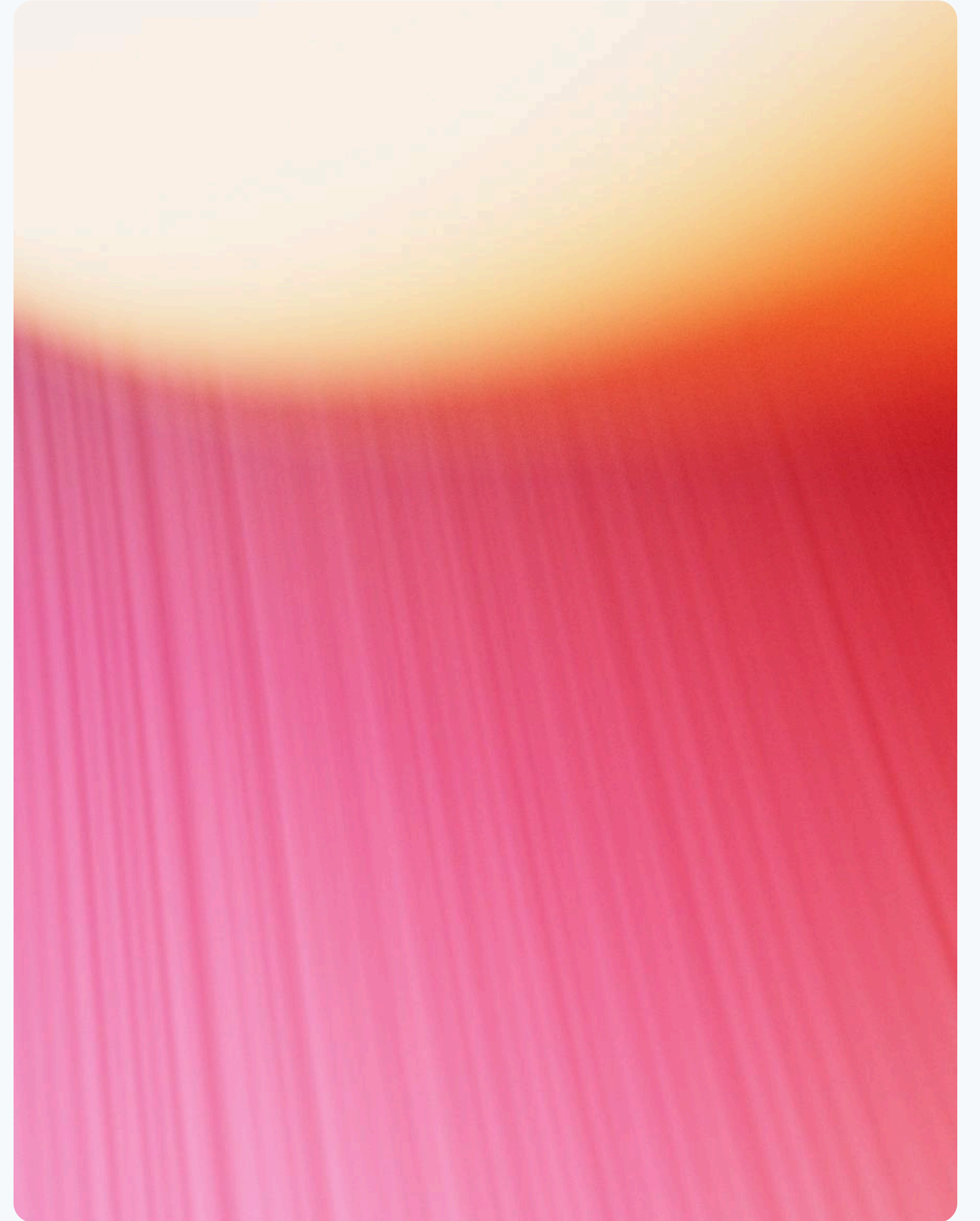




Five pricing trends from the fastest- growing companies



High-growth companies respond to uncertainty with flexible pricing

We surveyed around 2,000 global businesses to understand how they price their products and services within a landscape transformed by surging AI adoption. We found that what distinguished high-growth companies wasn't a single model or method.

Instead, these companies focused on flexibility: they combined pricing models, experimented with pricing, and saw the value of their product as something that was continually evolving. These tendencies were even more pronounced when we looked at the very fastest-growing companies in our sample.

In this report, we'll highlight five pricing lessons from the high- and hyper-growth companies we surveyed.

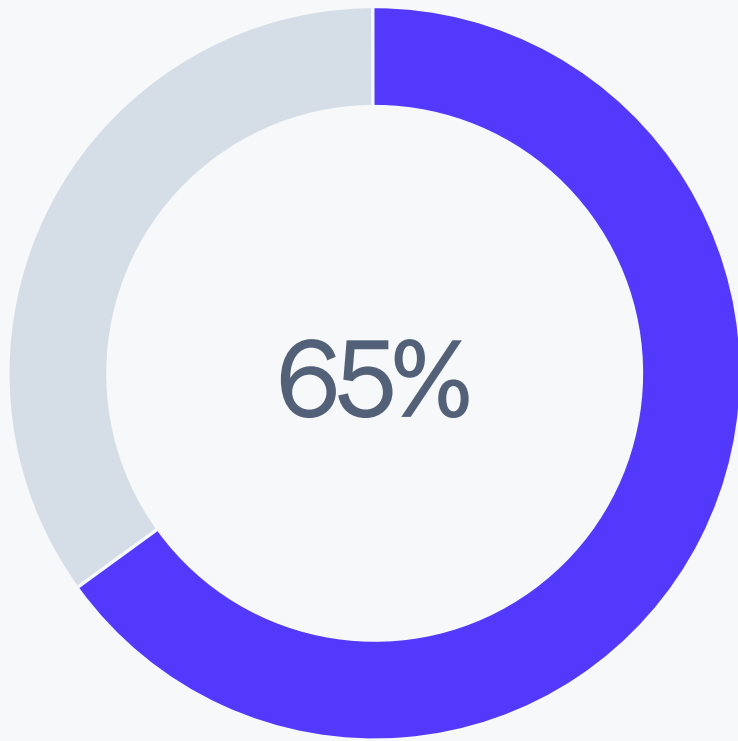
Definitions

High-growth: 20%+ year-over-year growth

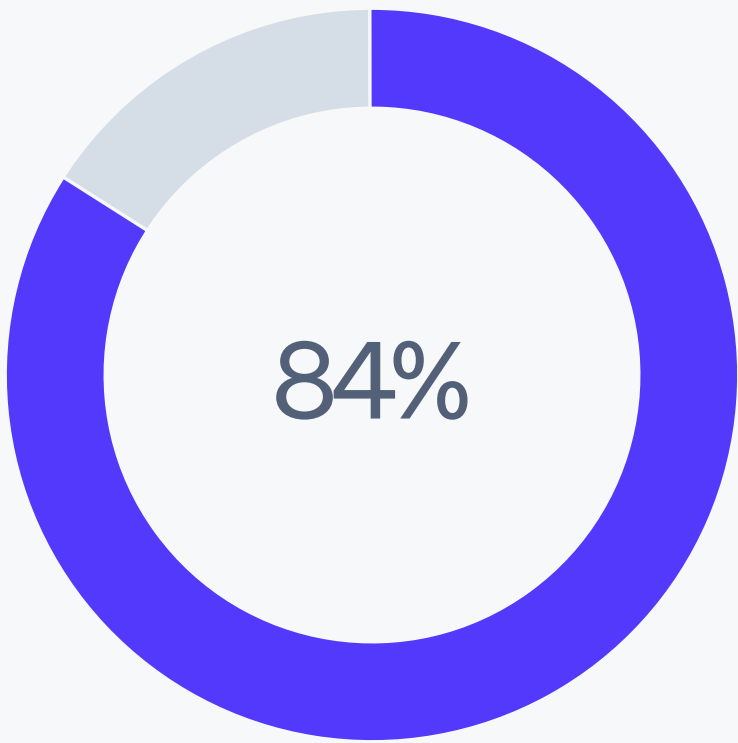
Hyper-growth: 100%+ year-over-year growth

For more information, please see [Methodology](#).

65% of global business leaders say that their industry is changing quickly, and that they aren't sure their pricing model will support their needs for the future



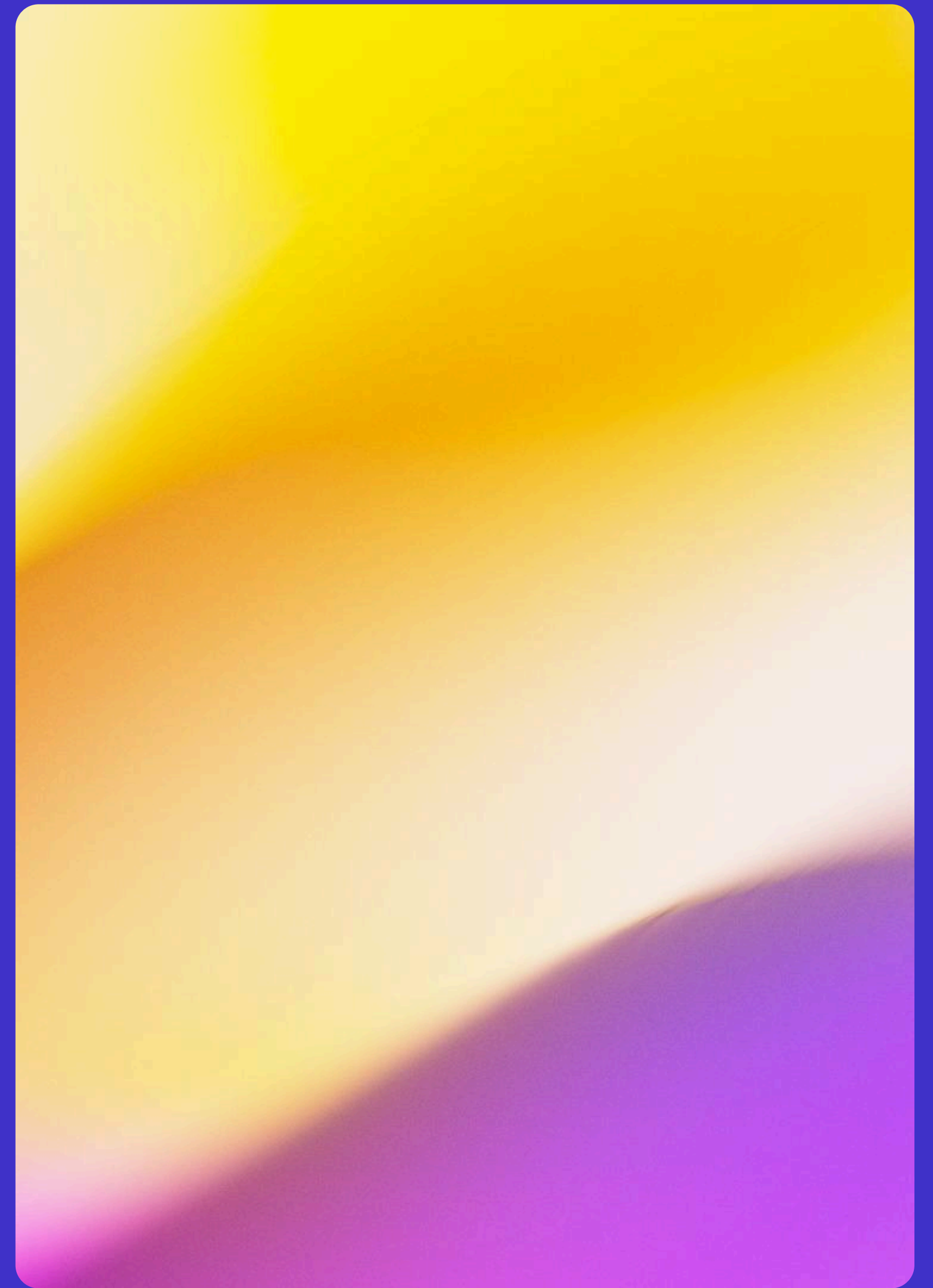
84% say that adapting pricing quickly will be a key competitive advantage in the next 1–2 years



High-growth companies are more likely to:

→ Adopt a hybrid pricing model that pairs usage-based and subscription fees	04
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High-growth companies are more likely to adopt hybrid pricing



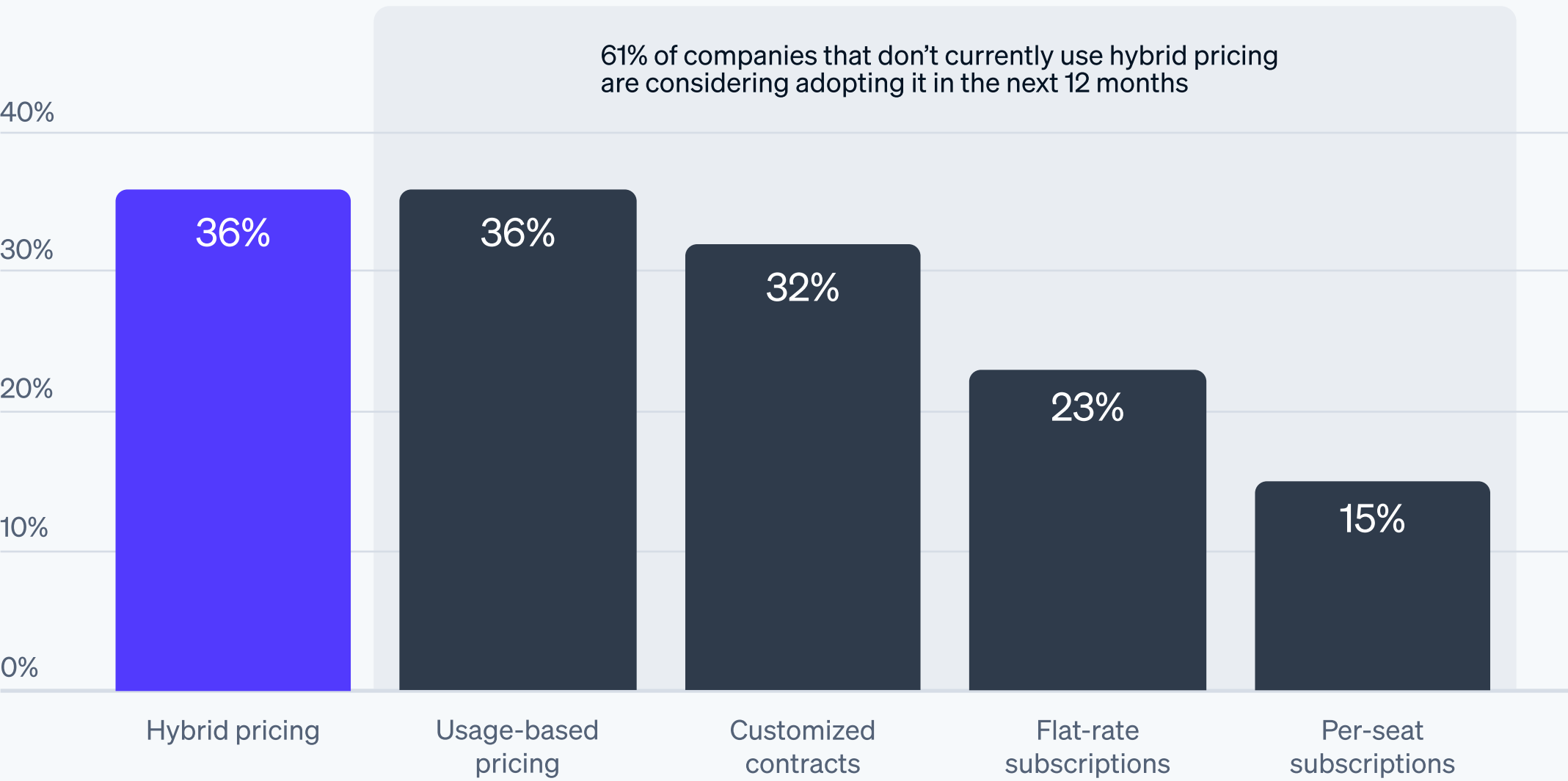
Hybrid pricing is widely adopted, and poised to grow

Hybrid pricing models typically pair a recurring “base” fee with a usage-based “scaling” fee. This approach can solve a common pricing challenge for businesses: offering the predictable, recurring revenue of a subscription model while ensuring any usage costs that exceed subscription revenue are still covered.

Hybrid pricing is particularly well-suited for pricing AI products. We found that AI companies were nearly twice as likely to report using hybrid models than the global sample.

But adoption of hybrid pricing was strong across our sample; along with usage-based pricing, it was the most commonly selected model. And even more businesses reported that they were considering adopting it over the next 12 months.

Across our survey, businesses reported* adopting the following pricing models:



* Respondents were invited to select multiple answer options if applicable.

Hybrid pricing adoption correlates with growth

Our data shows that hybrid pricing was the model of choice among our highest-growth businesses—whether they were AI businesses or not.

A hybrid approach provides a wide range of levers to adjust: subscription elements, prepaid credits, overage charges, pay-as-you-go charges, and more. This setup offers businesses significant flexibility to respond to market changes without overhauling their underlying billing infrastructure.

High- and hyper-growth companies were more likely to report using hybrid pricing than the global sample, while low-growth businesses were less likely to report using hybrid pricing.



B Browserbase Customer spotlight

Browserbase uses hybrid pricing to stay flexible

To interact with websites, AI agents rely on specialized, “headless” browsers that lack a graphical interface and live in the cloud. Browserbase is a platform that helps developers host and manage these browsers. With customers varying significantly in how many browser hours they used and how much data they consumed, Browserbase needed to tie its pricing structure to the data from millions of browser sessions every month—while at the same time keeping recurring revenue predictable.

With Stripe Billing, Browserbase was able to implement a hybrid solution that combines base subscription tiers—which each include a set number of browser hours per month—with pay-as-you-go overages. After launch, the company continued to experiment with new subscription tiers and different kinds of volume-based discounts to optimize customer acquisition and retention—all without making significant changes to its underlying billing infrastructure.

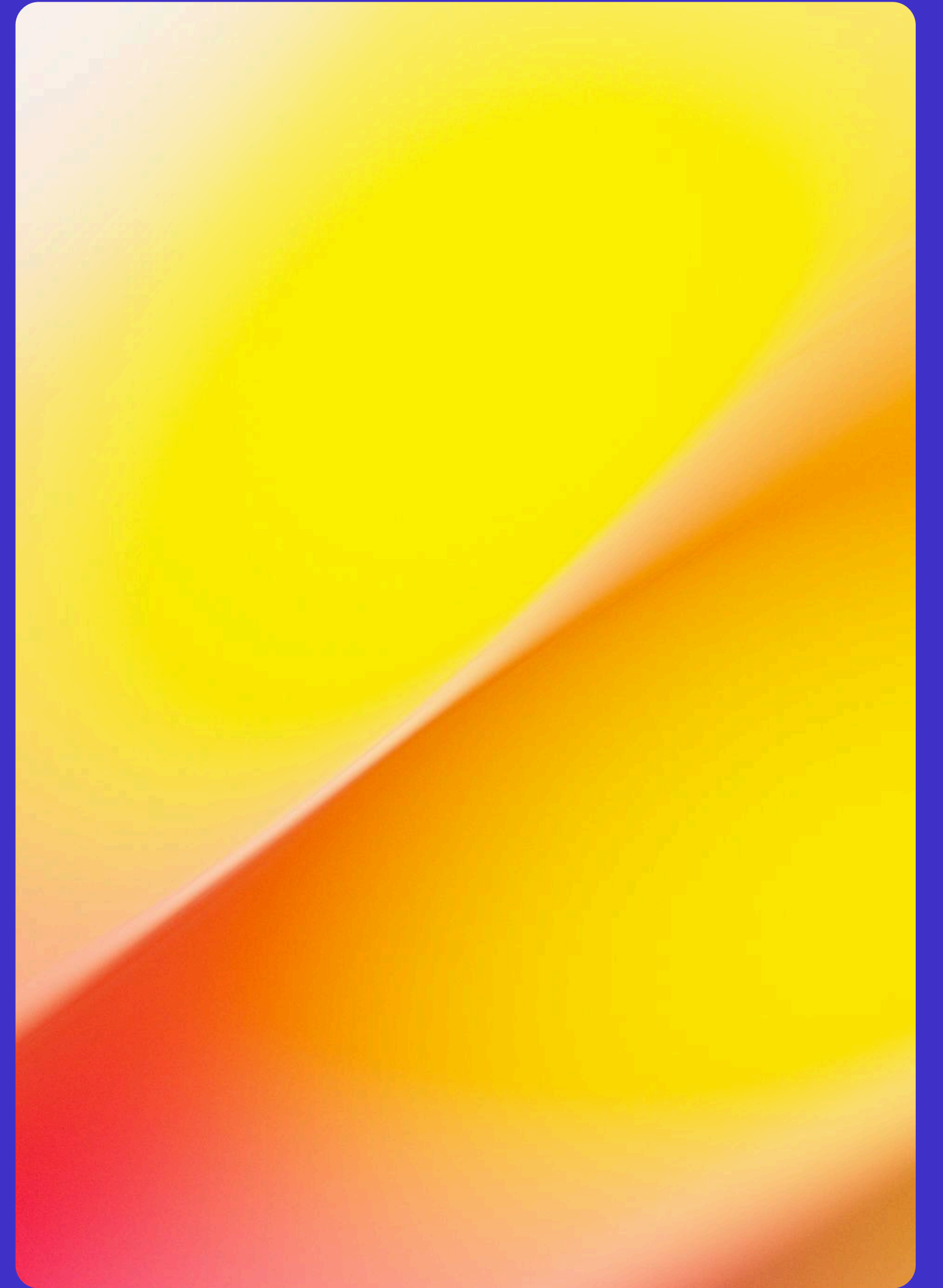
[Read the full case study](#) →

“ We are measuring a lot of usage and have a variety of ways people can get discounts. That meant we needed a flexible billing platform that is highly accurate even with large quantities of data...

Stripe Billing scaled with us throughout our entire business, from zero to millions of dollars in revenue.”

Paul Klein IV, Browserbase Founder and CEO

High-growth companies are more likely to treat pricing as a continuous experiment



The more frequent the pricing changes, the higher the growth

Business leaders tell us that their pricing adjustments are often a reaction to adverse events. They lower their prices when customer acquisition is slow, or they raise them to cover unexpected costs.

But our data suggests something different. Frequent pricing adjustments aren’t correlated with businesses under stress; they’re correlated with businesses growing quickly.

High-growth companies reported higher rates of pricing experimentation than the global sample, and low-growth companies reported lower rates. These successful businesses don’t treat pricing as something to solve, once and for all, but as an iterative process.

Rates of pricing experimentation were significantly correlated with growth. High- and hyper-growth companies were more likely to report having changed their pricing three or more times in the last two years, while low-growth companies were less likely to have changed their pricing as frequently in the same time frame.



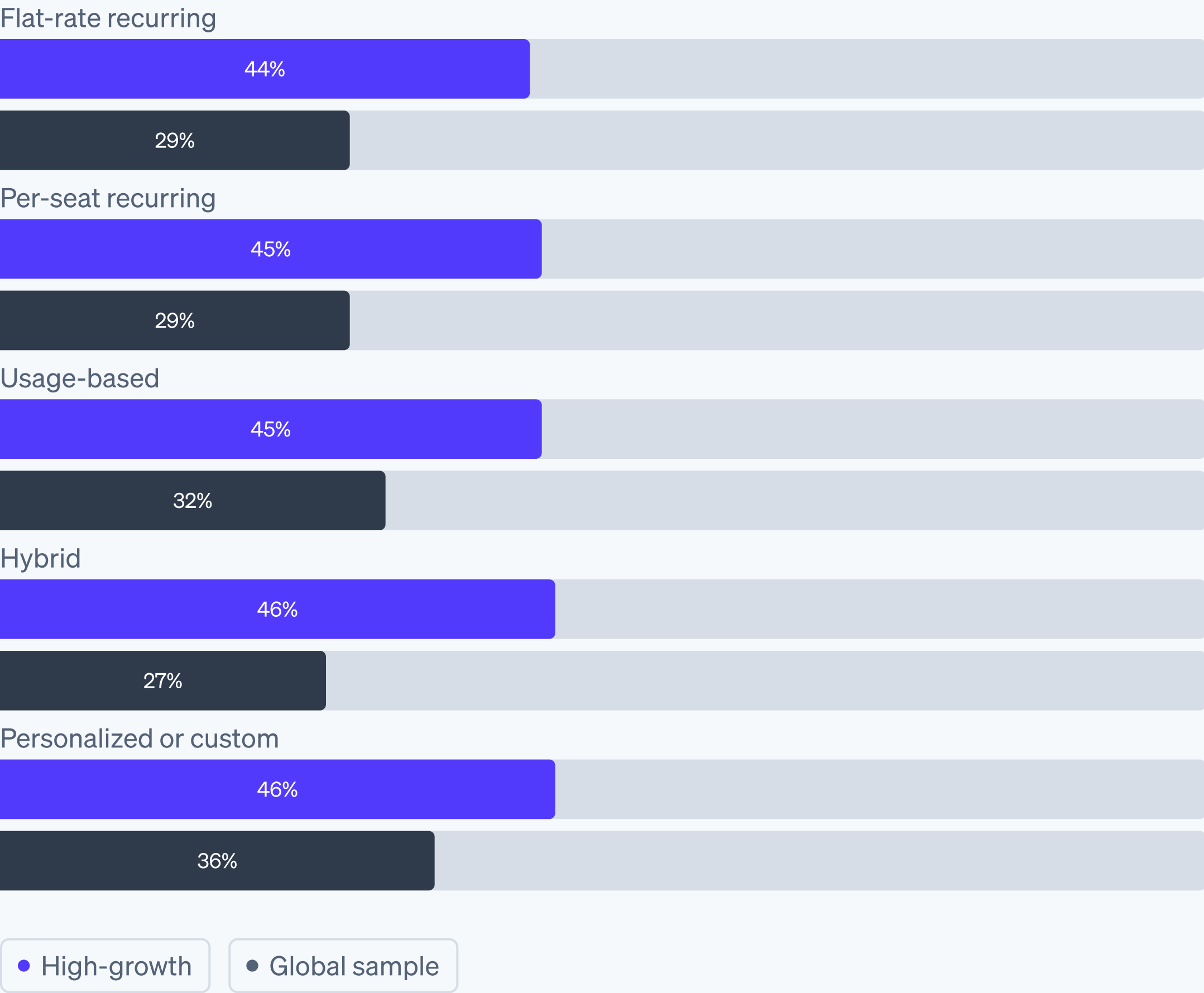
Market leaders remain open to refining models

High-growth companies cast a wider net than their peers when considering future options.

When we asked which models business leaders were considering adopting in the future, those from high-growth companies were more likely to remain open to every model.

These businesses have adjusted their pricing in the past, expect to do so again, and stay up-to-date on all of the options available to them.

High-growth companies' interest in adopting each pricing model over the next 12 months, compared to the global sample.



High-growth companies reported 20%+ year-over-year growth

High-growth companies are more likely to use AI-powered dynamic pricing tools

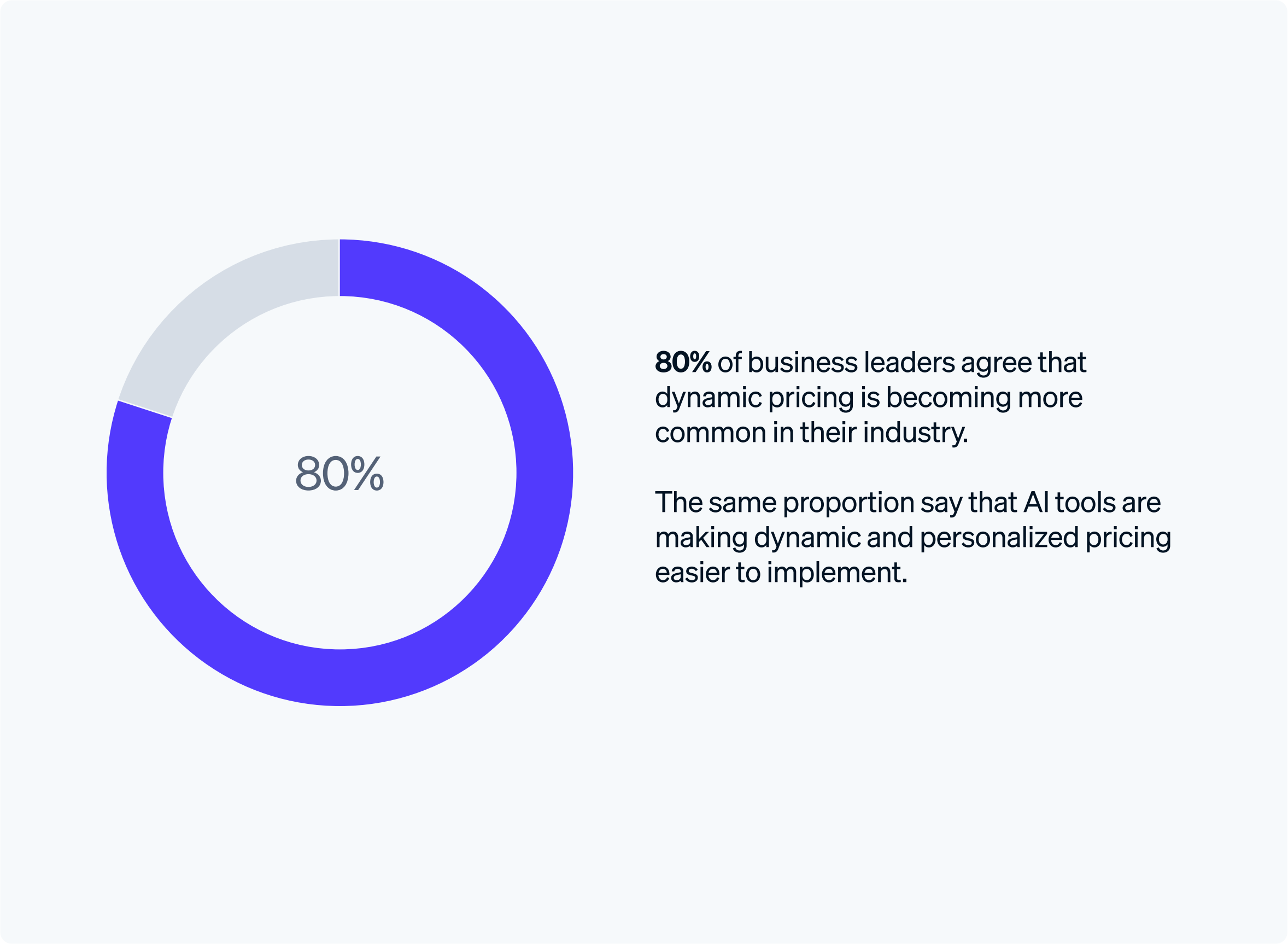


AI tools propagate a new wave of dynamic pricing

If frequent pricing changes are associated with high-growth companies, it's no wonder businesses are increasingly looking toward fully dynamic pricing solutions to keep up with market changes.

Across our global sample, a majority of business leaders agreed that dynamic pricing was becoming more common in their industries.

And they pointed to AI-powered tools as the reason for this shift, agreeing that AI tools were making dynamic pricing easier to implement.



High-growth companies are more interested in AI tools

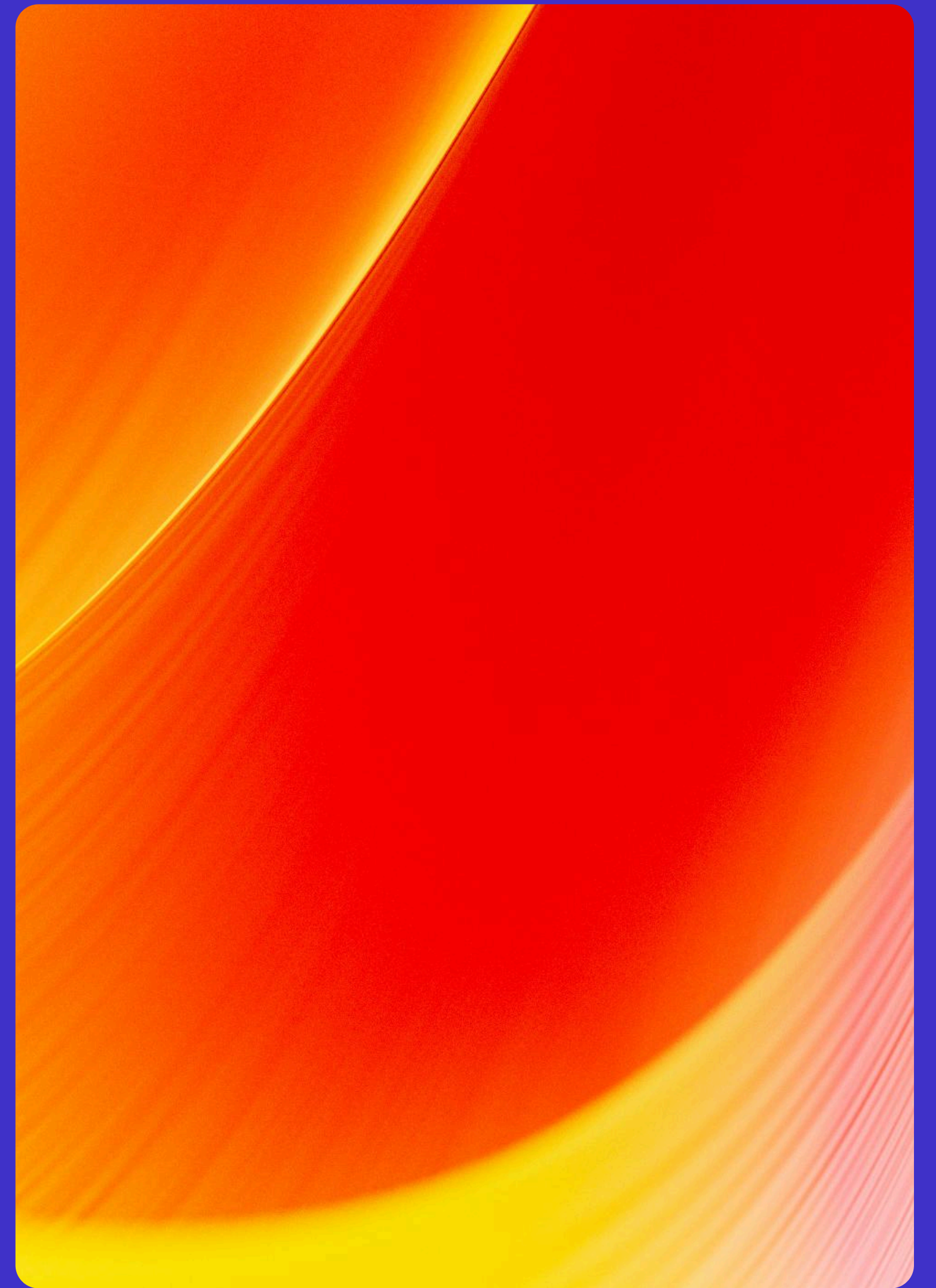
Across all surveyed businesses, we saw significant interest in adopting AI pricing tools. For every tool we asked about, around 20% of business leaders said that they had adopted it or were interested in adopting it.

But interest trended clearly with their companies’ rates of growth. Low-growth companies showed persistently lower interest, and high-growth companies showed more interest.

It seems likely that these tools are already facilitating the high rates of pricing experimentation these companies report—and that the pace of change among lower-growth businesses might accelerate if they begin adopting these tools at higher rates.



High-growth companies are more likely to successfully align pricing with customer outcomes



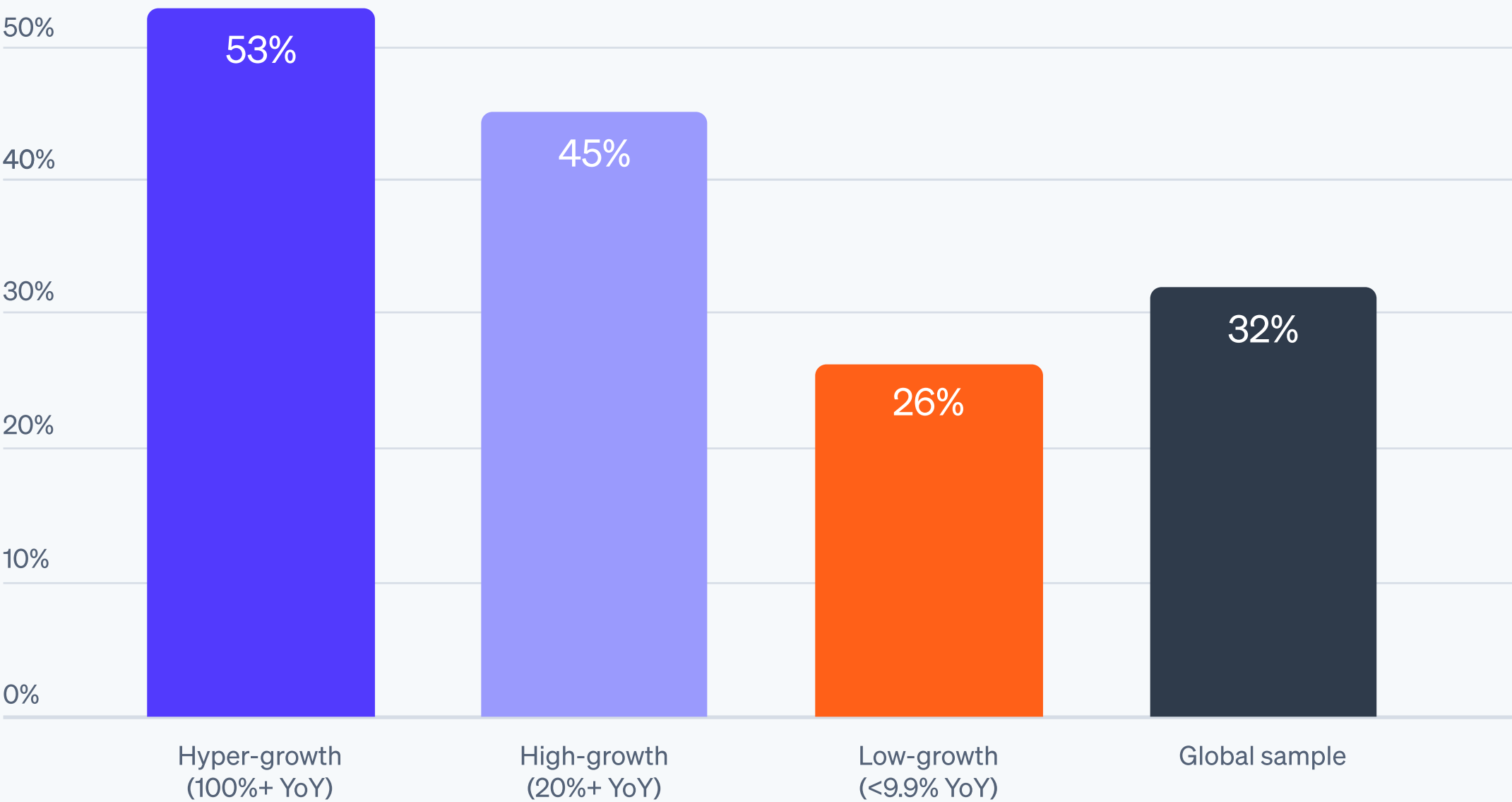
Customers want outcome-based pricing, but lower-growth companies lag behind

To price successfully, companies need a keen understanding of how their customers derive value from their products.

Usage-based and hybrid pricing models give companies an opportunity to more closely tailor their pricing to that perceived value—but high-growth companies are more likely to take full advantage.

Though a large majority of business leaders we surveyed reported that their customers were pushing for “outcome-based” pricing, where they pay only for successful results, those at high-growth companies were far more likely to actually offer it.

Companies that offer outcome-based pricing



77% of business leaders agree

that customers are increasingly pushing for outcome-based pricing

Only 32% of businesses report

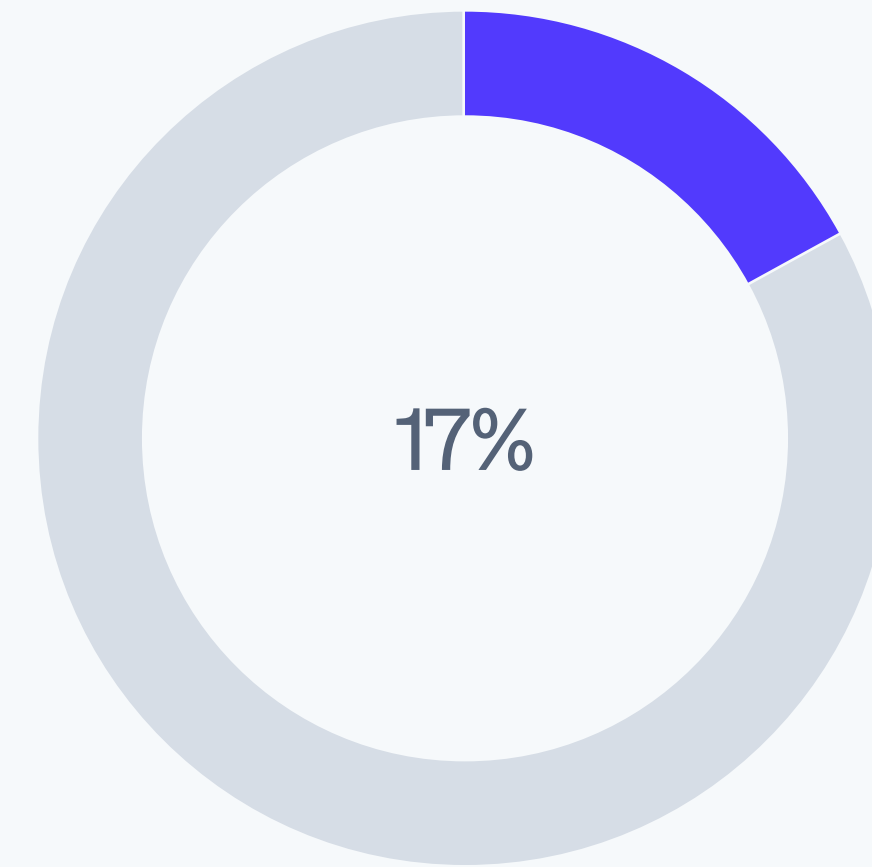
defining “usage” this way within their hybrid or usage-based pricing models

Ongoing pricing adjustments bring companies in line with customer value

We saw signs that some of the companies we surveyed were following in the footsteps of the high-growth group, and that outcome-based pricing may yet become the norm for a significant proportion of companies with usage-based and hybrid pricing models.

The vast majority of business leaders whose companies use these models said they had subsequently adjusted their pricing after launch.

A large proportion of these same leaders said that they had adjusted their definition of “usage” and, as a result, saw improved alignment with perceived customer value.



Only **17%** of businesses that used usage-based billing (UBB or hybrid models) have kept their pricing the same since launch)

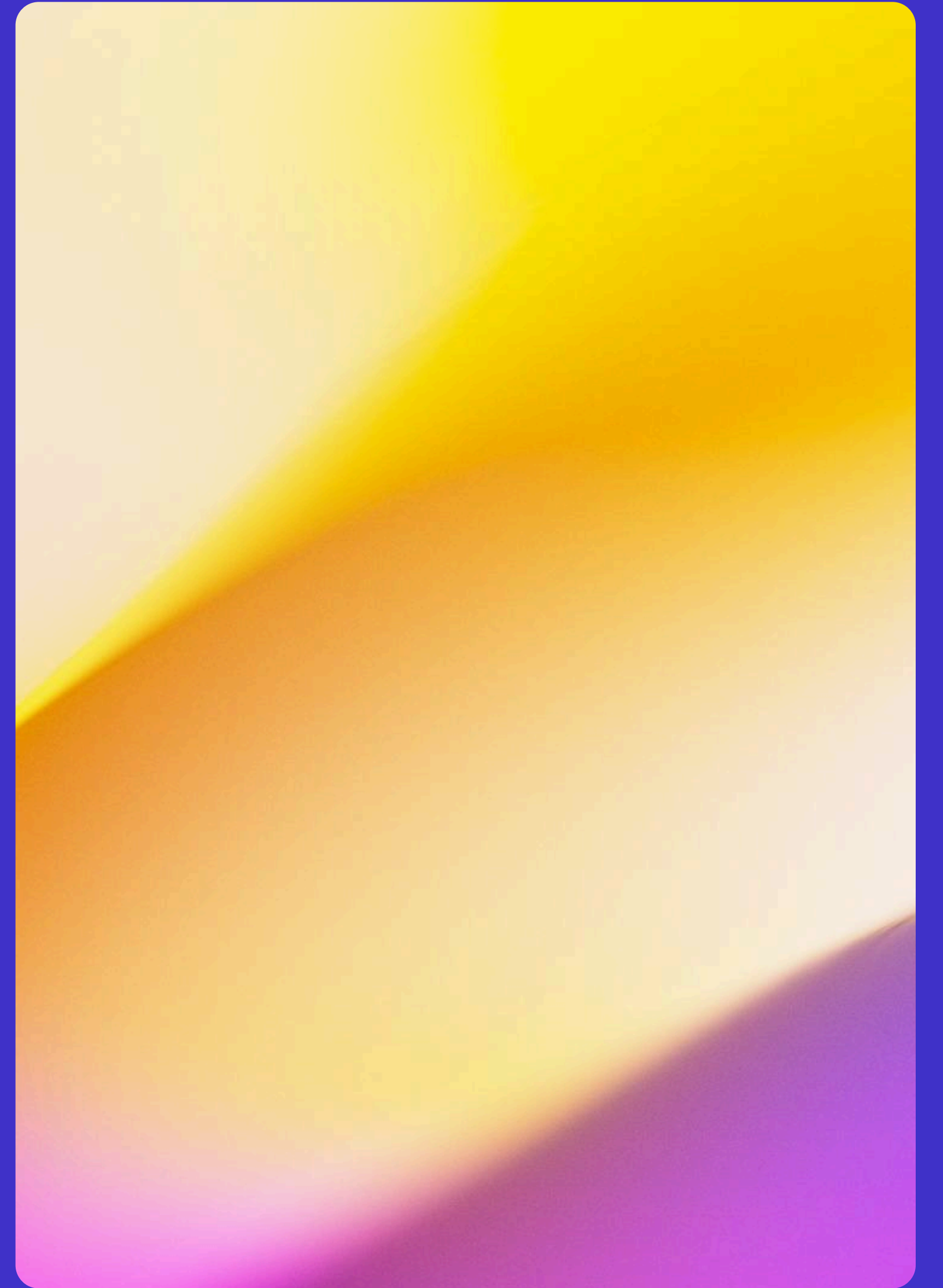
31% of surveyed businesses

have specifically adjusted their definition of “usage”;

56% of those report

that “our pricing is now better-aligned with perceived customer value.”

High-growth companies are more likely to offer and successfully price AI agents



Successful companies are better at defining agentic value

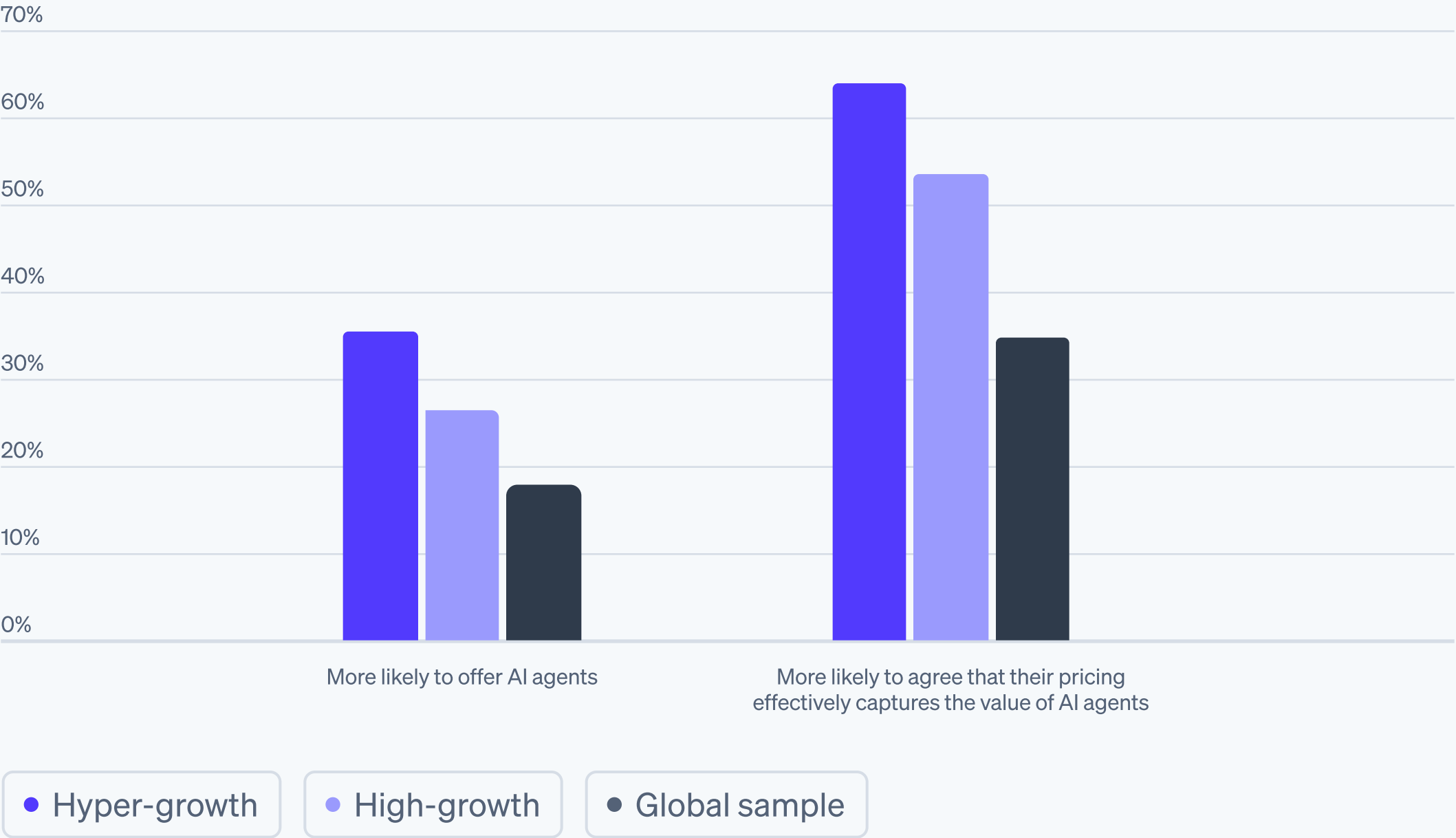
As AI agents grow in popularity, business leaders across our survey agreed that they are challenging to price. “Defining value delivered” was the most commonly cited obstacle by businesses across the growth spectrum.

But high-growth businesses were more likely to meet that challenge head-on—and report confidence in their results.

They were more likely to offer an AI agent or autonomous workflow product, and more likely to say that their pricing effectively captures the value of their agentic products.

41% of respondents

said “defining value delivered” was the biggest challenge for pricing AI. This was the most common response.



Hyper-growth companies reported 100%+ year-over-year growth
High-growth companies reported 20%+ year-over-year growth

Work-based and outcome-based pricing are the leading models for AI agents

What’s driving this success? High-growth companies that offered AI agents had different pricing habits than lower-growth peers that also offered agents. They not only reported higher rates of adoption for outcome-based pricing, but for work-based pricing as well.

Work-based pricing, in which customers are charged for tasks or workflows completed rather than outcomes delivered, represents a good compromise for certain agentic products. Work-based pricing makes sense when it’s possible to anticipate the kinds of actions an agent might take—but difficult to predictably link those actions to a “successful” outcome.

Likelihood to adopt work-based pricing

High-growth (20%+ YoY) companies offering AI agents



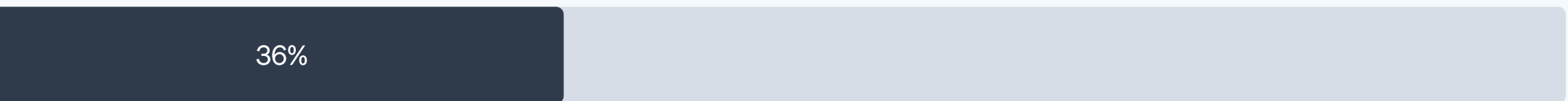
All businesses offering AI agents



Non-high-growth (<20% YoY) businesses offering AI agents



All businesses (global sample)



Likelihood to adopt outcome-based pricing

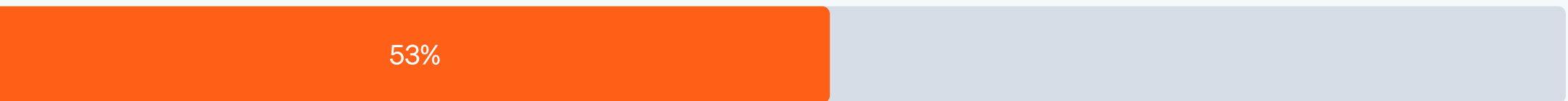
High-growth (20%+ YoY) companies offering AI agents



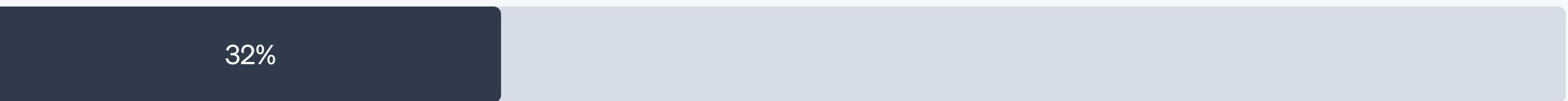
All businesses offering AI agents

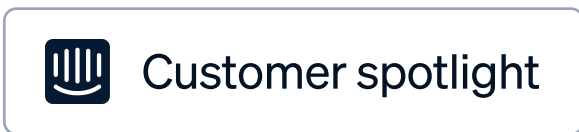


Non-high-growth (<20% YoY) businesses offering AI agents



All businesses (global sample)





Intercom charges for successfully completed tickets

In pursuit of excellent and personal customer service, Intercom invested in intelligent support bots early, launching ML based bots in 2018. The emergence of ChatGPT in December 2022 signaled the start of a new AI era, and Intercom was quick to capitalize on its long-standing investment. Three months after ChatGPT launched, they had shipped the most complete and most powerful product of its kind: Fin. Fin’s advanced capabilities offered a new kind of value to Intercom’s customers—and prompted a reevaluation of both the company’s pricing models and billing infrastructure.

Intercom worked with Stripe to implement a new, outcome-based pricing model that charged customers only for successful support resolutions. For customers, this model was a better match for the value Fin delivered than the seat-based pricing they were accustomed to. With seats, a better agent would mean fewer human users and lower revenue. Billing for delivered value only built stronger customer trust than a purely usage-based model, in which customers would risk paying for failed agent interactions. As Fin and market conditions continue to evolve, Stripe’s billing infrastructure offers the flexibility needed for Intercom to continue to adjust pricing levers and keep the entire company aligned on the metric that matters most: delivering brilliant customer service, every time.

[Read the full case study →](#)

“ Outcome-based pricing has been a powerful growth driver for us, as it aligns our success directly with our customers’ and focuses our whole team on delivering results for our customers.

Stripe gave us the flexibility to not only launch this model, but to iterate on it quickly, which is essential for keeping our business model in lockstep with our product innovation.”

Aisling O'Reilly, Intercom Head of Pricing

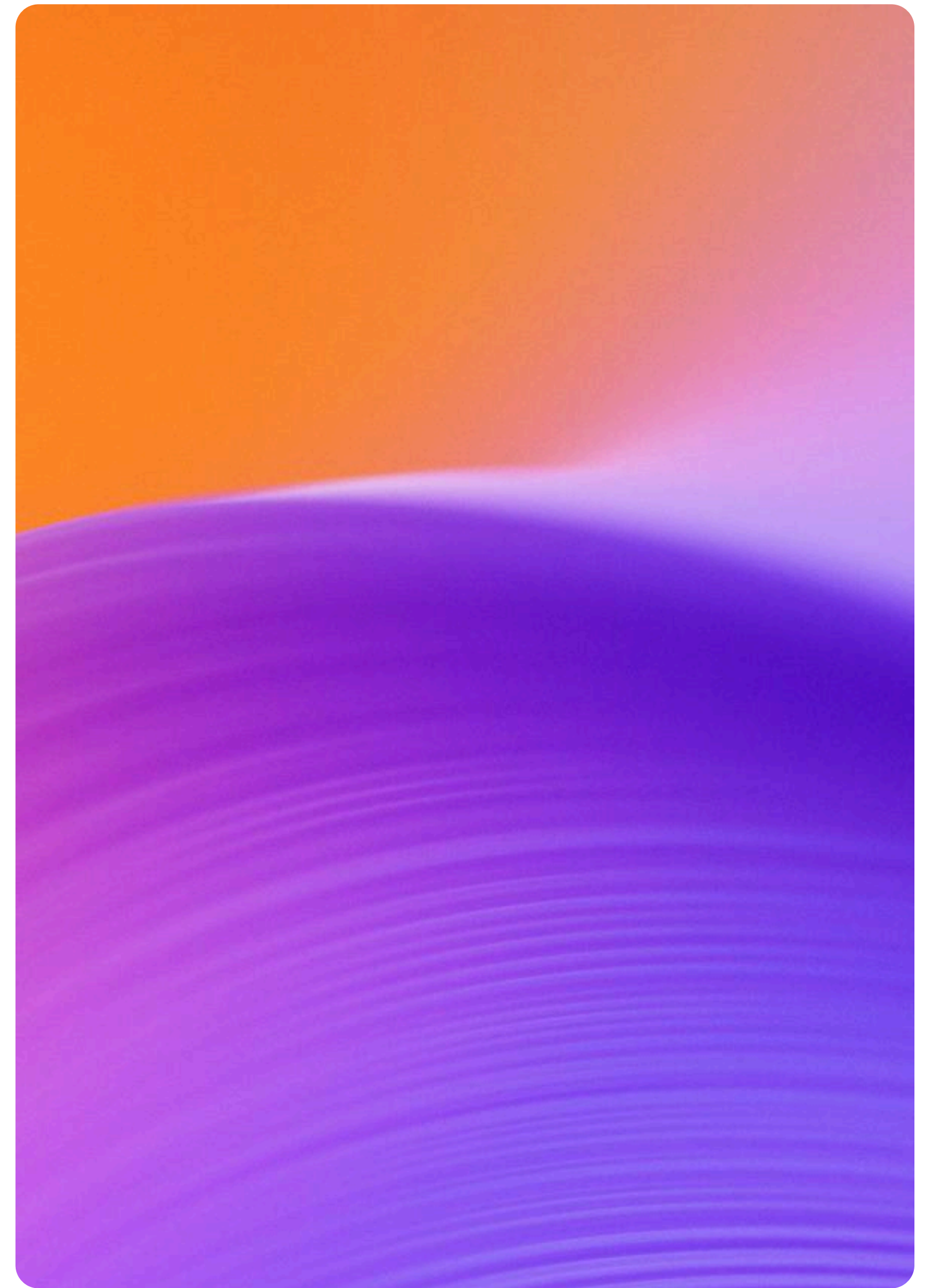
How Stripe can help

Stripe Billing lets you bill and manage customers however you want—from simple recurring billing to usage-based billing and sales-negotiated contracts. Collect and retain more revenue, automate revenue management workflows, and accept payments globally.

With Stripe, you can:

- **Offer flexible pricing:** Launch quickly with built-in usage-based and hybrid pricing models—including flat-fee plus overage, credits, and more. Support for coupons, free trials, prorations, and add-ons is built in.
- **Experiment and iterate on pricing:** Respond to user demand faster with no-code tools to adjust usage-based rates, manage pricing cohorts, and inform pricing decisions with granular usage and spend analytics.
- **Align pricing to customer value:** Meter and charge by the usage dimensions that deliver the most impact, and define pricing in ways that directly reflect how customers gain value.
- **Increase revenue and reduce churn:** Improve revenue capture and reduce involuntary churn with AI-powered Smart Retries and recovery workflow automations. Stripe recovery tools helped users recover over \$6.5 billion in revenue in 2024.
- **Boost efficiency:** Use additional Stripe solutions for tax, revenue reporting, and data to consolidate multiple revenue systems into one. Easily integrate with third-party software.

To learn more about how Stripe can help your company price for growth, [contact our team](#).



Methodology

In mid-2025, Stripe worked with Milltown Partners (in partnership with its data provider, Focaldata) to run a survey on pricing models. We surveyed 2,053 business leaders from Australia, Brazil, France, Germany, Japan, Singapore, the United Kingdom, and the United States.

We targeted a fairly even split across industries, with around 10% of businesses reporting each industry option. Technology companies were somewhat overrepresented (23%), while automotive, entertainment, media, healthcare, and travel companies were somewhat underrepresented (around 5%).

We divided companies into several growth-based cohorts to understand how they varied in their approach to pricing. These cohorts were defined as:

- Low-growth (negative to 9.9% growth): 44% of the sample
- Medium-growth (10%–19.9% growth): 24% of the sample
- High-growth (20%+ growth): 26% of the sample

Additionally, we broke out subsets of the low-growth and high-growth groups for additional analysis:

- Lack of growth (negative or stagnant growth): 4% of the sample
- Hyper-growth (100%+ growth): 5% of the sample

We observed that the high-growth businesses differed from the sample in a few key ways:

- They were somewhat more likely to be large businesses, with more than 1,000 employees (52%, compared to 40% of the global sample).
- They were more likely to be high-revenue businesses (13% of the high-growth cohort—and 26% of the hyper-growth cohort—reported revenue between \$500M–\$999M, compared to 8% of the global sample).
- They were more likely to be in the tech industry (34%, compared to 23% of the global sample).
- They were more likely to offer AI products (57%, compared to 38% of the global sample).