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Global Markets Research
29 July 2026

China Internet & New Media

EQUITY: INTERNET & NEW MEDIA

Monthly App Tracker – June 2026

Cross border ecommerce grapples with raised policy barriers in Europe

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MAS rose 1.2% y-y and total monthly time spent increased 10.1% y-y in June

Monthly active smartphone (MAS) users in China rose 1.2% y-y to 1.28bn in June 2026. China's MAS has remained stable in recent months. Total monthly time spent (MTS) grew 8.6% y-y in June, decelerating from 10.1% y-y growth in May 2026.

Shifting focus from consumer AI chatbots to business agents

According to Questmobile, Doubao [owned by Bytedance (unlisted)] appeared to have further widened its lead in the crowded field of AI native chatbots with DAU growth of 6% m-m and 3.3x y-y to 167mn. DeepSeek (unlisted) ranked second with DAU standing at 32.4mn, up 6% m-m and 1% y-y, followed by Alibaba's (BABA US, Buy) Qwen app (up 84x y-y and up 5% m-m to 29.3mn). According to Questmobile, 55% of Qwen users appeared to be casual users (daily time spent < 1 minute), for which the number increased 168x y-y in June. Qwen app's hardcore users (daily time spent > 1 minutes) accounted for 45% in June, down from 72% one year ago, for which the number increased 52x y-y. In comparison, the share of hardcore users of Doubao and DeepSeek stood at 85% and 81%, respectively, in June, largely stable compared with the levels a year ago. As a result, the average daily time spent per DAU (DTSD) of Qwen was much lower than that of Doubao and DeepSeek's. Among Chinese AI native chatbots, DeepSeek delivered the highest DTSD at 16.67mn in June 2026, up 65% y-y.

As major Chinese AI platforms are shifting focus from consumer AI towards business-oriented AI solutions, we project the competition in AI chatbots to further cool down which will be accompanied by slowing user engagement and declining marketing spent from major AI chatbot publishers down the road.

Tencent's WorkBuddy maintains top spot among office AI agents

According to Analysys, a third-party research firm, Tencent's (700 HK, Buy) WorkBuddy remained the most popular desktop AI agent platform in China as of June 2026, with monthly visits surging to 21mn (up from 8.85mn in March). ByteDance's TRAE IDE (domestic version) ranked second, recording 12.79mn monthly visits (vs. 3.34mn in March), while Alibaba's QoderWork followed with 7.88mn visits (vs. 2.15mn in March).

This highlighted that internet giants are leveraging their ecosystem advantages to dominate the AI agent platform market at this stage. For instance, their super-apps—including office and business applications—serve as instant messaging platforms to seamlessly call the aforementioned AI agents, enhancing user accessibility.

Within traditional office applications, Feishu (owned by ByteDance) exhibited the strongest DAU growth at 51% in June 2026, according to Questmobile, likely partially driven by its smaller user base – its DAU is equivalent of 12–13% of DingTalk (owned by Alibaba) and WeCom's (owned by Tencent). Besides, WeCom sustained solid DAU growth of 10% in June, further narrowing its gap with DingTalk, which reported flat y-y DAU growth.

DAU gap between Dou Sheng Sheng and Dianpian is narrowing

In February, Douyin LS launched an independent local service app, "Dou Sheng Sheng" (DSS). The DAU gap between DSS and Dianpian app [owned by Meituan (3690 HK, Buy)] is narrowing, thanks to the Douyin traffic support. According to QuestMobile data, Dianping app's DAU declined 2% m-m to 32mn in June, while DSS's DAU grew 32% m-m to 21mn, implying 65% of Dianpian's level in June, up from 15% in March. But, in terms of DTSD, Dianping app was at 8.3 minutes (down 3% m-m), which is much higher than DSS's 4.5 minutes (down 3% m-m), suggesting that Dianping may still

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enjoy higher user engagement.

Chinese cross-border ecommerce platforms decelerating in major overseas markets

According to Sensor Tower, Temu's [owned by PDD (PDD US, Neutral)] global monthly active users (MAU) reverted to a 2% y-y decline in June 2026 (vs. 2% growth in May 2026), primarily driven by weakened MAU performance in Latin America and Europe, which offset its robust growth in the US (due to low base a year ago caused by the US's tariff hike and import policy change). QuestMobile data corroborates this trend, showing that Temu's sellers' DAU down 11% y-y in June 2026.

Similarly, Shein's global MAU decelerated to 5% y-y in June 2026 (vs. 14% y-y in May 2026), with strong user growth in Brazil and India offsetting declines in Europe.

Overall, it seems that Temu and Shein's global user base is stabilizing, while both are witnessing a drop of users lately in their European markets, where tightening regulations against imported merchandise—including the removal of de minimis exemptions for low-value cross-border products and the introduction of additional tariffs—officially took effect on 1 July 2026. We will monitor closely whether and how these Chinese cross-border ecommerce platforms will navigate these tough market conditions smoothly.

Overview of leading Chinese apps

Much of the traffic flow in June 2026 was dominated by apps owned by Bytedance, Tencent, 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 June, according to QuestMobile. Tencent's WeChat alone recorded a 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 19% and 6.3% time-spent share, respectively.

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

Top 20 Apps in MAU: MAUs change and penetration

App Name	Rank M-M chg	Penetration	Penetration Y-Y	Penetration M-M
WeChat	-	90.0%	2.9ppt	0.0ppt
Douyin	-	80.3%	8.1ppt	-0.1ppt
Taobao	-	76.7%	-0.6ppt	-0.4ppt
Alipay	-	74.3%	0.6ppt	0.7ppt
Amap	-	71.2%	0.3ppt	-1.2ppt
Pinduoduo	-	54.9%	-2.8ppt	-0.9ppt
Sogou Keyboard	-	54.5%	4.1ppt	0.1ppt
JD	-	52.7%	2.4ppt	2.0ppt
Baidu	-	50.0%	-5.3ppt	-0.7ppt
QQ	-	48.9%	-1.6ppt	-0.4ppt
Baidu Maps	-	44.1%	-1.9ppt	-0.7ppt
Meituan	-	40.7%	0.3ppt	-0.3ppt
Baidu Keyboard	↑	38.7%	-0.5ppt	0.0ppt
Weibo	↓	38.6%	-0.3ppt	0.0ppt
Kuaishou	-	34.4%	-1.9ppt	-0.9ppt
Doubao	↑	29.8%	18.7ppt	1.0ppt
Toutiao	↓	29.1%	-2.2ppt	-0.8ppt
Red Fruit Free Short Drama	-	28.7%	12.0ppt	0.8ppt
QQ Browser	-	26.1%	-7.4ppt	-0.7ppt
Douyin Lite	-	25.7%	3.0ppt	-0.3ppt

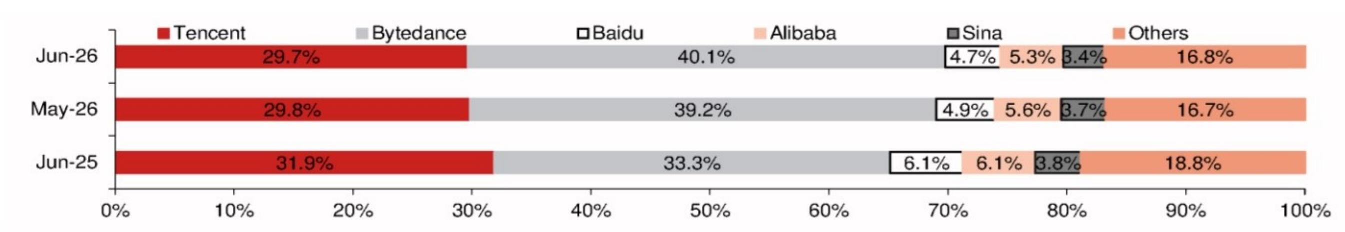
Time spent share for top 20 Chinese mobile apps in June

App Name	Rank M-M chg	Time spent share	Time spent share Y-Y	Time spent share M-M
WeChat	-	19.3%	-1.3ppt	0.3ppt
Douyin	-	19.0%	2.7ppt	0.3ppt
Douyin Lite	-	6.3%	1.0ppt	0.0ppt
Red Fruit Free Short Drama	-	4.5%	2.5ppt	0.5ppt
Kuaishou	-	3.8%	-1.0ppt	-0.1ppt
Sogou Keyboard	-	3.1%	-0.1ppt	0.0ppt
Toutiao	-	2.7%	-0.5ppt	-0.1ppt
Rednote	↑	2.3%	-0.1ppt	0.1ppt
Kuaishou Express	↑	2.3%	-0.4ppt	0.0ppt
Pinduoduo	↓	2.2%	-0.1ppt	-0.1ppt
Fanqie Free Novels	↑	1.9%	0.0ppt	0.0ppt
Baidu Keyboard	↓	1.9%	-0.4ppt	-0.2ppt
Weibo	↓	1.8%	-0.2ppt	-0.1ppt
Taobao	-	1.7%	-0.1ppt	-0.1ppt
Bilibili	-	1.7%	0.0ppt	0.0ppt
Baidu	↑	1.5%	-0.6ppt	-0.1ppt
Sina News	↓	1.4%	-0.1ppt	-0.2ppt
Alipay	↑	1.2%	0.1ppt	0.1ppt
Honour of Kings	↓	1.2%	0.1ppt	-0.1ppt
Tencent News	-	1.0%	-0.2ppt	-0.1ppt

Source: QuestMobile, Nomura research

Among the Top-50 apps, which accounted for ~93% of the total mobile time spent in China during June, we note that the Bytedance camp gained time-spent share on a y-y basis, which rose from 33.3% in June 2025 to 40.1% in June 2026, surpassing Tencent camp's 29.7%. Sequentially, Bytedance's time-spent share was up 0.9pp m-m.

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



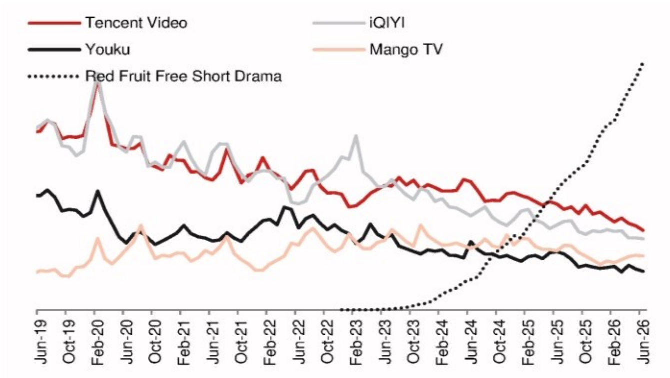
Source: QuestMobile, Nomura research

Long-form vs short-form dramas

Long-form video apps remained weak in June. The MTS of Tencent Video (owned by Tencent) recorded a 34% y-y decline in June, dragged by a 25% decline in DAU and a 12% decline in DTSD. Youku (owned by BABA)/Mango TV (300413 CH, Not rated)/iQIYI (IQ US, Neutral) recorded 47%/3%/11% y-y declines in total time spent, mainly dragged by 34%/9%/16% declines in DAU.

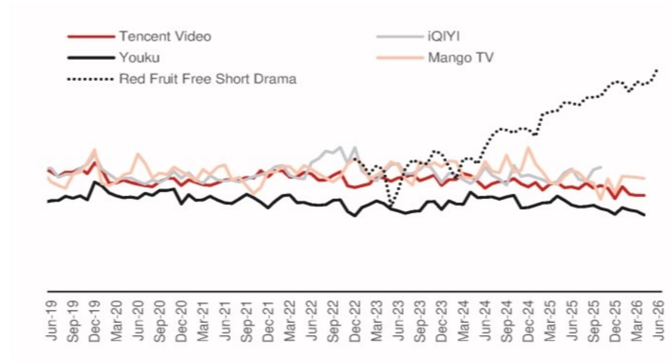
The dominant short-form drama app – Red Fruit Free Short Drama (owned by Bytedance)– kept its strong growth trend with an MTS increase of 145%, backed by 106% growth in DAU and 19% growth in DTSD.

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



Source: QuestMobile, Nomura research

Fig. 4: Average daily time spent per user

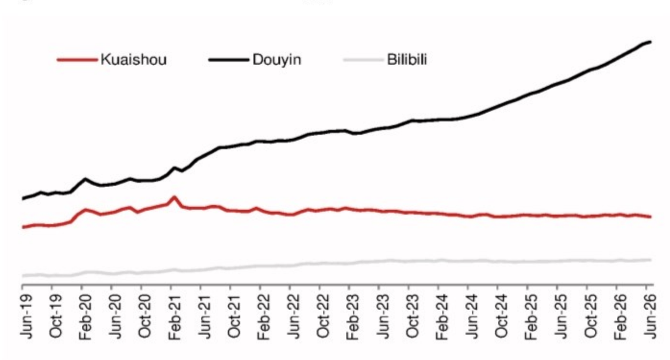


Source: QuestMobile, Nomura research

Short video

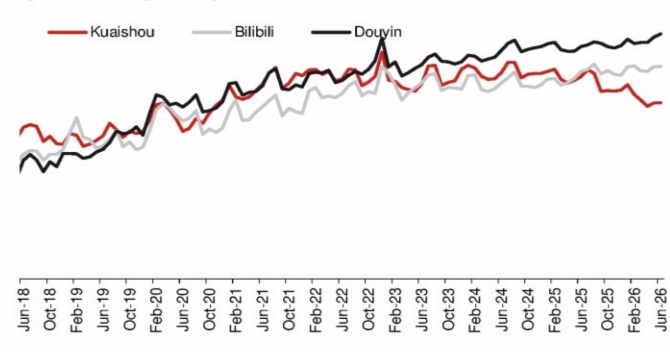
In June, Douyin maintained its solid growth momentum in terms of MTS, at 27% y-y, mainly driven by 20% growth in DAU. Total time spent for Bilibili (BILI US, Neutral) recorded 7% y-y growth in June, driven by 5% y-y growth in DAU and 3% growth in DTSD. However, Kuaishou (1024 HK, Neutral) continued its relatively soft performance, with a decline of 14% y-y in MTS, mainly dragged by a 13% y-y decline in DTSD.

Fig. 5: DAUs of short video apps



Source: QuestMobile, Nomura research

Fig. 6: Average daily time spent per user



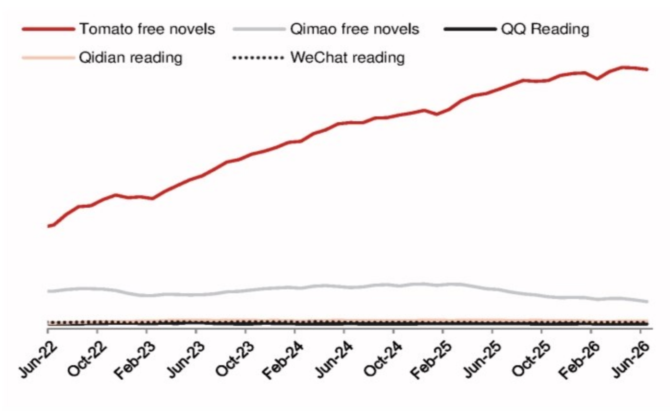
Source: QuestMobile, Nomura research

Online reading

The MTS of the free reading app leader Tomato Free Novels (unlisted; owned by ByteDance) showed decelerating growth trend at 8% y-y in June (from 12% in May 2026), mainly backed by an increase of 8% y-y in DAU. Another free reading app, Qimao Free Novels (unlisted) continued its downward trend with a 44% y-y decline in total time spent, dragged by 31% and 20% y-y declines in DAU and DTSD, respectively.

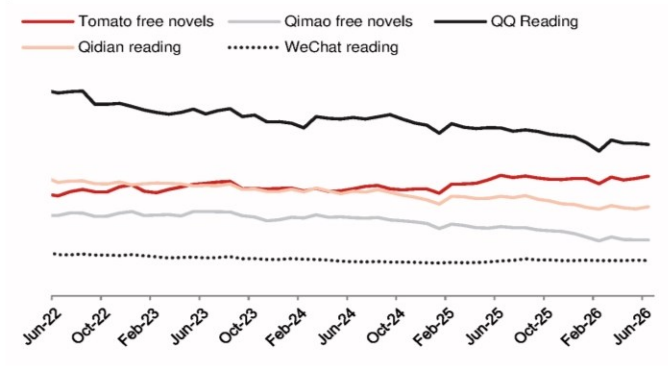
Paid reading apps owned by China Literature (772 HK, Buy), i.e., Qidian reading and QQ reading also appeared soft user engagements, recording respective declines of 8% and 7% on a y-y basis in DAU during the month, and their DTSDs each down by 10% y-y.

Fig. 7: DAU of online reading platforms



Source: QuestMobile, Nomura research

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

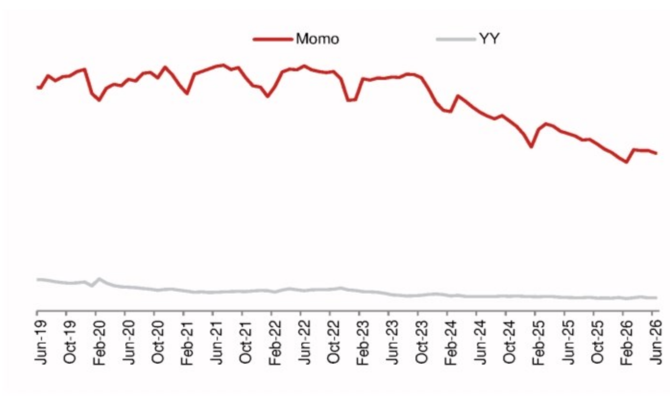


Source: QuestMobile, Nomura research

Live broadcasting

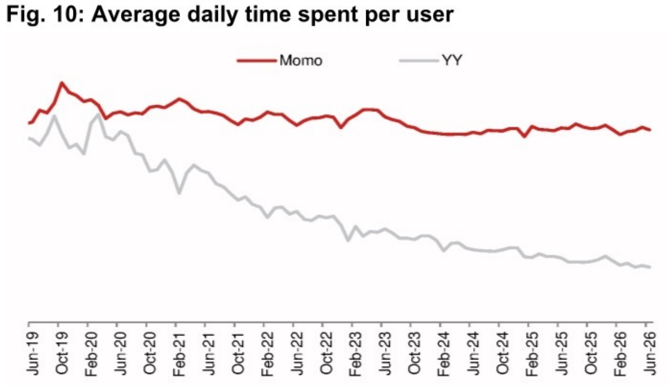
Live broadcasting show apps maintained their y-y downward trend in MTS in June. However, Momo's (MOMO US, Not rated) overall user engagement appeared more resilient compared to YY (owned by Baidu). The MTS of Momo dropped 12% y-y in June 2026, mainly owing to 11% decline of DAU. Comparably, YY's MTS reduced 17% y-y, mainly dragged by 14% decline in DTSD.

Fig. 9: DAUs of live broadcasting show apps



Source: QuestMobile, Nomura research

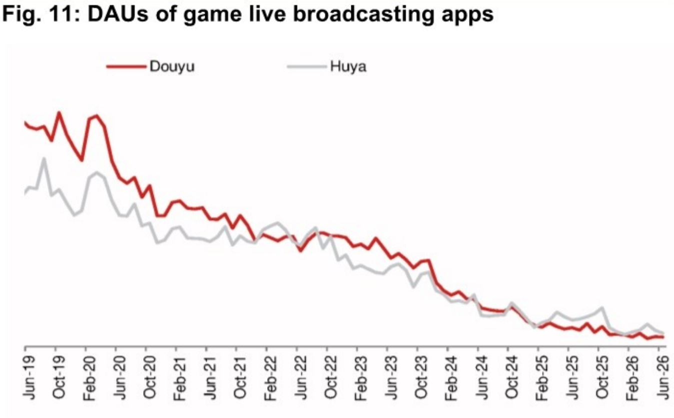
Fig. 10: Average daily time spent per user



Source: QuestMobile, Nomura research

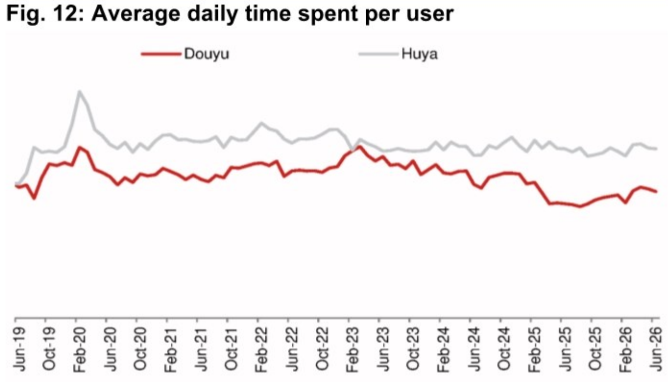
For game live broadcasting apps, the MTS for Huya (HUYA US, Not rated) recorded a 14% decline in June, mainly dragged by a 16% y-y decline in DAU. The MTS for Douyu (DOYU US, Not rated) recorded 2% y-y decline in June, dragged by a 12% y-y decline in DAU, offsetting 11% y-y growth in DTSD.

Fig. 11: DAUs of game live broadcasting apps



Source: QuestMobile, Nomura research

Fig. 12: Average daily time spent per user



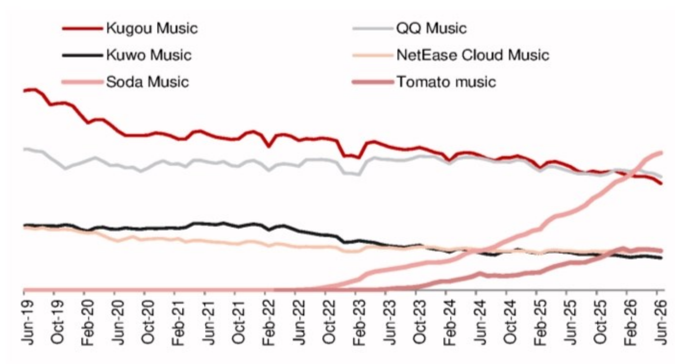
Source: QuestMobile, Nomura research

Music

The y-y decline in DAU continued for most part of the music universe, except for Soda Music and Tomato Music (both owned by ByteDance), which recorded 77% and 43% y-y growth, respectively, in June. Against the competition from the emerging Soda Music and Tomato Music, NetEase Cloud Music (9899 HK, Not rated) remained relatively stable user scale, with 1% y-y growth of DAU in June. However, the music apps [owned by TME (TME US, Buy)], i.e. QQ Music/Kugou Music/Kuwo Music were experiencing user churn, down 5%/13%/14% y-y in terms of DAU in June (as shown in *Fig. 13*).

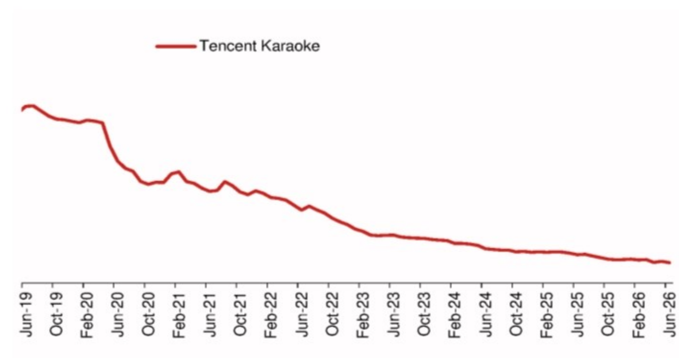
Tencent Karaoke maintained its y-y downward trend in MTS, with a 22% y-y decline, mainly dragged by a 28% y-y drop in DAU, offsetting 9% y-y growth in DTSD in June (as shown in *Fig. 14*).

Fig. 13: DAUs of music streaming apps



Source: QuestMobile, Nomura research

Fig. 14: DAUs of online karaoke app

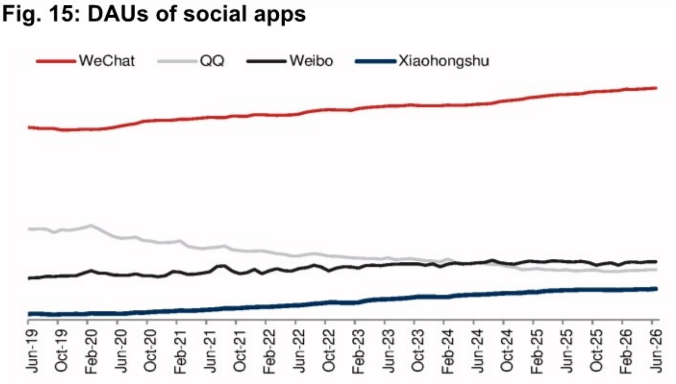


Source: QuestMobile, Nomura research

Social

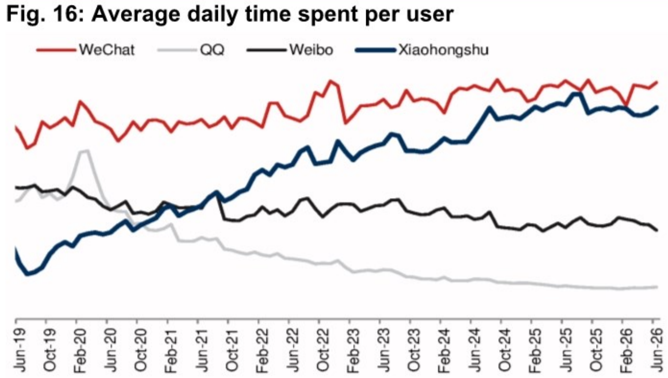
The MTS of Xiaohongshu (unlisted) recovered to 3% y-y growth in June, mainly driven by 4% y-y growth in DAU, driven by the exclusive online streaming right secured for the FIFA World Cup 2026 in China, in our view. The MTS of Weibo (WB US, Neutral) declined 3% y-y in June, dragged by a 3% decline in DTSD. Within Tencent's social ecosystem, QQ maintained its downward trend in MTS, with a 4% y-y decline, while WeChat recorded 2% y-y growth in terms of total time spent in June.

Fig. 15: DAUs of social apps



Source: QuestMobile, Nomura research

Fig. 16: Average daily time spent per user

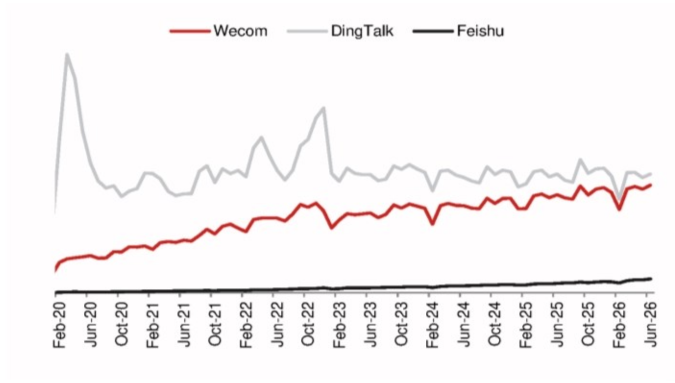


Source: QuestMobile, Nomura research

Office apps

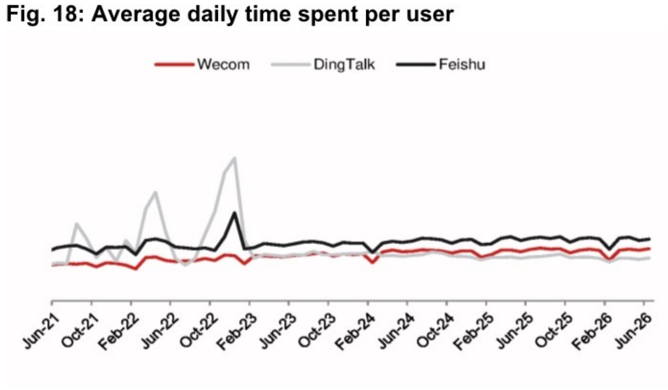
Within the office apps vertical, the DAU of Feishu (owned by Bytedance) and Wecom (owned by Tencent) recorded 51% y-y and 10% y-y growth, respectively, in June, while Ding Talk (owned by BABA) recorded flat y-y. However, Ding Talk owned the largest DAU base at ~82mn, which was 1.1x and 8.6x that of Wecom and Feishu, respectively. For Feishu, the DTSD was at 14.5 minutes (down 1% y-y), followed by Wecom's 12.2 minutes (up 1% 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

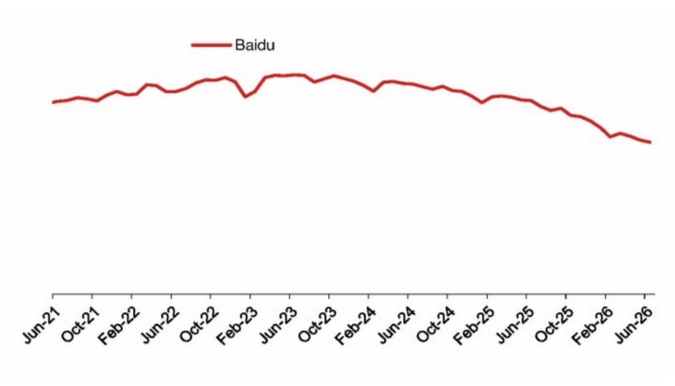


Source: QuestMobile, Nomura research

Search

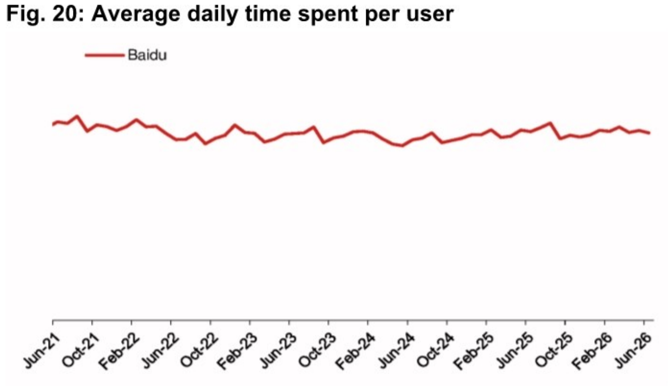
The Baidu app, despite being a dominant search engine in China, witnessed a 22% y-y decline in MTS during the month, mainly dragged by a 21% y-y decline in DAU.

Fig. 19: DAU of Baidu app



Source: QuestMobile, Nomura research

Fig. 20: Average daily time spent per user



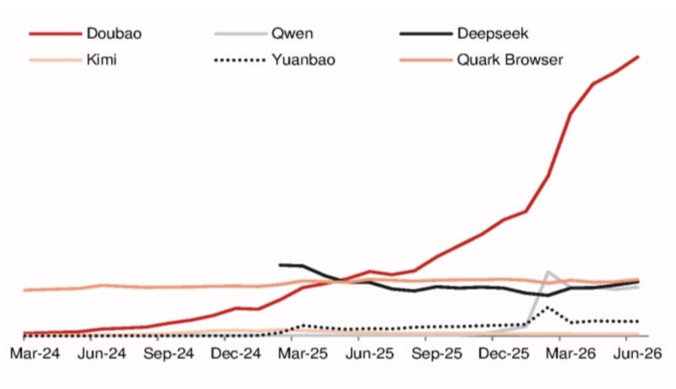
Source: QuestMobile, Nomura research

AI tools

The DAU of Doubao (owned by ByteDance) ranked first in June at 167mn (according to QuestMobile data), representing 3.3x y-y and 6% m-m growth. This was followed by Quark Browser at 34mn (flat y-y and 4% m-m), Deepseek at 32mn (up 1% y-y and up 6% m-m), and Qwen (owned by Alibaba) at 29mn (up 84x y-y and up 5% m-m).

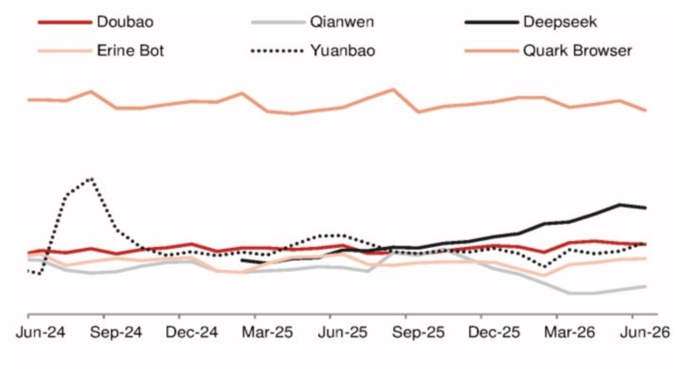
In terms of DTSD, Quark Browser recorded the highest time spent at 32 minutes in June (down 1% y-y and down 4% m-m). Deepseek ranked the second at 16.7 minutes (up 65% y-y and down 3% m-m), followed by Kimi's 12.4 minutes (up 75% y-y and up 8% m-m), Zhipu Qingyan's 12.2 minutes (up 71% y-y and up 4% m-m).

Fig. 21: DAUs of AI apps



Source: QuestMobile, Nomura research

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

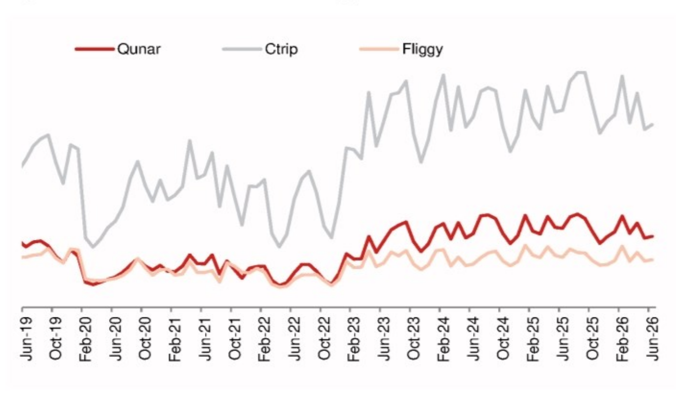


Source: QuestMobile, Nomura research

Online travel

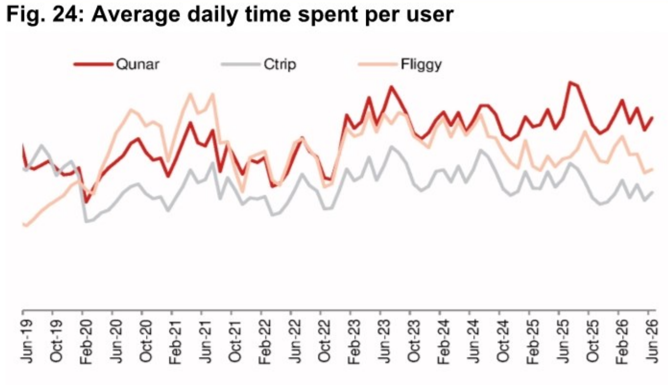
Among online travel apps, TRIP.com's (TCOM US, Neutral) domestic apps, Ctrip and Qunar, and Fliggy (unlisted, owned by BABA) recorded 17%/11%/11% y-y declines in MTS in June, mainly dragged by 7%/10%/5% y-y declines in DAU. In terms of DTSD, Ctrip and Fliggy recorded 10%/7% y-y declines in June, while Qunar recorded flat y-y.

Fig. 23: DAUs of online travel apps



Source: QuestMobile, Nomura research

Fig. 24: Average daily time spent per user



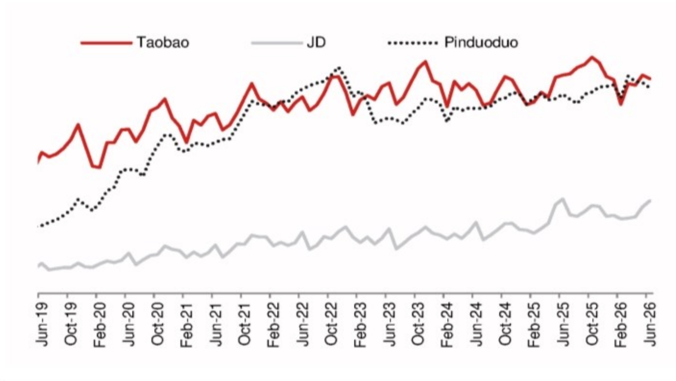
Source: QuestMobile, Nomura research

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. Pinduoduo's DAU recorded 3% y-y growth in June, mainly backed by 20% y-y growth in the number of casual users (daily time spent <1 minute), while the number of hardcore users (daily time spent >1 minute) recorded 1% y-y slip. However, Taobao's DAU decrease of 2% y-y was dragged by a 4% decline in the number of hardcore users, offsetting 7% y-y growth in the number of casual users. Meanwhile, JD app's DAU decreased 2% y-y, dragged by an 11% y-y decline in the number of hardcore users, offsetting 25% y-y growth in the number of casual users.

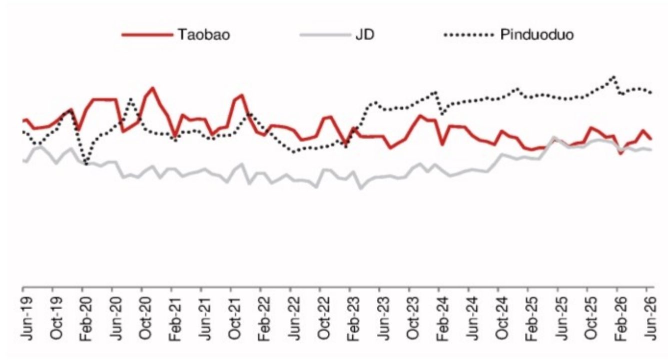
In terms of DTSD, Taobao and PDD delivered 2%/3% y-y growth in June, while JD app recorded a 5% y-y decline.

Fig. 25: DAUs of China e-commerce apps



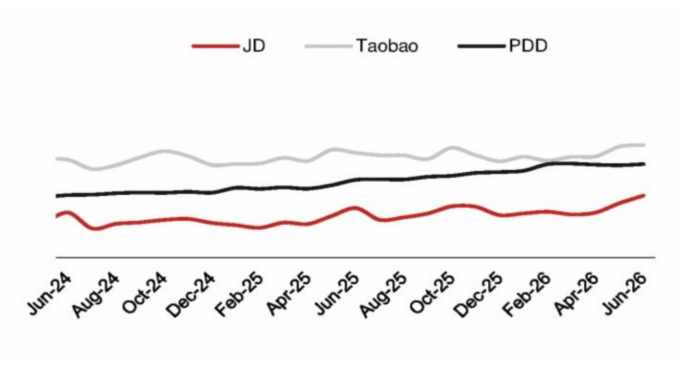
Source: QuestMobile, Nomura research

Fig. 26: Average daily time spent per user



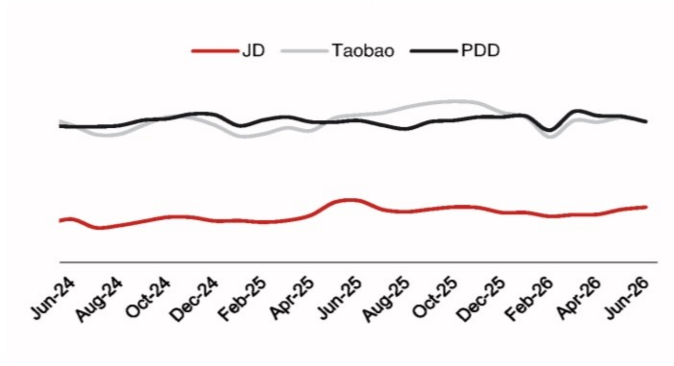
Source: QuestMobile, Nomura research

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

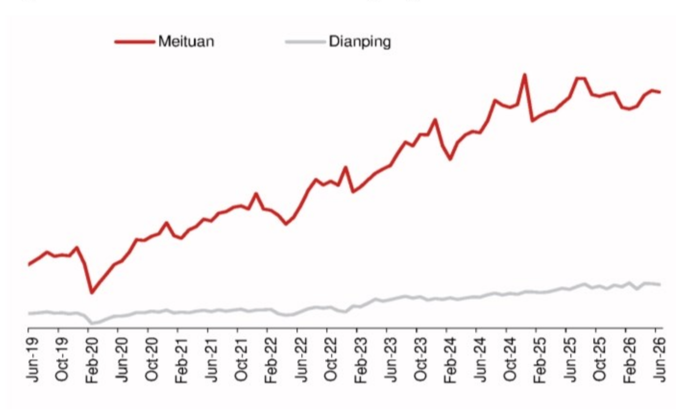


Source: QuestMobile, Nomura research

O2O

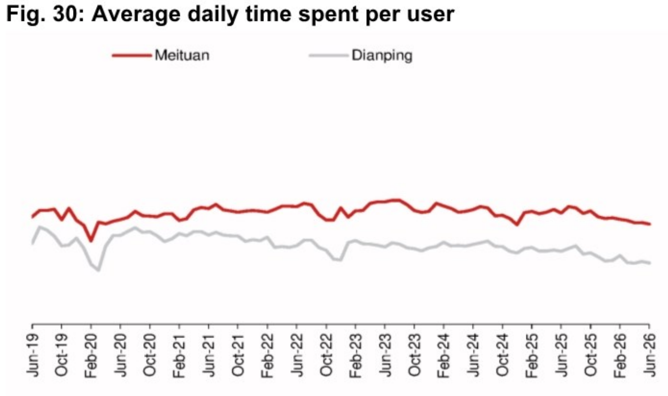
The Meituan app recorded an 8% y-y decline in MTS in June, dragged by a 10% decline in DTSD, offsetting 2% growth in DAU. Dianping app (owned by Meituan) recorded a 5% decline in MTS, dragged by a 16% y-y decline in DTSD, offsetting 13% growth in DAU.

Fig. 29: DAUs of Meituan and Dianping



Source: QuestMobile, Nomura research

Fig. 30: Average daily time spent per user

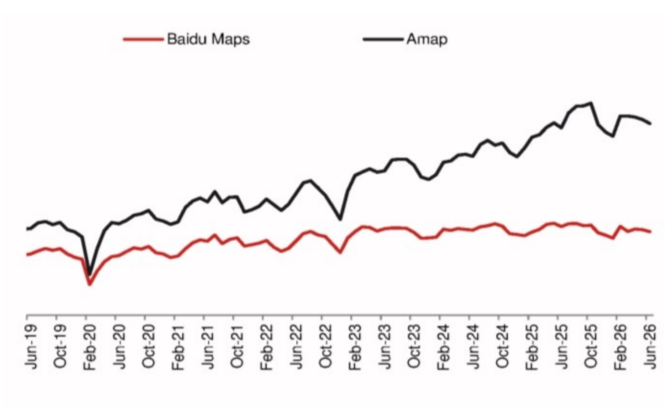


Source: QuestMobile, Nomura research

Mobile map apps

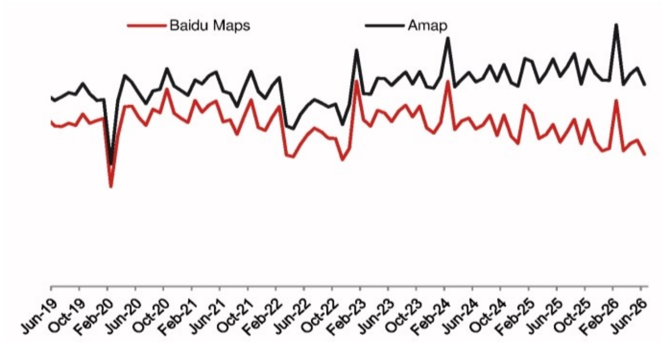
Total time spent on Baidu Maps declined 14% y-y in June, dragged by a 9% decline in DTSD and a 6% decline in DAU. The MTS of Amap (owned by BABA) fell 2% y-y in June, dragged by 4% y-y decline in DTSD, offsetting a 2% y-y increase in DAU.

Fig. 31: DAUs of Baidu Maps and Amap



Source: QuestMobile, Nomura research

Fig. 32: Average daily time spent per user



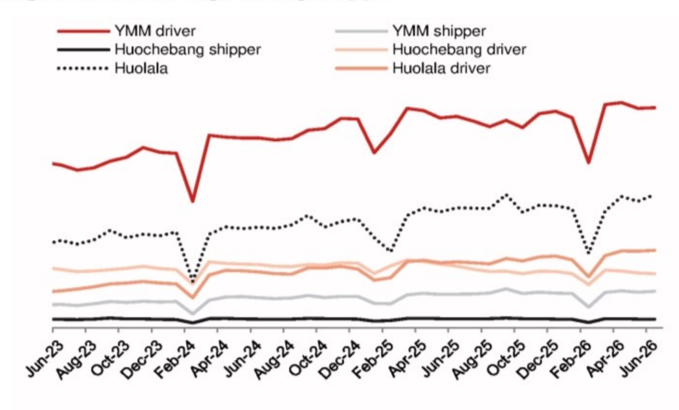
Source: QuestMobile, Nomura research

Digital freight apps

On the shipper side, the MTS of YMM Shipper (owned by Full Truck Alliance, FTA [YMM US, Buy]) and Huolala (unlisted) recorded 16% y-y and 20% y-y growth, respectively, mainly driven by 9% and 11% y-y growth in DAU. Huochebang Shipper (owned by FTA) recorded flat y-y in June, backed by 4% y-y growth in DTSD, offsetting a 4% y-y decline in DAU.

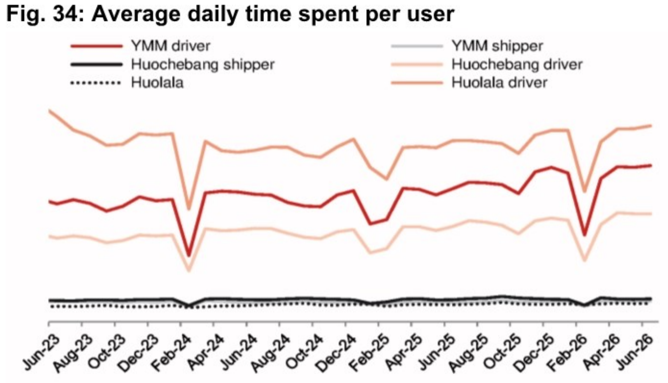
On the driver side, YMM Driver (owned by FTA) recorded 22% y-y growth in MTS in June, mainly driven by 17% in DTSD; Huolala Driver (unlisted)'s MTS increased 27%, mainly thanks to 17% y-y growth in DAU. While Huochebang Driver (owned by FTA) recorded flat y-y in MTS, backed by 14% growth in DTSD, offsetting 12% y-y decline in DAU.

Fig. 33: DAUs of digital freight apps



Source: QuestMobile, Nomura research

Fig. 34: Average daily time spent per user

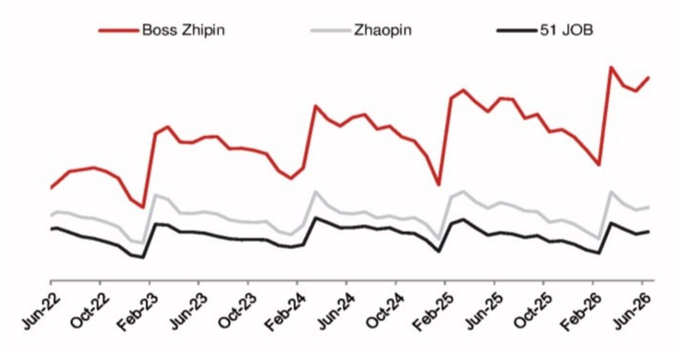


Source: QuestMobile, Nomura research

Online recruitment apps

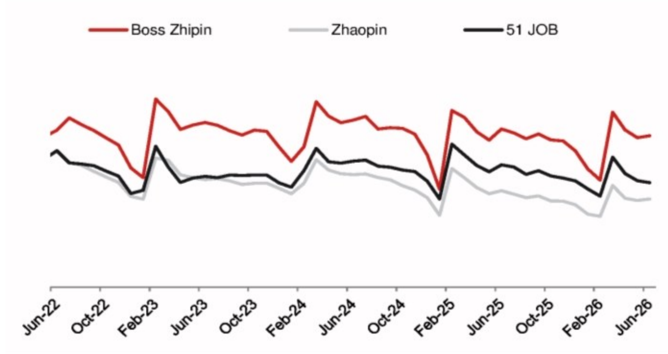
Boss Zhipin app (owned by Kanzhun [BZ US, Not rated]), one of the leading players in the online recruitment industry, recorded 7% y-y growth in MTS in June, driven by 11% y-y growth in DAU, offsetting a 4% y-y decline in DTSD. However, the MTS of Zhaopin (unlisted) and 51Job (unlisted) decreased 14% and 13% y-y in June, primarily dragged by a 9% and 14% 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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