

Panic at Google: Samsung considers dumping search for Bing and ChatGPT



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The New York Times has a big piece detailing Google's "shock" and "panic" when Samsung recently floated the idea of switching its smartphones from Google Search to Bing. After being the butt of jokes for years, Bing has been seen as a rising threat to Google thanks to Microsoft's deal with OpenAI and the integration of the red-hot ChatGPT generative AI. Now, according to the report, one of Android's biggest manufacturers is threatening to switch its new phones away from Google Search.

Of course, preinstalled search deals are more about cash than quality. Google pays billions every year to be the default

search engine on popular products with deals framed as either “revenue sharing” or “traffic acquisition fees.” Google reportedly pays as much as \$3.5 billion per year to be the default search on Samsung phones, while it pays Apple \$20 billion per year to be the default search on iOS and macOS. The report notes that the Samsung/Google search contract “is under negotiation, and Samsung could stick with Google.”

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This whole situation could just be a Samsung negotiating tactic. Google has a semi-credible search threat for the first time in years, and Samsung could be using that to push Google for a higher share of revenue. It’s not clear if Microsoft is even willing to play ball here. Microsoft is probably paying a lot for Bing’s ChatGPT integration—would it also be willing to match Google’s multi-billion-dollar payments? Samsung and Microsoft have an existing preinstall deal, to the point where there is usually a whole “Microsoft” folder preinstalled on the home screen, with apps like Office, OneDrive, LinkedIn, and Outlook.

If Samsung switched to Bing, it wouldn’t be the first time. In 2010 some models of the Galaxy S II shipped with Bing as the only search engine, and it wasn’t easy to change back to Google. Back then, Bing was new and ambitious and was attempting to beat Google’s market share, but after years of not gaining any traction, it feels like that ship has sailed at Microsoft. Recently, when Bing rode the ChatGPT hype to 100 million daily users, Microsoft VP Yusuf Mehdi said, “We are fully aware we remain a small, low, single digit share player. That said, it feels good to be at the dance!” That sounds like a company that is content with being in a distant second place, not one that has the budget and bravado it would take to rival Google Search.

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