perform well regardless of the role seats play. Low-maturity companies need the stability seats provide while they build ownership, infrastructure, and governance.
- **Layer AI monetization on top of your seat base: seats for access, usage-based AI charges for value.** This builds internal pricing capability and trains buyer willingness to pay at the same time. For guidance on executing the transition, see [The Repricing Moment](#). For the structural case and the financial shape of what's ahead, see [The Great Unbundling](#) and [Growth Durability](#).

## ARC 3: DEFAULT DECISIONS ARE COSTING YOU.

The most popular pricing governance, cadence, and change management choices are also the lowest-performing ones. Fear stalls pricing changes. Committees dilute accountability. Annual reviews let complexity build unchecked. At every turn, the deliberate alternative outperforms the default.

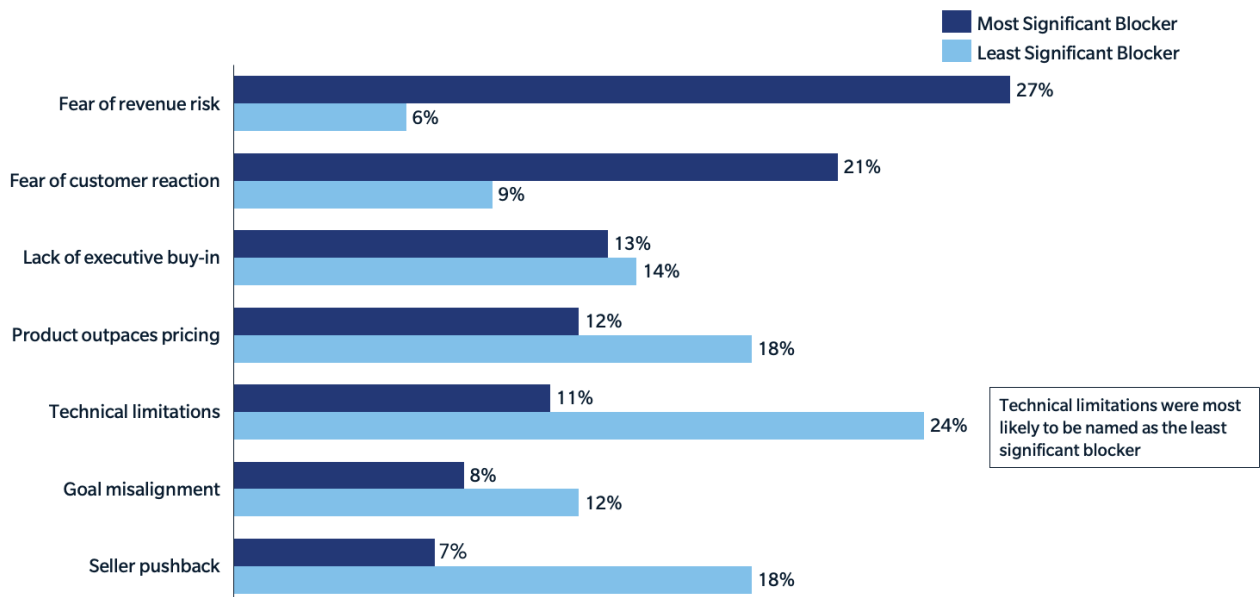
## 6 Fear Is the Most Common Reason Pricing Changes Stall. Governance Breaks the Cycle.

**TLDR:** Nearly half of respondents (48%) cite fear of revenue risk or customer reaction as their top pricing implementation blocker. **Companies that move past that fear to successfully make changes — and ultimately hit revenue targets — are more likely to pair pricing changes with governance updates** (i.e., the set of rules, processes, and oversight mechanisms that control how a company sets, approves, and manages pricing). Governance forces teams to think through the downstream effects of a change before it goes live. The fear doesn't go away, but governance gives you the commercial courage to move forward.

### RESEARCH HIGHLIGHTS

The biggest barrier to pricing change is psychological. **Fear of revenue risk (27%) and fear of customer reaction (21%)** are the top two implementation blockers. Technical limitations ranked 5th at 11% and are the most-cited “least significant” blocker at 24%, as the metering, billing, and pricing tooling landscape matures.

### Pricing Implementation Blockers: Fear Dominates, Tech Doesn't



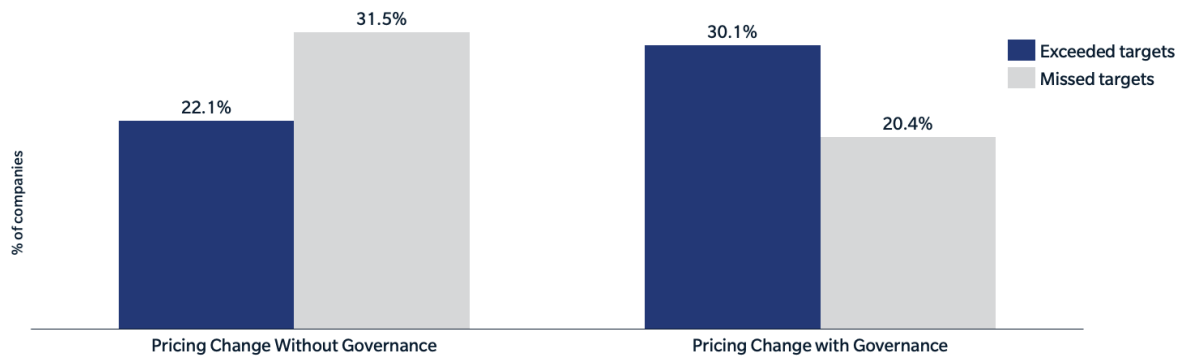
Technical limitations were most likely to be named as the least significant blocker

N= 356

Source: SBI 2026 State of SaaS Pricing Report

Fear is equally prevalent regardless of a company's size, governance model, etc. The difference is what they do with it. Companies that pair pricing changes with governance updates – things like discounting rules, approval thresholds, and deal desk policies – turn open-ended anxiety into a structured checklist and give the organization permission to act.

## Governance Paired with Pricing Changes Improves Growth Attainment



N= 356

Source: SBI 2026 State of SaaS Pricing Report

### RECOMMENDATIONS

- **Ground changes in customer value and feedback.** Overcome the fear with data. Pulse check potential updates with design partners, survey price sensitivity for different value propositions, and interview prospects about their decision criteria. These inputs ensure your changes are grounded in customer value and give you confidence to execute.
- **Pair every major pricing change with a governance update.** Update discounting rules, approval thresholds, and deal desk policies alongside the pricing change itself. Without that work, sales teams interpret new pricing through old rules. For a detailed framework on executing pricing changes without backlash, see our companion research, *The Repricing Moment*.
- **Build the customer communication plan alongside the pricing strategy.** Fear of customer reaction is the #2 blocker. If you can't articulate why the change benefits the customer, the pricing change may not be ready (or may not be the right one to make).
- **If you've done proper diligence** and are making a value-based change, fear not - companies that updated both pricing and pricing governance were 19pp more likely to hit or exceed their growth targets than those who did neither.

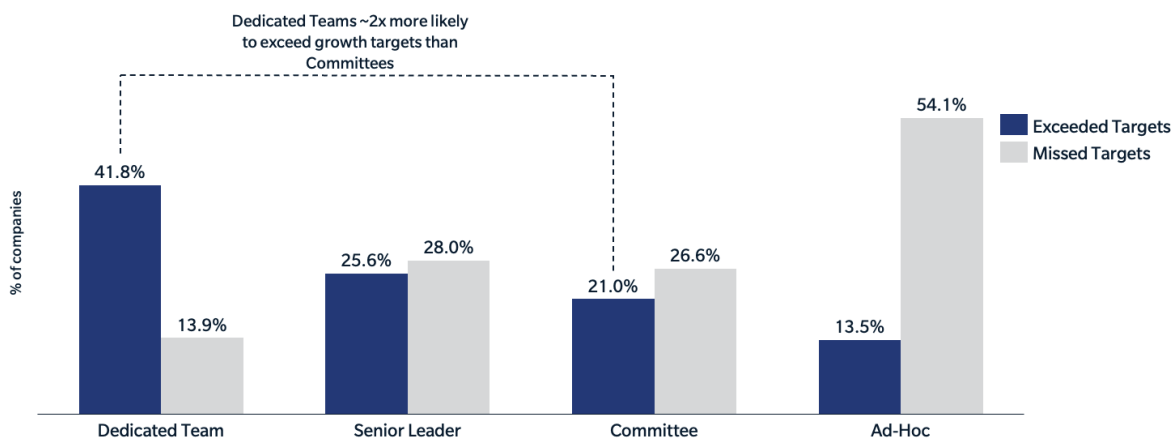
# 7 Pricing Accountability Drives Growth, and Most Companies Don't Have It.

**TLDR:** Pricing committees are the most common governance model at 42% of the market, but they underperform every alternative that concentrates accountability. **Companies with dedicated pricing teams are 2x more likely to exceed growth targets than those with committees.** Even a single accountable senior leader outperforms committees across every revenue band up to \$1B. Much of the market is shaping pricing strategy with a model that shirks accountability rather than one that claims it, and it shows in the growth data.

## RESEARCH HIGHLIGHTS

**Companies with dedicated pricing teams exceed growth targets at 42%, double the rate of those with committees at 21%.** Committees are the second worst performer among pricing governance models, ahead of only an 'Ad Hoc' approach. The gap comes down to ownership: committees surface ideas and build alignment, but when everyone is responsible for pricing, no one owns the outcome, bold changes get negotiated into incremental ones, and pricing becomes a check-the-box activity rather than a strategic growth lever. Dedicated teams pull the same cross-functional input but pair it with clear decision rights and results ownership, and that performance advantage holds across every revenue band. The data shows a strong association between dedicated pricing teams and growth attainment. Companies that invest in dedicated pricing teams may differ in ways we cannot fully isolate from a single survey. But the performance gap is wide, consistent across revenue bands, and holds when controlling for maturity and cadence. The pattern is strong enough to act on.

### Growth Attainment by Pricing Governance Model

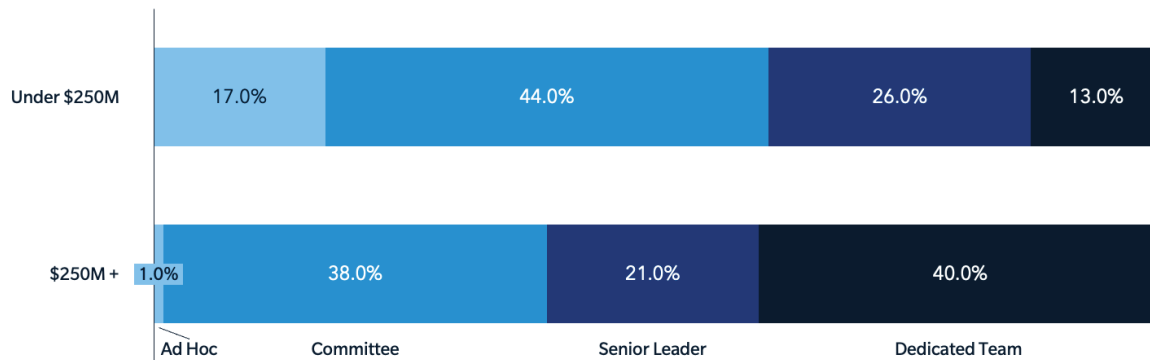


N= 356

Source: SBI 2026 State of SaaS Pricing Report

Despite the performance gap, dedicated pricing ownership has not gained share. In 2025, 23% of companies had dedicated pricing teams or leaders. In 2026, that number is unchanged. **The best-performing governance model has flat adoption** while committee-based governance remains dominant at over 40%.\* The \$250M revenue threshold is the breakpoint: only 13% of companies below \$250M have a dedicated team compared to 40% above \$250M. Below that threshold, an empowered senior leader outperforms a committee in every revenue band.

## Pricing Governance by Company Revenue: Dedicated Teams Triple Above \$250M



N= 356

Source: SBI 2026 State of SaaS Pricing Report

\*The 2025 survey included separate "Group Function" and "Committee" categories. The 2026 survey consolidated these. Direct YoY comparisons are directional.

### RECOMMENDATIONS

- **Above \$250M:** invest in a dedicated pricing team. At this scale, no other governance model comes close on growth attainment, and 40% of your peers already have one.
- **Below \$250M:** give one senior leader clear ownership of pricing decisions. You probably can't justify a full team yet, but you can make sure someone owns the outcome rather than spreading it across a committee.
- **If you already have a committee:** make it an advisory body, not a decision-making body. Keep the cross-functional input. Remove the consensus requirement. One person takes the input, makes the call, and owns the outcome.

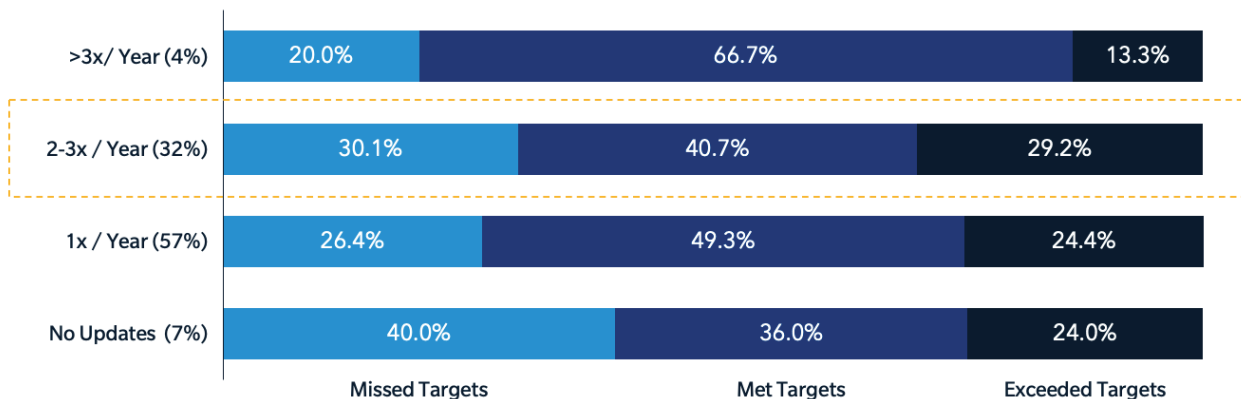
## 8 2-3 Pricing Updates Per Year Is the Sweet Spot, and Most Companies Are Missing It.

**TLDR: 57% of the market updates pricing just once per year, and it's costing them.** Companies that update 2-3 times per year are 5pp more likely to exceed revenue targets than those making one update per year. But more isn't always better: **companies updating more than 3x per year report the highest average growth but the lowest target attainment at 13.3%**, suggesting rapid iteration without preparation creates volatility. Companies with no pricing roadmap miss their growth targets at almost twice the rate of all other roadmap cohorts.

### RESEARCH HIGHLIGHTS

Most companies' (57%) pricing cadence has landed on one update-per-year. At the other extreme, just 4% of companies update more than 3x per year, and that cohort reports the highest rate of customer complaints about pricing complexity (27% cite "overly complex" as the top friction point vs. 17% for companies updating once a year). Frequent change without adequate governance and rationalization creates confusion for buyers and sellers.

### Revenue Growth Attainment by Pricing Update Cadence

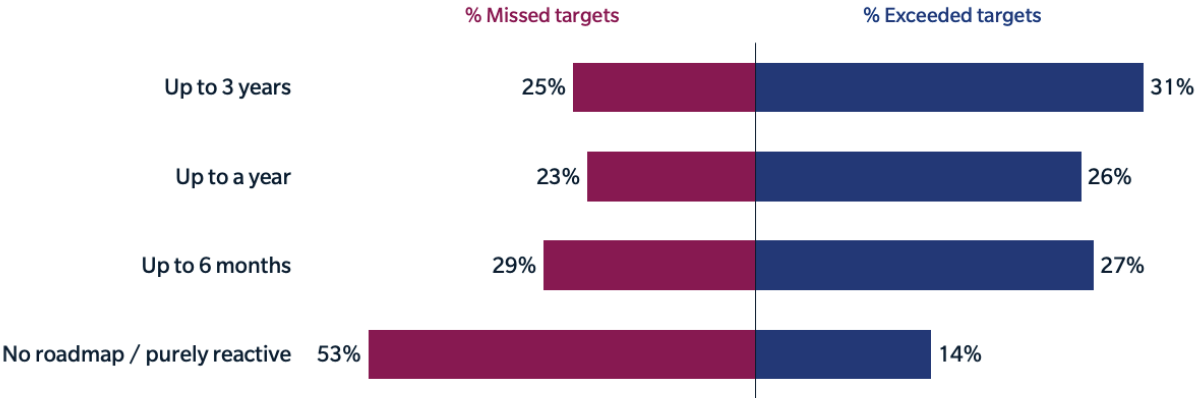


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Source: SBI 2026 State of SaaS Pricing Report

The 2-3x per year rhythm works because it's frequent enough to keep pricing aligned with the product and market but deliberate enough to give sales teams, customers, and billing systems time to absorb each change. Companies with no pricing roadmap (meaning no forward-looking plan for pricing changes and a purely reactive approach to updates) carry the highest miss rate of any behavior in the study: 53% missed growth targets. The have/have not difference is binary: those with a pricing roadmap - no matter the time horizon - are about 2x more likely to exceed their growth targets than those without. Companies with a pricing roadmap likely differ from those without one in broader operational discipline. The cadence finding should be read as directional evidence that structured pricing reviews correlate with better outcomes, not proof that adding a second annual review will mechanically improve growth.

# Pricing Roadmap Horizon and Growth Target Attainment



N= 356  
Source: SBI 2026 State of SaaS Pricing Report

## RECOMMENDATIONS

- **Build a 2-3x per year pricing review into your operating calendar.** Tie reviews to product release cycles, quarterly business reviews, or competitive landscape updates. The specific trigger matters less than the rhythm and regularity.
- **Establish a pricing roadmap with at least a 6-month planning horizon.** Reactive pricing correlates with the highest miss rate in this study.
- **Resist the temptation to over-iterate.** More than 3x per year may juice short-term growth but complexity peaks in this cohort and target attainment drops. Deliberate iteration, not constant motion.

# ARC 4: THE MONEY YOU'RE LEAVING ON THE TABLE.

## 9 Complete Pricing Integration Post-M&A Is Rare, and Even Lightweight Bundling Beats Doing Nothing.

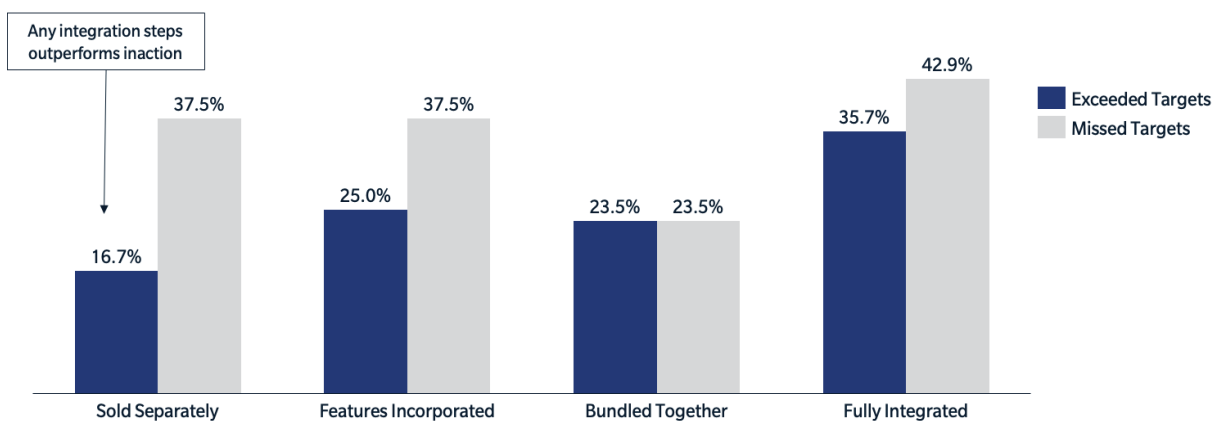
**TLDR:** Only 13% of post-M&A companies have fully integrated pricing. Nearly 1 in 4 haven't touched it at all, and that group carries the lowest growth attainment and highest miss rate of any integration level (16.7% exceeded, 37.5% missed). **Companies that take any pricing integration step exceed at 26.2% vs. 16.7% for those that haven't acted at all.** The specific approach matters less than whether you've started down the path.

### RESEARCH HIGHLIGHTS

Most post-M&A companies have taken some pricing integration step, but nearly 1 in 4 still haven't touched pricing at all. That group is selling acquired products entirely separately with separate buying motions and separate value propositions — and it carries the lowest growth attainment of any integration level.

Bundling produces the best risk profile without requiring full integration. Companies that package acquired products together under a combined price point exceed growth targets at 23.5% with a 23.5% miss rate, the most balanced outcome in the M&A cohort. Bundling creates a cross-sell path that uses the existing customer relationship without the heavy lift of full product and pricing unification.

### Post-M&A Growth Attainment by Pricing Integration Level



N= 356

Source: SBI 2026 State of SaaS Pricing Report

## RECOMMENDATIONS

- **Start with lightweight bundling.** Package acquired capabilities alongside existing offerings at a combined price point and synergistic customer narrative. This doesn't require full pricing unification. It requires a cross-sell path and a combined value proposition.
- **Use pricing integration as a forcing function for product rationalization.** The bundling exercise surfaces which acquired capabilities add value to existing customers and which are redundant or niche. Consolidate redundant capabilities to reduce pricing complexity and product load and cut niche capabilities or sell as add-ons to drive incremental revenue.

# 10 Each Step Up in Pricing Maturity Unlocks a Different Growth Lever, and the Actions Required Change at Every Stage.

**TLDR:** The actions that improve pricing performance change at every maturity stage, and applying the wrong ones wastes time. Emerging companies need ownership. Defined companies need concentrated authority and faster cadence. Strategic companies need deliberate AI monetization. **Each transition is specific, measurable, and compounds on the one before it.** 77% of the market sits at Defined or Strategic, where the growth levers are clearest.

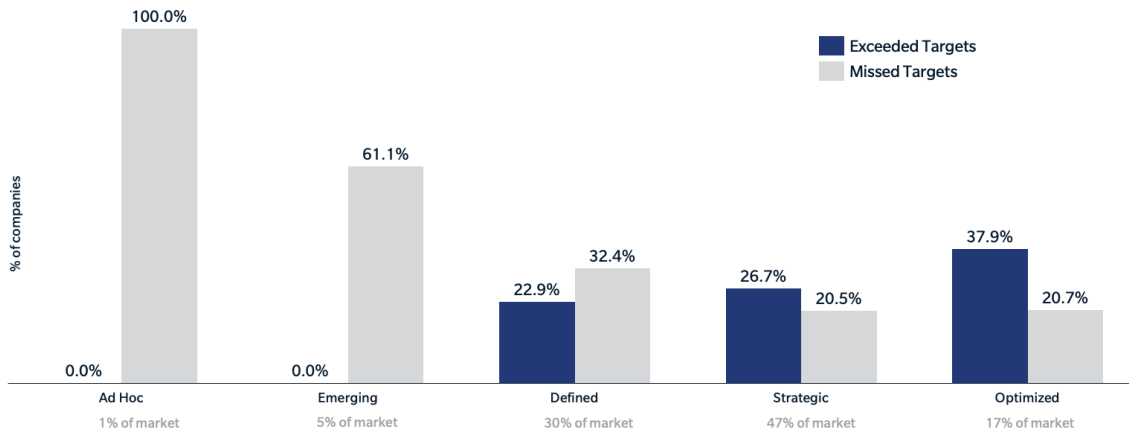
## RESEARCH HIGHLIGHTS

The Defined and Strategic stages comprise 77% of the market, and the move from one to the next is where companies most often stall. The findings below focus on those two transitions.

**Defined to Strategic.** Processes exist but committees govern and reviews are mostly annual. The exceeded rate is 23% but the miss rate is still 32%. The move: shift from shared responsibility to a dedicated pricing team or senior leader (10% dedicated teams at Defined, 25% at Strategic). This transition cuts the miss rate by 12pp.

**Strategic to Optimized.** A dedicated team or leader is in place with regular cadence and proactive changes, but the exceeded rate plateaus at 27%. The move: concentrate decision authority from committees to dedicated teams (25% to 49% adoption from Strategic to Optimized) and increase cadence to 2-3x per year (30% to 44%). This transition adds 11pp to the exceeded rate.

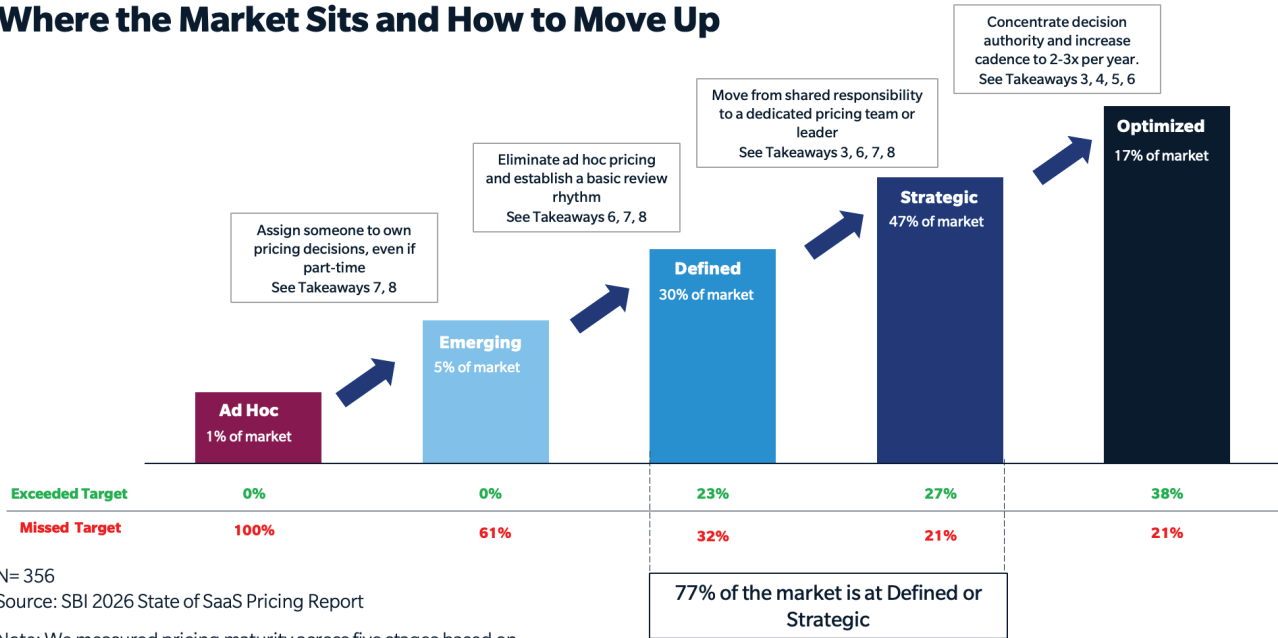
### Growth Attainment by Pricing Maturity Stage



N= 356

Source: SBI 2026 State of SaaS Pricing Report

# Pricing Maturity Staircase: Where the Market Sits and How to Move Up



N= 356

Source: SBI 2026 State of SaaS Pricing Report

Note: We measured pricing maturity across five stages based on respondents' rating of their own pricing sophistication on a five-point scale – from ad hoc on up to optimized. We mapped these to five maturity stages.

## RECOMMENDATIONS

- **Find your stage on the maturity staircase in the introduction and focus on the single transition that applies.** Trying to skip stages doesn't work. An Emerging company toiling over AI token limits that will rapidly change the underlying product and value narrative is solving the wrong problem. A Defined company building robust metering infrastructure before aligning on its underlying pricing strategy is over-extended.
- **Each transition compounds.** Dedicated ownership, governance, cadence, and AI monetization stack on top of each other. No single pricing decision produces a 38% exceeded rate. Building maturity across multiple dimensions does.

# The pricing leader's action plan

## (and the PE partner's diligence checklist)

**For pricing leaders:** Three moves.

- **First, concentrate ownership.** Dedicated pricing teams exceed targets at 2x the rate of committees (42% vs. 21%). Below \$250M, give one senior leader decision authority. Above \$250M, build the team.
- **Second, increase cadence.** Companies updating 2-3x per year exceed targets at 29% vs. 24% for annual reviewers. Companies with no pricing roadmap miss at 53%. Tie reviews to product releases or QBRs.
- **Third, monetize AI separately.** 58% of the market still includes AI in the price with no separate charge. That group exceeds targets at 23%. Companies that charge separately: 37%. Start by metering AI usage. Charging comes after measurement.

**For PE partners:** These three variables are diligence inputs that map directly to enterprise value. A portfolio company running committee governance, annual pricing reviews, and included AI is leaving measurable growth on the table, and that growth gap compounds through the hold period into EBITDA drag and multiple compression at exit. The AI margin gap (37% target, 30% actual, 57% underperforming) is a direct hit to gross margin that shows up in every quarterly review. The maturity staircase tells you which fix to sequence first at each portfolio company: ownership, cadence, or AI monetization. These are scoped, executable moves that fit within a standard value creation plan. Map each portfolio company against these benchmarks, or bring SBI's pricing team in to run the diagnostic with you.

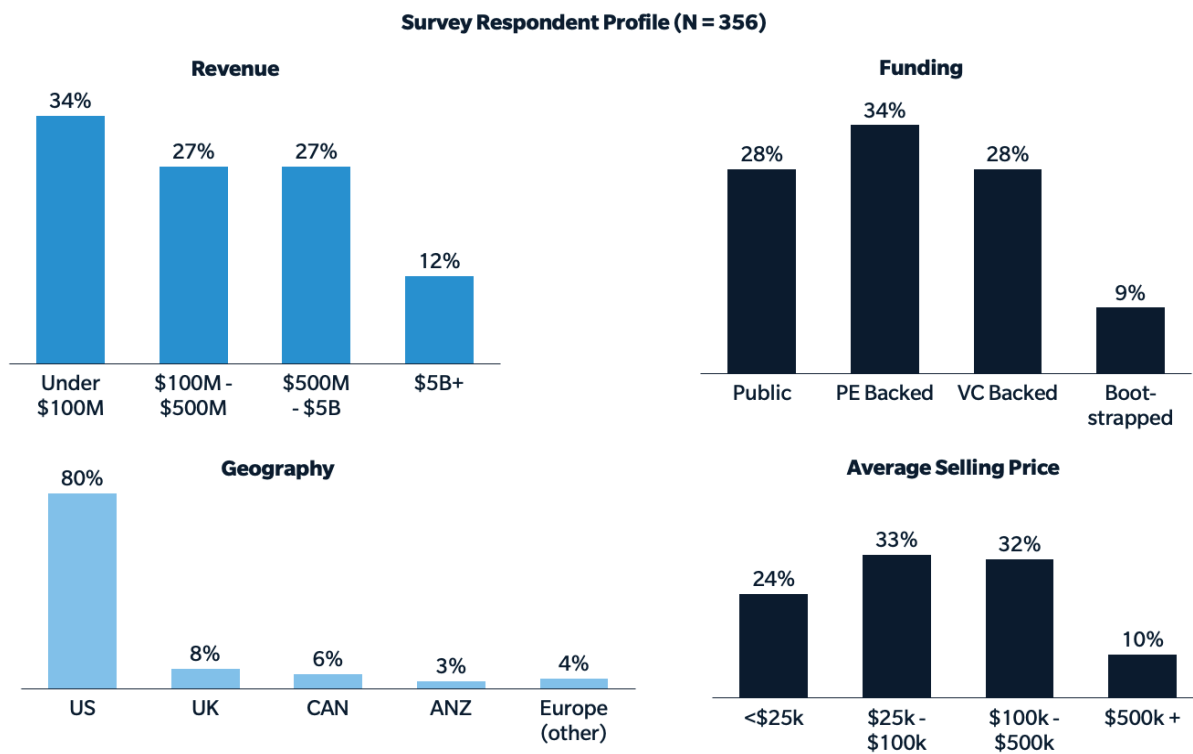
**There's a lot in this report.** If we were in your seat, the next step is straightforward: Take these 10 takeaways, feed them alongside your company's pricing structure, product strategy, and competitive position into your AI tool of choice, and ask it to score you against the three defaults, identify which maturity transition applies, and prioritize the first move. **The benchmarks are here. The specifics are yours. The gap between the two is where the growth is.**



# Methodology

This report is based on a survey of **356 SaaS operators and executives** who own or influence pricing and packaging decisions at their organizations. The survey was fielded by SBI’s pricing team in early 2026. This is the third annual edition of the State of SaaS Pricing Report; the 2025 edition surveyed 334 respondents using a comparable instrument, enabling year-over-year comparisons where question wording is consistent.

**Respondent profile.** Respondents span the full SaaS revenue spectrum, from \$10M to \$5B+ in annual revenue, with roughly equal representation across small (\$10M-\$100M), mid-market (\$100M-\$500M), large (\$500M-\$5B), and mega (\$5B+) segments. Funding types include PE-backed (34%), public (28%), VC-backed (28%), and bootstrapped (9%). The majority of respondents sit in Product (37%) and Marketing (23%) functions, with additional representation from Sales, IT, Operations, Finance, and Customer Success.



**Dependent variable.** Throughout this report, we use self-reported growth target attainment as the primary performance measure. Respondents rated whether they exceeded, met, or missed their growth targets in the prior year using a five-point Likert scale (far above, above, on target, below, far below). We collapsed this into three categories: Exceeded (above + far above), Met (on target), and Missed (below + far below). 25% of respondents exceeded targets, 46% met targets, and 28% missed.

**Analytical approach.** Findings are based on cross-tabulations between survey responses and growth attainment. We report percentage differences in exceeded and missed rates across groups. Sample sizes (n) are noted throughout; findings based on n<20 are flagged as directional. Year-over-year comparisons are limited to questions with consistent wording across both surveys; where question structure changed between years, we note the limitation. All data points in the report are sourced from the 2026 survey (n=356) unless explicitly noted as 2025 comparisons (n=334).

**A note on interpretation.** The findings in this report are based on cross-tabulations between pricing behaviors and growth attainment. They show strong associations, not proven causal relationships. Companies that invest in dedicated pricing teams may also differ from committee-governed companies in ways this survey does not capture, such as overall management quality, product-market fit, or access to capital. We flag this not to undermine the findings but to be transparent about what the data can and cannot prove. The patterns are consistent, large in magnitude, and hold across multiple controls. They are the best available evidence for how pricing decisions relate to growth performance.

## Why SBI?

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