

State of UK AI SaaS Pricing

Valueships × SaaSiest

It's no surprise that 2025 in software will be the year of AI. Not only are AI-native companies securing funding rounds, but they're also achieving higher valuations and growing at a much faster pace. Naturally, this has a significant impact on pricing models.

In our latest publication, we've focused on one of the most SaaS-developed markets in Europe – the United Kingdom. Our aim was to determine whether we're already witnessing critical shifts in pricing, as identified by Valueships. In other words, this report serves as a bridge between our previous methodology – **tested on approximately 7,000 SaaS pricing pages – and a brand-new approach that also takes AI pricing into account.**

We've identified 8 fundamental pricing shifts:

1. Charging for work instead of access
2. New metrics becoming viable
3. Multi-layer pricing architecture
4. Addressing cost challenges
5. Increasing add-on penetration
6. Hybrid revenue reporting
7. Faster time-to-value requirements
8. ROI attribution

Each of these shifts is explored in dedicated sections, making this report both a benchmarking tool and a valuable knowledge resource for SaaS operators worldwide.

Enjoy the read, and let's embark on the AI pricing journey together!



Maciej Wilczyński, Ph.D.

Managing Partner & Founder, Valueships



Krzysztof (Kris) Szyszkiewicz

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Thomas Sjöberg

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Only got a minute?

A brief summary of the State of UK AI SaaS Pricing report

We have managed to compare over **1000 SaaS companies based in UK** and found 355 among them having AI capabilities.

Main goal we wanted to achieve with this report is to check **how is the AI trend evolving** and what does it have to do **with pricing**.

Below we present the main values which are a perfect conclusion of our findings.



Around **33%** of UK SaaS companies **offer AI-driven tools and features**



Only **31%** of SaaS companies with AI solutions **have a pricing page**



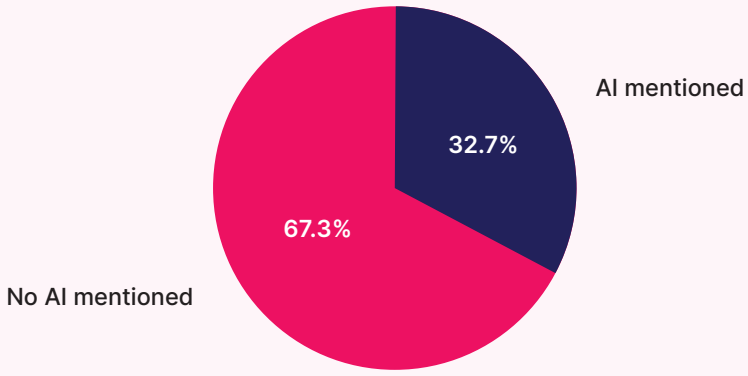
60% of AI solutions function as **integrated product features**

The bigger the company, **the more likely it is to integrate AI as features within their products**, rather than developing standalone AI tools

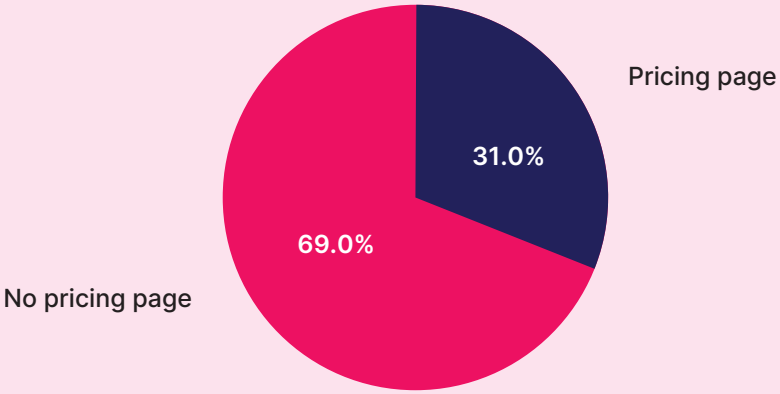
And now, we invite you to the world of AI SaaS pricing – come and dive into some data!

Surprisingly, a little above 30% of all UK companies offer pricing page or mention AI – indicating missed opportunity for transparency and innovation

UK SaaS companies with AI mentioned on the website



Companies with AI with/without pricing page on the website



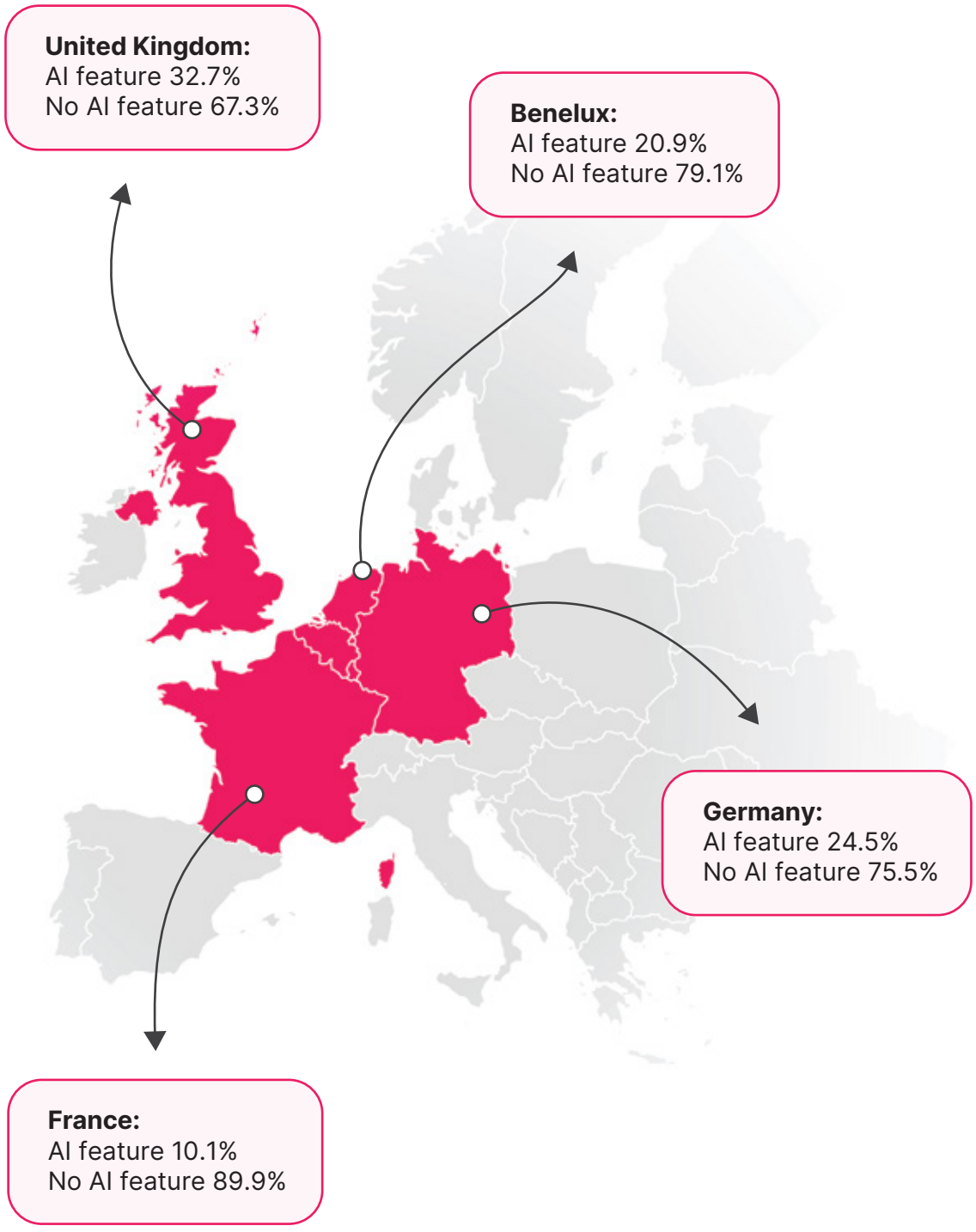
Only 32.7% of UK SaaS companies mention AI on their websites, reflecting the selective emphasis on this buzzword.

However, among those that do, **just 31% include a pricing page**, suggesting a gap in transparency that could hinder customer trust and conversion.

Jakub Jukowski
Senior Pricing Consultant
Valueships



How does it look in other parts of Europe?



Expert comment

As someone who's spent most of their adult life in a country that still hasn't adopted mixer taps yet, I was expecting the UK to have a pretty low AI adoption in SaaS - and in absolute terms - it had: only 33% of UK SaaS firms use AI—and just 31% have transparent pricing pages.

Yet, that's Europe's "best" adoption rate. Let that sink (without mixer taps) in: the UK, with glacial AI uptake, still leads the continent. The next "best" country in terms of AI adoption - Germany - stands at 24.5%. What does this say about "old" continental Europe? It's a wake-up call. London remains a tech hub in Europe, while not being in the EU anymore - ekhm, "old" continent, you're lagging.

But here's the rub: positioning AI as a feature vs. tool hinges on pricing strategy. For subscription-based models (or those hiding prices), AI-as-feature dominates (61-63%). These are the "old folks" that still haven't latched on to the potential of outcome based AI pricing. If you flip to usage-based pricing, AI-as-tool surges to 68%. 11x raised $50 million in Series B funding, while Artisan - the controversial SF startup that has been urging us to "stop hiring humans" all over its ads - raised a $7.3 million seed round for a reason. Comparing the outcomes of AI to outcomes of the full-time employees is what allows you to command much, much higher pricing - because you're now replacing a salaried team member, not another tool!

This points to the obvious conclusion: AI's potential isn't about what you build — it's how you price it.

But this comes... at a price.

Traditional SaaS was a thing of beauty—predictable ARR, tidy multiples. Then AI crashed the party, turning revenue into a cocktail of subscriptions, spiky usage fees, and "good luck forecasting this" outcome-based deals. Now, when VCs ask, "What's your ARR?", the answer is "Depends..." Cue finance teams sweating over spreadsheets and boards side-eyeing "recurring" revenue that swings with seasonality.

The Bottom Line: The old playbook's dead. Winners will reinvent metrics and models for AI replacing humans. Losers? Stuck with the old pricing models. And I'm sad to see the UK is the only kid in the pack that seems to be (slowly) getting this, while the rest of Europe is legislating against AI replacing manual jobs (Luddites!). Maybe the UK Brexited for a reason, after all.

userpilot

Emilia Korczyńska
VP of Marketing
Userpilot



We identify 8 key pricing shifts shaping the future

A strategic guide for SaaS leaders to navigate through the evolving pricing landscape

1. **Work delivered instead of just access**



2. **New pricing metrics possible**



3. **Multi-layered architecture**



4. **Cost structure evolution**



5. **Add-on monetization**



6. **Hybrid revenue reporting**

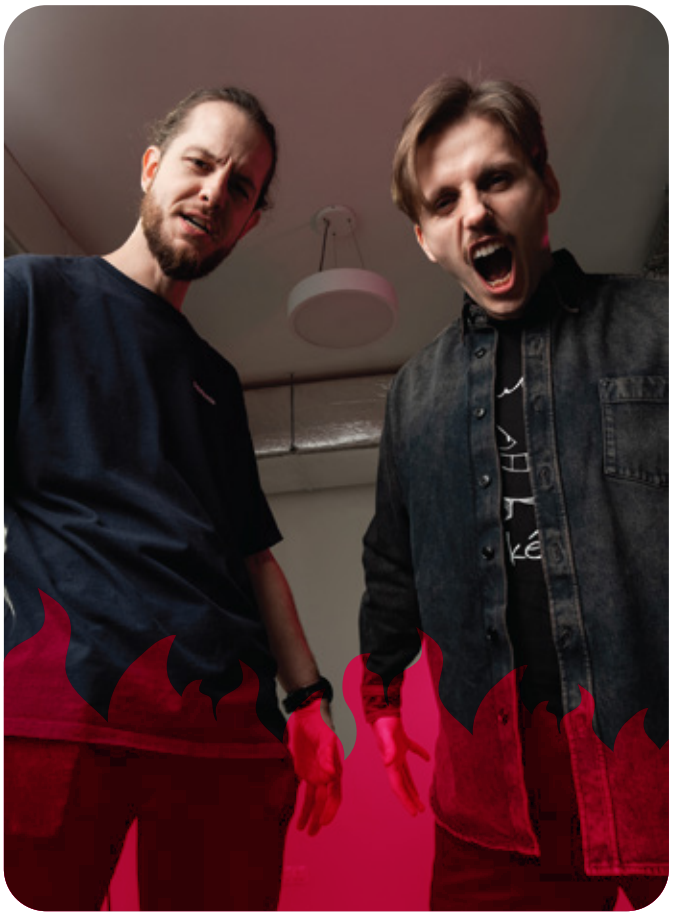


7. **Faster time-to-value**



8. **ROI measurement challenge**





Is this the new rock band dropping?

Nah. Just two guys dropping their **AI pricing playbook**.

We created these AI pricing strategy tools because we saw plenty of buzzwords about AI pricing; here, we aimed to create a framework and checklist that can help founders and teams make real decisions.

What you find inside:

- AI SaaS Pricing Canvas
- A Founder's Checklist
- Implementation Guidelines
- Real-World Examples - 30+ examples

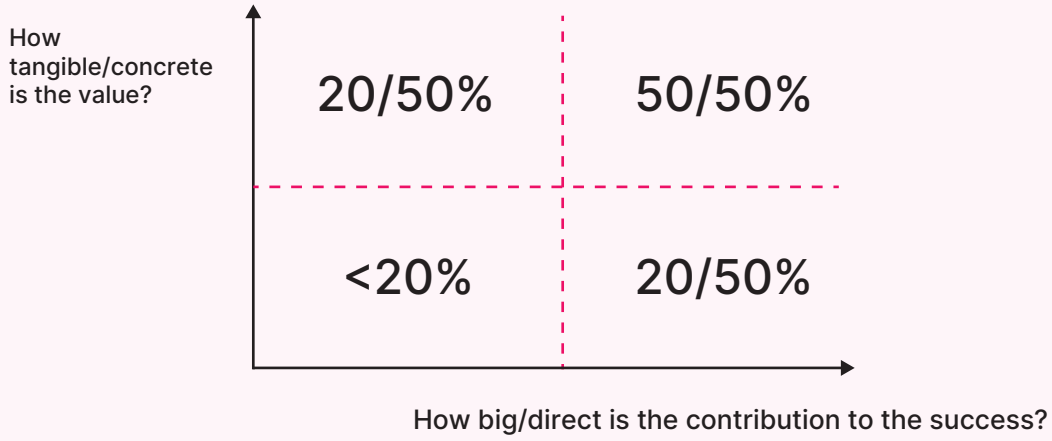
Your AI deserves rockstar pricing

Just click here

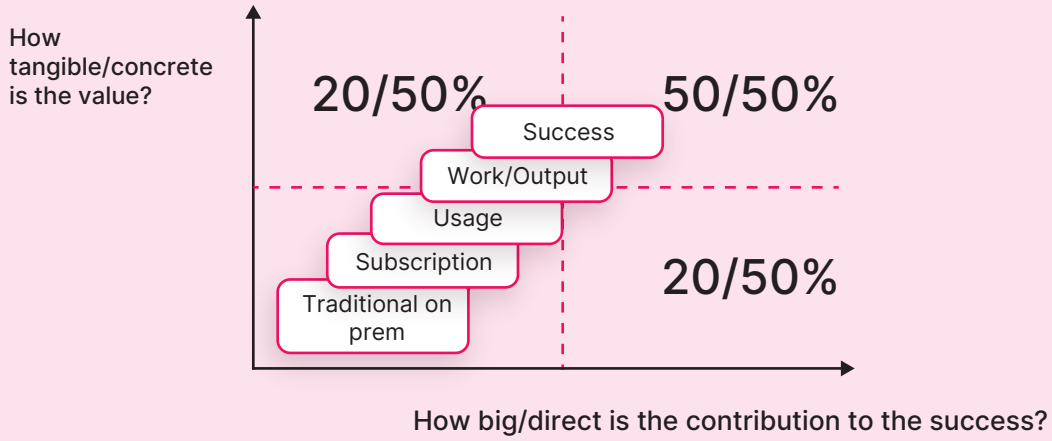
The evolution of SaaS pricing – from "how many users?" to "what value do you get?"

It took more than 20 years to move from traditional upfront software licenses to today's hybrid and revolutionary AI-driven models.

Software moves towards higher value capture categories



Companies with AI with/without pricing page on the website



Pricing grandpa’s software tale for the fellow kids (simplified, but making a point)



Once upon a time, back in the '80s, software lived on-premise. You’d install it, pay for it upfront, and that was it. Once sold, there was no real incentive for the vendor to care if it worked or not. Then along came a guy named Marc Benioff from Salesforce (sure, he wasn’t the first, but let’s give credit where it’s due) with a groundbreaking idea: sell software in the cloud as SaaS.

Not long after, the subscription model exploded. While subscriptions were as old as time, for software, this was revolutionary. It became the new standard, and many of you probably remember (or still use) seat- or user-based licenses bundled into good-better-best packages.

A few years ago, people started questioning whether charging for just access was fair. Enter usage-based pricing. Some companies embraced it and thrived, but it was only the first step toward a model gaining traction now.

In the age of AI, the conversation has shifted to work/output models—charging for what the software does for you, not just for access. It’s a fundamental change that’s already happening. Looking ahead, we’ll likely see success-based pricing or even ROI-as-a-service. While a few companies are starting to experiment with these ideas, it will take time for them to become widespread.

For now, work/output models, along with AI-driven agents, are carving out enough value to justify their place. That’s why we believe that charging for work is one of the first fundamental pricing shifts of this era.

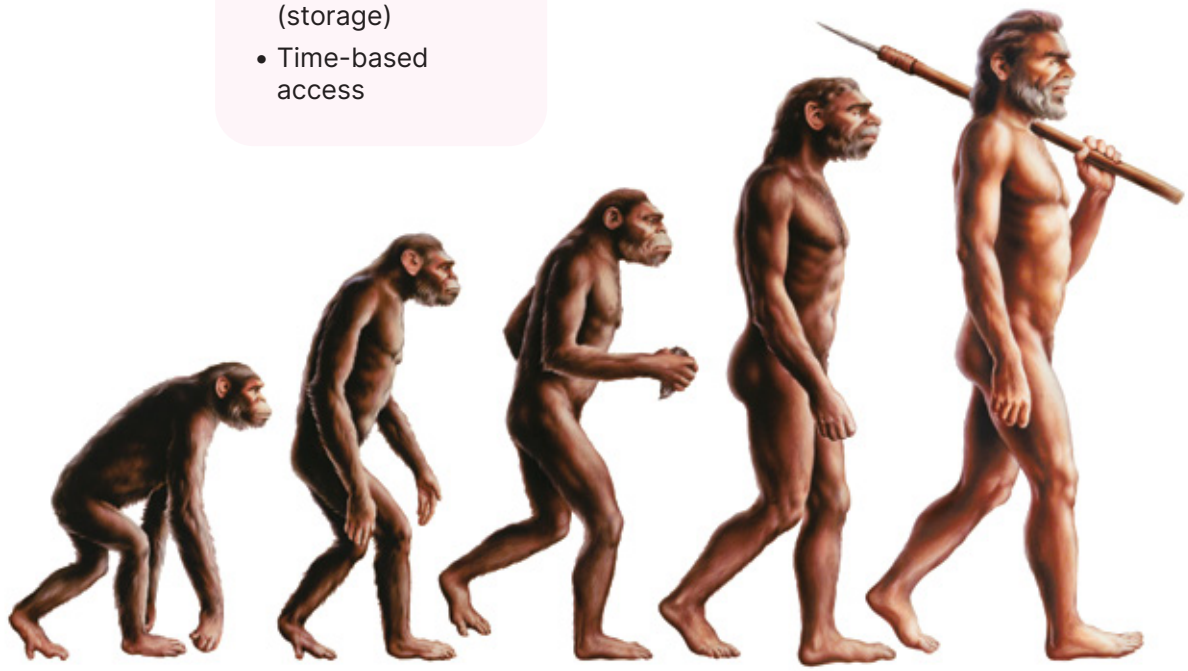
Now we have new outstanding pricing metrics available!

Output-based (AI) metrics:

- Resolutions
- Completed tasks/ workflows
- Generated outputs
- Quality validated completions
- Interaction-based

Tiering:

- Feature access
- Bandwidth limits (storage)
- Time-based access



Licenses:

- Seat
- User

Processing-based metrics:

- Credits
- Overages
- Upfronts
- Usage-based metrics
- Pay-as-you-go
- Input/output tokens
- Resources used/ spikes

ROI-as-a-Service:

- Success sharing
- Fees-at-risk
- Betting systems
- Auctions

Following Poyar's most disruptive AI pricing models we found great examples of such companies in our database

Examples of AI pricing models

TOOL

Chattermill

Pay per data credit

Salesfire

Price depends on number of page views

SPEECHMATICS

Pay per hour of speech model usage

PAPERCUP

Price depends on the required turnaround times

FEATURE

RotaCloud

Pay per agent

awaken

Price per concurrent user - calls and voicemails processed are charged by the hour

GIS

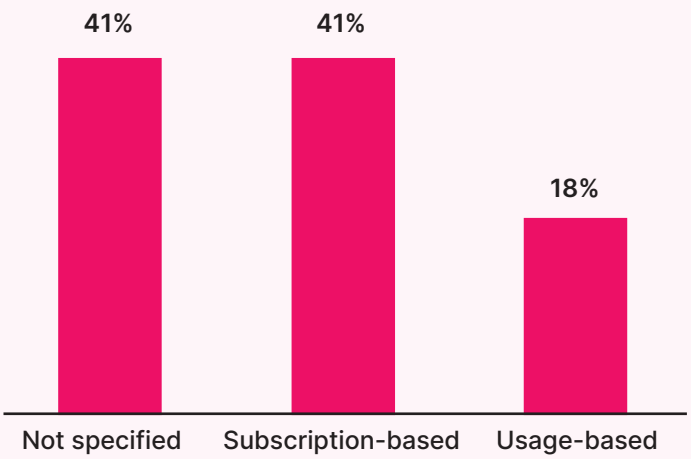
Pay per seat

Sendible

Price per user and number of social profiles

The never-ending debate: subscription-based models lead the charge, but is there a room for usage-based pricing to catch up?

Charging models of SaaS AI features/tools with pricing pages



In the SaaS world, companies have two distinct paths: **subscription-based** or **usage-based** models. Currently, subscription-based model dominates with **41%** over usage-based model with **18%**.

This division shows the industry's preference for predictable, recurring revenue over flexible, pay-as-you-go models.

Damian Kudła
Senior Pricing Consultant
Valueships



Expert comment

While the report emphasizes AI's integration as a feature, it opens up a broader conversation: **its potential to democratize high-value SaaS capabilities**. By introducing AI into standard offerings, companies can make advanced features accessible to businesses that previously couldn't afford specialized tools.

That's where pricing strategy comes in. The smartest SaaS companies aren't just throwing AI into premium tiers – they're rethinking their models altogether. Hybrid pricing, blending predictable subscriptions with flexible usage tiers, could help strike a balance between affordability and the real value AI brings. We might even see new metrics like "adaptive ARR" or "value-based recurring revenue" emerge as AI reshapes how businesses measure growth.

But here's the catch: overusing "AI" without real differentiation risks eroding customer trust. Consumers aren't just looking for AI – they want to understand how it actually improves their business. Thus, companies should focus on articulating clear, measurable AI benefits rather than relying on the term itself to sell their solutions.

The report also highlights transparency in pricing and ROI attribution challenges, but an underlying issue remains: customers often lack a deep understanding of AI's potential impact. Possible solution? Multi-layered pricing that guides customers through their AI journey. Think: entry-level AI features at lower price points, with natural upgrade paths as they scale. This way, pricing isn't just about capturing value—it's about driving customer success.

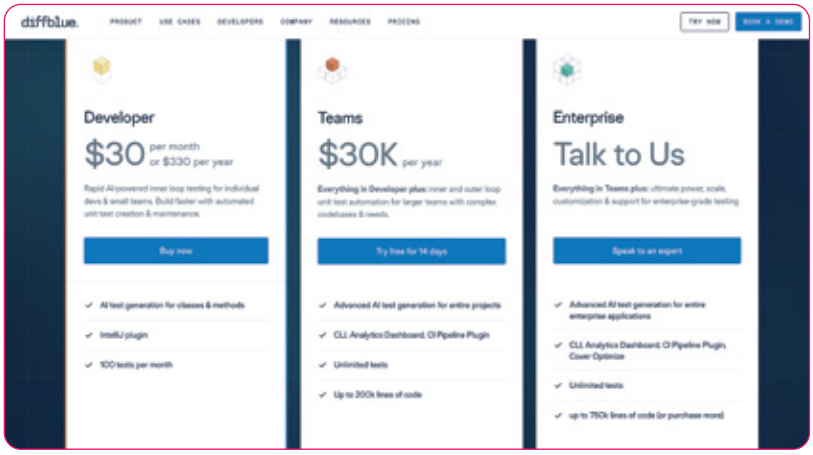
The AI playbook is still being written, but one thing's clear – the integration of AI into SaaS offerings is reshaping the landscape.

dealfront

Dipak Vadera
Director of Community and Ecosystem Marketing
Dealfront



AI drives value as either a core tool or an enhancing feature, shaping how users interact with the product

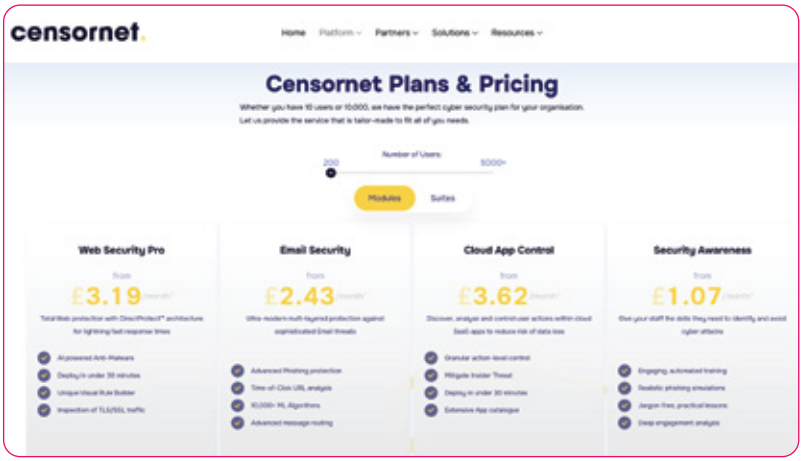


AI as a tool: offering a product whose **core functionality is powered by AI**, designed to enhance efficiency or solve specific problems.

It focuses on delivering AI-driven capabilities directly to users as a practical resource.

AI as a feature: offering a tool that includes **AI as an added functionality**, enhancing the product but not serving as its core or defining element.

It acts as a **supplementary capability**, adding value without being the central focus.

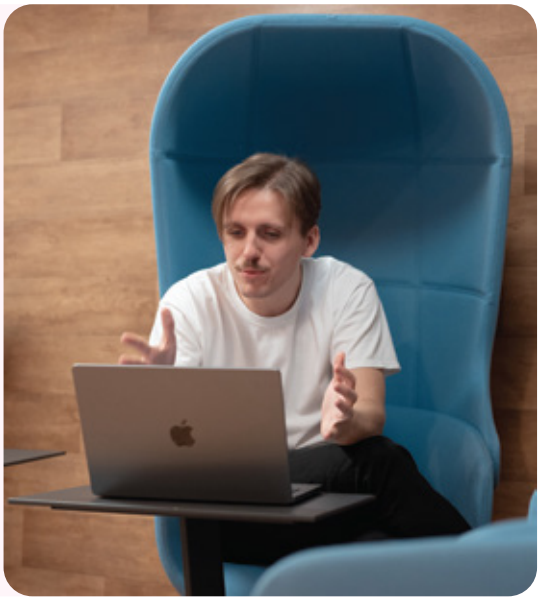


Stuck on AI pricing? You're not alone.

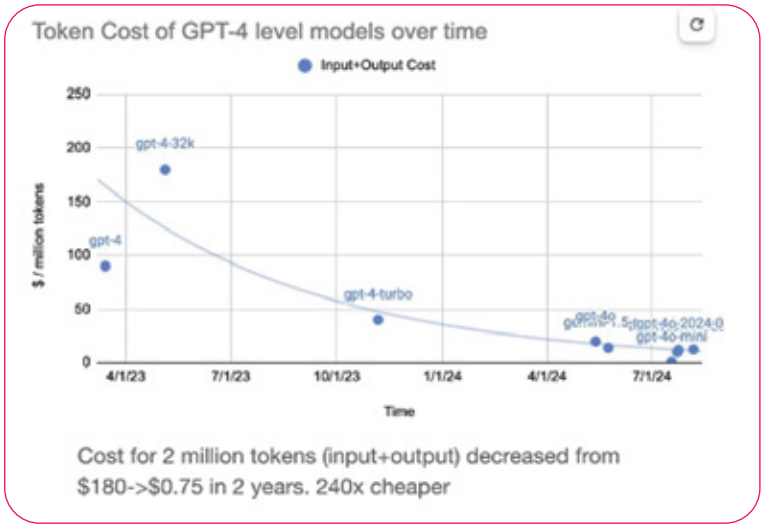
Let's solve it!

Book free consultation

Krzysztof (Kris) Szyszkiewicz
Head of Delivery & Partner, Valueships

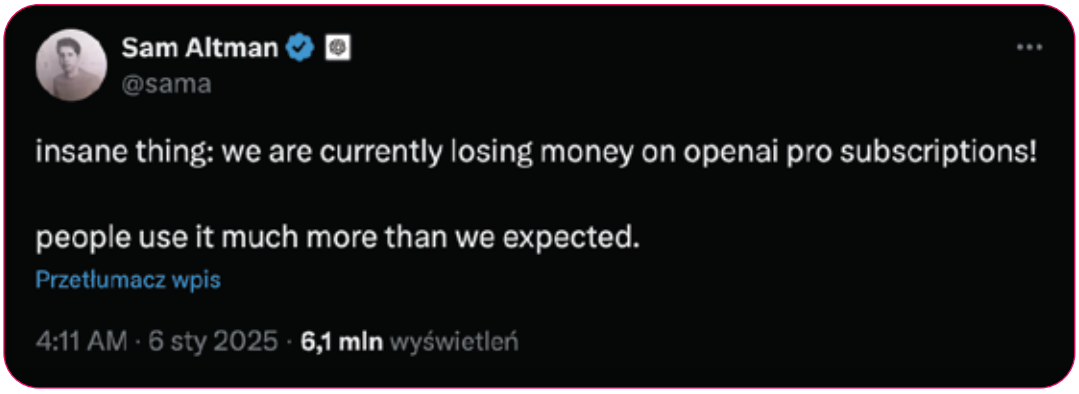


Growth of the AI Solutions available on the market caused nearly an exponential decline in Costs per Token...



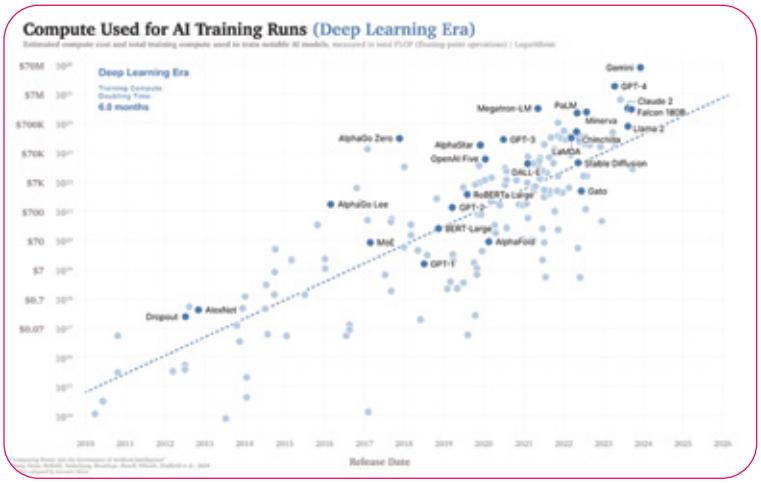
Source: X post by Elad Gil

Even though the AI costs decreases in time, you are still pushed to the application layer.



Source: X post by Sam Altman

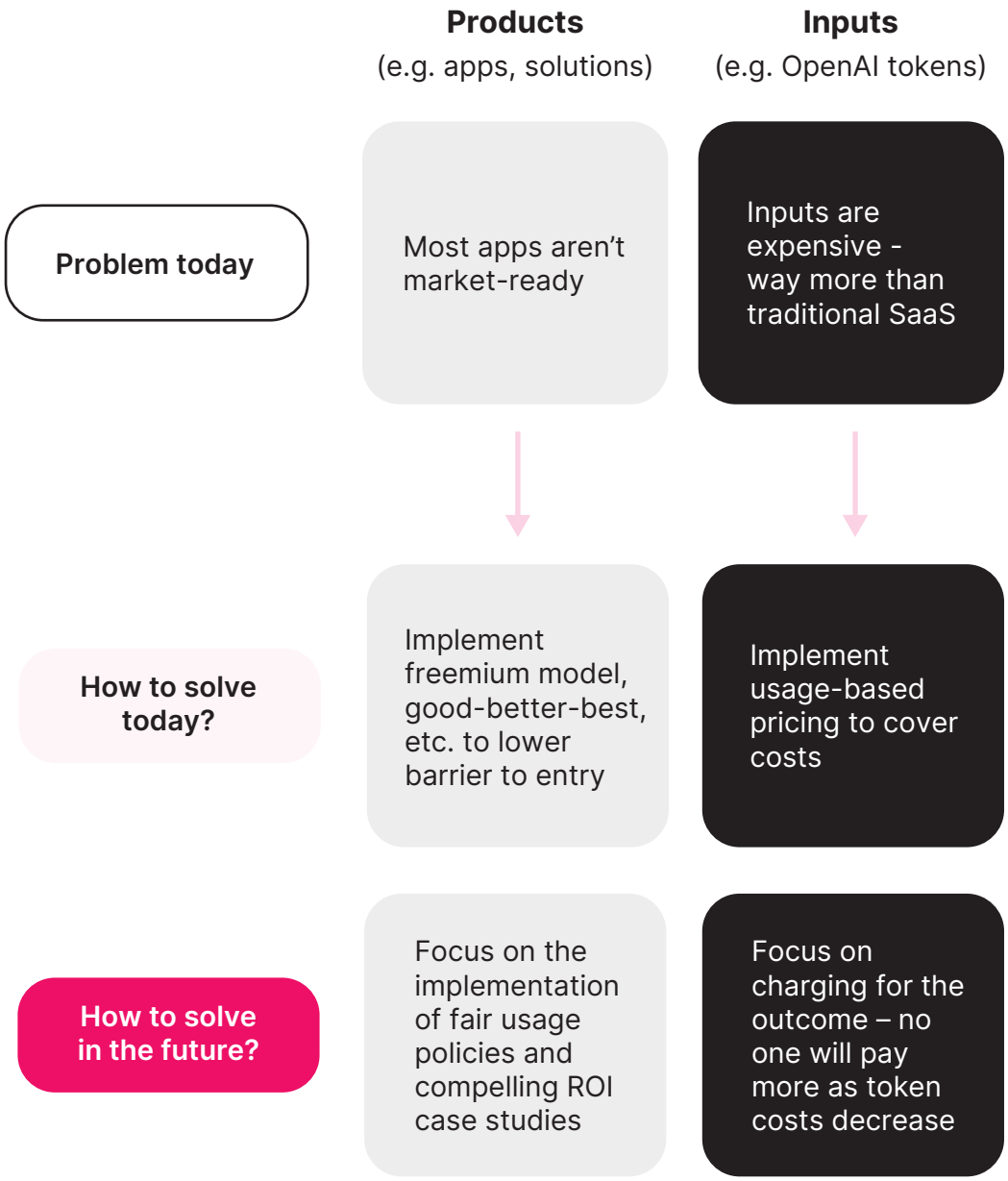
Nevertheless, for some SaaS companies, introducing usage-based costs to their P&L is a novelty.



Source: Research Gate

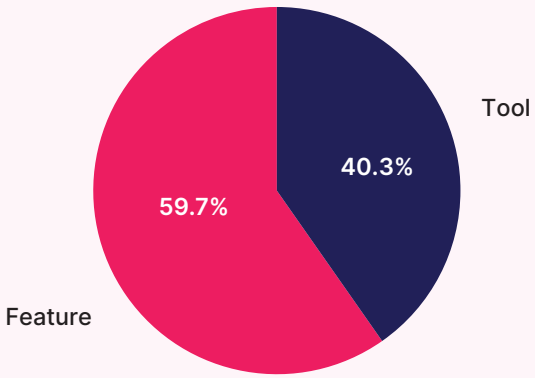
Costs of training are raising exponentially - so rather forget becoming an AI native.

The thing about AI SaaS pricing that most folks miss: there's a difference between charging for access vs. charging for inputs



AI as a feature dominates the SaaS landscape, signaling a shift towards enhancing value rather than serving as the core driver

Usage of AI in SaaS – tool vs feature



Which one is more popular: AI as a feature or as a tool?

Across the SaaS landscape, AI as a feature takes the lead with **59.7%**, overshadowing AI as a tool, which accounts for **40.3%**.

What's interesting is that it suggests companies view AI as a **value-enhancing addition rather than the core of their offerings**.

This trend highlights a clear preference: **AI is increasingly seen as a way to elevate user experiences**, leaving tools to play a supporting role in driving functionality.

Maciej Orczykowski
Head of Data Analytics
Valueships



Expert comment

SaaS pricing has always been tricky. Pricing can seem straightforward initially, but as businesses grow, pricing structures become inevitably more complex. For example, there might be just three pricing plans on the website, but under the hood is an ever-evolving jumble of add-ons, custom discounts, and tailored plans that shift as customer needs and billing requirements change.

Managing pricing well requires clear ownership, robust processes, and, most importantly, clean data. AI is bringing dynamic, value-based models to SaaS pricing. This is reshaping the landscape and making pricing more fluid and sophisticated than ever. This report serves as a wake-up call for SaaS companies to assess their pricing practices now.

By building strong foundations today, SaaS companies will be better prepared to seize the opportunities presented by AI-based pricing in future.

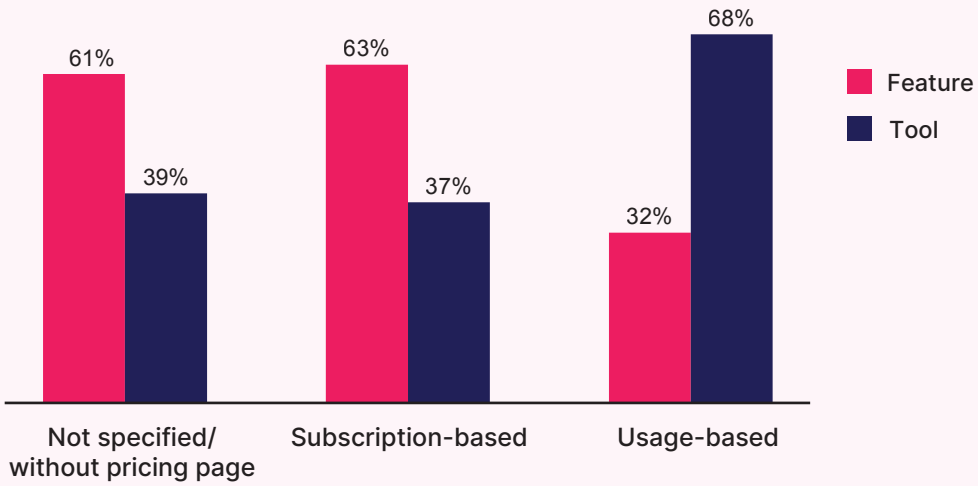
ChartMogul

Sofia Faustino
Senior Manager of Insights
ChartMogul



A clear division emerges: AI as a feature dominates in subscription-based models, while AI as a tool takes the lead in usage-based pricing

Models of AI in SaaS – tool vs feature by charging models



Should you position AI as a feature or as a tool? The answer isn't as straightforward as it seems.

For models without a pricing page or subscription-based models, AI as a feature is more popular, amounting to **61%** and **63%** respectively. In contrast, for usage-based models, AI as a tool takes the lead, representing **68%** of the usage.

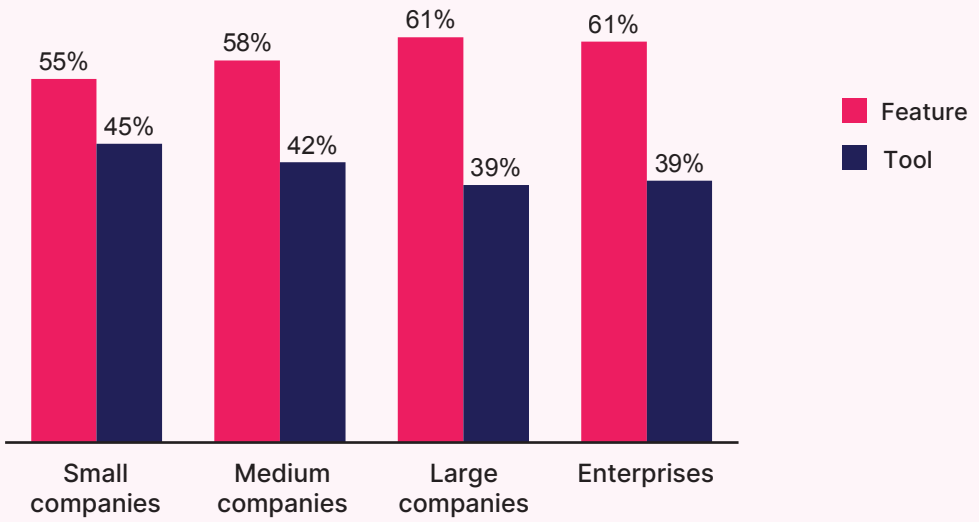
Understanding the right fit for your pricing model could be the key to unlocking AI's full potential.

Michał Narkiewicz
Senior Associate
Valueships



Although in most cases existing companies follow the AI trend, there are many who try to build AI as a standalone tool

Usage of AI in SaaS – tool vs feature by company size



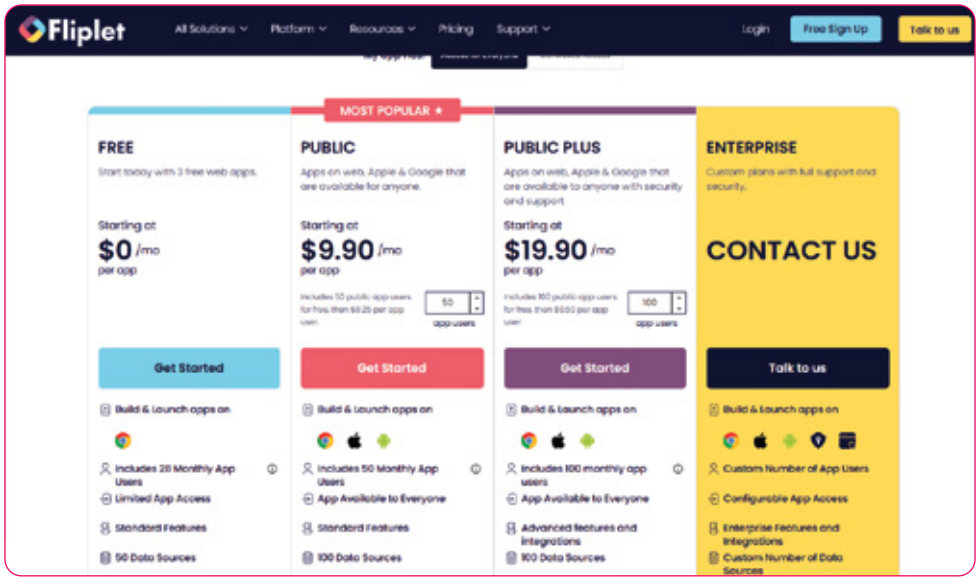
Small and Medium companies lean slightly towards AI as a feature, however, as organizations grow into large companies and enterprises, features domination grows in power with **61%**, leaving tools stuck at **39%.**

A clear message emerges: **regardless of scale, companies see AI as a feature leading the SaaS narrative**, leaving tools playing the supporting role.

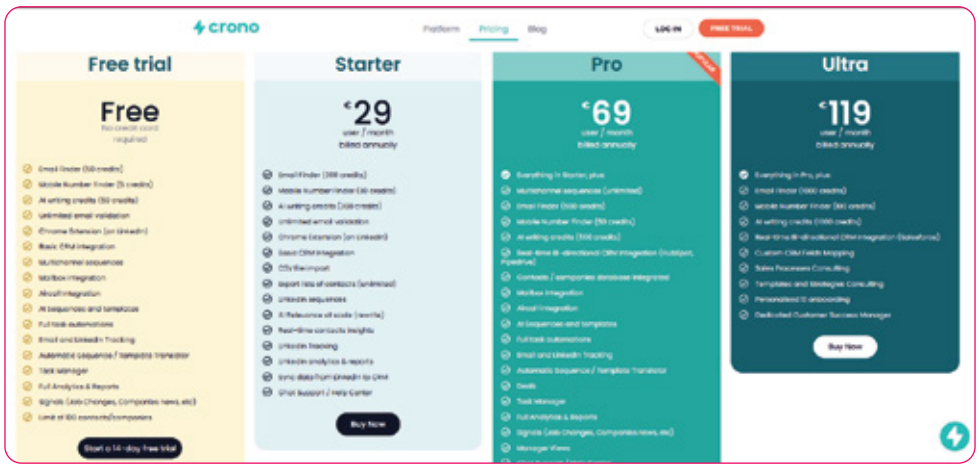
Julia Parzonka
Pricing Consultant
Valueships



Transparent pricing page: clearly disclosing the prices and features of each package

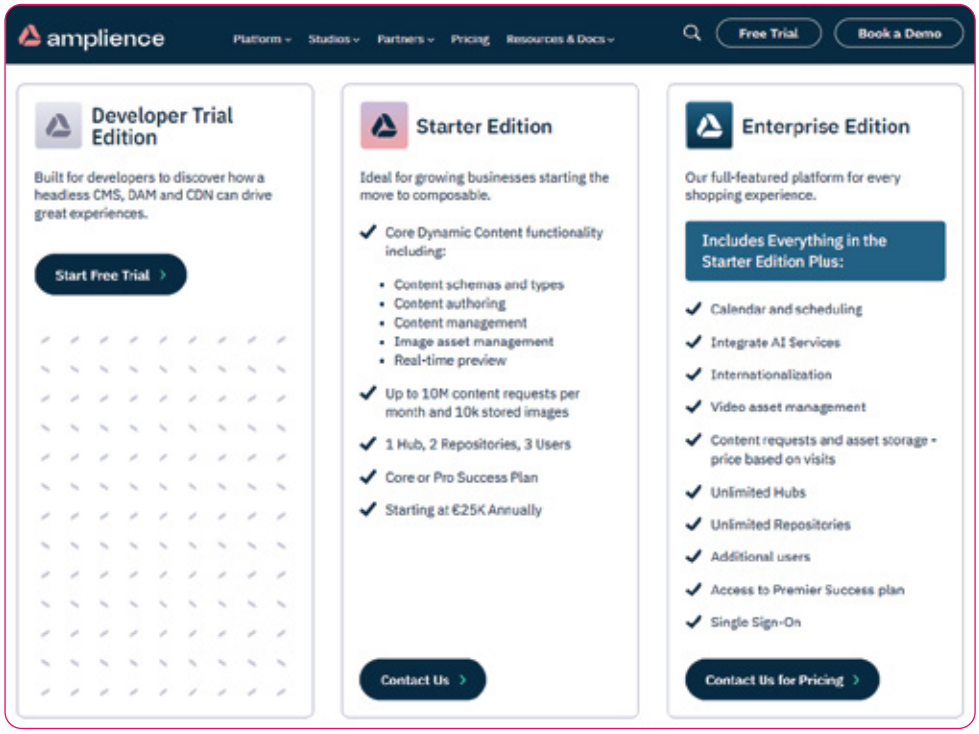


Fliplet: presents detailed information about its plans with clearly-listed prices.

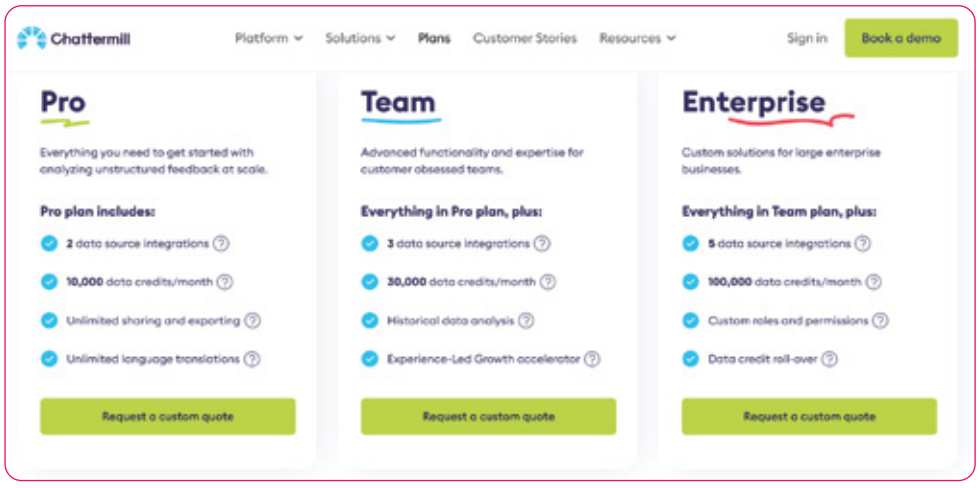


Crono: provides some information regarding the plans' benefits, along with the prices for each set.

Intransparent pricing page: a compromise between hiding prices and disclosing information regarding package features



Amplience: provides detailed information regarding the content of the plans but no pricing information.



Chattermill: lists the solutions they offer but provides no information of prices.

The dirty secret of AI SaaS Metrics that nobody wants to talk about



Our beloved revenue reporting models are breaking down, and VCs are starting to get twitchy.

Here's why: Traditional SaaS was a thing of beauty. Predictable recurring revenue, clear ARR, neat growth metrics. VCs could slap a multiple on it and call it a day. Everyone was happy.

Then AI came along, and suddenly revenue is a strange cocktail of:

- **Good old subscription revenue** (the VC favorite)
- **Usage-based revenue** (spiky and unpredictable)
- **Outcome-based revenue** (good luck forecasting that)

Now, when a VC asks, "*What's your ARR?*", the answer is increasingly, "*Well, it depends...*" And nobody likes that answer—not your finance team trying to build forecasts, nor your board staring at quarterly projections.

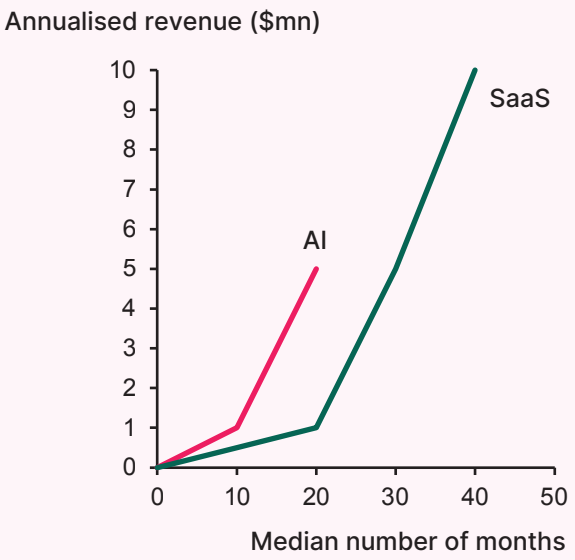
Here's the kicker: seasonality hits differently when you're charging for actual usage. Your "recurring" revenue isn't so recurring anymore. January might be 2x December just because your customers went AI-crazy after the holidays.

We need new metrics, new models, and new ways to talk about revenue that make sense in this hybrid world. But first, we need to admit that the old playbook just doesn't work anymore.

The companies that figure this out first will have a massive advantage in fundraising. Everyone else? They'll be stuck explaining why their "recurring" revenue keeps bouncing around like a ping-pong ball.

Welcome to the messy middle of the AI SaaS transition. Hope you like spreadsheets.

AI Companies generate money faster than their SaaS incumbents



Source: Stripe, FT graphic: Alan Smith

AI companies are revenue machines (and it's making traditional SaaS look like slowpokes)

Look at this beauty from Stripe. While traditional SaaS companies are taking the scenic route to revenue, AI companies are in the fast lane, burning rubber.

After month 10, it's not even a race anymore - AI companies just take off like they've got rocket fuel in their pricing strategy.

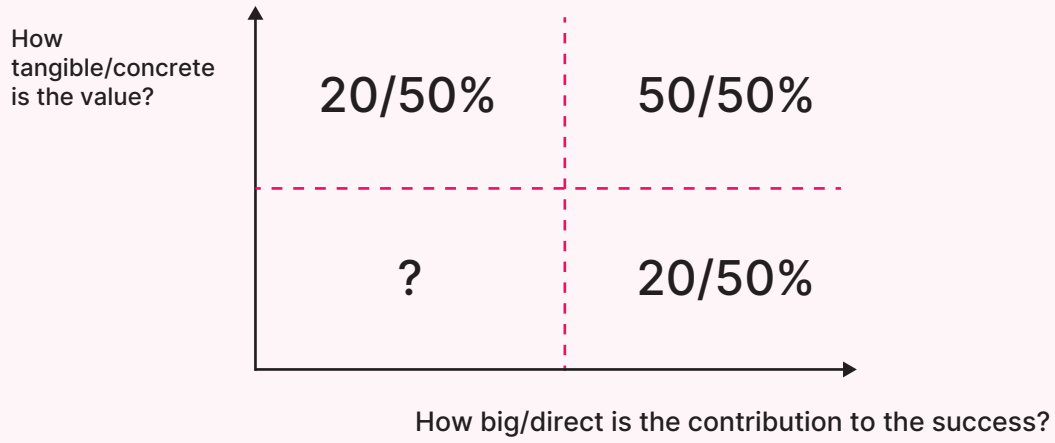
Traditional SaaS players might want to take notes... or start adding some AI before they get left in the dust.

Maciej Prokop
Senior Pricing Consultant
Valueships



Remember this chart? For most companies it’s hard to quantify value and prove they were necessary

Software moves towards higher value capture categories



“Price for value” they said. “It'll be easy” they said.

Reality check:

Who owns the success?

- Your AI?
- Customer's input?
- The implementation?
- The workflow?

Try attributing that.

What we need:

- Clear success metrics
- Fair usage limits
- Grace periods
- Regular reviews
- Attribution models

Outcome-Based Pricing: the beautiful theory that's breaking everyone's revenue models

"*Hey, let's just charge based on the value we deliver!*" - Every SaaS founder who hasn't tried it yet. Here's the messy truth: Outcome-based pricing sounds like a dream until you're in the trenches trying to measure "success." Is it time saved? Revenue generated? Problems solved? Happiness points?

The reality is more like:

- Your AI claims to "save 4 hours per week" but Karen from accounting swears it's making her job slower
- Your sales team is promising "10x ROI" while your engineers are crying about measuring attribution
- Your customers love the product but can't prove the ROI to their boss
- Your finance team is having a breakdown trying to forecast next quarter's revenue

And just when you think you've figured it out, some customer comes along and uses your product in a completely different way than you expected. Good luck measuring that outcome!

The plot twist nobody talks about: Traditional SaaS metrics were neat and tidy.

Monthly recurring revenue? Easy. Churn? Calculable. But AI products? They're forcing us to rethink everything we thought we knew about pricing models. The future isn't about picking the perfect pricing model - it's about building value tracking directly into your product. Because if you can't measure it, you can't price it. And if you can't price it, you're just another AI company with a fancy demo and a prayer.

Welcome to the new world of SaaS pricing, where the only thing harder than building the AI is figuring out how to charge for it. Don’t worry – we’re here to guide you through it!



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