

B2B SaaS is winging it on pricing.

How 50 VPs of Product, CMOs and CEOs actually decide what to charge.

62%

HAVE NO SINGLE PRICING OWNER

78%

DON'T DO RIGOROUS PRICING RESEARCH

62%

HIDE PRICING ENTIRELY

90%

LET COMPETITORS SHAPE THEIR PRICING

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Executive summary

We asked 50 senior B2B SaaS leaders how they actually decide what to charge. The honest version: most of them are making it up as they go.

Pricing is the single highest-leverage lever in B2B SaaS, and it's also the most neglected. Despite its importance to revenue, margin, and positioning, the way most companies arrive at their pricing is a mix of competitor benchmarking, informal customer conversations, and instinct. Very few apply the kind of rigor they'd demand from any other commercial decision.

Five findings define this study:

1 Pricing has no owner.

62% of companies named either a "cross-functional committee" or "other" (a write-in describing ad-hoc combinations of roles) as who owns pricing. The CEO, VP Product, and CFO each own it at under 15% of companies. When pricing is everyone's job, it's nobody's job.

2 Nobody does rigorous pricing research.

Only 22% of leaders do anything that would qualify as rigorous pricing research (A/B tests, conjoint, willingness-to-pay studies). 62% either don't test at all or just ask a handful of friendly customers. The default mode of pricing decisions is "gut and benchmark."

3 Most B2B SaaS hides pricing.

62% gate pricing behind "contact sales" and only 10% are fully transparent. The reasons cluster around three anxieties: competitors seeing prices, complexity in pricing structure, and heavy discounting that makes list price fiction. None are good reasons. All are tells.

4 Underpricing is the #1 regret.

When asked about their biggest pricing mistake, more leaders named underpricing and raising prices too late than any other single category. The fear of charging too much is not supported by the data. The cost of charging too little is.

5 90% let competitors set their pricing.

When asked how much competitor pricing influences their own, only 10% said "barely" or "not at all." Everyone else is calibrating to someone else's number. And that number, as the data repeatedly shows, is almost certainly wrong.

The pattern that emerges is this: pricing decisions in B2B SaaS are not decisions. They are vibes, shaped by what competitors publish and what AEs report. The companies that price well are the exceptions. The companies that price poorly are the rule.

This report documents both.

Methodology

This study was conducted by Wynter in April 2026 using Wynter’s verified B2B panel of senior decision-makers.

Sample size	50 respondents
Audience	VPs of Product, VPs of Product Marketing, CMOs, CEOs, Chief Product Officers, and equivalent at B2B SaaS companies
Company sizes	Mid-market (200-999 employees) and Enterprise (1,000+ employees), primarily in SaaS/software
Secondary industries	Fintech, financial services, IT services, cybersecurity, manufacturing, e-learning
Survey length	10 questions (8 open-ended, 2 multiple-choice)
Response format	Written, open-ended answers. Every response was typed by a verified decision-maker. No checkbox surveys.
Analysis	Qualitative coding of open-ended responses into themed categories. Multiple-choice answers tallied directly.
Fielded	April 2026

A NOTE ON SAMPLE SIZE

Fifty respondents is a deliberate choice, not a limitation. This study is qualitative-first research with senior B2B decision-makers, not a consumer poll. Fifty written responses from accountable pricing owners across dozens of companies delivers more signal than 500 checkbox responses from random panelists. The patterns documented in this report emerged repeatedly across the sample. Where 23 of 50 leaders say the same thing in their own words, that is a pattern worth acting on.

A NOTE ON QUALITATIVE CODING

Respondents often gave multi-theme answers. Where this occurred, the dominant theme was coded. In Q1 (how pricing models are set) specifically, the percentages sum to more than 100% because respondents frequently named multiple approaches. All other questions sum to 100%.

Cross-question correlations

The most interesting findings in this data are not inside any single question. They are the patterns that connect them.

Q2 × Q7

Companies that haven't changed pricing in years overwhelmingly regret underpricing.

The handful of companies that said their pricing hadn't changed in 3+ years disproportionately named underpricing or "waiting too long to raise" as their biggest mistake. Inertia has a cost. It compounds.

Q1 × Q7

Competitor-anchored pricing produces competitor-anchored regret.

Respondents who described their pricing method as competitor benchmarking were more likely to cite "race to the bottom" or "didn't capture value" as their mistake. The approach and the regret share a root cause.

Q4 × Q5

Companies that don't test pricing are the same companies that gate it.

Gated pricing and lack of testing reinforce each other. If you don't publish prices, you can't A/B test them. If you don't test, you have less confidence in the pricing you chose. The loop keeps tightening.

Q5 × Q8

Gated pricing strongly correlates with enterprise motion.

Almost every company that gates pricing runs an enterprise sales motion. Almost every company with transparent pricing runs a self-serve SMB motion. This is expected. What's less expected is how many enterprise companies gate pricing purely out of habit, even when their buyers would prefer transparency.

Q6 × Q5

Companies without a pricing page can't test it. Most don't realize that's a problem.

The majority of respondents who have never tested their pricing page cited, as the primary reason, the fact that they don't have one. What gets gated doesn't get optimized. The pricing page is the highest-leverage CRO target in B2B SaaS, and most companies have chosen not to have one.

Q2 × Q10

The companies repricing around AI right now are the same ones flying blind on AI pricing.

Respondents whose most recent pricing change was driven by AI overwhelmingly cited "how to price AI" as their biggest data gap. The category is in the middle of repricing itself with no playbook. Everyone is figuring it out at the same time.

Q9 × Q10

Everyone wants competitor data. Almost nobody is willing to publish their own.

The #1 wish in Q10 is better competitor pricing data. Yet 62% of these same companies hide their own pricing behind "contact sales." The industry has constructed a shared blind spot and then wishes someone would resolve it. Nobody will, because everyone benefits from the opacity except the collective.

Q4 × Q10

Leaders wish for data they refuse to collect.

A quarter of respondents wish they had better data on willingness to pay or price elasticity. These same respondents, in Q4, almost unanimously said they don't run WTP or conjoint studies. The data they want is the data they could collect. They simply don't.

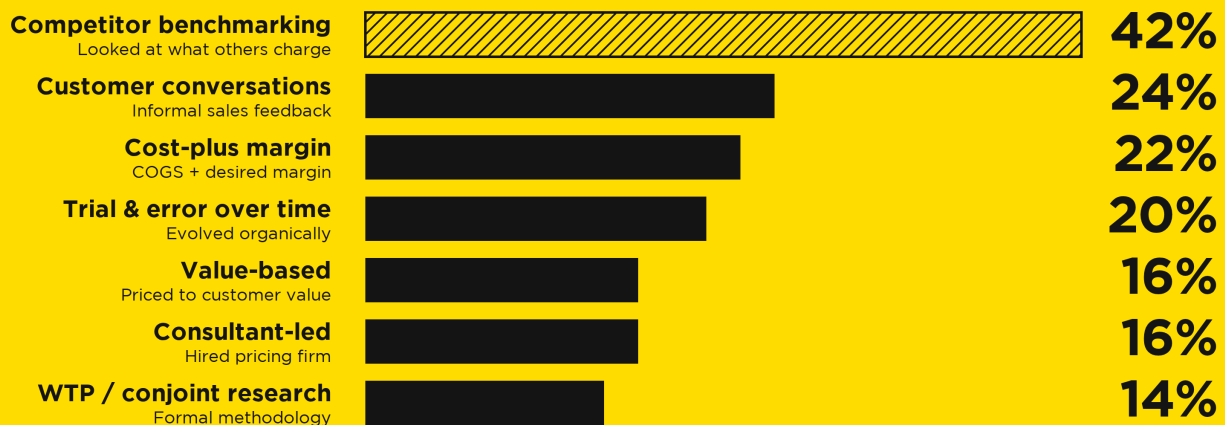
How pricing models are set

"How did you arrive at your current pricing model?"

Q1 — HOW PRICING MODELS ARE SET

Competitor benchmarking is the default way B2B SaaS sets pricing.

Most companies named multiple approaches. Benchmarking was cited most often.



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N=50 · April 2026

Wynter

What the data shows

Competitor benchmarking is the single most common method for setting B2B SaaS pricing. 21 of 50 respondents (42%) explicitly named "looking at competitors" as part of how they arrived at their model. Many named it as the first step.

The second most common approach is also informal: customer conversations and sales feedback (24%). Close behind are cost-plus margin models (22%) and trial-and-error evolution over time (20%). Value-based pricing was named by 16% of respondents. Consultant-led pricing exercises were also named by 16%. Rigorous willingness-to-pay or conjoint research was named by 14%.

Respondents frequently described multi-step journeys that blended several methods. Armani, a CMO and co-founder, summarized it this way:

"Over the 8 years it's been a mix of trial and error, historic data, benchmarking against competitors, and conversations with customers. I suspect GTM will always be a work in progress."

ARMANI, CMO & CO-FOUNDER · MID-MARKET SAAS

What stands out

Value-based pricing, the approach most recommended by pricing academics and consultants, was named by only 16% of respondents. This is notable because value-based pricing is treated as the gold standard in almost every pricing book published in the last decade. In practice, it is rare. Most companies who claim to do it are actually doing some form of competitor benchmarking dressed up in value-based language.

Cyrus, a CPO with 25 years of experience, was one of the few who articulated a consistent value-based philosophy:

"I have historically, meaning in the past 25 years, taken pricing as a percentage of value saved for the customer, whether it's time, effort, or system replacement. Anything else is just guesswork."

CYRUS, CHIEF PRODUCT OFFICER · ENTERPRISE SAAS

Consultant-led pricing (16%) was more common than I'd expected. Julius's company worked with Simon-Kucher in 2019. Kristy's company engaged a board-recommended consultant. Harlow used both consultants and Wynter for lightweight WTP research. Jaron hired a major consulting firm for a full study.

THE INSIGHT

The aspirational method (value-based pricing) and the actual method (competitor benchmarking) are different for most of the market. The gap is what Q7 will later call the #1 regret.

When pricing last changed

"When was the last time you made a significant change to your pricing or packaging? What prompted it?"

Q2 — WHEN DID PRICING LAST CHANGE

AI is forcing the fastest pricing-change cycle B2B SaaS has ever seen.

80% have repriced or are actively repricing right now.



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What the data shows

80% of respondents have changed pricing in the last 12 months or are actively in the process of doing so. Only 4% have pricing that's unchanged in 3+ years. This is the fastest pricing-change cycle B2B SaaS has seen in memory.

The dominant trigger is AI. Respondents repeatedly mentioned AI features, token costs, and outcome-based models forcing reconsiderations of existing pricing structures. Sharon, a VP of Product Management at an enterprise SaaS company, framed the tension:

"It's driven by market consolidation where products are now covering what used to be 4 separate markets. You can't charge 4x so you need to find ways to offer all-in-one pricing without giving the house away. We also have to come up with pricing for new capabilities, mainly driven by AI."

SHARON, VP PRODUCT MANAGEMENT · ENTERPRISE SAAS

Ernesto from an enterprise SaaS company described the AI pressure explicitly: "Typically, any AI feature that enhances COGS quite a bit, we have to revisit the pricing structure,

whether it's creating more enterprise licensing programs that are credits-based or just figuring out if we need to package things differently within add-ons."

Other triggers named repeatedly include:

- Market consolidation (as in Sharon's quote)
- New features or product capabilities launched
- Customer feedback about complexity or friction
- Moving up-market to new segments
- Bundling simplification (Monique, Neil, Gregg)

What stands out

The "3+ years unchanged" cohort is tiny (2 companies in the sample). But when you cross-reference their Q7 answers, they disproportionately name underpricing as their biggest mistake. Candice's company hasn't changed pricing since origin and explicitly flagged: "We will look expensive and not outcomes based" at upcoming renewals. Pricing stability feels safe; it isn't.

THE INSIGHT

AI has compressed the pricing-change cycle from multi-year to ongoing. The companies figuring out how to price AI capabilities are the same ones, in Q10, begging for data on how others are doing it. Everyone is flying blind, in public, at the same time.

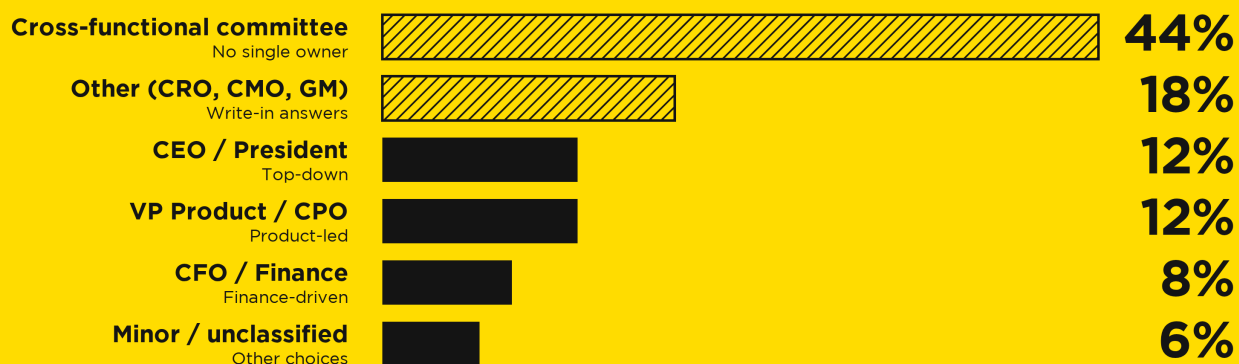
Who owns pricing decisions

"Who owns pricing decisions at your company?"

Q3 — WHO OWNS PRICING DECISIONS

Pricing has no single owner in B2B SaaS.

62% of companies have no individual accountable for pricing.



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N=50 - April 2026

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What the data shows

22 of 50 respondents said a cross-functional committee owns pricing. Another 9 wrote in custom answers that described similar arrangements: "a mix of product marketing, CRO and CFO," "Chief Product Officer plus CFO," "General Managers of our portfolio brands."

That's 62% of companies where no single individual is accountable for pricing.

The remaining distribution is scattered: CEO (12%), VP Product or CPO (12%), CFO (8%), plus minor choices. Two companies in the sample have a dedicated "Chief Pricing Officer" function. Several have pricing owned by the Chief Revenue Officer.

What stands out

Ownership fragmentation is the rule, not the exception. And where the CEO does own pricing, it rarely sounds strategic. It sounds like the CEO got pricing because nobody else wanted it. One VP described ownership as "a mix of product marketing, CRO and CFO," which functionally means no one.

The companies in this sample with the cleanest pricing stories had one common trait: a single accountable owner. Amanda's company has a Chief Pricing Officer. Julius's company has a dedicated Market Intelligence team that owns pricing as part of their mandate. Albert's company has the CEO owning it explicitly, with rigor (hundreds of tests on the pricing page).

Most companies don't have any of this. And when pricing is a committee function, three predictable things happen:

- Nobody has time to run rigorous pricing research (see Q4)
- Price changes only happen when something breaks externally
- Sales gets blamed for discounting, but no one owns the root cause

THE INSIGHT

Find a B2B SaaS company with great pricing and you'll find one person who owns it. Find one with mediocre pricing and you'll find a committee.

Pricing research rigor

"Have you ever tested different pricing before rolling it out? If yes, how?"

Q4 — PRICING RESEARCH RIGOR

Only 22% of B2B SaaS does rigorous pricing research before rolling out.

62% either don't test or just ask a few friendly customers.



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What the data shows

22 of 50 respondents (44%) "tested" pricing by asking a few customers informally. Another 9 (18%) said they never tested pricing at all before rollout.

Only 11 respondents (22%) do anything that qualifies as rigorous pricing research: A/B tests on pricing pages (12%) or formal conjoint analysis and willingness-to-pay studies (10%).

Live sales experiments (16%) sit in the middle: A/B pricing through different reps or regions. Pablo's company does this across APJ vs. North America. Hal's company uses Australia as a test market. Cotton's company refines new packages regionally before broader rollout.

Quotes worth reading twice

"I've always been skeptical about how one would even do that, given that asking customers what they want to pay doesn't work."

EVERT, CHIEF PRODUCT OFFICER · MID-MARKET FINTECH

Evert is right that naively asking "what would you pay?" is useless. He is wrong that there is no alternative. Conjoint analysis, Van Westendorp, anchored cohort testing, structured ICP research — these all exist, and they work. Most companies simply don't run them.

"Not really, mostly because we haven't had the time/resources to run tests. We have been aware that we are not pricing optimally but haven't really known how to improve. It is painful for us."

MONIQUE, VP PRODUCT DEVELOPMENT · ENTERPRISE SAAS

Monique's honesty is remarkable. She knows the pricing is wrong. She doesn't know how to fix it. And the company hasn't invested in the capability to find out.

What stands out

The "informal" bucket dominates this question. When leaders say they "tested" pricing, what they usually mean is: "we ran it by 5 friendly customers and they said the number sounded reasonable." This is not testing. This is confirmation-seeking.

A handful of respondents do real research. Jayda's prior company ran conjoint analysis. Branden's company uses focus groups, financial modeling, and A/B tests. Hal's company used Van Westendorp and conjoint analysis to set pricing and validates with sales teams via a CPQ tool. Harlow used external consultants plus Wynter for lightweight WTP research.

THE INSIGHT

Pricing research is accessible, effective, and rare. Most companies could run rigorous WTP studies for a fraction of what they spend on sales enablement. They simply don't.

Pricing page transparency

"Does your pricing page show prices, or do you gate it behind 'contact sales'? Why did you make that choice?"

Q5 — PRICING PAGE TRANSPARENCY

Most B2B SaaS hides pricing behind 'contact sales.'

Only 1 in 10 is fully transparent about pricing.



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What the data shows

31 of 50 respondents (62%) hide pricing entirely. 14 (28%) use a hybrid approach: SMB tiers visible, Enterprise gated. Only 5 (10%) are fully transparent about pricing.

The reasons for hiding pricing fall into three themes, each articulated repeatedly across the sample:

1. **Competitive fear.** "Showing prices in our area will just help competitors to cross-position against leader." (Hurley)
2. **Complexity rationale.** "Our pricing is variable in our industry based on safety record, workers comp rate, unemployment rate, payment terms, insurance needs, etc." (Dennis)
3. **Discount reality.** "We offer discounts on our products so no one pays 'retail' for our products. Thus, it wouldn't be great to show prices online." (Gregg)

Transparent companies tell a different story. Sadie, a VP of Marketing, said flatly:

"Transparency is a core belief for us. Why hide the pricing? We have discounts available in certain scenarios that we mention, but our customers like the

transparency."

SADIE, VP MARKETING · MID-MARKET SAAS

What stands out

Each of the three reasons for hiding pricing is, on closer inspection, a tell.

If competitors can weaponize your pricing, your positioning is not strong enough. If your pricing is too complex to publish, your buyer thinks it's complex too, and deals die in procurement. If you discount heavily enough that list price is fiction, you've trained every AE to cave and every buyer to push harder.

Meanwhile, the transparent 10% are not naive. They've made a strategic bet that buyers self-qualify faster when they can see prices, which saves the sales team from low-quality conversations. The data doesn't tell us whether their bet is paying off in revenue, but it tells us their rationale is coherent.

Kristy's story is instructive in the opposite direction. Her company used to publish pricing and found it backfired: "Some international customers would use it to drive down our prices well below rate card. As a result, we had become the 'cheap' or 'low cost' provider who always had to compete on price." Her company removed the pricing page entirely. Whether that's the right response is another question. The point is that transparency is not neutral.

THE INSIGHT

"Contact sales" is a business decision, but for many companies it's also a confession. It often means "we don't know what to charge you," not "our pricing is too premium for a public page."

Pricing page testing

"Have you ever run qualitative pricing page tests or A/B tested significant changes to your pricing page? What did you learn?"

Q6 — PRICING PAGE TESTING

The pricing page is rarely tested, even by companies that test everything else.

The most commercially important page. Mostly unoptimized.



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What the data shows

29 of 50 respondents (58%) have never run any test on their pricing page. 17 (34%) have run A/B tests. 4 (8%) have run qualitative research only (customer interviews, focus groups).

The pricing page is the single most commercially important page on a B2B SaaS website. For a majority of companies, it is also the least optimized.

The reasons leaders gave for not testing cluster into structural and strategic buckets:

- **Structural:** "We don't have a pricing page" (the majority). You can't test what isn't published.
- **Volume:** "We don't have enough traffic for meaningful tests." (Armani)
- **Sales cycle:** "Our sales cycles are so long, that it would make it hard to get quick reads on something like an A/B." (Gregg)
- **Complexity:** Bundling makes isolated testing impractical.

The testing minority

The companies that do test tell a different story. Albert, a CEO, has run "literally hundreds of tests" on his pricing page — layouts, plan types, prices, SKU names. His biggest lesson:

"While many of these were confirmatory, there were more failures than successes. That's the biggest learning. And usually the biggest wins required multiple iterations."

ALBERT, CEO · ENTERPRISE SAAS

Abel, an SVP of Product Marketing, frames pricing page testing as non-negotiable:

"The pricing page is one of the most heavily trafficked pages at every company, so running A/B tests is crucial. I have done a ton of testing on CTAs, how to show Free Tier side by side with paid tiers, or not show free at all."

ABEL, SVP PRODUCT MARKETING · MID-MARKET SAAS

These voices are the minority in this data.

What stands out

There is a self-reinforcing loop between Q5 and Q6. Companies that hide pricing (Q5) can't run pricing page tests (Q6). Companies that don't test (Q6) have less confidence in their pricing (Q4). Companies with less confidence default to gating pricing (Q5). The loop produces the exact outcome most companies say they want to avoid: mediocre pricing, static for too long.

THE INSIGHT

B2B marketers A/B test hero headlines and CTA button colors religiously. They don't test the one page that determines revenue. The pricing page is the highest-leverage CRO target in B2B SaaS, and 58% of the market has chosen to leave it unoptimized.

Biggest pricing mistake

"What's the biggest pricing mistake you've made?"

Q7 — BIGGEST PRICING MISTAKE

Underpricing is the #1 regret in B2B SaaS pricing.

More leaders regret charging too little than any other mistake.



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What the data shows

This is the richest question in the study. Every response is a story. Coded into themes, the mistakes cluster as follows:

- **Underpriced or raised prices too late:** 10 respondents (20%)
- **Overcomplicated pricing:** 8 respondents (16%)
- **Wrong pricing model for the market:** 8 respondents (16%)
- **Rolled out pricing changes badly:** 8 respondents (16%)
- **Didn't do enough research:** 7 respondents (14%)
- **Over-discounted to win deals:** 5 respondents (10%)
- **No major mistake named:** 4 respondents (8%)

Underpricing is the single largest bucket. And across the study, more leaders regret charging too little than any other single failure mode.

The underpricing confession

"We priced too low for a long time, especially when we first launched our highest tier SKU. Had we started higher we would have grown faster and I feel confident that the market and customers would have borne it."

ALBERT, CEO · ENTERPRISE SAAS

"Rushing to market with transparent pricing that was too low, which resulted in leaving money on the table. We underestimated the WTP and it was really hard to walk that back."

SHELBY, VP PRODUCT MARKETING · MID-MARKET SAAS

"Not pricing for enterprise buyers high enough thinking we didn't provide enough value to them. Fixing that allowed us to both increase price and convert at a much higher and faster rate."

COTTON, VP GM PRODUCT MANAGEMENT · MID-MARKET SAAS

Read Cotton's quote twice. Raising prices increased conversion, not the other way around. This is the pattern buried in every "we priced too low" story. Higher prices didn't kill deals. They accelerated them. Because price is a signal: a cheap price says "commodity, negotiate me down"; a confident price says "we know what this is worth."

Other patterns worth noting

Overcomplicated pricing (16%) is the second most common regret. Lee, a Senior Vice President, described it in terms any B2B marketer would recognize: "We had too many offerings and packages, which just confused buyers and slowed everything down. Harder for sales to tell a clean story, harder for customers to understand what they're actually getting."

Over-discounting to close deals (10%) produces its own regret cycle. Rafael, a CMO, said it plainly: "Our AEs cave too quick to the customer when asking for better pricing — we need to hold to best price and prove the value of our solution." When the organization doesn't defend its price, the price itself loses meaning.

THE INSIGHT

Most founders worry they'll charge too much. The data says the opposite. The asymmetry of pricing mistakes in B2B SaaS is simple: if you price too high, you find out quickly and correct. If you price too low, you find out in five years when you're drowning in low-margin support.

Pricing by segment

"How do you handle pricing for enterprise vs. mid-market vs. SMB? Do you use the same page/model or different approaches?"

Q8 — PRICING BY SEGMENT

Two-thirds use the same pricing model across all customer segments.

Enterprise and SMB buy differently. Most pricing models don't reflect that.



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What the data shows

18 of 50 respondents (36%) use the same pricing model across all segments, with volume discounts being the main lever for bigger customers. Another 11 (22%) use the same base model but package it differently for different segments. 16 (32%) use fundamentally different pricing models per segment. The remaining 5 (10%) only serve one segment.

The split between "same model" and "different models" is roughly even. What's telling is that two-thirds of the market (58%) doesn't meaningfully differentiate pricing models by segment — they just flex prices or bundles within one model.

The segmentation argument

The most articulate case for true segment-level pricing came from Branden:

"Enterprise focus is on risk reduction and predictability of pricing, as enterprise budgets cause concerns with overruns. Multi-year contractual terms. Mid-Market focus

is ROI and TCO-aligned pricing to guide the return on investment. SMB focus is on simplicity and direct self-serve pricing model (per user), monthly terms."

BRANDEN, VP PMM · ENTERPRISE SAAS

Three different buyers. Three different budgets. Three different timeframes. Three different things they care about. In Branden's framing, treating them all with the same pricing model is malpractice.

Joyce, a CEO, was blunter:

"No! The variation between Enterprises is enormous — they normally have bigger budgets, they tend to outsource services, and they are willing to pay extra for convenience and availability."

JOYCE, CEO · MID-MARKET SAAS

Lee, a Senior Vice President, described the consequence of not segmenting:

"We tried to stretch the same model across all segments and it got messy. Enterprise, mid market, SMB all buy differently, but we were forcing them through the same structure. Created confusion, longer cycles, and mismatched expectations."

LEE, SENIOR VICE PRESIDENT · MID-MARKET SAAS

What stands out

The "same model across segments" approach is most common among mid-market SaaS companies with enterprise ambitions. They built pricing for their initial SMB or mid-market ICP, then scaled the same pricing up rather than rebuilding it. This is efficient but leaves enterprise deals under-captured, as Cotton's Q7 regret illustrates.

Companies that truly segment (32%) pay a complexity tax but often capture more value per deal. Lily's enterprise deals are bespoke; her SMB pricing is standardized. Jayda's SMB is self-serve transparent; her enterprise is "contact sales" with heavy negotiation. These companies have internalized that SMB and enterprise are different animals, not the same animal at different scale.

THE INSIGHT

SMB and enterprise buy differently. Two-thirds of B2B SaaS pricing models don't reflect that. The companies that segment pricing tend to have better unit economics at the top of their customer base — they just paid a complexity tax to get there.

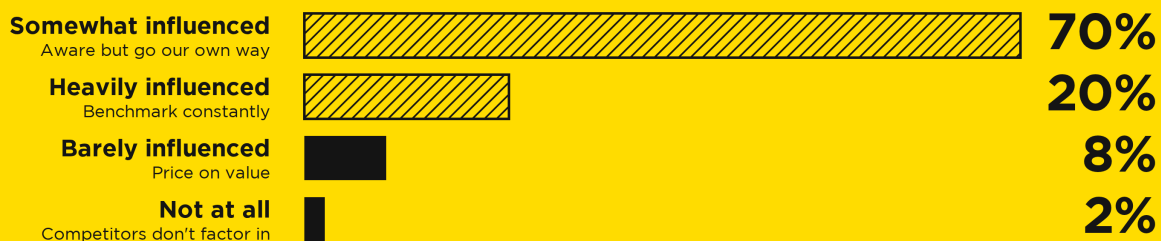
Competitor pricing influence

"How much does competitor pricing influence your own?"

Q9 — COMPETITOR PRICING INFLUENCE

90% of B2B SaaS lets competitor pricing shape their own.

Only 5 companies (10%) genuinely ignore competitors.



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What the data shows

35 of 50 respondents (70%) said competitor pricing influences their own "somewhat — we're aware but go our own way." Another 10 (20%) said "heavily — we benchmark constantly." Only 4 (8%) said "barely — we price on value." And just 1 respondent said competitors don't factor in at all.

Combined, 45 of 50 companies (90%) let competitor pricing shape theirs in some form. Only 5 (10%) claim they don't.

The diplomatic answer

The 70% who picked "aware but go our own way" deserve special attention. This is the diplomatic answer. It sounds independent. In practice, it usually isn't. Read their Q1 responses about how they arrived at their pricing, and competitor benchmarking shows up in nearly every answer.

"Aware but go our own way" is what leaders say when they don't want to admit they opened their competitor's pricing page last week and adjusted.

"Looked at competitor pricing a bit, but really just put it out there and adjusted it over time."

RAFAEL, CMO · MID-MARKET SAAS

"Pricing is determined by the COGS plus the known competitive pricing out there for comparable products. It is effectively a cost plus margin model."

JANE, VP MARKETING · MID-MARKET SAAS

Both Rafael and Jane picked "somewhat" in Q9. Both described clear competitor influence in Q1. This is not independence.

What stands out

The minority who genuinely price on value (8%) are the most successful pricing operators in the sample. They tend to have strong positioning, clear differentiation, and management teams willing to defend higher prices. Cyrus, Amanda, and a handful of others describe pricing systems built around customer-value anchoring rather than competitor references.

The problem with competitor-anchored pricing is that it is a closed loop. If three competitors look at each other and adjust, they converge on the same number. And that number, as the data in this study repeatedly shows, is almost certainly wrong — because competitor-anchored pricing is also how companies end up underpriced (see Q7, the #1 regret).

THE INSIGHT

Competitor pricing is information, not strategy. 90% of B2B SaaS treats it as both. The 10% who genuinely price on value do it because they've invested in the research and capability to know what their customers will pay. Most companies don't have that capability, so they borrow a number from someone who might be equally wrong.

Data leaders wish they had

"What's one thing about SaaS pricing you wish you had better data on?"

Q10 — DATA LEADERS WISH THEY HAD

The biggest data gap is willingness to pay, the one thing only customers can tell you.

Competitor data is desired but obtainable. WTP is the real gap.



Wynter study · VPs of Product, Marketing & CEOs

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Wynter

What the data shows

The #1 wish in this sample is competitor pricing data (24%). Respondents want to know what competitors actually charge, what discounts they give, and what customers actually pay after negotiation.

But the more interesting wishes are the ones customers can only tell you themselves: willingness to pay and price elasticity (18%), value-to-price mapping (14%), and how AI should be priced (18%).

Combined, 32% of respondents wish for data that can only come from talking to customers — WTP, value mapping, retention signals. This is data they could collect in weeks with a well-designed study. Most don't.

The willingness-to-pay gap

"We know we create value for our customers but there seems to be a multiple in what customers are willing to pay versus that value creation. For example, if we create \$125 for a customer, they're not willing to pay \$100 — but they might be willing to pay \$50. What is the right multiple?"

IDRIS, VP OF PRODUCT · MID-MARKET SAAS

"Willingness to pay at the segment and feature level is data we are missing, especially at the feature level when we are in planning. We can definitely get some intelligence through qual testing, but it's still quite murky. I think every 12-18 months we get itchy to revise and review and optimize packaging, but it feels very anecdotally driven vs hard data."

COTTON, VP GM PRODUCT MANAGEMENT · MID-MARKET SAAS

"I would love to understand price sensitivity across different customer segments, not just overall averages. We lack insight into willingness to pay, which varies across power users, casual users, and different business sizes."

IRENE, VP OF PRODUCT · MID-MARKET SAAS

The AI pricing gap

Nine respondents (18%) wish they had better data on AI pricing. Julius wants to understand "how the changes coming to pricing models as a result of AI should influence our pricing model." Abel said it bluntly: "Right now it's all about how to price the use of AI." Cooper: "Where is the market really going with AI and pricing?"

This is the same group that's actively repricing around AI (see Q2). They're rewriting pricing with no playbook. The category is figuring it out in public, together, and wishing someone had done the work already.

What stands out

The structural irony of this question is that most of the data these leaders wish they had is data they themselves could commission. Conjoint studies exist. WTP research exists. ICP interviews exist. They're within reach of any company over \$10M ARR.

The data isn't hiding. It's sitting in rooms full of customers these companies haven't asked.

Competitor pricing data, interestingly, is the one category where the wish is partially valid — you can triangulate competitor pricing through sales intel, Reddit, public pricing pages, and SEC filings, but it's harder to get the real invoiced prices after discounting. That part is structural to the industry's opacity (see Q5).

THE INSIGHT

Willingness-to-pay is the single biggest knowable-but-unknown in B2B SaaS pricing. It's also the one piece of data you can only get from your ICP. Competitor data is desired but obtainable through normal market intelligence. WTP is the real gap, and it only closes when companies actually ask their customers.

What this means for pricing teams

The patterns in this data are clear, and they are actionable.

If you take five things away from this study, take these:

1. NAME THE OWNER

Pricing without a single accountable owner does not get better over time. It gets older. Assign one person. Usually that should be the CPO or CRO, occasionally the CFO for enterprise-heavy motions. Almost never a committee.

2. RUN ONE REAL PRICING STUDY THIS YEAR

Not a customer conversation. Not sales feedback. An actual study with 50-150 target ICP respondents and structured methodology (Van Westendorp, conjoint, or value-anchored research). The cost is modest. The alternative is continuing to guess.

3. TEST YOUR PRICING PAGE, OR START PUBLISHING ONE

The pricing page is the highest-leverage CRO surface in B2B SaaS. If you have one, test it. If you don't, the strategic question isn't whether to test — it's whether the reasons you don't have a pricing page actually hold up, or whether they're inherited anxieties that no longer apply.

4. RAISE PRICES BEFORE YOU THINK YOU SHOULD

The #1 regret in this study was underpricing. The second most common regret was raising prices too late. The market bears more than most founders believe. The cost of being wrong about charging too much is small and fast to correct. The cost of being wrong about charging too little is large and slow.

5. STOP PRETENDING COMPETITOR BENCHMARKING IS A STRATEGY

If your pricing is derived from three competitors' pricing pages and they derived theirs from yours, you are all converging on a number that nobody actually validated against customer value. Do the value-anchored work. It's the only way out of the loop.

A note on the state of B2B SaaS pricing

The pattern documented in this report is uncomfortable but worth naming directly: pricing in B2B SaaS is not a strategic discipline. It's a reactive function, mostly done poorly by people who don't want to own it. Most companies know their pricing is wrong. Most don't know how to fix it. Most haven't invested in the capability to find out.

This isn't a failure of intelligence. These are smart, experienced operators. It's a failure of priority. Pricing has not historically been treated as a core competency in B2B SaaS the way it is at a Simon-Kucher or a Patrick Campbell shop. That may change as AI reshapes pricing economics across the industry. It may not.

The companies that treat pricing as a discipline, not a decision, will capture disproportionate value over the next decade. The companies that continue to wing it will find themselves in the same place they are now: aware their pricing is wrong, unable to say how wrong, and underpricing by default.

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