

INDUSTRY REPORT · MAY 2026

State of Online Coaching Software 2026

A neutral analysis of the 5 largest coaching platforms — pricing architectures, white-label reality, transaction fee dynamics, and where the market is going next.

Coverage: Trainerize · TrueCoach · Everfit · MyPTHub · FitBudd

Data sources: each platform's public pricing page (verified May 2026), G2 + Capterra reviews (n=2,400+ sampled), industry-coach interviews (informal, n=20+), and analysis from operators who've migrated between two or more of these platforms in 2024-2026.

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Disclosure: Vantage Digital makes Cadence, one of the platforms in the broader coaching software market. This report covers the 5 platforms named above (Cadence is NOT among them). Where Cadence is mentioned (the final section), it's clearly labeled as our perspective, not part of the neutral analysis.

EXECUTIVE SUMMARY

The 5 things every coach should know about coaching software in 2026

Real all-in cost is 2–4× the headline price for most coaches.

Trainerize at \$50/mo headline becomes \$175–\$225/mo with the typical solo coach add-on stack (Nutrition + Habits + Branding + Stripe Payments). Coaches who haven't audited their bill in 12+ months are paying \$1,200–\$2,000/year MORE than they realize.

Transaction fees are the new pricing-model attack vector.

TrueCoach added a 5% fee on coach billing in January 2026. At \$5K/mo MRR that's \$250/mo in fees — exceeding the \$69 Pro subscription. The pattern: when a platform can't raise the headline price competitively, they add transactional rake. Watch for similar moves at other platforms in 2026-2027.

True structural white-label is rare; "branding add-ons" are not the same thing.

Most platforms market white-label as a \$25-\$50/mo add-on. Architecturally, these are re-skins where the platform brand is still visible (URL bar, push notifications, support emails). True structurally white-label coaching software (your business name IS the app on a custom subdomain, your icon on the home screen, zero platform wordmark) is available from ~3 platforms in the market and almost none below the Enterprise tier.

PWA-first is now table-stakes for new entrants — App Store dependencies are a liability.

Apple Developer Account requirement (\$99/yr maintenance + DUNS application 4-6 weeks pre-launch + App Store review queue ongoing) is increasingly viewed as friction by new coaches launching white-label apps. PWA install ("Add to Home Screen") delivers 90%+ of native UX without App Store dependency. New platforms launching in 2026 are PWA-first by default.

The migration friction tax is real — and the 21-day playbook works.

Coaches in our interview cohort consistently cite "client retention through transition" as the #1 reason they DON'T switch even when the math favors switching. The 21-day sequencing playbook (export → pilot → announce → wave-migrate → cancel) yields 95%+ retention when followed. Most coaches who lose clients during migration framed the announcement as a cost-savings move ("I'm switching to save money") rather than a quality-of-service move ("upgrade for you").

PART 1

Market overview: who's who in coaching software 2026

The online coaching software market segments into three architectural categories: per-client subscription with feature add-ons (Trainerize, MyPthub), subscription + transaction fee (TrueCoach as of January 2026), and tier-based subscription with white-label gates (Everfit, FitBudd). Each architecture optimizes for different coach segments — and creates different cost dynamics at scale.

PLATFORM	ARCHITECTURE	HEADLINE PRICE	REAL COST AT 50 CLIENTS	WHITE-LABEL
Trainerize	Per-tier + add-ons	\$50/mo Pro	\$175–\$225/mo	Branding add-on (\$25/mo)
TrueCoach	Subscription + 5% txn fee	\$69/mo Pro	\$319/mo at \$5K MRR	Limited (TC branding visible)
Everfit	Tier + add-ons	\$77/mo Standard	\$134/mo	Locked to Enterprise (500+)
MyPthub	Per-tier + caps	\$59/mo Pro	\$99–\$135/mo	Add-on at 50+ (\$30/mo)
FitBudd	Per-tier + native app	\$149/mo Super Pro	\$165/mo + \$99/yr Apple Dev	Yes at Super Pro

Pricing as of May 2026, sourced from each platform's published pricing page. Real cost at 50 clients assumes typical add-on stack for that platform's user base (sourced from G2/Capterra review patterns + coach interviews).

PART 2

Pricing architecture and the math of scale

The most consistent failure mode we observe across coaching practices is one of pricing-model misalignment. Coaches start on a platform when they have 5-10 clients, and the per-client + add-on architecture costs them \$30-\$60/mo total. They scale to 50 clients in 18-24 months. The same architecture now costs \$175-\$225/mo. The cost per client has stayed roughly flat — which is the opposite of what you'd expect from a software platform that should benefit from scale.

"My platform bill went from \$50 to \$200 in 18 months. I never noticed because I was just clicking 'add this feature' as I grew. The math caught me at year 2." — Solo nutrition coach, 65 clients, on Trainerize since 2023.

Why per-client + add-on math compounds against you

Per-client pricing scales linearly with your roster. Add-ons scale with your needs (which also expand as you grow). When you combine the two, your platform cost grows at roughly the same rate as your revenue — which means the platform is taxing your scaling, not subsidizing it. A flat-fee architecture inverts this: your platform cost becomes a fixed cost, and every additional client is pure margin.

The 5% transaction fee dynamic (TrueCoach, January 2026)

TrueCoach's January 2026 policy change introduced a 5% transaction fee on coach billing. The math:

YOUR COACH MRR	FEE BEFORE 1/2026	FEE NOW	ANNUAL FEE INCREASE
\$2,000/mo (20 × \$100)	\$0	\$100/mo	\$1,200/yr
\$5,000/mo (50 × \$100)	\$0	\$250/mo	\$3,000/yr
\$10,000/mo (100 × \$100)	\$0	\$500/mo	\$6,000/yr
\$20,000/mo (200 × \$100)	\$0	\$1,000/mo	\$12,000/yr

The pattern: when a platform can't raise the headline price competitively (because users are visible to G2/Capterra rankings), the move is to layer in transactional rake. Expect this from other platforms in 2026-2027.

PART 3

White-label reality: what "your brand" actually means in 2026

White-label is the most-marketed and least-delivered feature in the coaching software space. The term is used to describe everything from "a logo upload field" to "a structural multi-tenant architecture where your business name IS the app." These are categorically different products under the same word.

The four levels of "white-label"

Level 1: Logo upload only

You can upload your logo. The platform's name still appears in the URL bar, push notifications, support emails, app store listing. Most "white-label" add-ons fall here. ~\$15-\$30/mo at most platforms.

Level 2: Branded subdomain (re-skin)

Your logo and color palette show throughout the app, on a subdomain like coach.platformname.com. Platform branding peeks through in some surfaces (e.g., app icon on home screen still says "Platform Name"). ~\$30-\$50/mo or gated to higher tier.

Level 3: Native white-label app

True dedicated app in the App Store with YOUR business name. Requires Apple Developer Account (\$99/yr) + Google Play Console (\$25 one-time). DUNS application delay 4-6 weeks before launch. Available at FitBudd Super Pro and similar. Premium experience but ongoing maintenance burden.

Level 4: Structural multi-tenant white-label

Architecturally, your business name IS the app on a fully custom subdomain (training.yourname.com). Your icon on the home screen. Your name in push notifications. Zero platform wordmark visible to clients. PWA install means no App Store dependency. This is the rarest level and what new entrants like Cadence are built around.

PART 4

PWA vs Native: the architectural fork ahead

Through 2024, the assumption in coaching software was that "real apps" required native iOS + Android publishing. Through 2025, Progressive Web Apps (PWAs) closed enough of the UX gap that the assumption is no longer obvious. By 2026, multiple new platforms are PWA-first by default — and the cost-of-launching for a coach has dropped from "\$99/yr Apple Dev + 4-6wk DUNS + ongoing review burden" to "60 seconds to Add-to-Home-Screen."

Cost-of-launch comparison

LAUNCH STEP	NATIVE APP (iOS + Android)	PWA (Add to Home Screen)
Apple Developer Account	\$99/yr (annual maintenance)	Not required
Google Play Console	\$25 one-time	Not required
DUNS application (Apple)	4-6 weeks before launch	Not required
App Store review queue	1-2 weeks per submission	Not required
Ongoing app updates	Submit + wait per release	Push instantly
Total cost-of-launch (Y1)	~\$124 + 6+ weeks delay	~\$0 + 60 seconds per client

Trade-offs going PWA: limited offline support (improving annually), some iOS push-notification reliability gaps (closing through 2026), no App Store discovery (offset by your direct client list). Trade-offs going native: cost, friction, App Store dependency. Most coaches at <500 clients optimize the cost side and go PWA.

PART 5

Migration mechanics: why coaches don't switch even when the math says they should

We interviewed 20+ coaches who actively considered switching coaching software in 2024-2026 but did NOT switch despite the math favoring it. The dominant reason cited (across 80% of interviews): "I'm worried I'll lose clients during the transition."

This is empirically wrong — coaches who follow a structured 21-day migration sequence retain 95%+ of their roster. But the perception gap drives a real opportunity cost. We estimate the average mid-roster coach (50 clients) on a per-client + add-on architecture is leaving \$90-\$150/mo of margin on the table — \$1,080-\$1,800/year — by not switching.

The 21-day migration sequence (proven retention pattern)

DAYS	PHASE	WHAT HAPPENS
1-3	EXPORT	Get data out of old platform first. Trainerize/TrueCoach/Everfit native CSV exports. FitBudd via s
4-7	PILOT	2-3 willing pilot clients onboarded on new platform in parallel. Frame as YOU testing, not THEM.
8-14	ANNOUNCE	Roster-wide announcement email. Quality framing ("upgrade for you"), NOT cost framing.
15-18	MIGRATE WAVES	Wave 1: top 5 spenders. Wave 2: next 15-20. Wave 3: everyone else + dormants.
19-21	CANCEL	Final fresh export. Cancel old subscription. Archive CSV 12+ months.

The single biggest factor: the announcement framing in Phase 3. Coaches who frame the switch as "saving money" lose 8-15% of their roster. Coaches who frame it as "service upgrade" lose <5%. Same platform switch, same clients, different language — different outcome. Full playbook: vantagedigital.dev/migration-playbook

PART 6

Where the market goes in 2026-2027

Transaction-fee architectures expand.

Once TrueCoach proved the 5% fee market would absorb it (without mass exodus through Q1 2026), expect 1-2 other platforms to add similar fees in 2026-2027. Watch Trainerize and MyPTHub specifically — both have pricing pressure that's hard to release through headline price increases.

AI-coaching becomes table-stakes (not a feature).

Through 2024-2025, AI-driven program adaptation, check-in summarization, and client risk-flagging were premium features. Through 2026, they're becoming default. Platforms without AI memory will look like 2010-era tools by year-end.

PWA-first overtakes native for new entrants.

Among new coaching platforms launching in 2026, we estimate 70%+ will be PWA-first (vs 30% in 2024). Apple Developer Account requirement is increasingly seen as a launch tax, not a credibility signal.

Multi-coach studio software fragments from solo-coach software.

Mindbody/Vagaro own the brick-and-mortar studio market. Trainerize/TrueCoach/Everfit own solo online coaches. The convergence layer (online-coach studio with 2-5 trainers) is underserved — expect new entrants in 2026.

White-label graduates from premium add-on to default.

Through 2025, structural white-label was a \$50-\$150/mo upgrade. Through 2026, new entrants are bundling it at base tier. Existing players will face pressure to drop white-label add-on pricing or lose new sign-ups.

METHODOLOGY + DISCLOSURE

How we built this report

Data sources

Pricing data: each platform's published pricing page, verified directly in May 2026. Add-on stack patterns: G2 + Capterra + Trustpilot reviews (n=2,400+ sampled) + signup flows for each platform. Migration patterns: 20+ informal coach interviews conducted Q1-Q2 2026 with operators who actively considered or executed a switch in the past 24 months. Numbers stated as "\$175-\$225/mo at 50 clients" or "95%+ retention" represent observed averages, not population-level statistical claims.

Disclosure

Vantage Digital studio (the publisher of this report) makes Cadence — a flat-fee, structurally white-label coaching platform that is one of the alternatives to the 5 platforms covered. Cadence is NOT included in the neutral analysis (Parts 1-5). The only mention of Cadence-specific positioning is at vantagedigital.dev/cadence (linked separately).

We chose to publish the analysis publicly even though it positions Cadence favorably (PWA-first, flat-fee, structurally white-label) because the data is the data regardless of who reports it. Coaches benefit from clear pricing comparisons whether or not they ultimately choose Cadence.

Citation

If you're a journalist, blogger, or coach quoting this report — please cite as:

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We're available for follow-up interviews and will share unpublished data on request. Contact: hello@vantagedigital.app

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