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Monthly App Tracker – April 2026

Bytedance sweeps online entertainment space

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MAS rose 1.5% y-y and total monthly time spent increased 10.3% y-y in April

Monthly active smartphone (MAS) users in China rose 1.5% y-y to 1.28bn in April 2026. China's MAS has remained stable in recent months. Total monthly time spent (MTS) grew 10.3% y-y in April, largely on par with the 10.9% y-y in March 2026.

Text-to-video generation apps gaining strong traction globally

According to Sensor Tower data, both Kling [owned by Kuaishou (1024 HK, Neutral)] and Jimeng apps (owned by Bytedance and embedded with Bytedance's video-generation LLM, Seedance 2.0) maintained their growth trajectory in April, with gross revenue increasing 10% and 12% m-m, respectively. Kling app's revenue scale was ahead of Jimeng's, and meanwhile, a structural difference existed between the two apps' revenue sources: Kling app's revenue was primarily driven by overseas markets, while Jimeng app's came predominantly from the domestic market. Examining recent trends, Kling saw notable weekly revenue growth for the week beginning 11 May 2026, rising 62% on a w-w basis and 3.6x on a y-y basis, compared to 34% w-w growth and 2.8x y-y growth for Jimeng app. This uptick was largely attributable to Kling's overseas performance following the viral spread of its Korean Baseball effect, i.e., allowing users to transform themselves into spectators at a live Korean baseball game. However, it remains to be seen whether this momentum is sustainable, as such viral trends can be transient. We believe market competition in this vertical remains intense, and it is premature to predict a clear winner.

We note that both Kling and Jimeng may derive a majority of their revenue from their web versions, as a desktop enables better experience for such applications. Hence, the trends we discuss here for their mobile apps may differ from those for the web versions. Furthermore, both applications may derive a meaningful portion of their grossing from the third-party LLM API aggregation platforms such as Higgsfield, which further dilutes the revenue share for the mobile apps.

Finally, Bytedance's SOTA video LLM, Seedance 2.0, is not only present in its Jimeng app, but is also included in other video-related apps launched owned by Bytedance, including its flagship video-editing app, CapCut (剪影). This app's monthly gross billing in April was 27x that of Kling app.

Bytedance's DouShengSheng gaining traction

ByteDance launched its standalone group-buying app, Dou Sheng Sheng, in February 2026. The app showed growth after its release, with MTS doubling sequentially in April, mainly driven by 115% m-m growth in daily active users (DAU). In contrast, MTS for Meituan app was flat, while that for Dianping app rose 9% on an m-m basis (both owned by Meituan [3690 HK, Neutral]). On a y-y basis, MTS for Meituan and Dianping declined 3% and 1%, respectively, primarily due to reduced average daily time spent, which offset 7% and 18% y-y DAU growth. In April, Dou Sheng Sheng's MTS reached 16% of Dianping's level, while its DAU reached 29% of Dianping's.

Softening user engagement across the travel sector

The travel sector showed sequential improvement in user engagement during April, driven by the Qingming Festival and in the lead-up-to the Labour Day holidays. However, the y-y picture was less favorable, with weakening engagement observed across the sector. Trip.com's (TCOM US, Neutral) two Chinese apps experienced notable declines – Ctrip's DAU fell 3% y-y, while Qunar's dropped 7% y-y. Fliggy saw an even steeper 9% y-y decline. The state-backed ticketing app Umetrip was the sole platform to record growth, though its momentum decelerated to 14% in April.

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We attribute this weakness partly to the domestic air fuel surcharge increases implemented in early April. With Chinese authorities raising these surcharges further in May, we anticipate the y-y decline in user engagement will persist through May.

Bytedance sweeping the online entertainment space, except gaming

ByteDance is systematically capturing user time across multiple entertainment verticals – online video, music streaming, and digital reading – by leveraging Douyin's traffic ecosystem and employing low-monetization strategies centered on advertising rather than subscription models.

Video streaming

Long-form video platforms continued to experience material MTS erosion in April, declining 10-20% y-y, driven primarily by DAU attrition. In contrast, ByteDance's Red Fruit app, a free short drama platform, sustained robust growth momentum, with MTS expanding 145% y-y, underpinned by 115% y-y DAU growth.

Music streaming

ByteDance's music platforms – Soda Music and Tomato Music – continued to gain market share, recording MTS growth of 131% and 77% y-y, respectively, in April. This stands in sharp contrast to Tencent Music's (TME US, Buy) three flagship apps, which experienced MTS declines of 14% (Kugou), 11% (QQ Music), and 9% (Kuwo Music), according to QuestMobile data. NetEase Cloud Music (9899 HK, Not Rated) demonstrated greater resilience, declining only 1% y-y.

On a DAU basis, Soda Music rose 76% y-y to 57mn users, surpassing QQ Music (51mn) and Kugou (50mn) to become China's largest music streaming platform by this metric.

Online reading

ByteDance's Tomato Free Novels maintained solid growth momentum, with MTS rising 15% y-y in April, supported by 12% DAU expansion. Conversely, China Literature's (772 HK, Buy) paid reading platforms – Qidian Reading and QQ Reading – recorded MTS declines of 21% and 17% y-y, respectively, dragged by DAU contractions of 13% and 9%.

Overview of leading Chinese apps

Much of the traffic flow in April 2026 was dominated by apps owned by Bytedance, Tencent (700 HK, Buy), Baidu (BIDU US, Buy), and Alibaba. In particular, Bytedance's apps took five spots among the Top-20 in terms of both monthly active users (MAU) and time spent share in April, according to QuestMobile. Tencent's WeChat alone recorded an 19.3% share in terms of time spent by Chinese mobile users, leading the next two apps – Douyin and Douyin Lite (both unlisted, owned by Bytedance) – with 18.2% and 6.2% time-spent share, respectively.

Fig. 1: Top-20 apps in China, by MAU and time spent – April

Top 20 Apps in MAU: MAUs change and penetration

App Name	Rank M-M chg	Penetration	Penetration Y-Y	Penetration M-M
WeChat	-	89.1%	2.0ppt	0.3ppt
Douyin	-	79.4%	8.6ppt	0.4ppt
Taobao	-	75.0%	-0.5ppt	0.0ppt
Alipay	↑	73.1%	0.2ppt	0.0ppt
Amap	↓	71.4%	1.6ppt	-1.9ppt
Pinduoduo	-	56.2%	2.5ppt	-1.4ppt
Sogou Keyboard	-	54.5%	4.3ppt	0.2ppt
Baidu	-	50.8%	-4.6ppt	0.0ppt
QQ	-	48.5%	-1.2ppt	-0.2ppt
JD	-	47.4%	2.1ppt	0.5ppt
Baidu Maps	-	43.9%	-2.3ppt	0.5ppt
Meituan	-	40.4%	0.8ppt	0.3ppt
Baidu Keyboard	-	38.4%	-0.8ppt	-0.1ppt
Weibo	-	37.2%	-1.4ppt	-0.5ppt
Kuaishou	-	35.3%	-1.1ppt	-0.3ppt
Toutiao	-	29.5%	-1.3ppt	-1.1ppt
Doubao	↑	28.1%	18.6ppt	1.0ppt
QQ Browser	↓	27.6%	-6.7ppt	-1.5ppt
Red Fruit Free Short Dram	↑	26.2%	11.2ppt	1.5ppt
Douyin Lite	-	25.9%	3.7ppt	0.0ppt

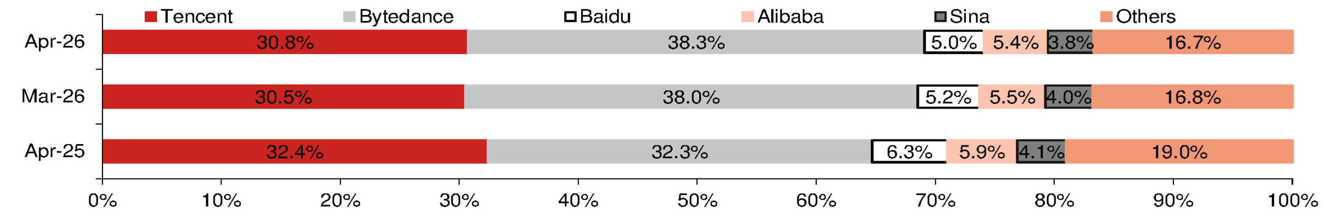
Time spent share for top 20 Chinese mobile apps in April

App Name	Rank M-M chg	Time spent share	Time spent share Y-Y	Time spent share M-M
WeChat	-	19.3%	-1.5ppt	-0.1ppt
Douyin	-	18.2%	2.1ppt	0.3ppt
Douyin Lite	-	6.2%	1.2ppt	-0.1ppt
Kuaishou	-	3.9%	-1.0ppt	-0.1ppt
Red Fruit Free Short Drama	-	3.8%	2.1ppt	0.2ppt
Sogou Keyboard	-	3.2%	0.0ppt	0.0ppt
Toutiao	-	2.9%	-0.3ppt	-0.1ppt
Pinduoduo	-	2.3%	0.1ppt	0.0ppt
rednote	-	2.2%	-0.2ppt	0.0ppt
Kuaishou Express	-	2.2%	-0.4ppt	0.0ppt
Baidu Keyboard	-	2.0%	-0.3ppt	0.0ppt
Weibo	-	2.0%	-0.2ppt	-0.1ppt
Fanqie Free Novels	-	1.9%	0.1ppt	0.0ppt
Taobao	-	1.7%	0.0ppt	0.0ppt
Bilibili	-	1.7%	0.0ppt	0.0ppt
Sina News	↑	1.6%	-0.1ppt	0.0ppt
Baidu	↓	1.6%	-0.5ppt	-0.1ppt
Honour of Kings	↑	1.3%	0.0ppt	0.2ppt
Alipay	-	1.2%	0.1ppt	0.0ppt
Tencent News	↓	1.1%	0.0ppt	-0.1ppt

Source: QuestMobile, Nomura research

Among the Top-50 apps, which accounted for ~93% of the total mobile time spent in China during April, we note that the Bytedance camp gained time-spent share on a y-y basis, which rose from 32.3% in April 2025 to 38.3% in April 2026, surpassing Tencent camp's 30.8%. Sequentially, Bytedance's time-spent share was up 0.3pp m-m.

Fig. 2: Time-spent share of various internet camps among the Top-50 apps in China



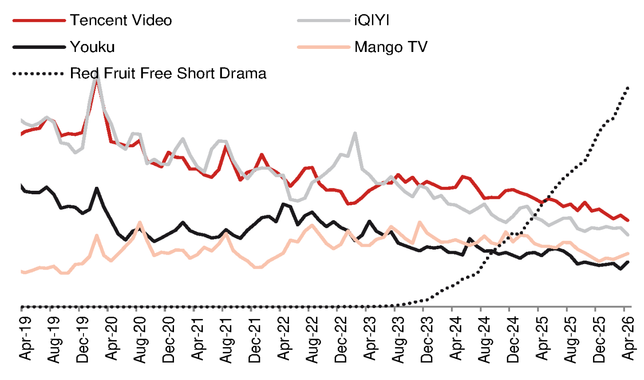
Source: QuestMobile, Nomura research

Long-form vs short-form dramas

Long-form video apps remained weak in April. The MTS of Tencent Video (owned by Tencent) recorded a 21% y-y decline in April, dragged by a 17% decline in DAU and a 4% decline in DTSD. Youku (owned by BABA)/Mango TV (300413 CH, Not rated)/iQIYI (IQ US, Neutral) recorded 20%/15%/12% y-y declines in total time spent, mainly dragged by 13%/12%/17% declines in DAU.

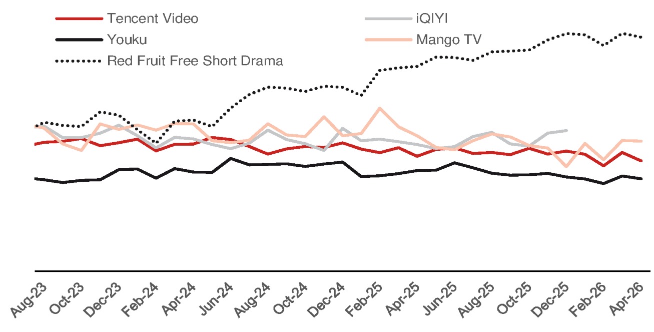
The dominant short-form drama app – Red Fruit Free Short Drama – kept its strong growth trend with an MTS increase of 145%, backed by 115% growth in DAU and 14% growth in DTSD.

Fig. 3: DAUs of long-form vs short-form dramas apps



Source: QuestMobile, Nomura research

Fig. 4: Average daily time spent per user

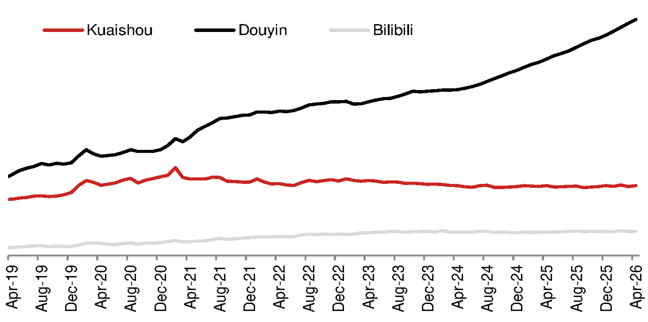


Source: QuestMobile, Nomura research

Short video

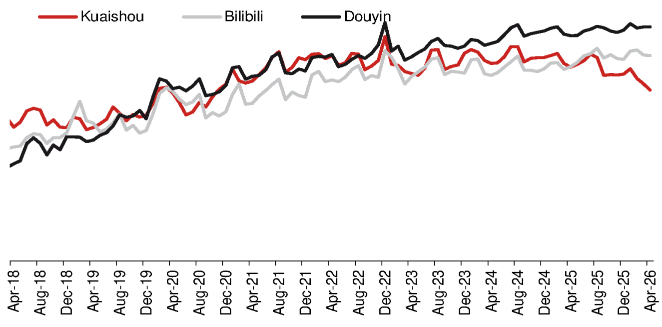
In April, Douyin maintained its solid growth momentum in terms of MTS, at 25% y-y, mainly driven by 20% growth in DAU. Total time spent for Bilibili (BILI US, Neutral) recorded 10% y-y growth in April, driven by 4% y-y growth in DAU and 6% growth in DTSD. However, Kuaishou (1024 HK, Neutral) continued its relatively soft performance, with a decline of 12% y-y in MTS, mainly dragged by a 12% y-y decline in DTSD.

Fig. 5: DAUs of short video apps



Source: QuestMobile, Nomura research

Fig. 6: Average daily time spent per user



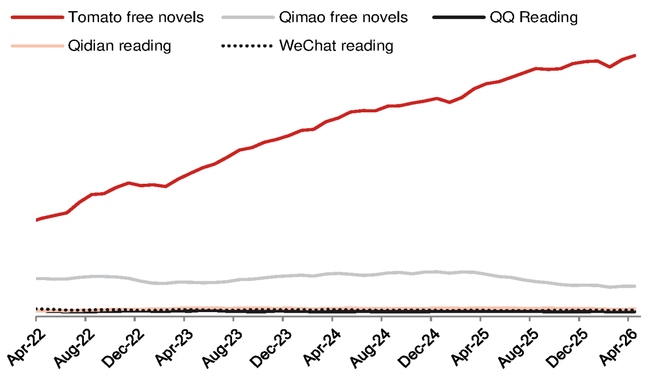
Source: QuestMobile, Nomura research

Online reading

The MTS of the free reading app leader Tomato Free Novels (unlisted; owned by ByteDance) maintained its solid growth momentum, up 15% y-y in April, driven by increases of 12% y-y in DAU. Another free reading app, Qimao Free Novels (unlisted), recorded a 41% y-y decline in total time spent, dragged by 29% and 18% y-y declines in DAU and DTSD, respectively.

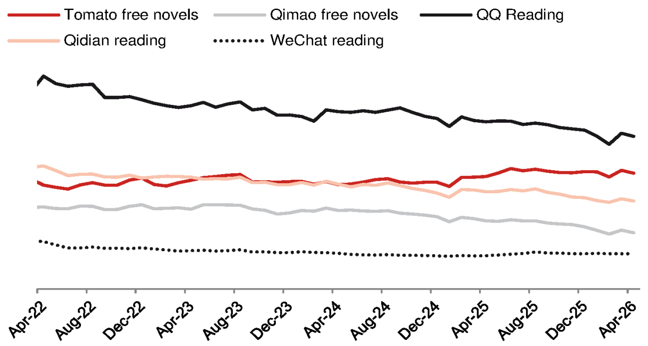
Paid reading apps owned by China Literature (772 HK, Buy), i.e., Qidian reading and QQ reading, recorded respective declines of 13% and 9% on a y-y basis in DAU during the month, while their DTSDs were down by 10% and 9% y-y, respectively.

Fig. 7: DAU of online reading platforms



Source: QuestMobile, Nomura research

Fig. 8: Average daily time spent per DAU of online reading platforms

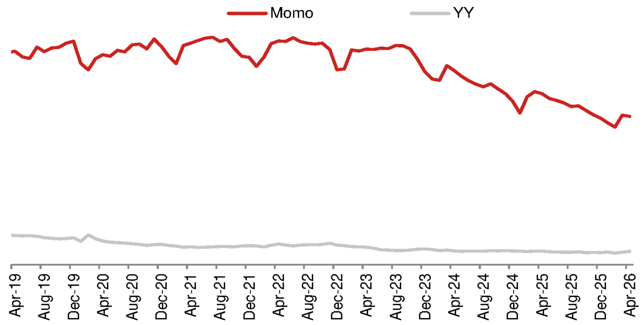


Source: QuestMobile, Nomura research

Live broadcasting

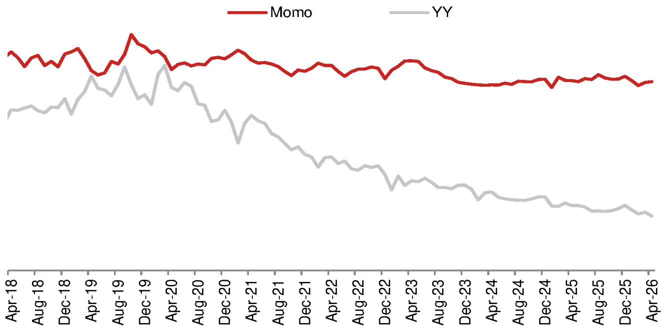
Live broadcasting show apps maintained their y-y downward trend in MTS in April. The DAU of Momo (MOMO US, Not rated) and YY (owned by Baidu) declined by 13% and 2% y-y, respectively. In terms of DTSD, Momo was flat y-y, while YY recorded a 16% y-y decline during the month.

Fig. 9: DAUs of live broadcasting show apps



Source: QuestMobile, Nomura research

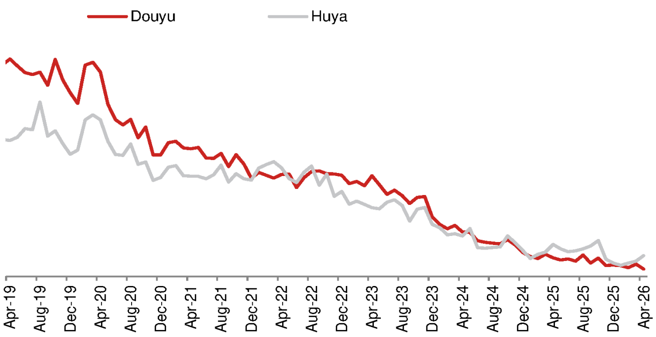
Fig. 10: Average daily time spent per user



Source: QuestMobile, Nomura research

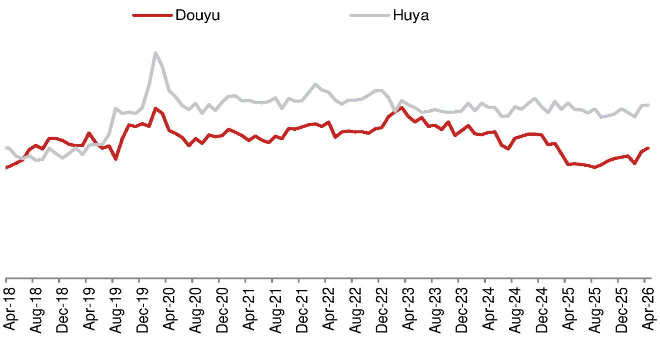
For game live broadcasting apps, the MTS for Huya (HUYA US, Not rated) recorded a 14% decline in April, mainly dragged by a 13% y-y decline in DAU. The downward trend of MTS for Douyu (DOYU US, Not rated) slowed in April, recording a 3% y-y decline, vs a 12% y-y decline in March, dragged by a 15% decline in DAU, offsetting 14% y-y growth in DTSD.

Fig. 11: DAUs of game live broadcasting apps



Source: QuestMobile, Nomura research

Fig. 12: Average daily time spent per user

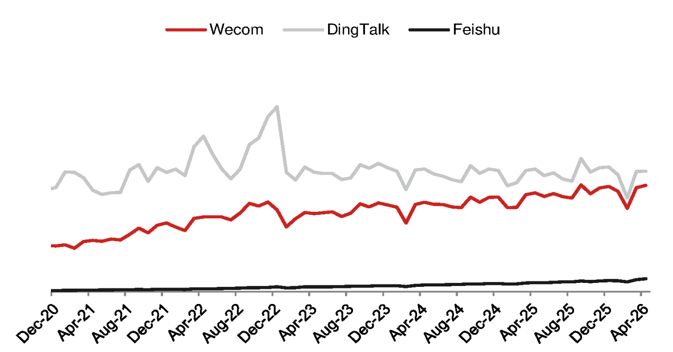


Source: QuestMobile, Nomura research

Office apps

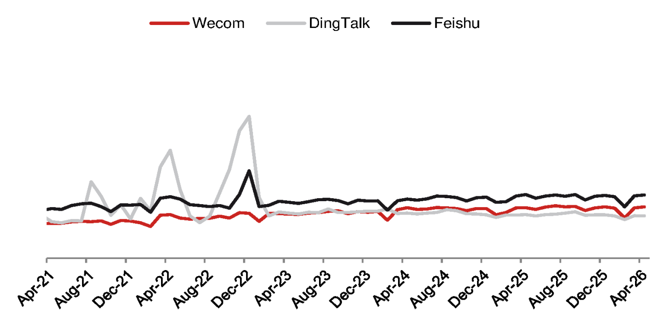
Within the office apps vertical, the DAU of Feishu (owned by Bytedance) and Wecom (owned by Tencent) recorded 42% y-y and 8% y-y growth, respectively, in April, while Ding Talk (owned by BABA) declined by 2%. However, Ding Talk owned the largest DAU base at ~83mn, which was 1.1x and 9.5x that of Wecom and Feishu, respectively. For Feishu, the DTSD was at 14.9 minutes (down 1% y-y), followed by Wecom's 12.2 minutes (up 2% y-y) and DingTalk’s 10.0 minutes (down 3% y-y), as per QuestMobile data.

Fig. 17: DAUs of office business apps



Source: QuestMobile, Nomura research

Fig. 18: Average daily time spent per user

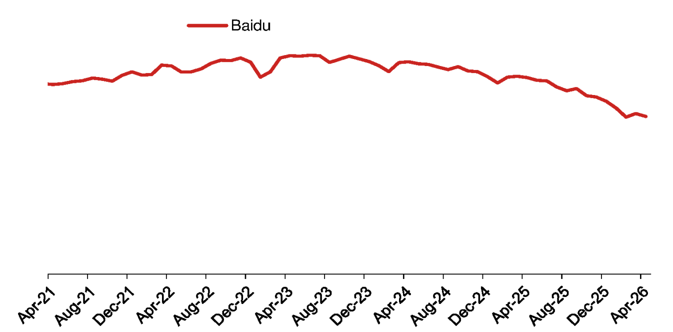


Source: QuestMobile, Nomura research

Search

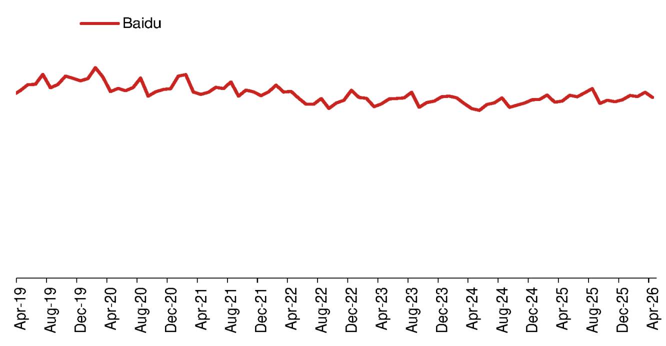
The Baidu app, despite being a dominant search engine in China, witnessed an 18% y-y decline in MTS during the month, dragged by a 20% y-y decline in DAU, offsetting 2% y-y growth in DTSD.

Fig. 19: DAU of Baidu app



Source: QuestMobile, Nomura research

Fig. 20: Average daily time spent per user



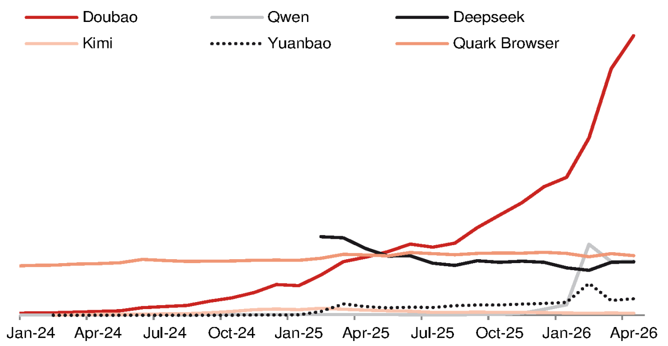
Source: QuestMobile, Nomura research

AI tools

The DAU of Doubao (owned by ByteDance) ranked first in April at 151mn (according to QuestMobile data), representing 3.8x y-y and 13% m-m growth. This was followed by Quark Browser at 32mn (down 1% y-y and 3% m-m), Qwen (owned by Alibaba) at 29mn (up 66x y-y and 1% m-m), and Deepseek at 29mn (down 20% y-y and up 1% m-m).

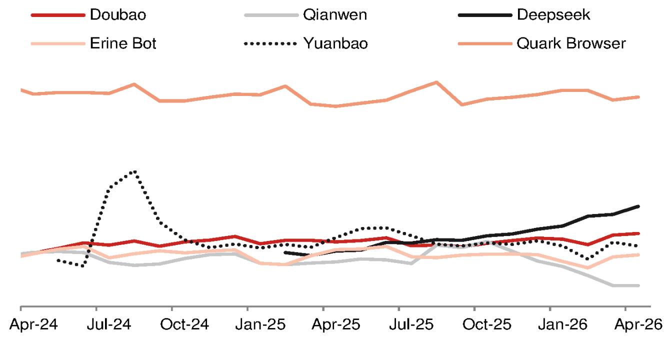
In terms of DTSD, Quark Browser recorded the highest time spent at 33 minutes in April (up 5% y-y and 1% m-m). Deepseek ranked the second at 15.7 minutes (up 80% y-y and 9% m-m), followed by Doubao’s 11.5 minutes (up 13% y-y and 2% m-m) and Zhipu Qingyan’s 11.4 minutes (up 70% y-y and 10% m-m).

Fig. 21: DAUs of AI apps



Source: QuestMobile, Nomura research

Fig. 22: Average daily time spent per DAU of AI apps

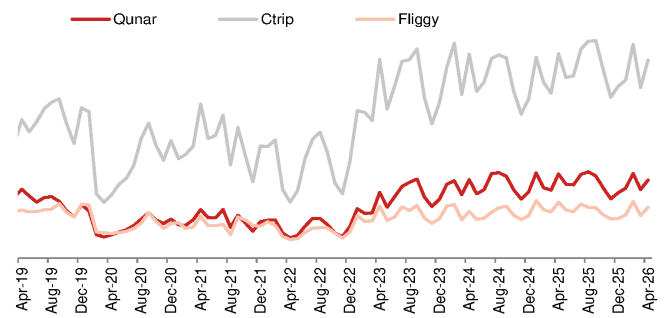


Source: QuestMobile, Nomura research

Online travel

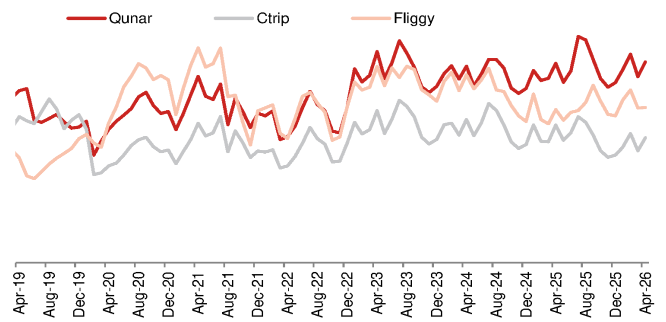
Among online travel apps, TRIP.com's domestic apps, Ctrip and Qunar, and Fliggy (unlisted, owned by BABA) recorded 12%/6%/8% y-y declines in MTS in April, mainly dragged by 3%/7%/9% y-y declines in DAU respectively. In terms of DTSD, Qunar app and Fliggy each recorded 1% y-y growth in April, while Ctrip app recorded a 9% y-y decline.

Fig. 23: DAUs of online travel apps



Source: QuestMobile, Nomura research

Fig. 24: Average daily time spent per user



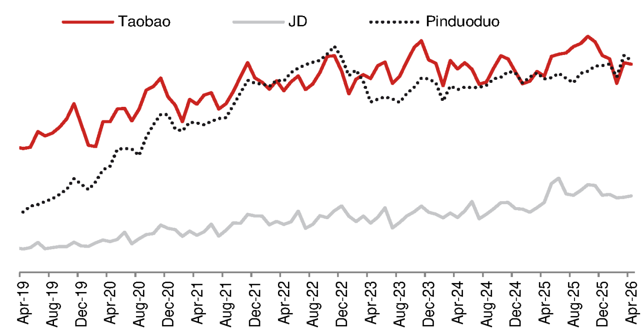
Source: QuestMobile, Nomura research

E-commerce

Pinduoduo (PDD US, Neutral) app and Alibaba's Taobao app were the top-two e-commerce names in terms of users and total time spent. In April, Taobao's DAU increase of 6% y-y was mainly driven by 7% growth in the number of hardcore users (daily time spent >1 minute) and 5% growth in the number of casual users (daily time spent <1 minute). Pinduoduo's DAU recorded 10% y-y growth in April, backed by 35% y-y growth in the number of casual users and 4% growth in the number of hardcore users. JD app's DAU increased 9% y-y, driven by 2% y-y growth in the number of hardcore users and 34% y-y growth in the number of casual users.

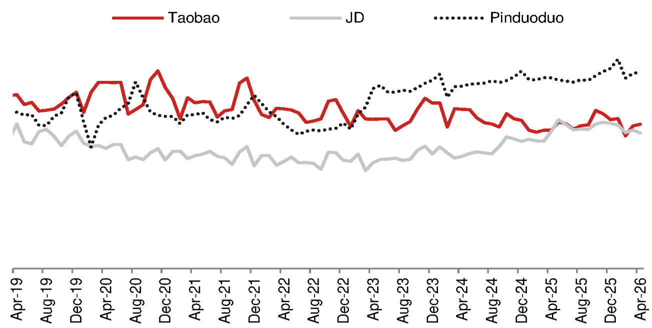
In terms of DTSD, Taobao and PDD delivered 4%/3% y-y growth, respectively, in April, while JD app recorded a 1% y-y decline.

Fig. 25: DAUs of China e-commerce apps



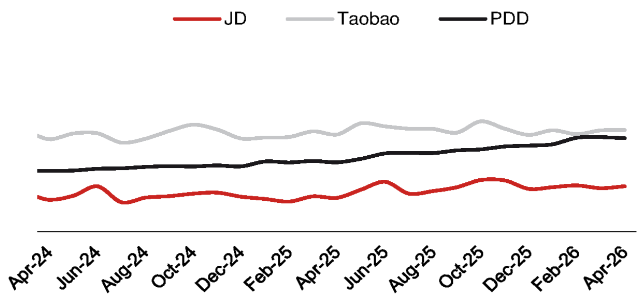
Source: QuestMobile, Nomura research

Fig. 26: Average daily time spent per user



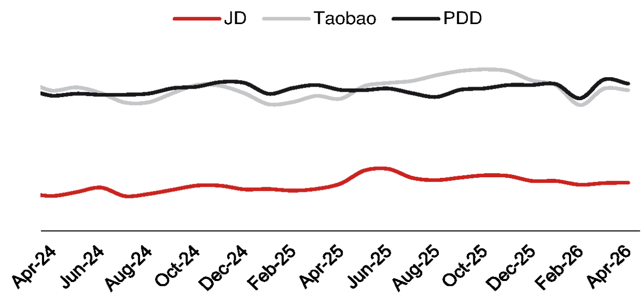
Source: QuestMobile, Nomura research

Fig. 27: Number of users with daily time spent at <1 minute



Source: QuestMobile, Nomura research

Fig. 28: Number of users with daily time spent at >1 minute

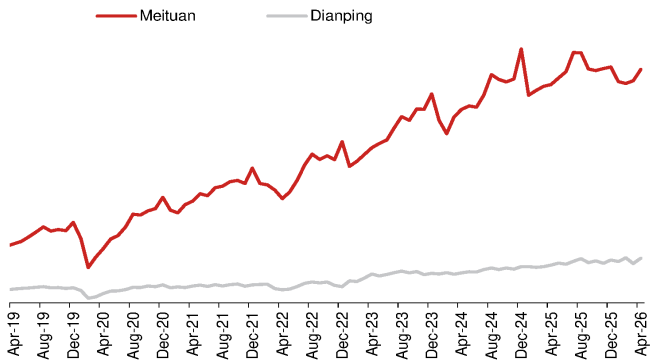


Source: QuestMobile, Nomura research

O2O

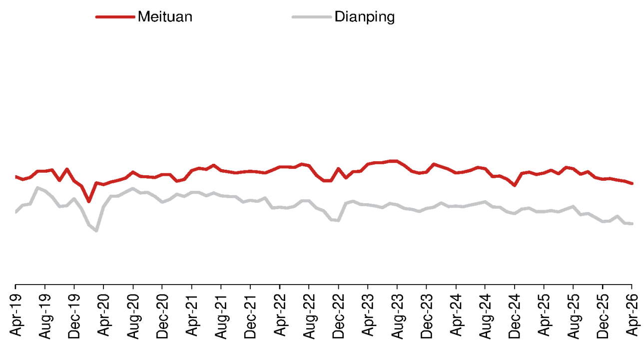
The Meituan app recorded a 3% y-y decline in MTS in April, dragged by a 9% decline in DTSD, offsetting 7% growth in DAU. Dianping app (owned by Meituan) recorded a 1% decline in MTS, dragged by a 17% y-y decline in DTSD, offsetting 18% growth in DAU.

Fig. 29: DAUs of Meituan and Dianping



Source: QuestMobile, Nomura research

Fig. 30: Average daily time spent per user

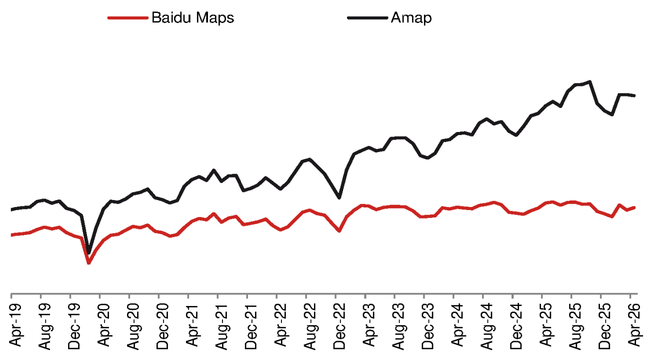


Source: QuestMobile, Nomura research

Mobile map apps

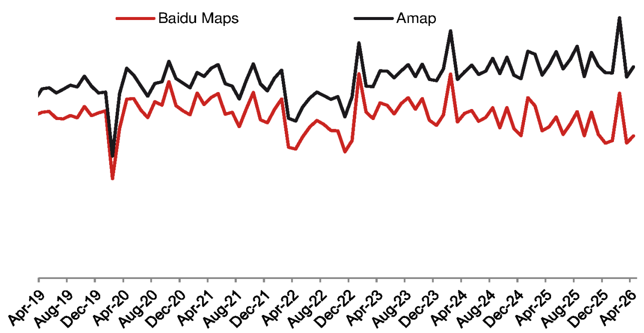
Total time spent on Baidu Maps (owned by Baidu) declined 11% y-y in April, dragged by a 6% decline in DTSD and a 5% decline in DAU. However, Amap (owned by BABA) recorded 4% y-y growth in April, mainly driven by a 5% y-y increase in DAU.

Fig. 31: DAUs of Baidu Maps and Amap



Source: QuestMobile, Nomura research

Fig. 32: Average daily time spent per user



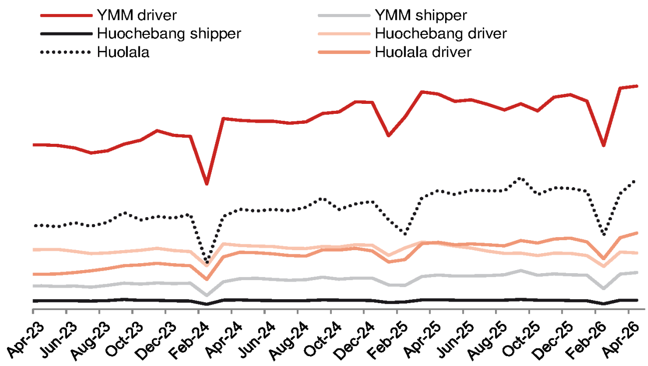
Source: QuestMobile, Nomura research

Digital freight apps

On the shipper side, the MTS of YMM Shipper (owned by Full Truck Alliance, FTA [YMM US, Not rated]) and Huolala (unlisted) recorded 10% y-y and 17% y-y growth, respectively, in April. However, Huochebang Shipper (owned by FTA) recorded a 7% y-y decline in April, dragged by 5% decline in DAU and a 2% decline in DTSD.

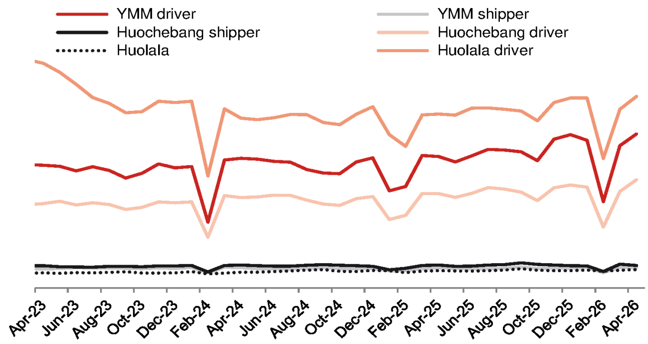
On the driver side, YMM Driver (owned by FTA)/Huolala Driver (unlisted) recorded 21%/25% y-y growth in MTS in April, accelerating from 10%/14% y-y growth in March, mainly driven by 17%/10% y-y growth in DTSD. Huochebang Driver (owned by FTA) recorded a 2% y-y decline in MTS, mainly dragged by a 14% decline in DAU.

Fig. 33: DAUs of digital freight apps



Source: QuestMobile, Nomura research

Fig. 34: Average daily time spent per user

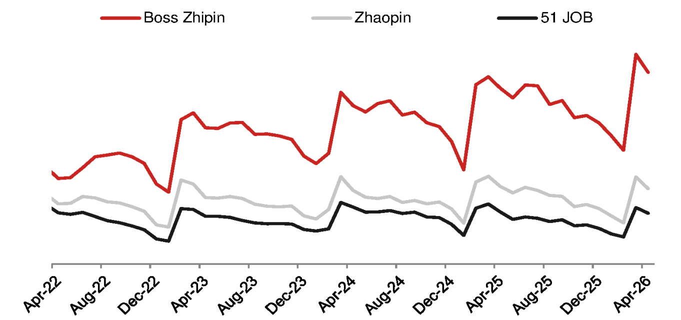


Source: QuestMobile, Nomura research

Online recruitment apps

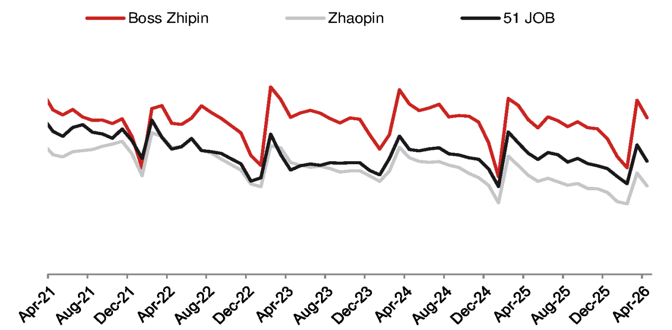
Boss Zhipin app (owned by Kanzhun [BZ US, Not rated]), a leading player in the online recruitment industry, recorded 10% y-y growth in MTS in April, driven by 9% y-y growth in DAU. The MTS of Zhaopin (unlisted) decreased 13% y-y in April, dragged by an 11% decline in DTSD and 3% drop in DAU. Another peer, 51Job (unlisted), reported an 8% y-y decline in MTS in April, dragged by a 2% y-y decline in DAU and a 7% y-y decline in DTSD.

Fig. 35: DAUs of online recruitment apps



Source: QuestMobile, Nomura research

Fig. 36: Average daily time spent per user



Source: QuestMobile, Nomura research

Appendix A-1

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