Internet - China

China Mobile App Radar: Jun'26 in review

Industry Overview

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Equity
China
Internet/e-Commerce

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Key app data trends in Jun'26

We track various mobile app engagement data per QuestMobile to help gauge user behavior trends across AI/social/digital entertainment/ecommerce/verticals. For Jun'26, we observed 1) **AI chatbot: Doubao** (ByteDance) DAU stayed significantly ahead of peers but its time spent was down notably in early July vs. June, possibly due to summer holiday (less time spent from students); 2) **Taobao & JD.com** DAU saw slight decline YoY in June, in line with the weak consumption trend; **PDD** outperformed and sustained a notable lead in total time spent; 3) **ByteDance's Soda Music** DAU kept rising (now higher than all **TME**'s major apps) though time spent down MoM; 4) **Travel** category extends YoY decline trend of time spent in June; 5) **Xiaohongshu** time spent looks plateaued since late 2025; **Bilibili** time spent grew healthily; 6) **Tencent's key evergreen games** engagement remains stable, despite *Delta Force* time spent slightly down MoM; 7) Bytedance's short drama app **Red Fruit** time spent surpassed Kuaishou main app since May; 8) **Baidu** search time spent continued notable decline trend YoY in June; 9) Bytedance local service **Doushengsheng** had c.20m DAU in June (2/3 of Meituan's Dianping app).

AI: engagement divergence with leader widening lead

Bytedance's Doubao weekly DAU/total time spent grew to 165.7mn/11.7bn in the week of July 6, followed by DeepSeek's 30.7mn/3.5bn, Yuanbao's 8.7mn/669mn and Qwen's 27.9mn/772mn. On per user level, most AI apps saw slight declines in daily user time spent and daily sessions. Doubao's daily time spent/number of sessions per user edged down to 10 mins/5 times in the week of July 6. DeepSeek's daily time spent/number of sessions per user declined slightly to 16 mins/8 times in the week of July 6.

Our take: *Doubao widening the gap with peers (e.g. DeepSeek, Yuanbao (Tencent) and Qwen (Alibaba). Qwen per user time spent appears to be the lowest among peers.*

DAU: daily active user

HoK: Honor of Kings

CNY: Chinese New Year

Transaction platforms: engagement remains resilient

eCommerce: Taobao DAU/total time spent -2%/flat YoY to 410mn/253bn mins in June. PDD's DAU/total time spent was +2%/+6% YoY to 392mn/316bn mins in June. JD's DAU/total time spent -2%/-7% YoY to 177mn/101bn mins in June.

Local Service: Meituan's DAU/total time spent +2%/-8% YoY to 175mn/71bn mins in June. Amap's DAU/total time spent +2%/-2% YoY to 177mn/155bn mins in June. Dianping's DAU/total time spent +12%/-6% YoY to 33mn/9bn mins in June.

Our take: *user engagement for Taobao & JD app saw slight decline YoY in June. PDD appears relatively resilient.*

(Continue on page 2)

Entertainment & social: growth concentrates on leaders

Social media: Weixin's DAU/total time spent +3%/+2% YoY to 930mn/2.8tn mins in June. Xiaohongshu's DAU/total time spent +4%/+3% YoY to 125mn/338bn mins in June. Bilibili's DAU/total time spent +5%/+7% YoY to 73mn/247bn mins.

Short video: Douyin's DAU/total time spent +20%/+27% YoY to 710mn/2.8tn mins in June. Kuaishou's DAU/total time spent was -1%/-14% YoY to 199mn/555bn mins in June. Red Fruit's DAU/total time spent +106%/+145% YoY to 157mn/662bn mins in June.

Online games: Honour of Kings' DAU/total time spent +11%/+19% YoY to 45mn/173bn in June. Peacekeeper Elite DAU/total time spent -13%/-5% YoY to 11mn/45bn in June. Delta Force shows meaningful user build-up since launch, with DAU/total time spent +96%/+94% to 29mn/105bn in June.

Online music: QQ Music's DAU/total time spent -5%/-11% YoY to 49mn/16bn; Kugou Music's DAU/total time spent -13%/-15% YoY to 47mn/21bn; Kuwo Music's DAU/total time spent -14%/-8% YoY to 14mn/12bn in June. Cloud Music's DAU/total time spent +1%/+1% YoY to 17mn/4bn in June. Soda Music DAU/total time spent +77%/+135% YoY to 60mn/16bn in June.

Long-from video: iQIYI's DAU/total time spent -16%/-11% YoY to 45mn/99bn in June. Tencent Video DAU/total time spent -25%/-34% YoY to 51mn/91bn in June. Youku's DAU/total time spent -34%/-47% YoY to 25mn/36bn in June.

Our take: *social and digital entertainment user engagement continues to diverge, with Douyin and Bilibili gaining share while legacy players lagging. Game engagement resilient and recovered sequentially in June. Long-form video time spent decline continues, with share loss to short-drama apps. Soda Music (ByteDance) stands out in terms of user scale growth within online music sector, with TME's Kugou/Kuwo seeing notable YoY decline among major music apps.*

Verticals: stable across the board

Ride sharing: Didi dominates ride sharing sector, with DAU/total time spent +15%/+30% YoY to 34mn/9.5bn in June. Huolala's DAU/total time spent +11%/+20% YoY to 2.6mn/0.7bn in June.

Travel: Trip.com's DAU/total time spent -7%/-17% YoY to 13mn/2.7bn in June. Tongcheng's DAU/total time spent +6%/-9% YoY to 2mn/0.4bn in June. Fliggy's DAU/total time spent -5%/-11% YoY to 4mn/0.9bn in June.

Recruitment: Boss Zhipin's DAU/total time spent -7%/+7% YoY to 5mn/10.9bn in June. Zhaopin's DAU/total time spent +2%/-14% YoY to 3mn/2.3bn in June. 51Job's DAU/total time spent +8%/-13% YoY to 2mn/1.8bn in June.

Search: Baidu DAU/total time spent continued to trend lower with -21%/-22% YoY to 172mn/213bn in June.

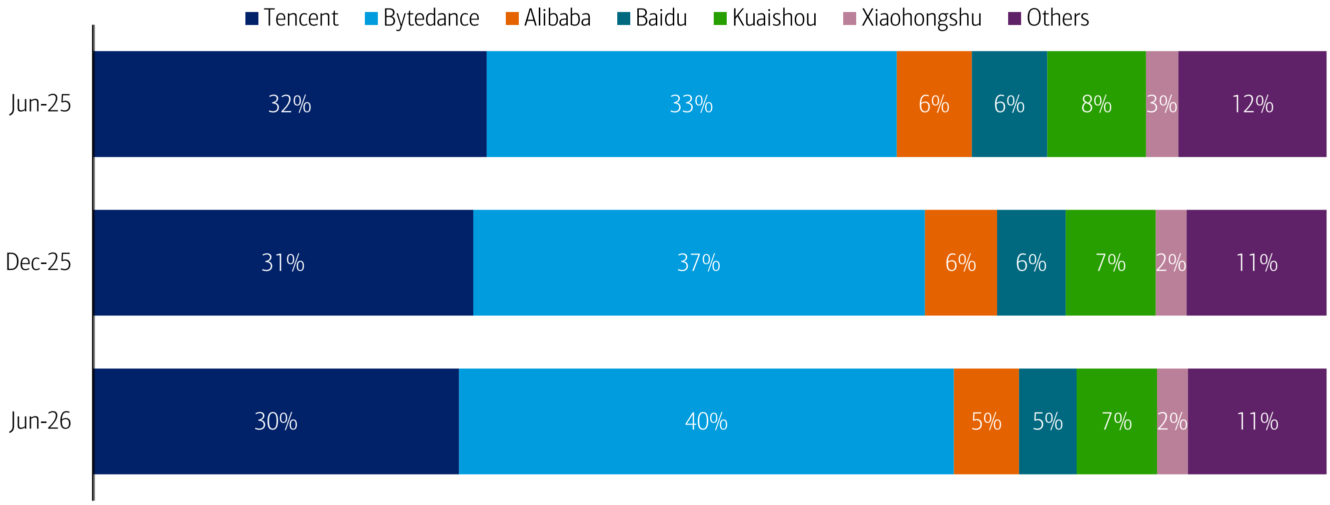
Online property: 58 leads property apps, with DAU/total time spent -7%/-17% YoY to 7mn/2.0bn in June. Beike DAU/total time spent-11%/-1% YoY to 4mn/1.3bn in June.

Online auto: Autohome's DAU/total time spent +9%/-16% YoY to 14mn/6.1bn in June. Dongchedi's DAU/total time spent -14%/-33% YoY to 7mn/8.7bn in June.

Our take: *ride hailing and recruitment were resilient, and online property picked up in June. Travel category time spent saw further engagement level moderation in June.*

Time spent share: the big picture

Exhibit 1: ByteDance apps' share grew to 40% in Jun'26, up from 33% in Jun'25
China top 50 mobile internet apps' % share by total user time spent



Source: QuestMobile, BofA Global Research

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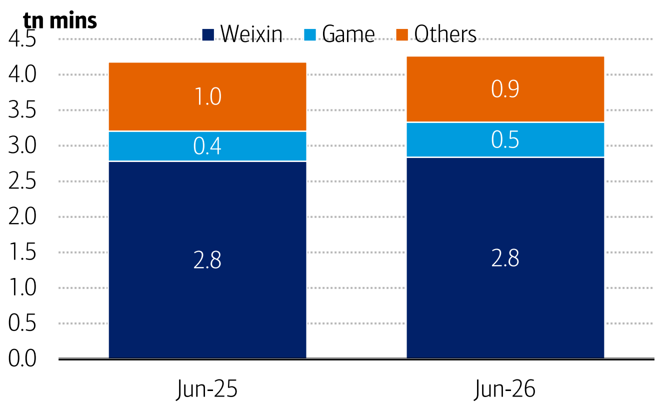
Exhibit 2: Tencent's Weixin/game/other apps time spent is stable at 2.8tn/0.5tn/0.9tn mins in Jun'26
Tencent apps' total time spent



Source: QuestMobile, BofA Global Research

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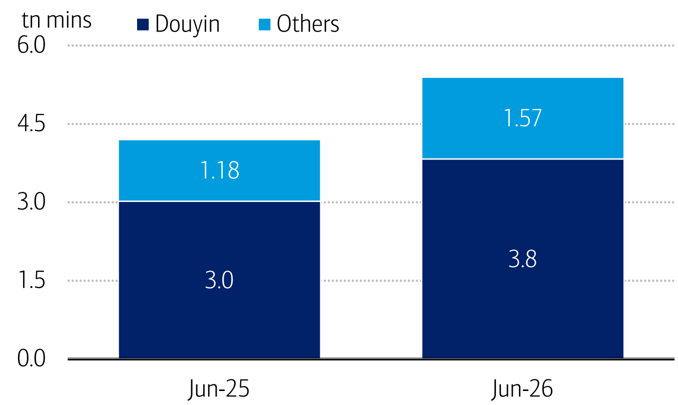
Exhibit 3: ByteDance's Douyin/other apps time spent reached 3.8tn/1.6tn in Jun'26
ByteDance apps' total time spent



Source: QuestMobile, BofA Global Research

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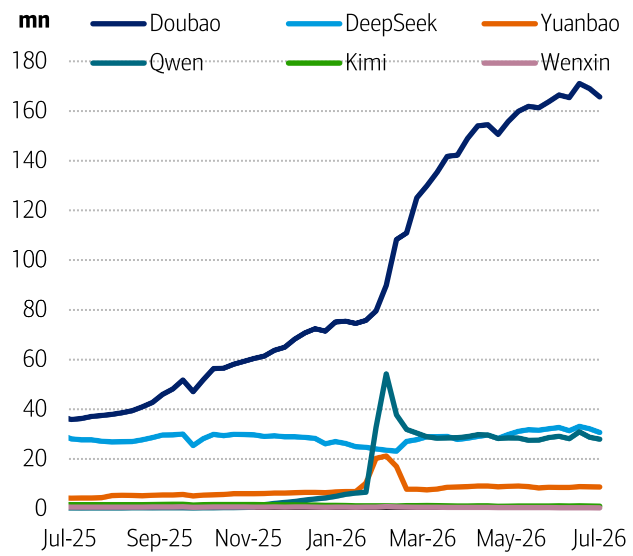
AI apps (consumer facing)

Exhibit 4: Doubao DAU surged to 166mn, extending the gap vs. peers

AI apps weekly DAU trend



Source: QuestMobile, BofA Global Research

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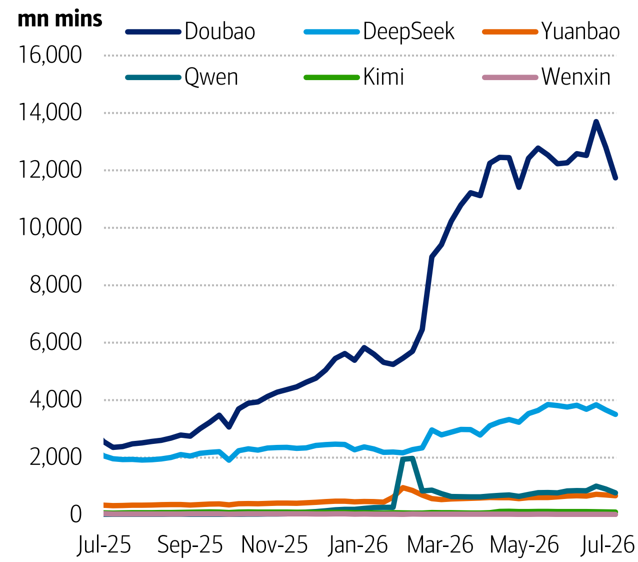
Exhibit 5: Doubao retained a significant lead in total time spent, despite a slight pullback recently

AI apps weekly time spent trend



Source: QuestMobile, BofA Global Research

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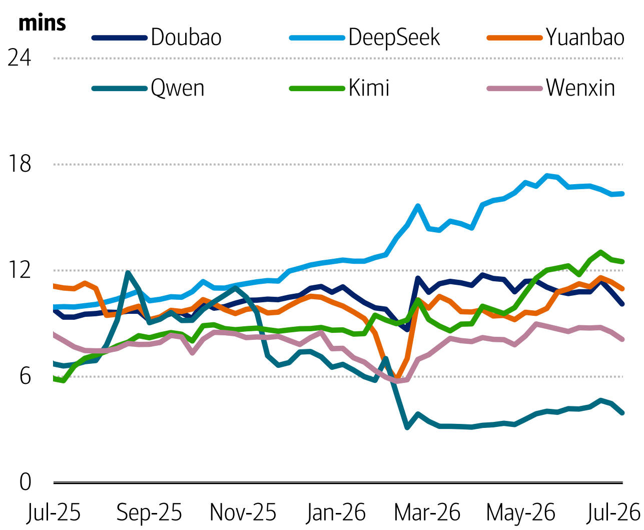
Exhibit 6: Average daily time spent per user held steady with mixed performance across apps in the week of July 6'26

AI apps daily time spent per DAU



Source: QuestMobile, BofA Global Research

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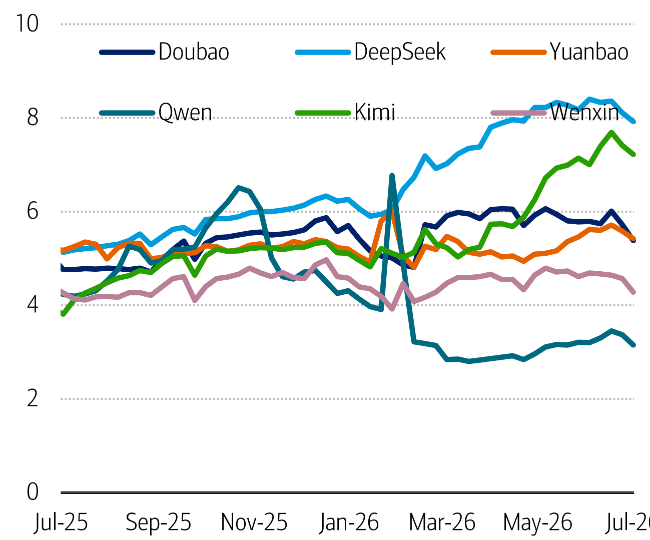
Exhibit 7: Session per user diverged across AI apps in the week of July 6'26

AI apps daily session per user



Source: QuestMobile, BofA Global Research

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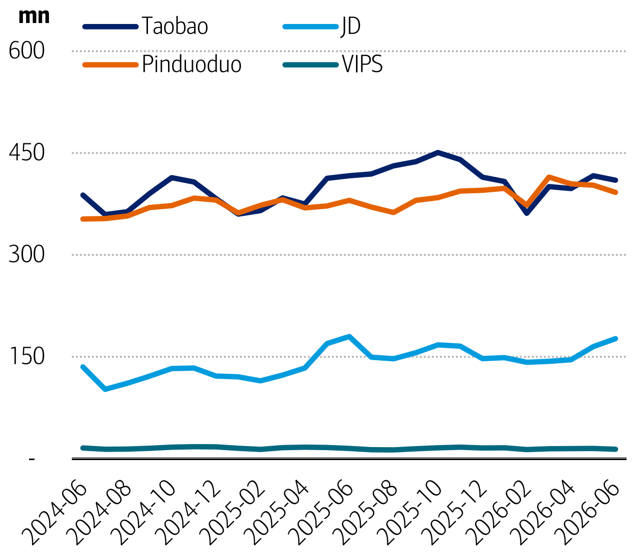
Transaction platforms

eCommerce

Exhibit 8: Taobao and PDD DAU reached 410mn/392mn in Jun'26

eCommerce apps monthly DAU



Source: QuestMobile, BofA Global Research

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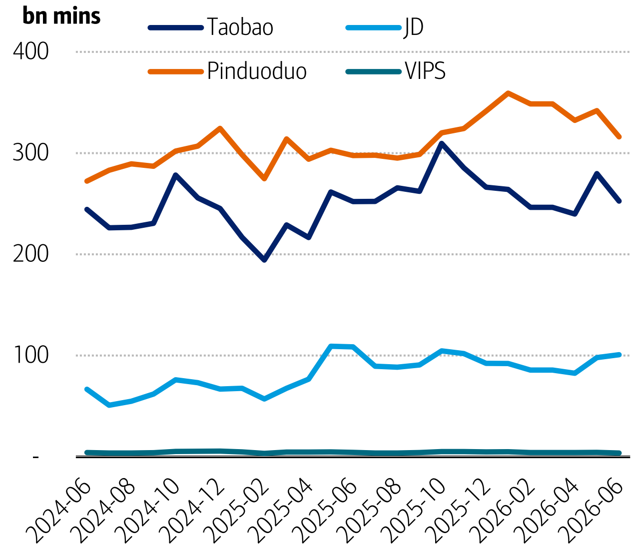
Exhibit 9: PDD retained its lead in total time spent at 316bn mins in Jun'26

eCommerce apps monthly total time spent



Source: QuestMobile, BofA Global Research

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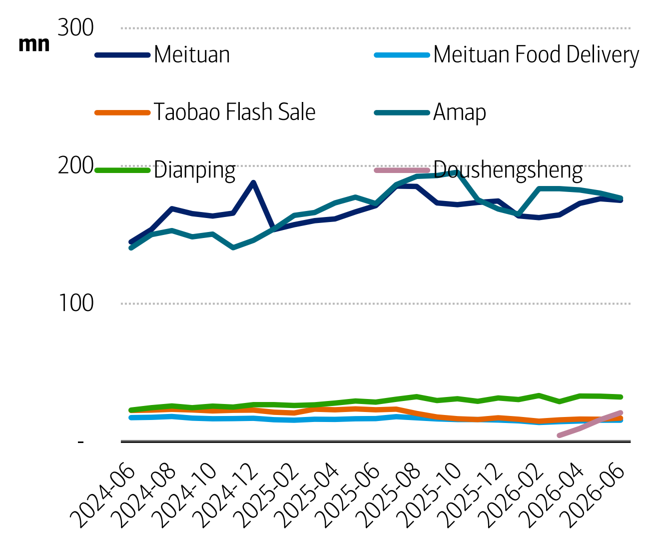
Local service

Exhibit 10: Meituan/Amap's DAU was 175mn/177mn in Jun'26

Key local service apps monthly DAU



Source: QuestMobile, BofA Global Research

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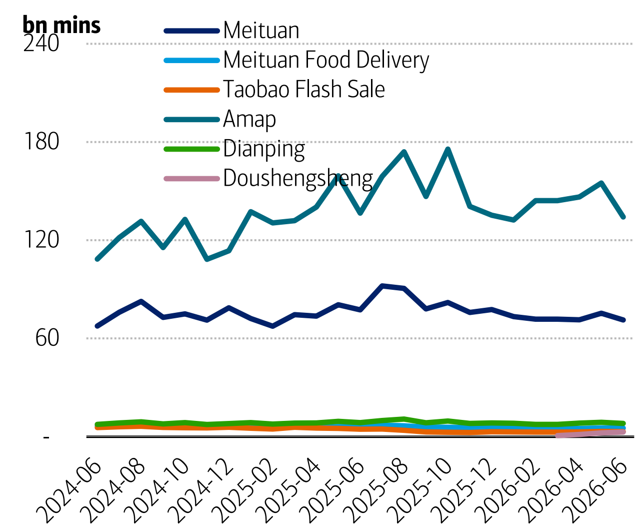
Exhibit 11: Amap total time spent was 134bn mins in Jun'26

Key local service apps monthly total time spent



Source: QuestMobile, BofA Global Research

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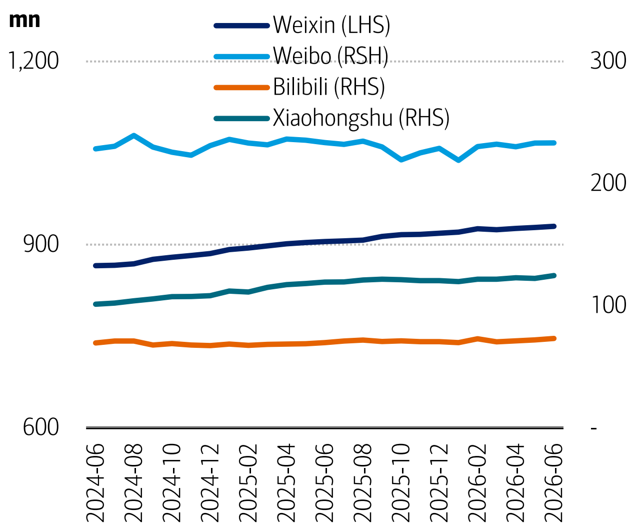
Digital entertainment & social

Social media

Exhibit 12: Weixin's DAU grew to 930mn in Jun'26
Social media apps monthly DAU



Source: QuestMobile, BofA Global Research

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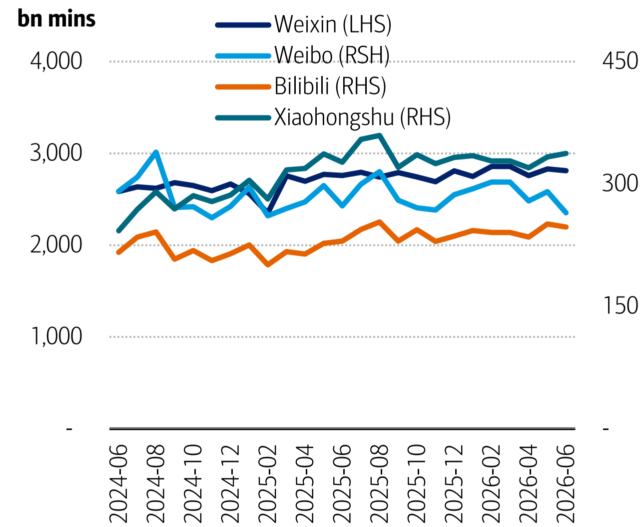
Exhibit 13: Social apps' total time spent was stable in Jun'26
Social media apps monthly total time spent



Source: QuestMobile, BofA Global Research

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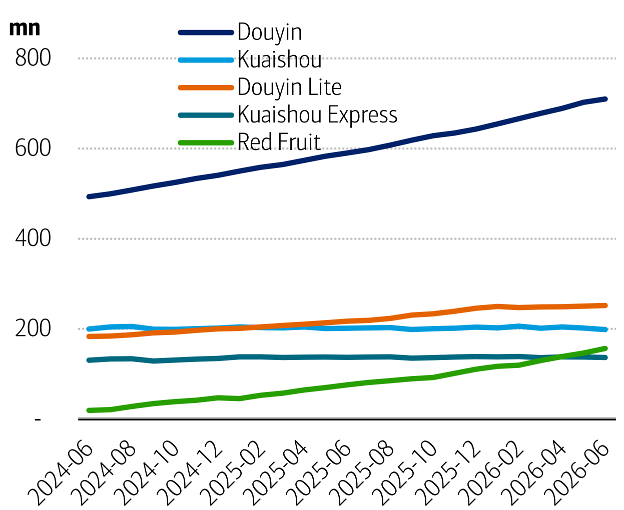
Short video

Exhibit 14: ByteDance core apps' DAU continued to expand; Kuaishou apps DAU held steady
Short video apps monthly DAU



Source: QuestMobile, BofA Global Research

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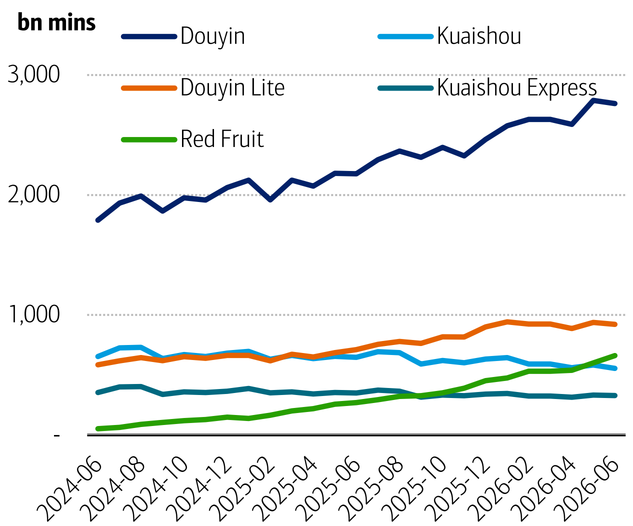
Exhibit 15: Douyin's time spent rose to 2.8tn mins in Jun'26
Short video apps monthly total time spent



Source: QuestMobile, BofA Global Research

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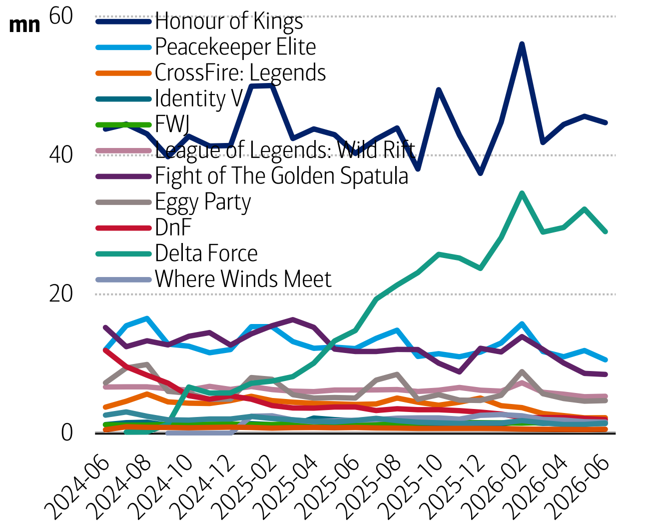
Online game

Exhibit 16: Leading titles saw a slight DAU decline in Jun'26
Key games monthly DAU



Source: QuestMobile, BofA Global Research

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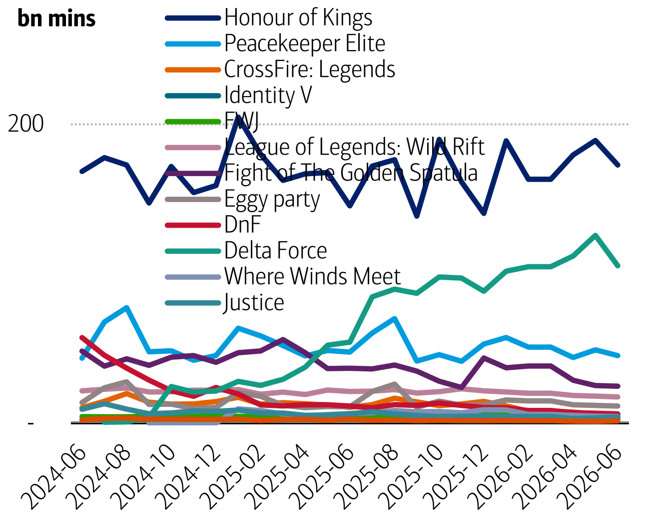
Exhibit 17: Leading titles time spent slightly edged down in Jun'26
Key games monthly time spent



Source: QuestMobile, BofA Global Research

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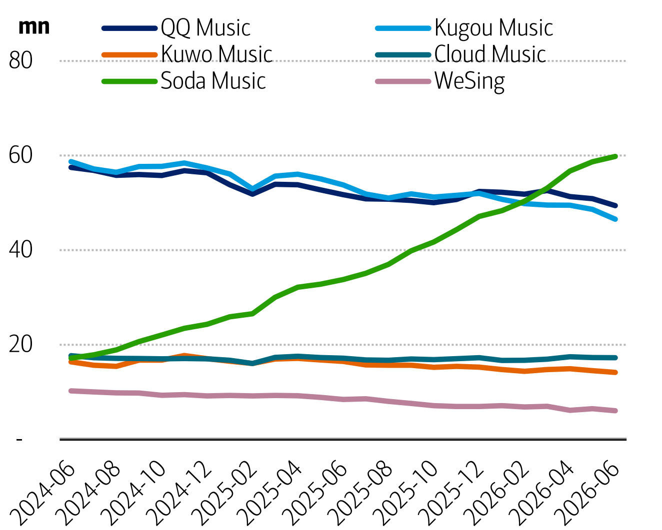
Online music

Exhibit 18: Soda music DAU continued to surpass QQ Music/Kugou Music in Jun'26
Online music apps monthly DAU



Source: QuestMobile, BofA Global Research

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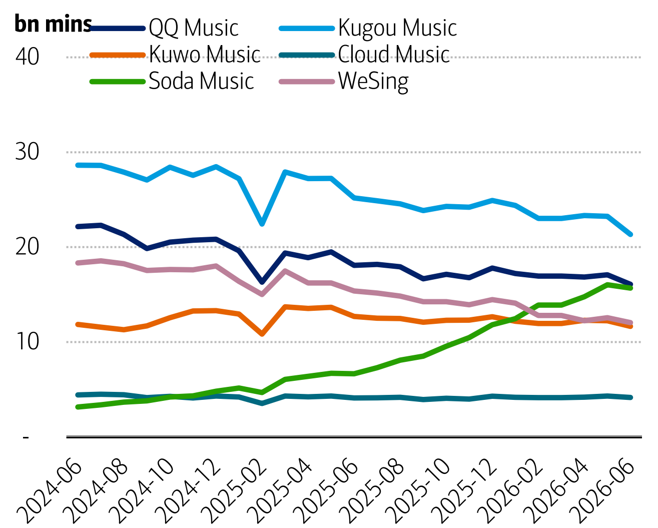
Exhibit 19: Soda music monthly time spent further outperformed Kuwo Music/WeSing in Jun'26
Online music apps monthly time spent



Source: QuestMobile, BofA Global Research

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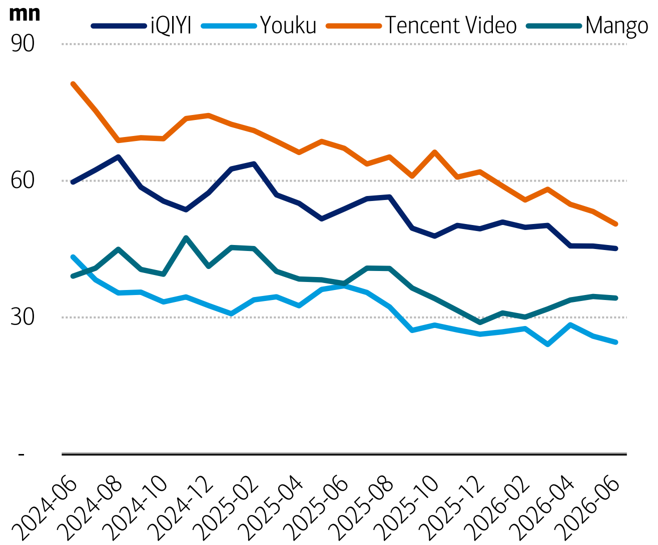
Long-form video

Exhibit 20: Major apps DAU continued to decline
Long-form video platform monthly DAU



Source: QuestMobile, BofA Global Research

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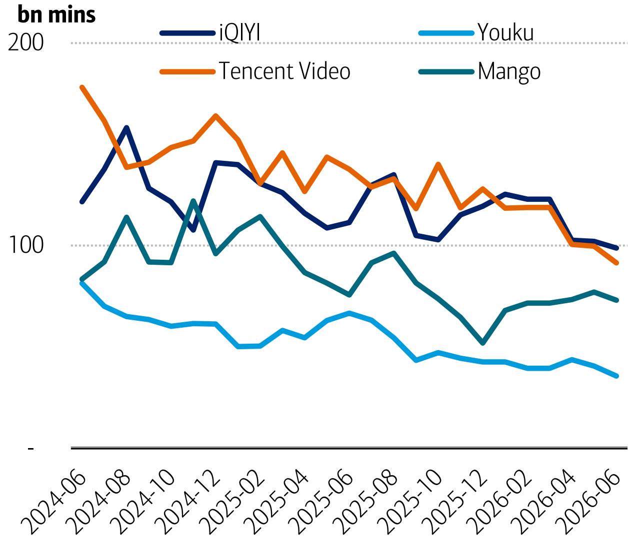
Exhibit 21: Total time spent trends decreased MoM in Jun'26
Long-form video platform monthly time spent



Source: QuestMobile, BofA Global Research

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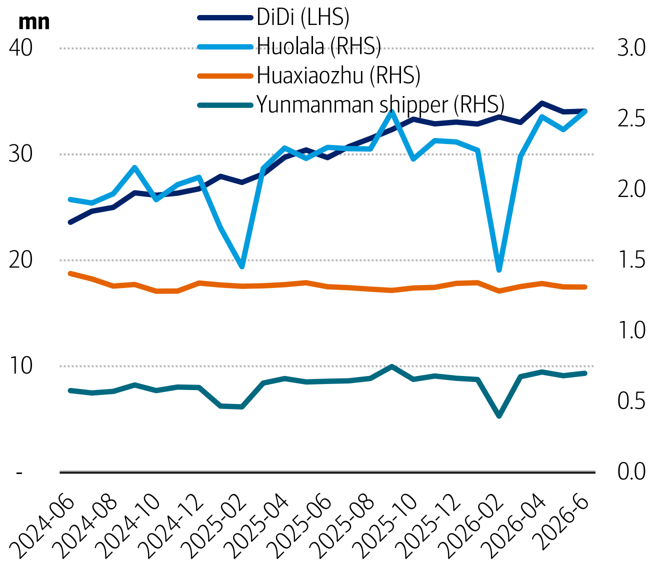
Verticals

Ride sharing

Exhibit 22: DiDi continues to dominate ride-sharing DAU
Ride sharing apps monthly DAU



Source: QuestMobile, BofA Global Research

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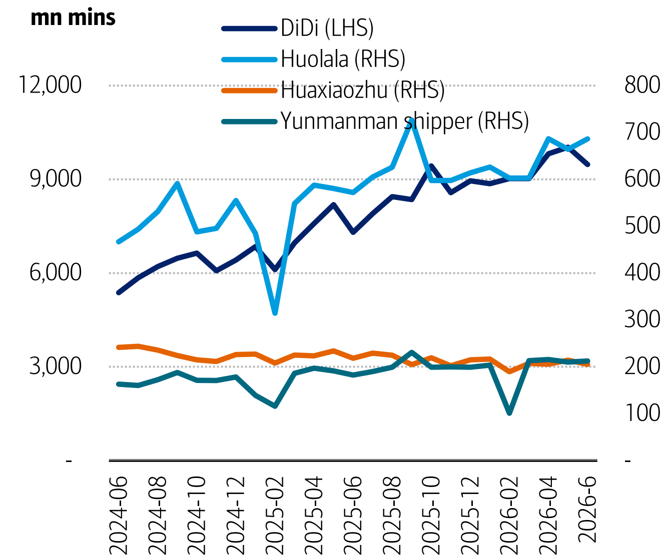
Exhibit 23: DiDi total time spent remained stable in Jun'26
Ride sharing apps monthly time spent



Source: QuestMobile, BofA Global Research

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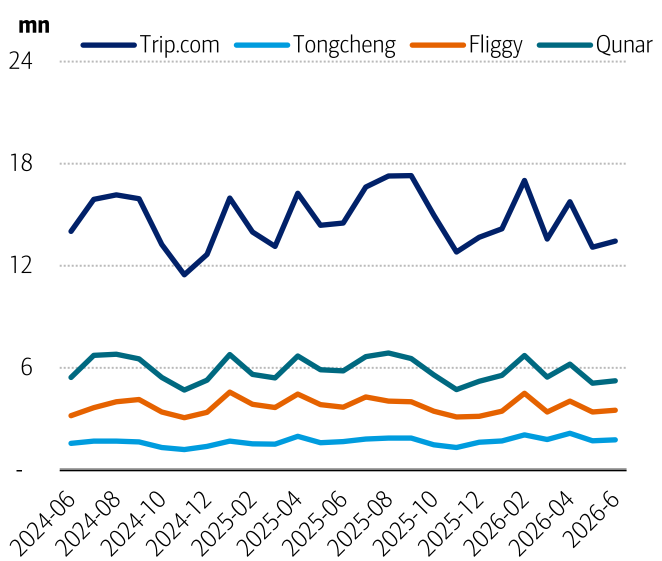
Travel

Exhibit 24: Travel apps' DAUs were slightly up in Jun'26
Key travel apps monthly DAU



Source: QuestMobile, BofA Global Research

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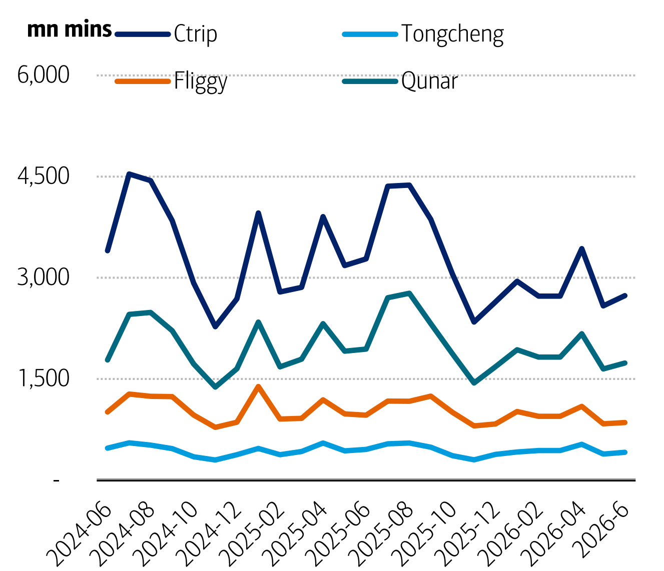
Exhibit 25: Travel apps' total time spent were slightly up in Jun'26
Key travel apps monthly time spent



Source: QuestMobile, BofA Global Research

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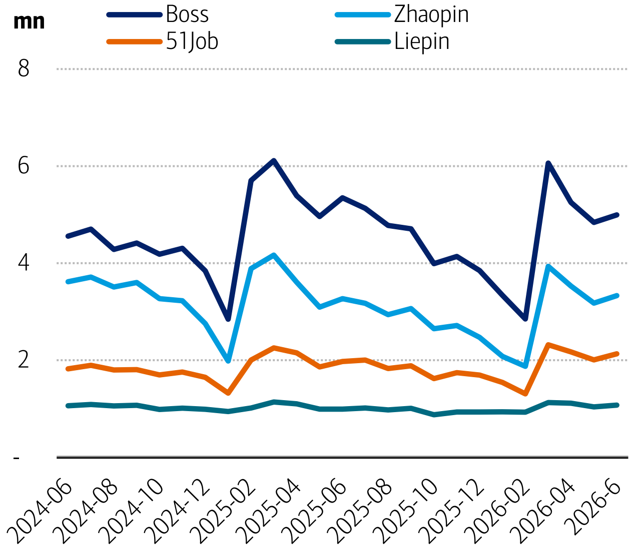
Recruitment

Exhibit 26: Recruitment apps' monthly DAU was stable in Jun'26
Recruitment apps monthly DAU



Source: QuestMobile, BofA Global Research

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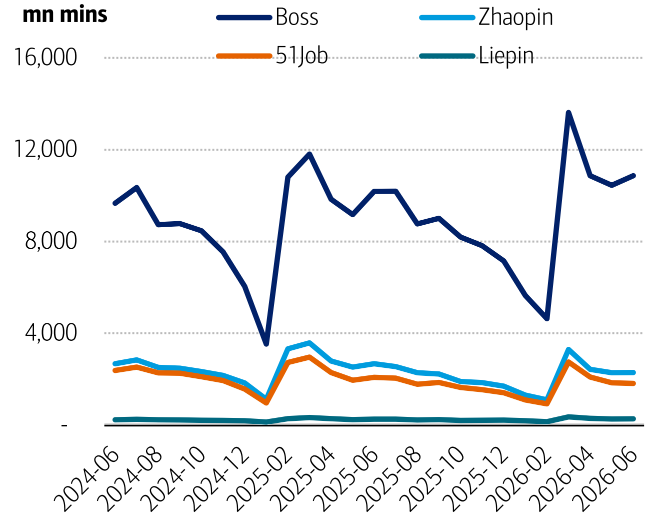
Exhibit 27: Boss Zhipin maintained its lead in total time spent
Recruitment apps monthly time spent



Source: QuestMobile, BofA Global Research

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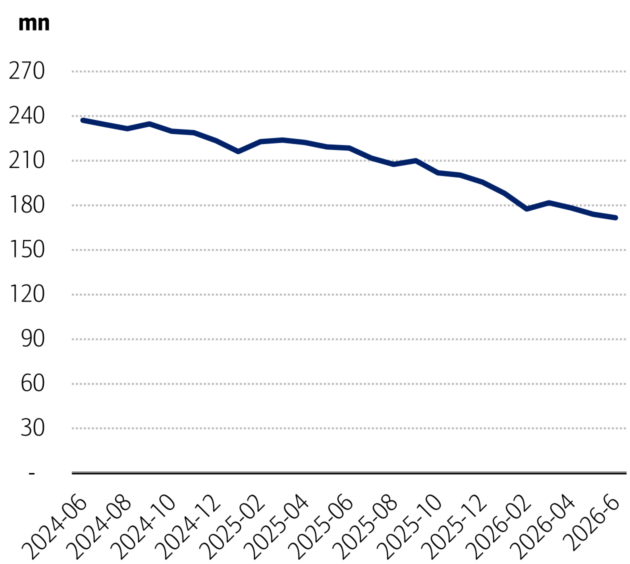
Search

Exhibit 28: Baidu DAU continues to trend lower over time
Baidu monthly DAU trend



Source: QuestMobile, BofA Global Research

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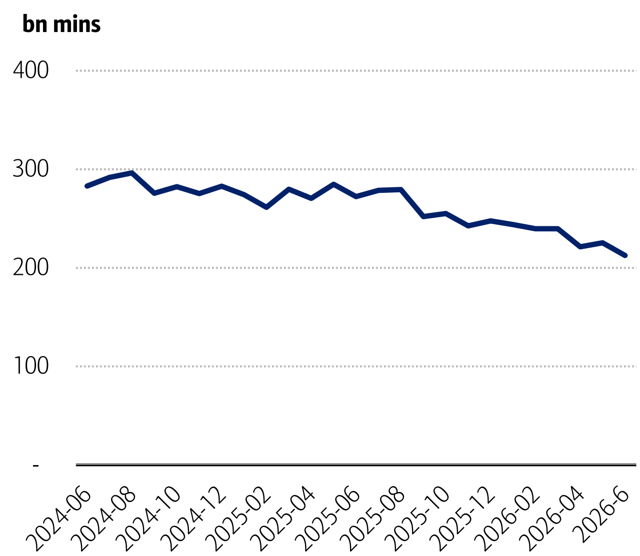
Exhibit 29: Baidu total time spent shows steady downward trend, consistent with DAU contraction
Baidu monthly time spent trend



Source: QuestMobile, BofA Global Research

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Disclosures

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