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China Internet & New Media

Global Markets Research
5 October 2026

EQUITY: INTERNET & NEW MEDIA

Monthly App Tracker – August 2026

Bytedance gains significant time spent share

MAS rose 0.9% y-y and total monthly time spent increased 8.1% y-y in August

Monthly active smartphone (MAS) users in China rose 0.9% y-y to 1.28bn in August 2026. China's MAS has remained stable in recent months. Total monthly time spent (MTS) grew 8.1% y-y in August, decelerating from 8.8% y-y growth in July 2026.

Bytedance group captures over 40% time spent among China's top 50 most-used apps

Among China's top 50 most used apps in terms of monthly time spent (MTS), the entire ByteDance (unlisted) portfolio's time spent share gained 7.6pp in August from a year and rose 0.9pp sequentially. This was mainly driven by its two super apps – Douyin and Hongguo. Douyin app surpassed Weixin for the first time in July 2026, becoming China's most popular app in terms of MTS. In August, Douyin's MTS rose an impressive 25% y-y with time spent share reaching 19.3% (divided by total monthly mobile time spent by Chinese mobile populations) vs. 16.7% a year ago. Hongguo, the short-drama app, saw its MTS surging 182% y-y with time spent share at 6%, up from 2% share a year ago. As in previous months, the rapid time spent gains for Bytedance is taking a toll on most other content apps, in particular the long-form video-streaming apps. MTS for iQIYI (IQ US, Neutral) and Tencent video app [owned by Tencent (700 HK, Buy)] fell 40% and 35% y-y in August, worsening than in previous months. Douyin's competitor, Kuaishou (1024 HK, Neutral) saw its MTS down by 16% y-y.

Dou Sheng Sheng (DSS) app gains users but the outlook remains misty

Dou Sheng Sheng (DSS), a dedicated local service app launched by Douyin this Feb. to expand its local service reach, has maintained strong user-growth momentum in recent months. DSS's MAU (monthly active users) increased 18% m-m to 99mn in August, reaching nearly half of Dianping (DP)'s 206mn MAU, which grew 4% m-m. But users' engagement appears to have a wider gap – the DTSD of DSS app dropped 3% m-m to 4.7 minutes while DP's rose 1% m-m to 8.2 minutes. This shows that while DSS has benefited from the user traffic referral from Douyin to grow user scale quickly, it may still need to spend more efforts to enhance the engagement of its users. We will continue to watch closely the growth trend of DSS to see whether it can sustain this momentum when Bytedance may want its local service segment to improve profitability based on our channel checks with industry experts.

Peak travel season fails to buoy travel apps

While Chinese travel apps did see a seasonal sequential improvement in user engagement with the start of summer holiday period, the y-y trend remained subdued. Trip.com's (TCOM US, Neutral) two Chinese apps saw notable drops – Ctrip's DAU fell 10% y-y in August, vs 9% decline in July, while Qunar's dropped 6% y-y in August, largely on par with July. This weakness in apps' performance echoes management's cautious tone about the near-term outlook, citing macro, air fuel prices and regulations as the factors.

Boss Zhipin outperformed peers in recruitment vertical

Boss Zhipin app [owned by Kanzhun (BZ US, Not rated)], a leading player in the online recruitment industry, further accelerated its MTS growth to 17% in August (from 12% y-y growth in July), mainly driven by 21% y-y DAU growth. Liepin (6100 HK, Not rated) also performed resiliently with MTS up 14% y-y, supported by 11% y-y growth in DAU. For 51 job (unlisted), although its DAU rose 8% y-y in August, its MTS dropped 7% y-y due to 14% decline in DTSD. Zhaopin (unlisted) was the weakest performer among the major recruitment platforms, with MTS declining 9% y-y in August alongside a 4% drop in DAU.

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See Appendix A-1 for analyst certification, important disclosures and the status of non-US analysts.

Overview of leading Chinese apps

Much of the traffic flow in August 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 August, according to QuestMobile. ByteDance's Douyin recorded a 19.3% share in terms of time spent by Chinese mobile users, followed by Tencent's Wechat app with 18.3% time- spent share. Douyin Lite (unlisted, owned by Bytedance) ranked third, with a 6.3% time-spent share.

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

Top 20 Apps in MAU: MAUs change and penetration

App Name	Rank M-M chg	Penetration	Penetration Y-Y	Penetration M-M
WeChat	-	90.6%	3.1ppt	0.4ppt
Douyin	-	80.4%	6.9ppt	-0.2ppt
Taobao	-	76.0%	-1.9ppt	0.5ppt
Alipay	-	74.4%	0.3ppt	0.5ppt
Amap	-	73.7%	-1.1ppt	0.5ppt
Pinduoduo	-	56.4%	0.4ppt	0.9ppt
Sogou Keyboard	-	54.3%	3.6ppt	-0.1ppt
QQ	↑	50.1%	-1.1ppt	0.5ppt
JD	↑	49.4%	2.2ppt	0.3ppt
Baidu	↓	48.8%	-5.8ppt	-1.5ppt
Baidu Maps	-	43.6%	-3.2ppt	-0.7ppt
Meituan	-	41.8%	0.4ppt	0.5ppt
Baidu Keyboard	-	38.6%	-0.7ppt	0.0ppt
Weibo	-	37.2%	-1.5ppt	0.1ppt
Kuaishou	-	35.8%	-2.0ppt	0.4ppt
Doubao	-	32.4%	20.0ppt	1.3ppt
Red Fruit Free Short Drama	-	32.2%	13.8ppt	1.4ppt
Toutiao	-	28.6%	-1.7ppt	-0.5ppt
Douyin Lite	-	26.3%	2.6ppt	0.2ppt
Tencent Video	↑	25.2%	-4.0ppt	-0.1ppt

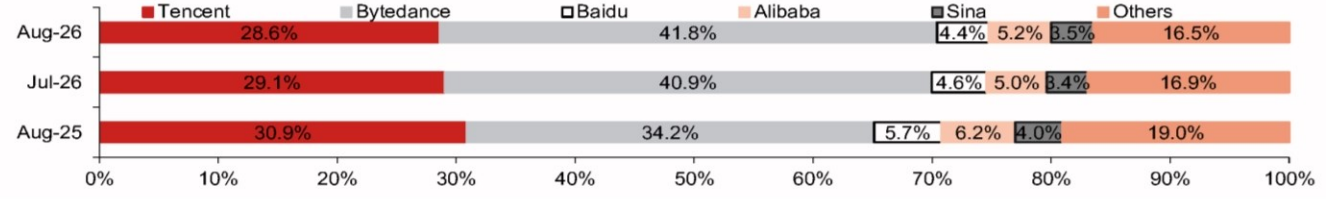
Time spent share for top 20 Chinese mobile apps in August

App Name	Rank M-M chg	Time spent share	Time spent share Y-Y	Time spent share M-M
Douyin	-	19.3%	2.6ppt	-0.1ppt
WeChat	-	18.3%	-1.0ppt	-0.5ppt
Douyin Lite	-	6.3%	0.8ppt	-0.1ppt
Red Fruit Free Short Drama	-	5.9%	3.7ppt	0.9ppt
Kuaishou	-	3.7%	-1.1ppt	-0.2ppt
Sogou Keyboard	-	3.0%	-0.2ppt	0.0ppt
Toutiao	-	2.5%	-0.5ppt	-0.1ppt
rednote	-	2.4%	-0.1ppt	0.0ppt
Kuaishou Express	-	2.2%	-0.4ppt	-0.1ppt
Pinduoduo	-	2.2%	0.1ppt	0.0ppt
Fanqie Free Novels	↑	2.0%	0.0ppt	0.1ppt
Weibo	↑	1.9%	-0.4ppt	0.0ppt
Baidu Keyboard	↓	1.8%	-0.1ppt	-0.2ppt
Bilibili	-	1.7%	-0.1ppt	0.0ppt
Taobao	-	1.5%	-0.4ppt	0.0ppt
Sina News	↑	1.4%	-0.1ppt	0.0ppt
Baidu	↓	1.4%	-0.6ppt	0.0ppt
Honour of Kings	-	1.3%	0.1ppt	0.0ppt
Alipay	-	1.2%	0.0ppt	0.0ppt
Amap	↑	1.1%	-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 August, we note that the Bytedance group gained time-spent share on a y-y basis, which rose from 34.2% in August 2025 to 41.8% in August 2026, surpassing Tencent camp's 28.6% (down from 30.9% a year ago). The gap in time-spent share between ByteDance and Tencent is widening. Sequentially, Bytedance's time-spent share was up 0.9pp m-m, while Tencent's time-spent share was down 0.5pp m-m.

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



Source: QuestMobile, Nomura research

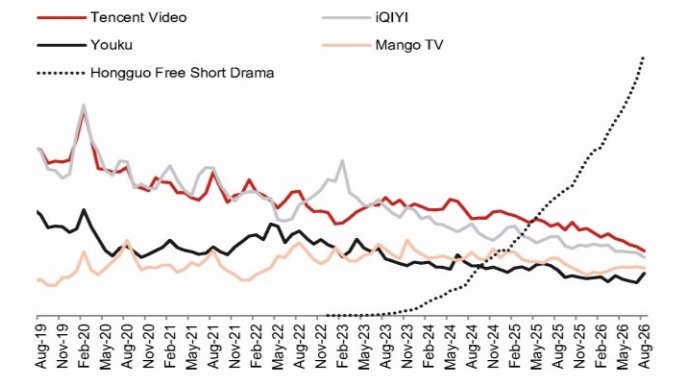


Long-form vs short-form dramas

Long-form video apps remained weak in August. Comparably, Youku [owned by Alibaba (BABA US, Buy)] performed better thanks to the release of blockbuster titles, *Mystic Nine* and *the Early Spring*. Its MTS of declined 9% y-y in August, significantly narrowing from 47% drop in July. Despite iQIYI commending the largest MTS across long-form video apps, its MTS reduced 35% in August, mainly dragged by a 27% decline in DAU. Besides, the MTS of Tencent Video and Mango TV (300413 CH, Not rated) recorded declines of 40% and 27% y-y in August, partly weighed down by 29% and 17% declines in DAU.

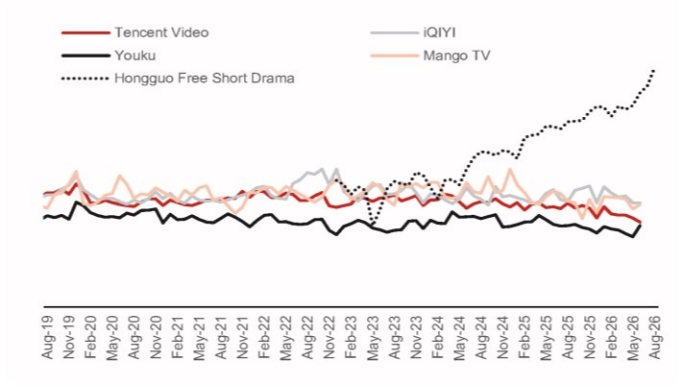
The dominant short-form drama app – Hongguo Free Short Drama (owned by Bytedance) – sustained its strong growth trend with an MTS increase of 182%, backed by 118% growth in DAU and 29% growth in DTSD.

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



Source: QuestMobile, Nomura research

Fig. 4: Average daily time spent per user

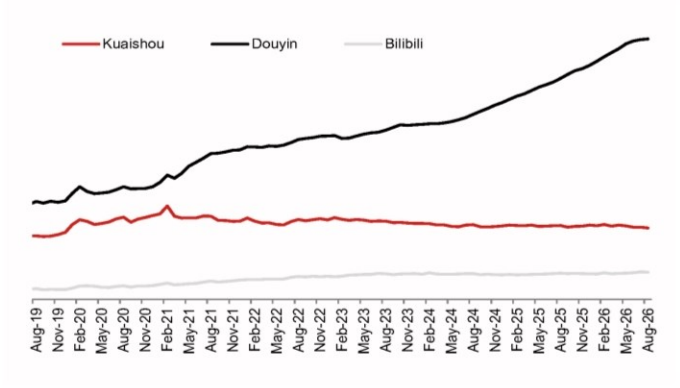


Source: QuestMobile, Nomura research

Short video

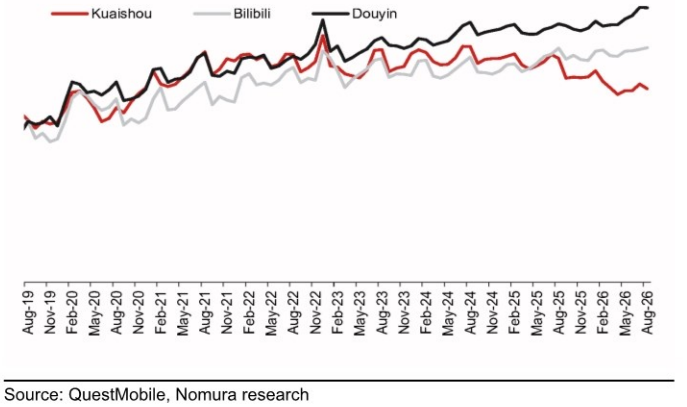
The gap in MTS between Douyin and Kuaishou (1024 HK, Neutral) has widened. In August, Douyin maintained its solid growth momentum in terms of MTS, at 25% y-y, driven by 18% growth in DAU and 6% growth in DTSD. However, Kuaishou continued its relatively soft performance, with a decline of 16% y-y in MTS, mainly dragged by a 14% y-y decline in DTSD. Total time spent for Bilibili (BILI US, Neutral) recorded 4% y-y growth in August, driven by 4% y-y growth in DAU.

Fig. 5: DAUs of short video apps



Source: QuestMobile, Nomura research

Fig. 6: Average daily time spent per user



Source: QuestMobile, Nomura research

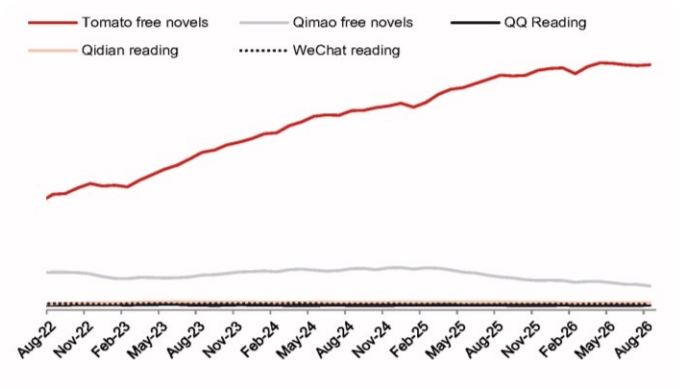
Online reading

The MTS of the free reading app leader Tomato Free Novels (unlisted; owned by ByteDance) recorded 8% y-y growth in August, backed by 4% y-y increase in DAU and 3% y-y rise in DTSD. Another free reading app, Qimao Free Novels [owned by Baidu (BIDU US, Buy)] continued its downward trend with a 46% y-y decline in total time spent, dragged by 27% and 26% y-y declines in DAU and DTSD, respectively. Tomato Free

Novels hit 144mn DAU in August, 10x DAU of the Qimao Free Novels.

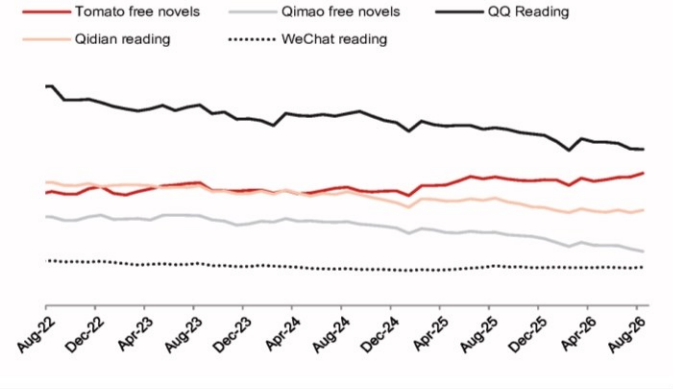
Paid reading apps owned by China Literature (772 HK, Neutral), i.e., Qidian reading and QQ reading also appeared soft user engagements, recording respective declines of 9% and 2% on a y-y basis in DAU during the month, and their DTSDs were down by 11% and 12% y-y, respectively.

Fig. 7: DAU of online reading platforms



Source: QuestMobile, Nomura research

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



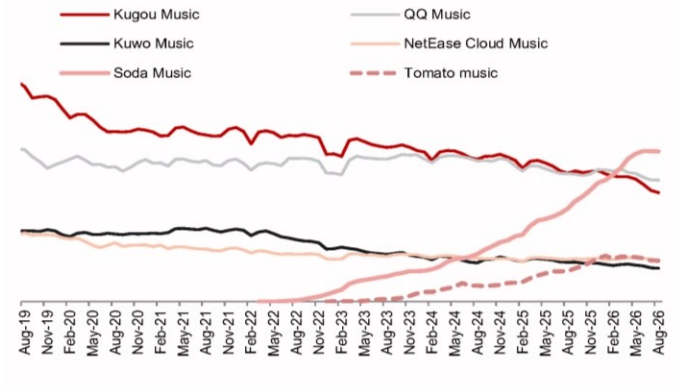
Source: QuestMobile, Nomura research

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 61% and 33% y-y growth, respectively, in August. 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 decline of DAU in August. However, the music apps [owned by TME (TME US, Neutral)], i.e. QQ Music/Kugou Music/Kuwo Music were experiencing user churn, down 5%/15%/15% y-y in terms of DAU in August (as shown in *Fig. 9*).

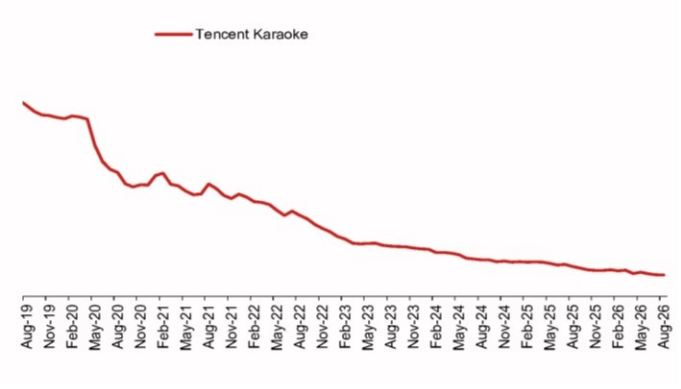
Tencent Karaoke maintained its y-y downward trend in MTS, with a 21% y-y decline, mainly dragged by a 29% y-y drop in DAU, offsetting 10% y-y growth in DTSD in August (as shown in *Fig. 10*).

Fig. 9: DAUs of music streaming apps



Source: QuestMobile, Nomura research

Fig. 10: DAUs of online karaoke app

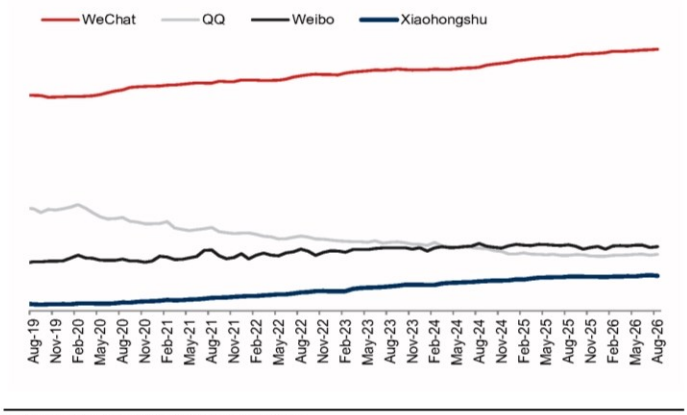


Source: QuestMobile, Nomura research

Social

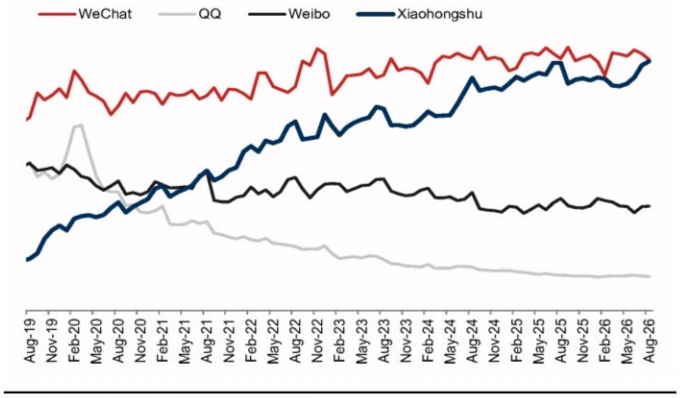
The MTS of Xiaohongshu (unlisted) recorded 3% y-y growth in August, driven by 3% y-y growth in DAU and 1% rise in DTSD. Xiaohongshu's DTSD reached 96 minutes in August, approaching WeChat's 97 minutes. The MTS of Weibo (WB US, Neutral) declined 9% y-y in August, dragged by a 7% decline in DTSD and a 3% drop in DAU. Within Tencent's social ecosystem, QQ maintained its downward trend in MTS, with a 1% y-y decline, while WeChat recorded 3% y-y growth in terms of total time spent in August.

Fig. 11: DAUs of social apps



Source: QuestMobile, Nomura research

Fig. 12: Average daily time spent per user

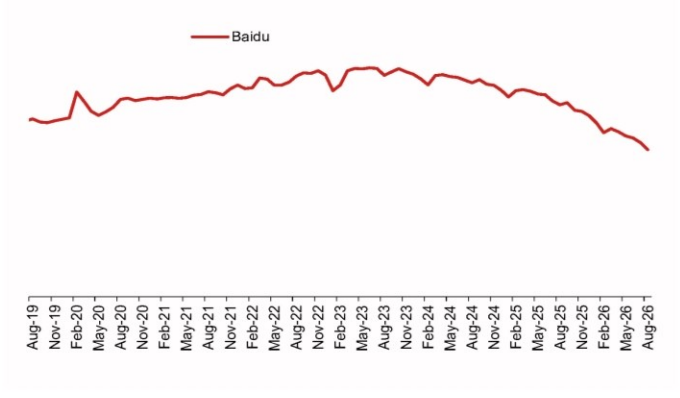


Source: QuestMobile, Nomura research

Search

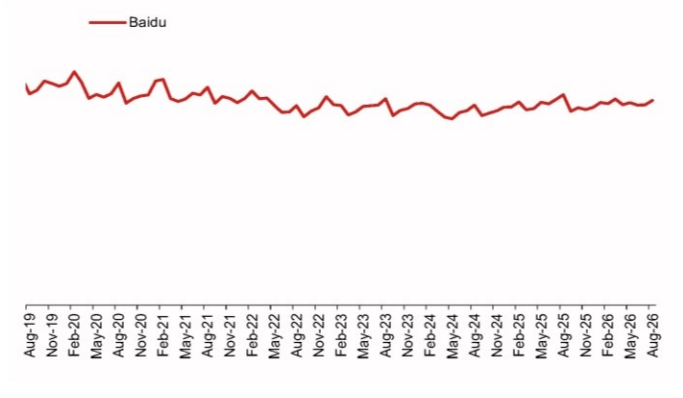
The Baidu app, despite being a dominant search engine in China, witnessed a 25% y-y decline in MTS in August, mainly dragged by a 23% y-y decline in DAU.

Fig. 13: DAU of Baidu app



Source: QuestMobile, Nomura research

Fig. 14: Average daily time spent per user



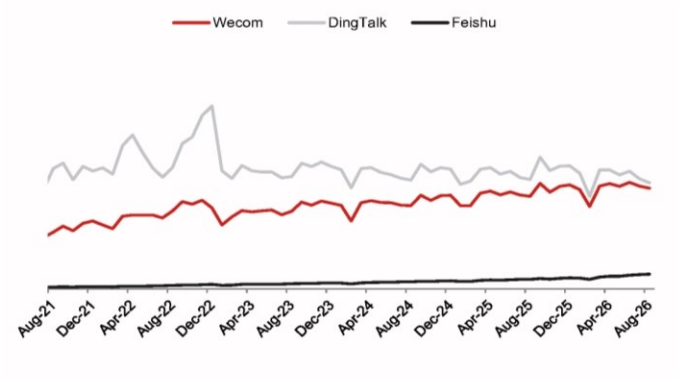
Source: QuestMobile, Nomura research

Office apps

Within the office apps vertical, the DAU of Feishu (owned by Bytedance) and Wecom (owned by Tencent) recorded 53% y-y and 9% y-y growth, respectively, in August, while Ding Talk (owned by BABA) recorded 3% y-y decline. However, Ding Talk owned the largest DAU base at ~74mn, which was 1.1x and 7.3x that of Wecom and Feishu, respectively. For Feishu, the DTSD was at 14.4 minutes (down 2% y-y), followed by Wecom's 12.3 minutes (up 2% y-y) and DingTalk's 10.0 minutes (down 7% y-y), as per QuestMobile data.

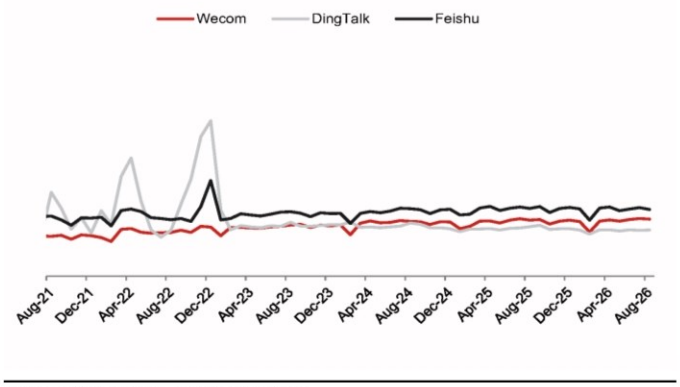
We noted that ByteDance has implemented a wide-ranging restructuring in late July, combining Feishu's product team with Doubao and merging Feishu's sales team with Volcano Engine, and ByteDance's new AI office agent, Doubao Work, was officially launched in late August. We will continue to track the impact of AI office agents on traditional office apps.

Fig. 15: DAUs of office business apps



Source: QuestMobile, Nomura research

Fig. 16: Average daily time spent per user



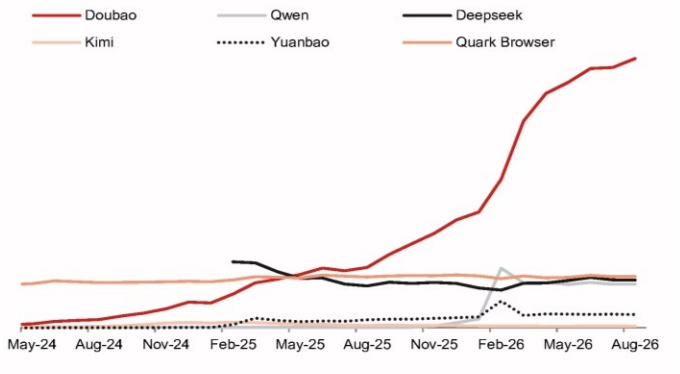
Source: QuestMobile, Nomura research

AI tools

The DAU of Doubao (owned by ByteDance) ranked first in August at 174mn (according to QuestMobile data), representing 3.5x y-y and 3% m-m growth. This was followed by Quark Browser at 33mn (up 1% y-y and flat m-m), Deepseek at 31mn (up 14% y-y and flat m-m), and Qwen (owned by Alibaba) at 28mn (up 81x y-y and flat m-m).

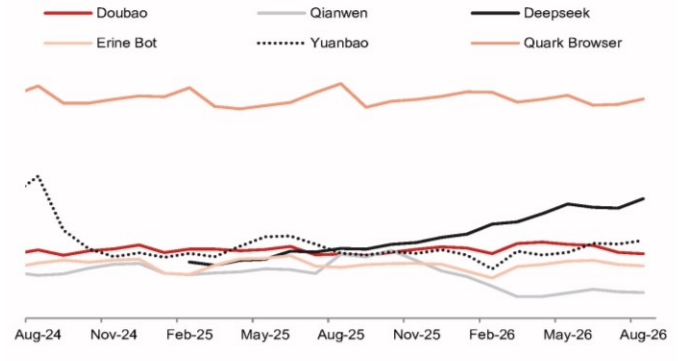
In terms of DTSD, Quark Browser recorded the highest time spent at 33 minutes in August (down 7% y-y and up 2% m-m). Deepseek ranked the second at 18 minutes (up 71% y-y and 9% m-m), followed by Kimi's 14 minutes (up 80% y-y and 13% m-m).

Fig. 17: DAUs of AI apps



Source: QuestMobile, Nomura research

Fig. 18: Average daily time spent per DAU of AI apps

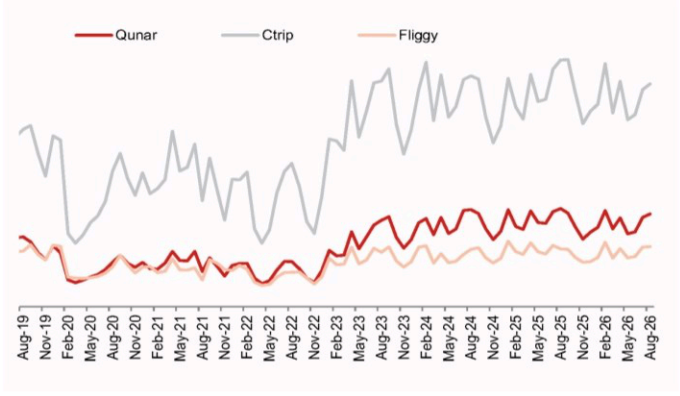


Source: QuestMobile, Nomura research

Online travel

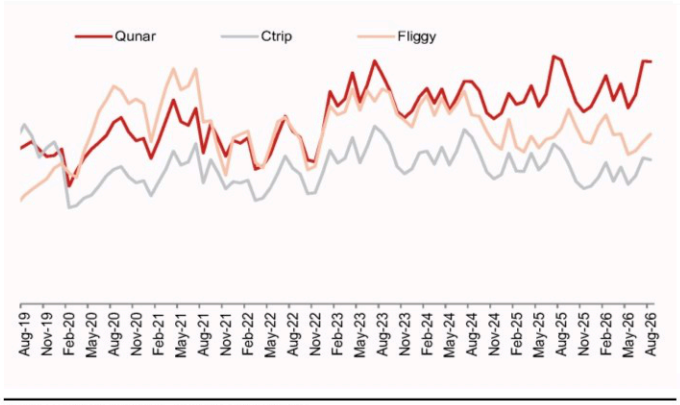
Among online travel apps, TRIP.com's (TCOM US, Neutral) domestic apps, Ctrip and Qunar recorded 15% and 6% y-y declines in MTS in August, respectively, mainly dragged by corresponding 10% and 6% y-y declines in DAU. Fliggy (unlisted, owned by BABA) remained flattish in MTS, backed by 4% y-y growth in DAU, offsetting 3% y-y decline in DTSD.

Fig. 19: DAUs of online travel apps



Source: QuestMobile, Nomura research

Fig. 20: Average daily time spent per user



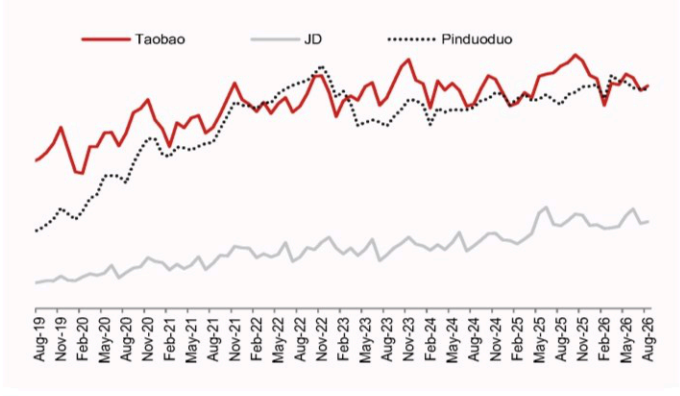
Source: QuestMobile, Nomura research

E-commerce

Alibaba's Taobao app and Pinduoduo (PDD US, Neutral) app were the top-two e-commerce names in terms of users and total time spent. Pinduoduo's DAU recorded 7% y-y growth in August, mainly backed by 19% y-y growth in the number of casual users (daily time spent <1 minute) and the number of hardcore users (daily time spent >1 minute) recorded 5% y-y growth. JD app's (JD US, Buy) DAU increased 5% y-y, mainly backed by a 24% y-y growth in the number of casual users. However, Taobao's DAU decrease of 8% y-y was dragged by a 14% decline in the number of hardcore users, offsetting 12% y-y growth in the number of casual users.

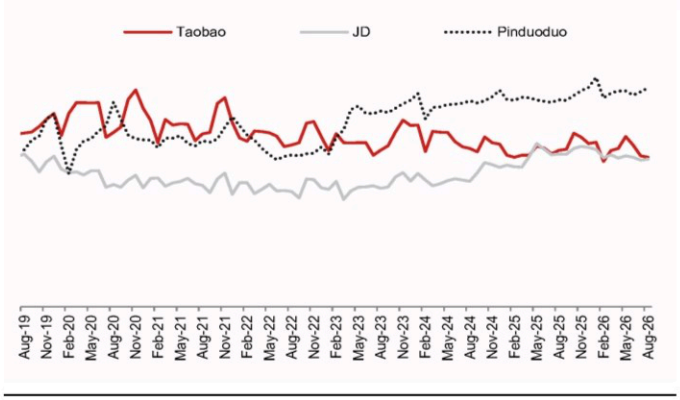
In terms of DTSD, PDD delivered 6% y-y growth in August, while Taobao and JD app recorded 5% and 3% y-y declines, respectively.

Fig. 21: DAUs of China e-commerce apps



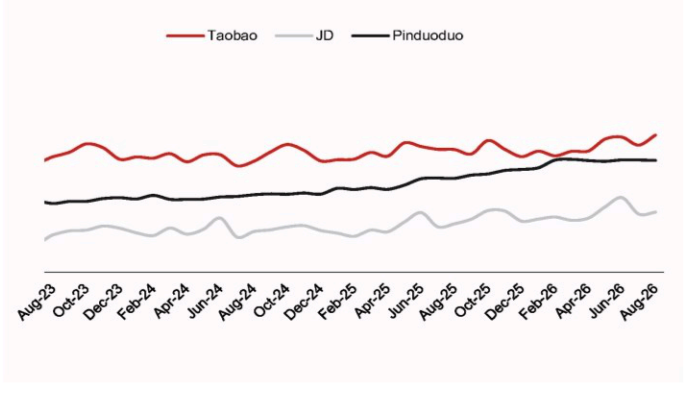
Source: QuestMobile, Nomura research

Fig. 22: Average daily time spent per user



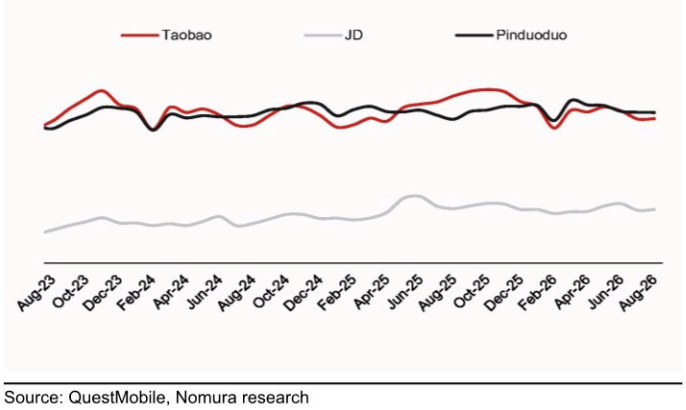
Source: QuestMobile, Nomura research

Fig. 23: Number of users with daily time spent at <1 minute



Source: QuestMobile, Nomura research

Fig. 24: Number of users with daily time spent at >1 minute

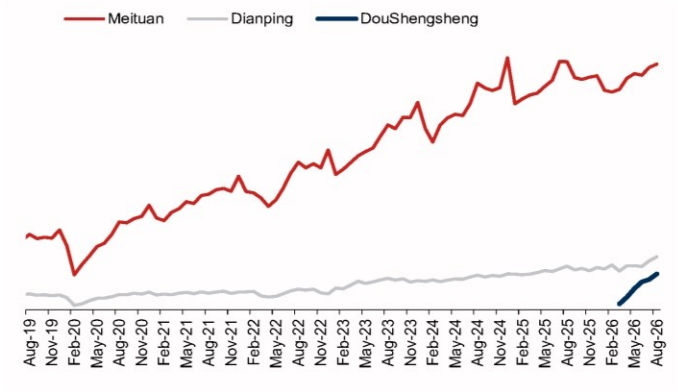


Source: QuestMobile, Nomura research

O2O

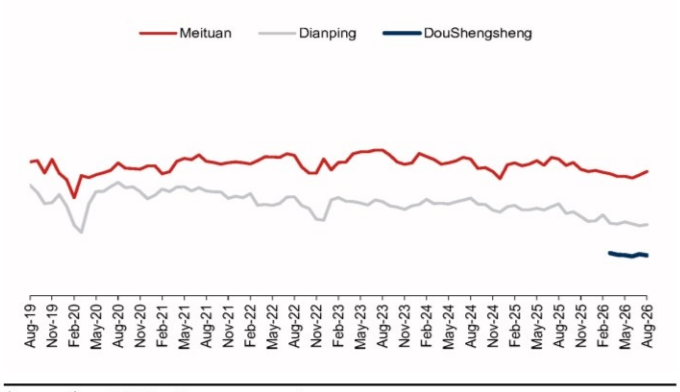
The Meituan app [owned by Meituan (3690 HK, Buy)] recorded 10% y-y decline in MTS in August, mainly dragged by 9% y-y declines in DTSD. Dianping app (owned by Meituan) recorded a 6% decline in MTS, dragged by a 23% y-y decline in DTSD, offsetting 21% growth in DAU. Since its launch in February this year, ByteDance's Doushengsheng app has gradually closed the gap with Dianping app, reaching 27mn in August, vs Dianping's 39mn. Both platforms' DAU remain materially lower than Meituan app's 183mn DAU.

Fig. 25: DAUs of Meituan and Dianping



Source: QuestMobile, Nomura research

Fig. 26: Average daily time spent per user

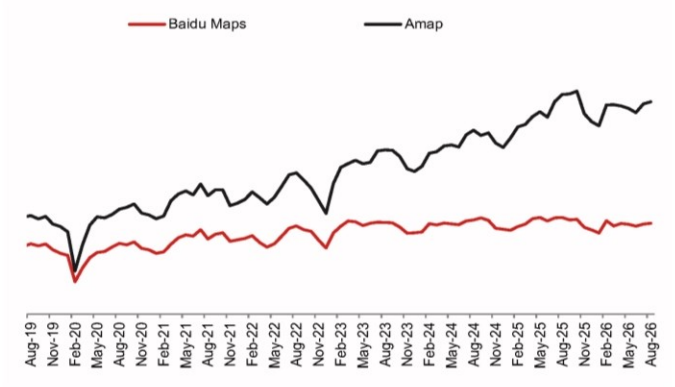


Source: QuestMobile, Nomura research

Mobile map apps

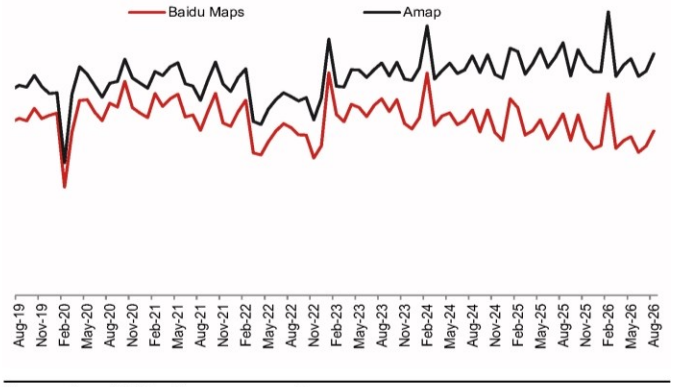
Total time spent on Baidu Maps declined 15% y-y in August, dragged by a 9% decline in DTSD and a 6% decline in DAU. The MTS of Amap (owned by BABA) fell 7% y-y in August, dragged by a 4% y-y decline in DTSD and a 3% y-y decline in DAU. Amap's DAU has trended upward amid fluctuations, while Baidu Maps' DAU stayed relatively flat over years, resulting in a growing DAU gap between the two mapping apps.

Fig. 27: DAUs of Baidu Maps and Amap



Source: QuestMobile, Nomura research

Fig. 28: Average daily time spent per user



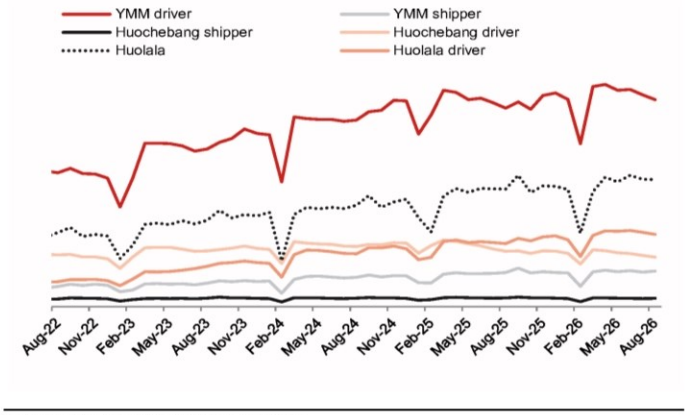
Source: QuestMobile, Nomura research

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 11% y-y and 16% y-y growth, respectively, mainly driven by 5% and 8% y-y growth in DAU. However, Huochebang Shipper (owned by FTA) recorded a 1% y-y decline in MTS in August, dragged by a 5% y-y decline in DAU, offsetting 4% y-y growth in DTSD.

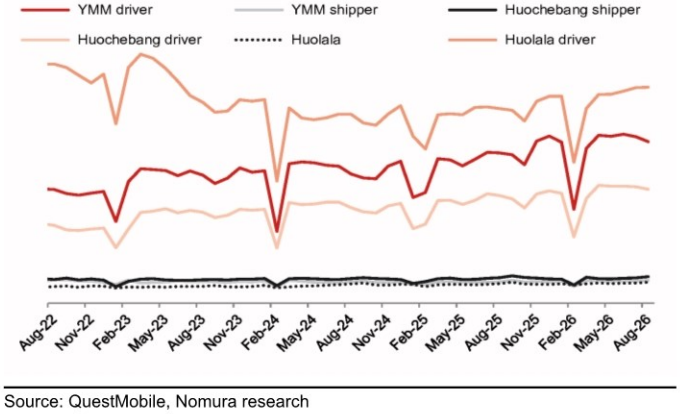
On the driver side, YMM Driver (owned by FTA) recorded 12% y-y growth in MTS in August, mainly driven by a 7% rise in DTSD; Huolala Driver's (unlisted) MTS increased 27%, mainly thanks to 14% y-y growth in DAU and 11% y-y growth in DTSD. While Huochebang Driver (owned by FTA) recorded a 6% y-y decline in MTS, dragged by an 11% y-y decline in DAU, offsetting 6% y-y growth in DTSD.

Fig. 29: DAUs of digital freight apps



Source: QuestMobile, Nomura research

Fig. 30: Average daily time spent per user

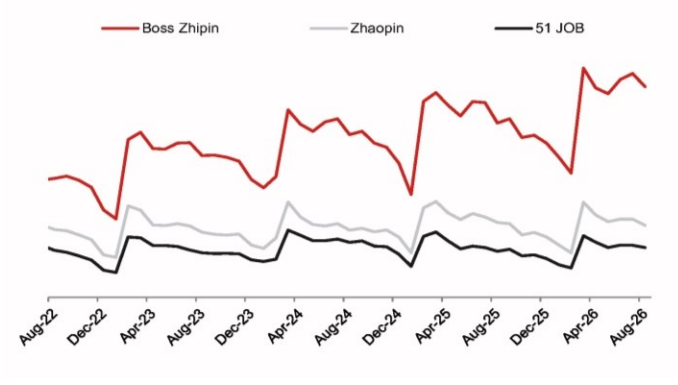


Source: QuestMobile, Nomura research

Online recruitment apps

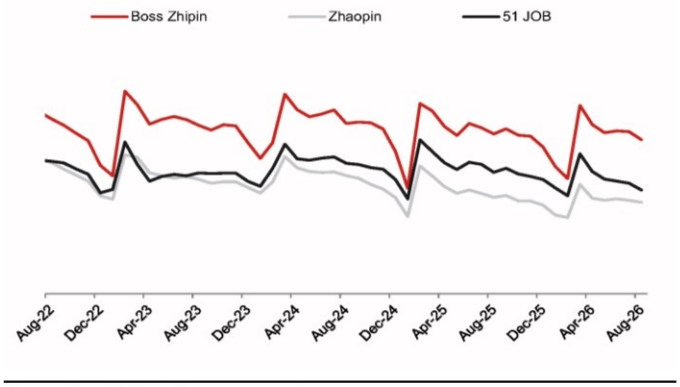
Boss Zhipin app (owned by Kanzhun [BZ US, Not rated]), one of the leading players in the online recruitment industry, recorded 17% y-y growth in MTS in August, accelerating from 12% y-y growth in July, driven by 21% y-y growth in DAU, offsetting a 4% y-y decline in DTSD. However, the MTS of Zhaopin (unlisted) and 51Job (unlisted) decreased a respective 9% and 7% y-y in August, primarily dragged by corresponding declines of 5% and 14% in DTSD.

Fig. 31: DAUs of online recruitment apps



Source: QuestMobile, Nomura research

Fig. 32: Average daily time spent per user



Source: QuestMobile, Nomura research

Appendix A-1

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