

UPS ANNOUNCES RESULT OF VIETNAM SME

Survey conducted by



Overview of Methodology

Fieldwork period: March 11, 2010 – April 20, 2010

Interviewing method: Computer Assisted Telephone Interviewing using native-language B2B interviewers

Average interview length: 36 minutes

Total sample: n=1,351

Respondent Qualification:

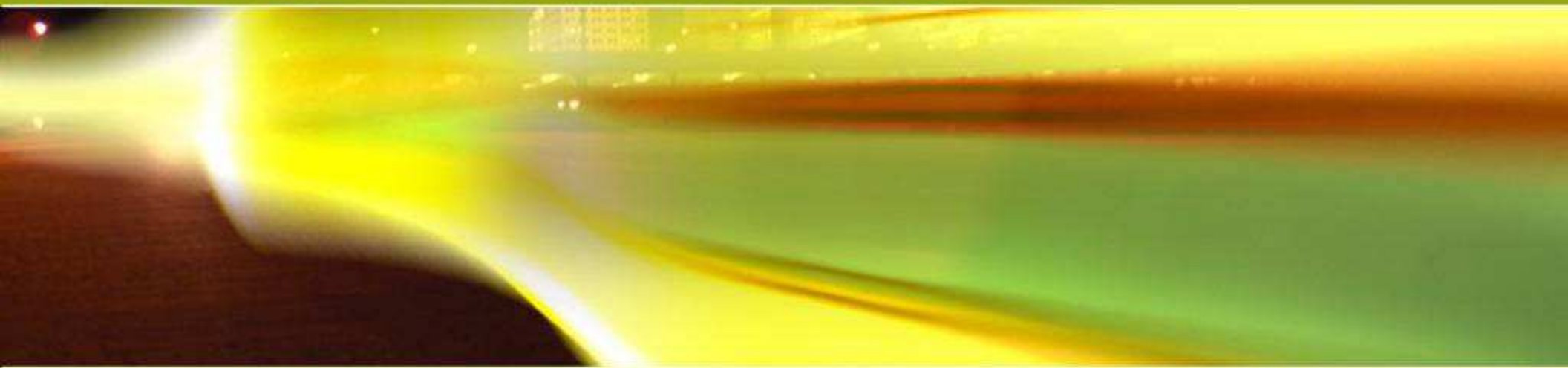
- Locally-based & Privately held companies
- Maximum 250 employees
- Key Strategic Decision-Makers

Sample breakdown by market:

Australia	China	Hong Kong	India	Indonesia	Japan
n=100	n=150	n=100	n=101	n=100	n=100

Korea	Malaysia	Philippines	Singapore	Taiwan	Thailand	Vietnam
n=100	n=100	n=100	n=100	n=100	n=100	n=100

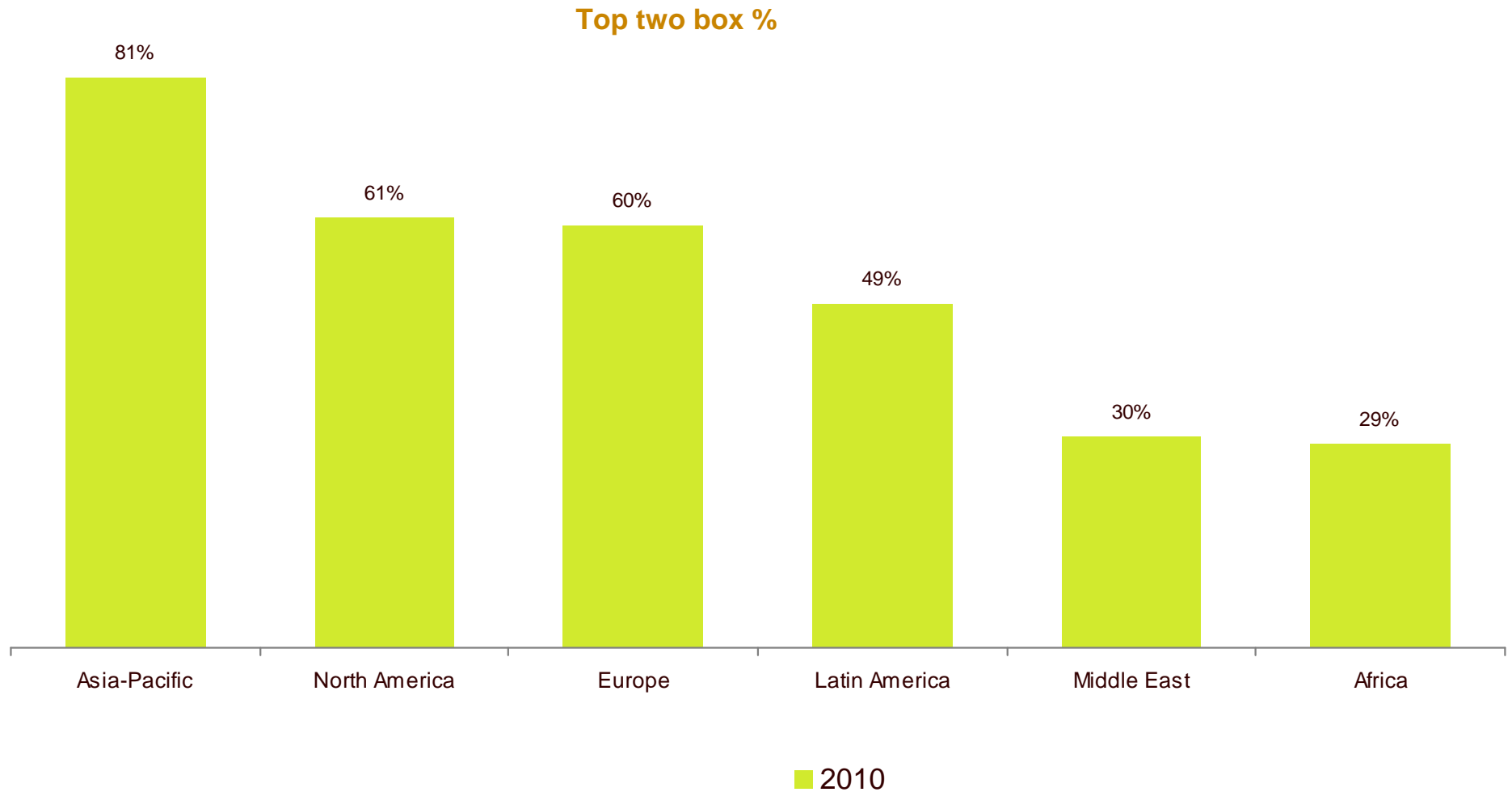
Asian Economic and Business Prospects Vietnam Perspective



Prospects for Trade Growth in 2010

– Vietnam

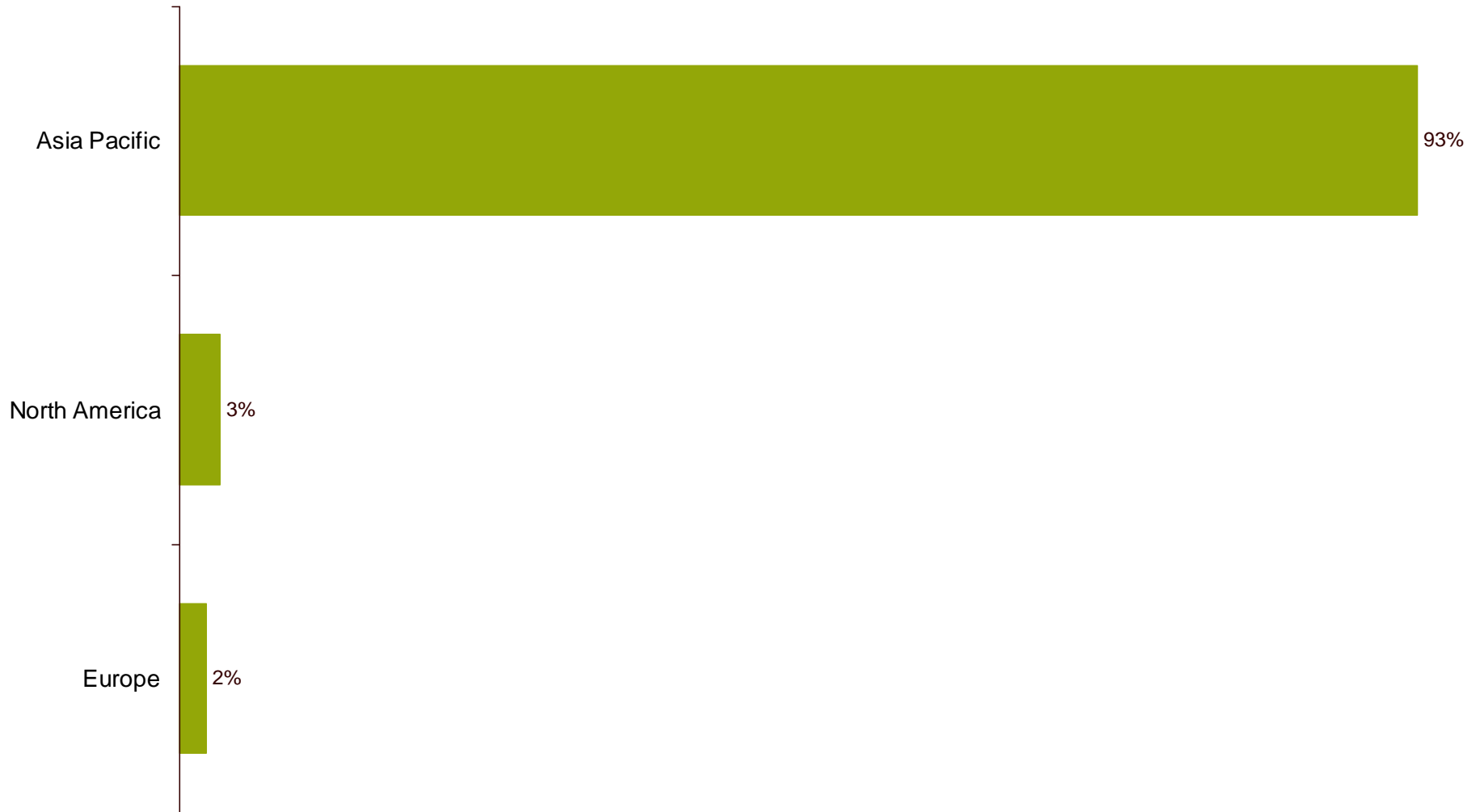
Q4. On a scale of 1 to 5, where 5 equals "grow strongly" and 1 equals "decline strongly", how do you rate the prospects for volume of trade growth between your country and the following in 2010?



* Vietnam is new market in 2010
Base : Asia Pacific in 2010

Current Distribution of Business – Vietnam

Q6. What percentage of your business is with the following regions now? MC



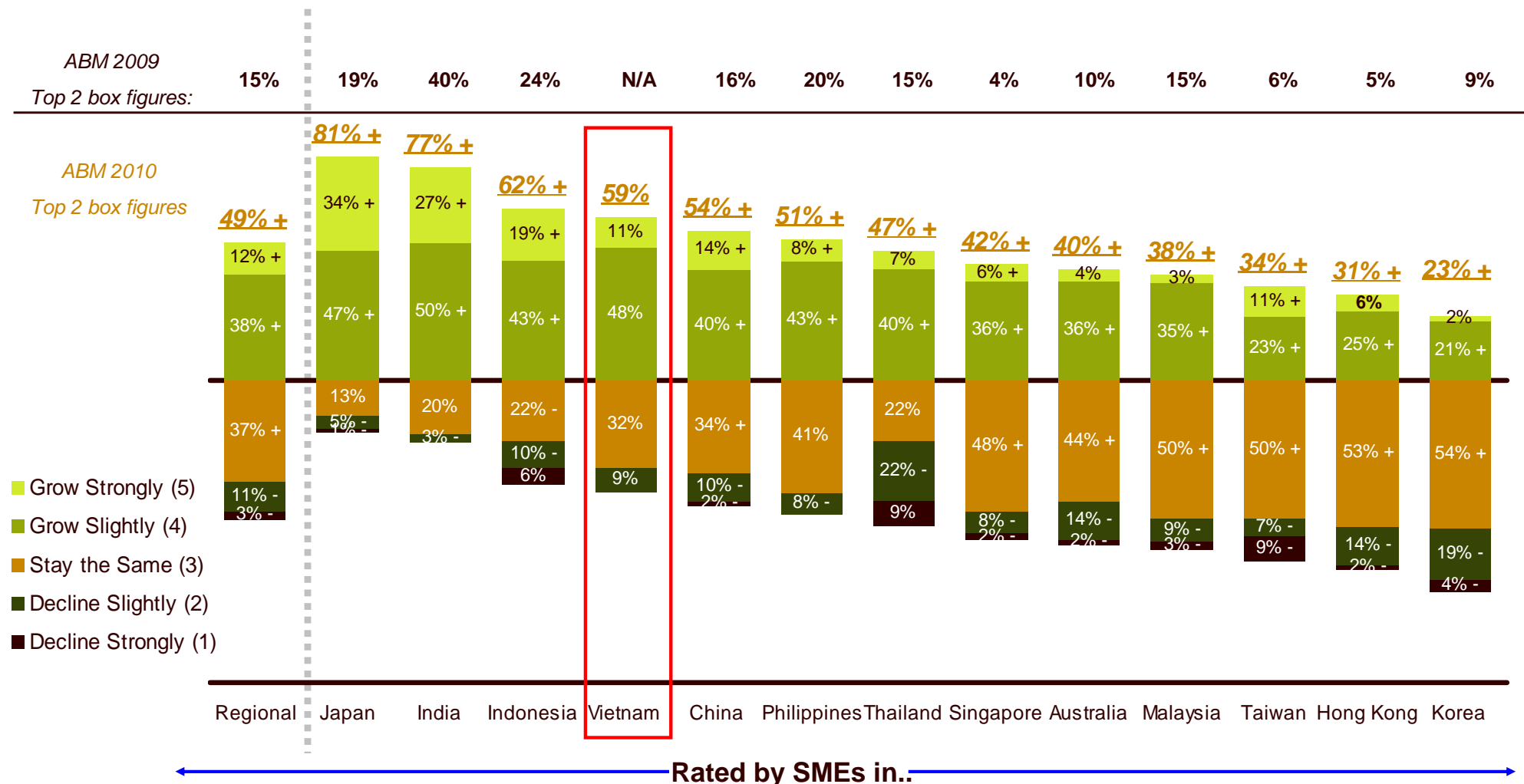
Base : Vietnam in 2010

* New question in 2010

Perceptions of Economic Growth in Next 12 Months For Asia Pacific

Q1. On a scale of 1 to 5, where 5 equals “grow strongly” and 1 equals “decline strongly”, how do you rate the prospects for economic growth across the region in 2010? SC

Mean overall top 2 box score for Asia Pacific region: 49%



Base : Asia Pacific in 2009, 2010

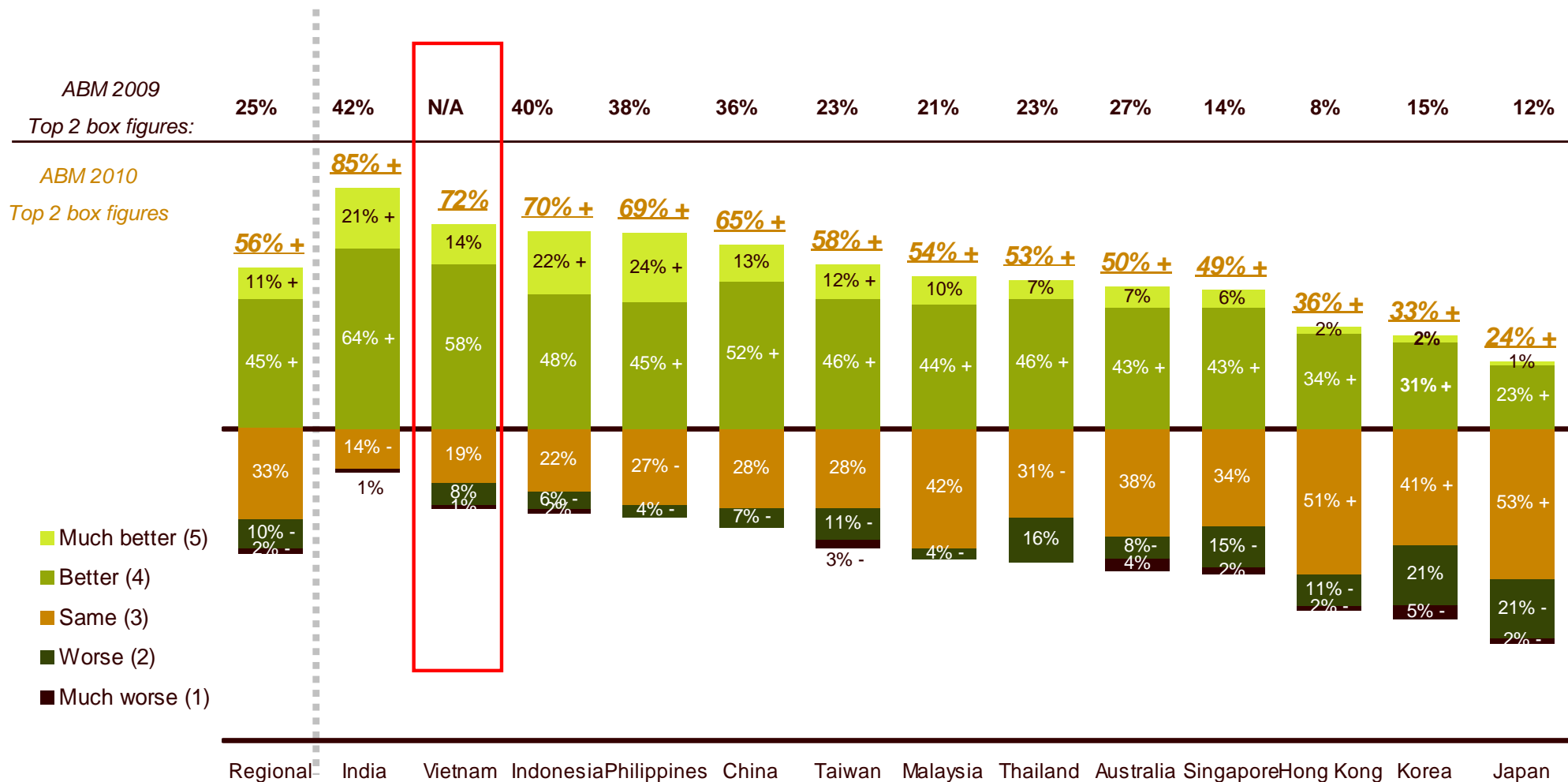
* Vietnam is new market in 2010

+/- : Significant change versus 2009 (at 95% confidence level)

Next 12 Months Prospects

Q2. On a scale of 1 to 5, where 5 equals “much better” and 1 equals “much worse”, do you think your company’s overall prospects 2010 will be better, worse or about the same as 2009? SC

Mean overall top 2 box score for Asia Pacific region: 56%



Base : Asia Pacific in 2009, 2010

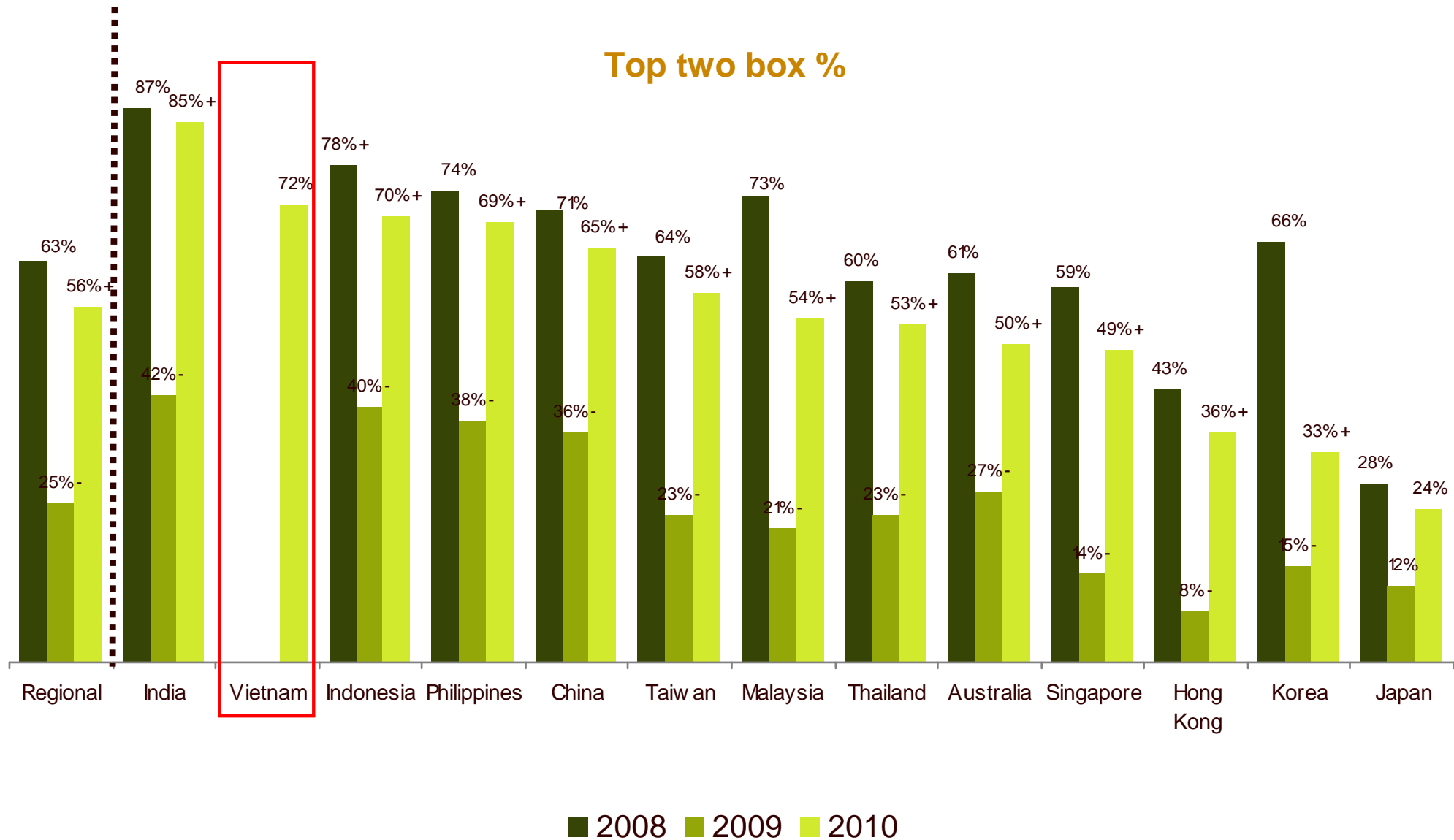
* Vietnam is new market in 2010

+/- : Significant change versus 2009 (at 95% confidence level)

Next 12 Months Projection

Q2. On a scale of 1 to 5, where 5 equals “much better” and 1 equals “much worse”, do you think your company’s overall prospects next year (2010) will be better, worse or about the same as 2009? SC

Top two box %



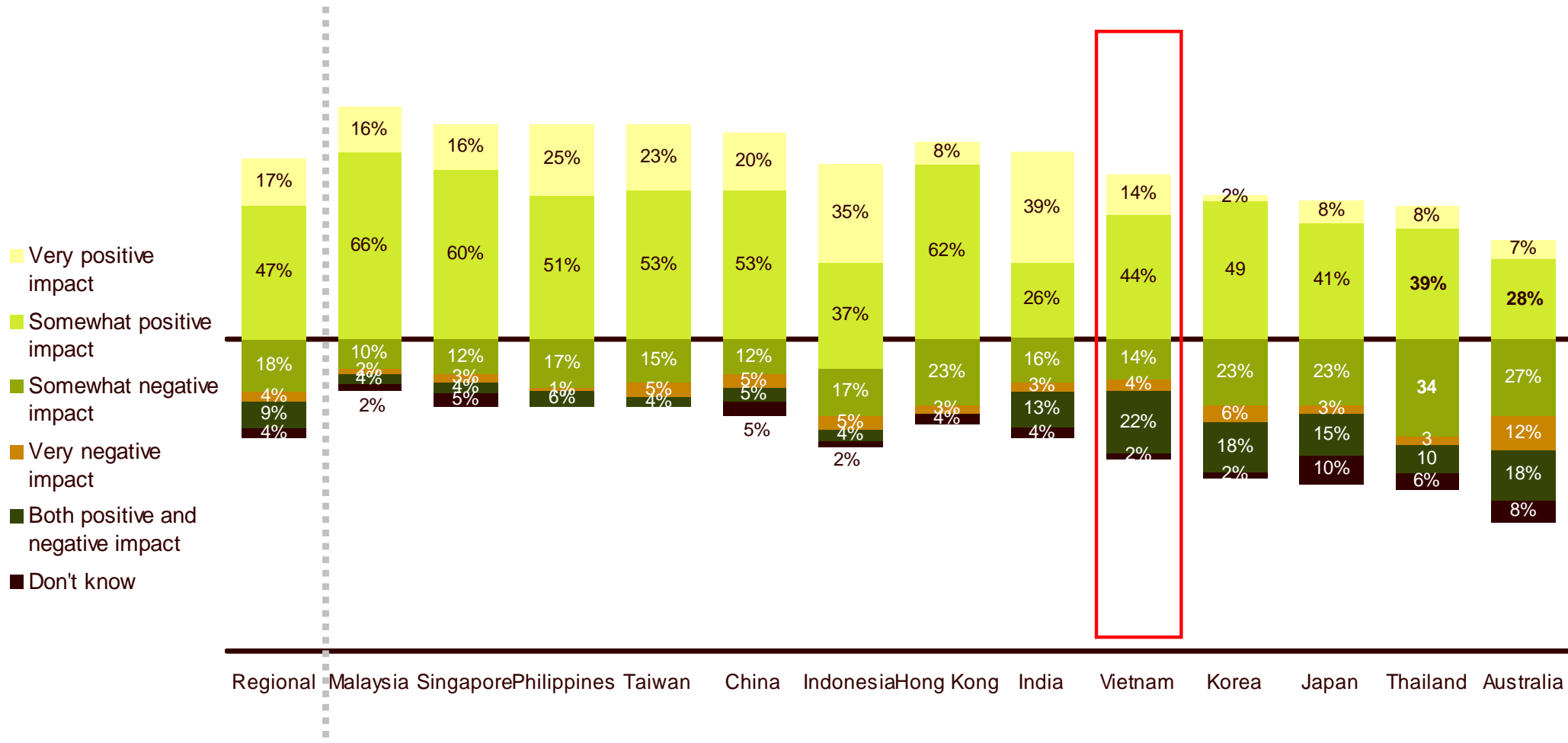
Base : Asia Pacific in 2008, 2009, 2010

* Vietnam is new market in 2010

+/- : Significant change versus previous year (at 95% confidence level)

Effect of Global Trade – By Markets

Q7. Overall, has global trade had more of a positive or more of a negative impact on your business growth? SC

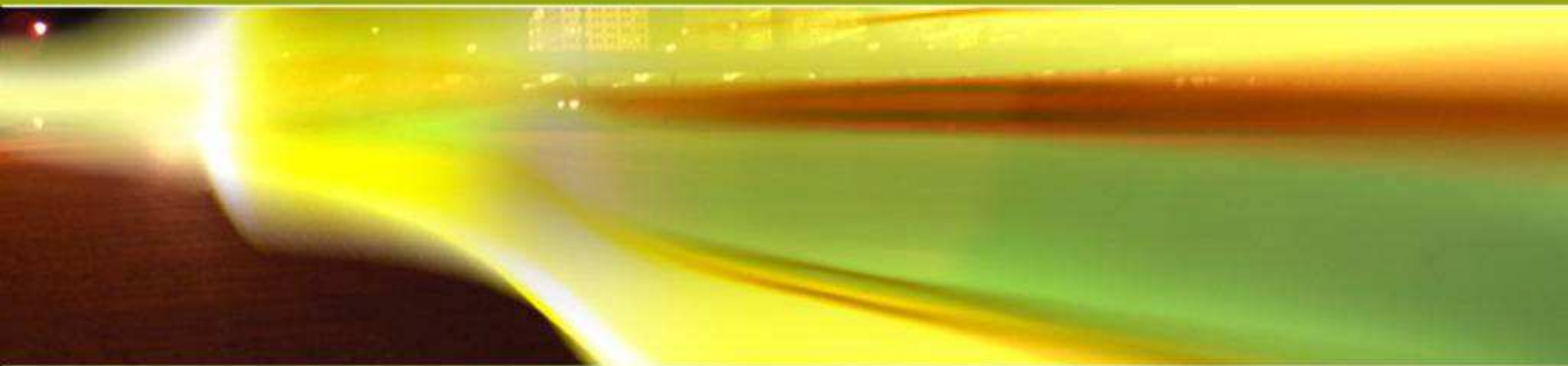


Base : Asia Pacific in 2010

+/- : Significant difference versus Total (at 95% confidence level)

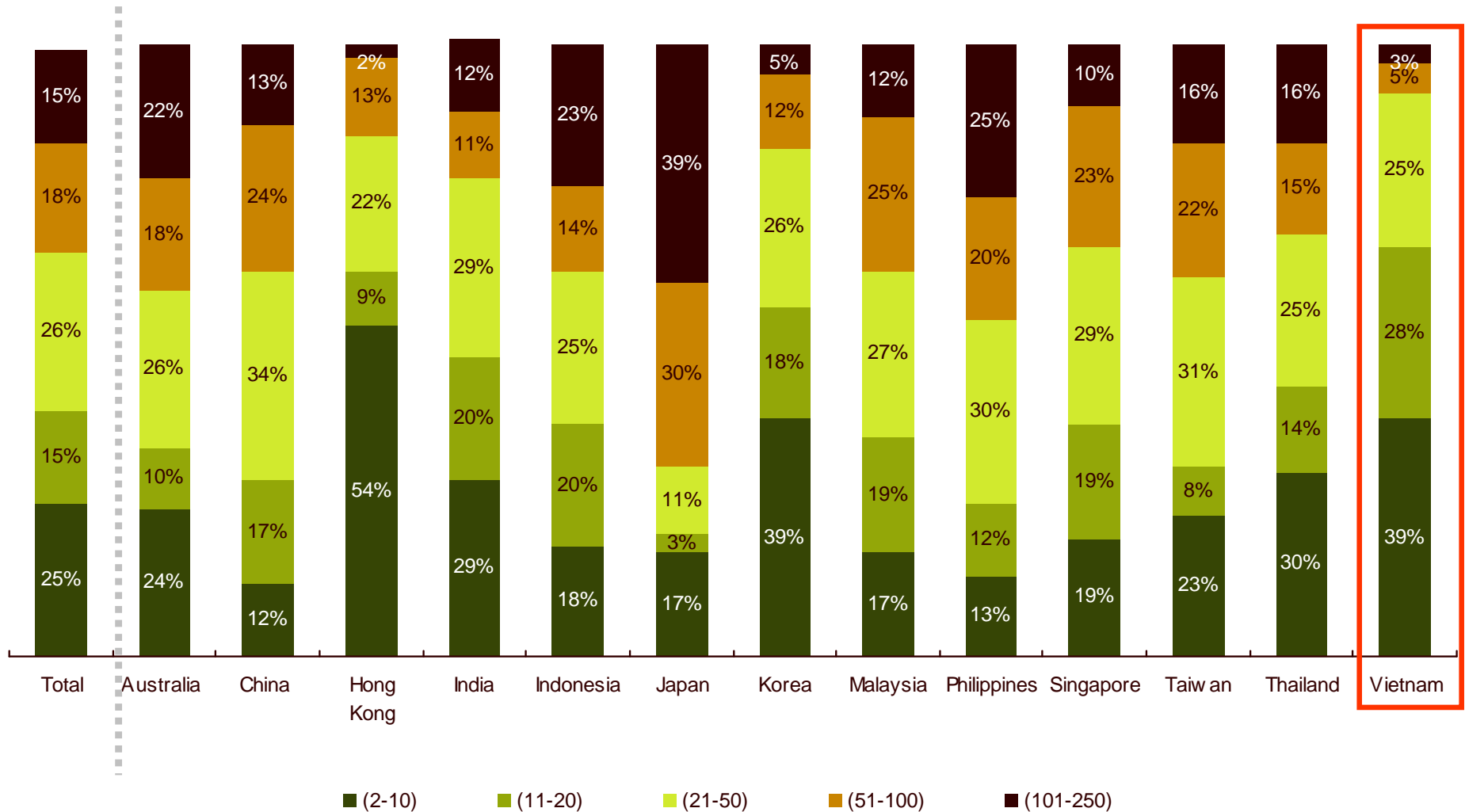
* New question in 2010

Role of SMEs



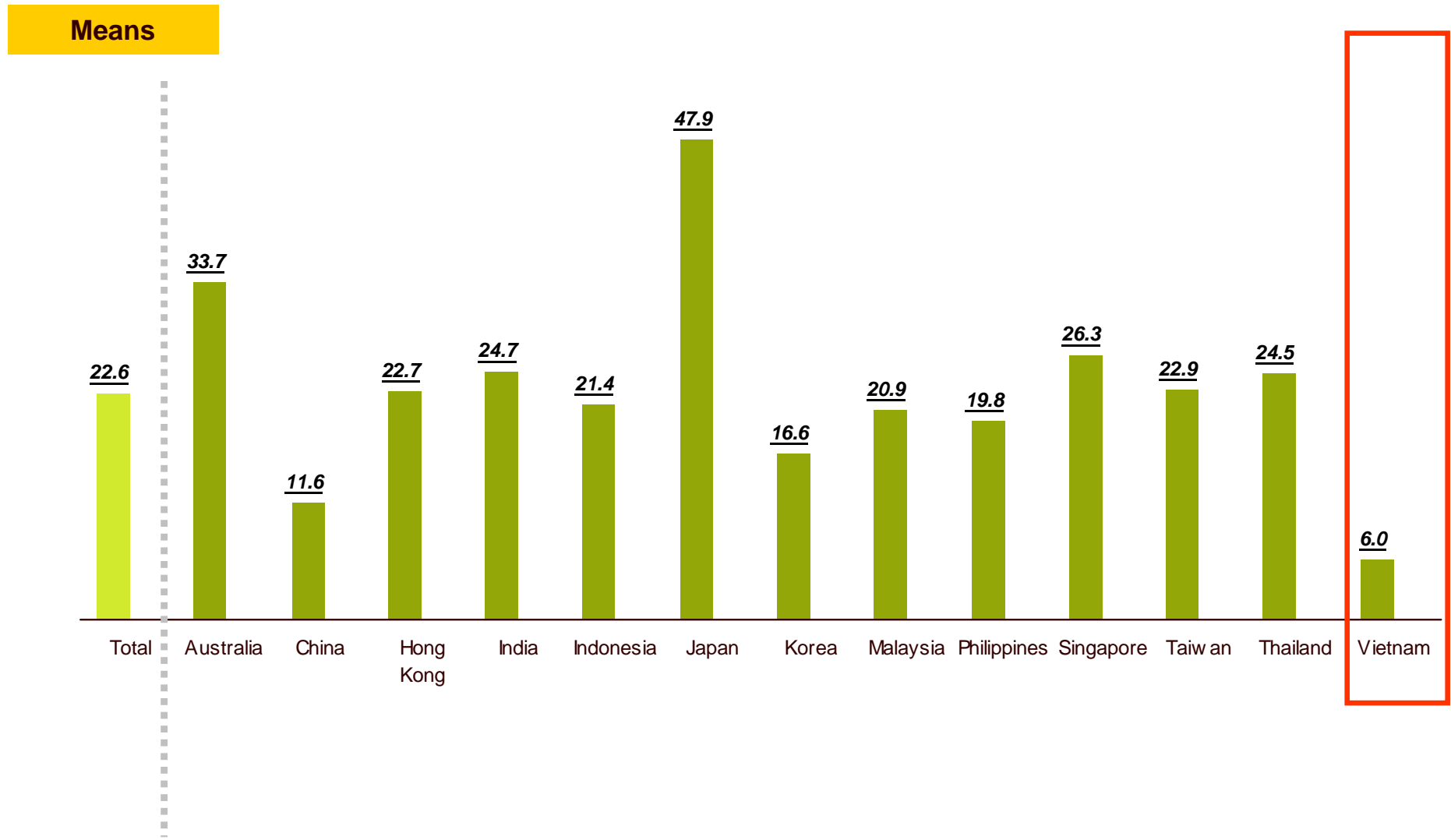
Number of Employees

S2. How many people does your company employ?

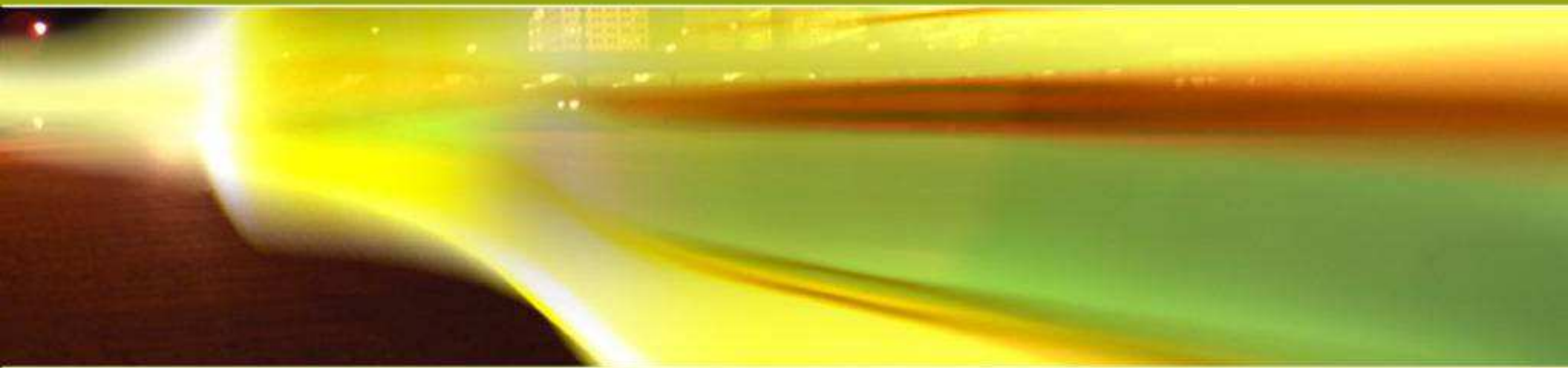


Years Established

S4. How many years ago was your company established?

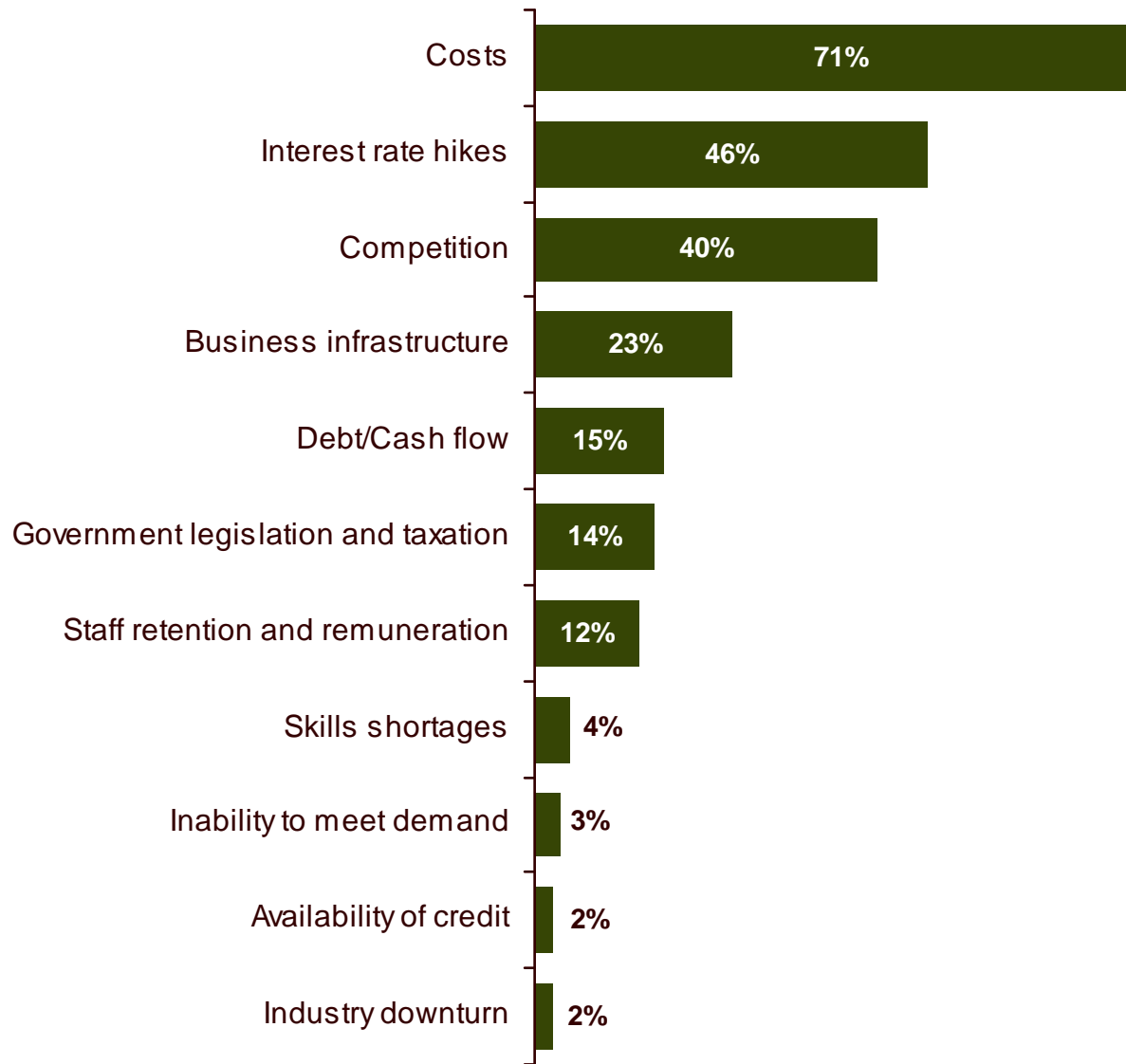


Key Business Concern



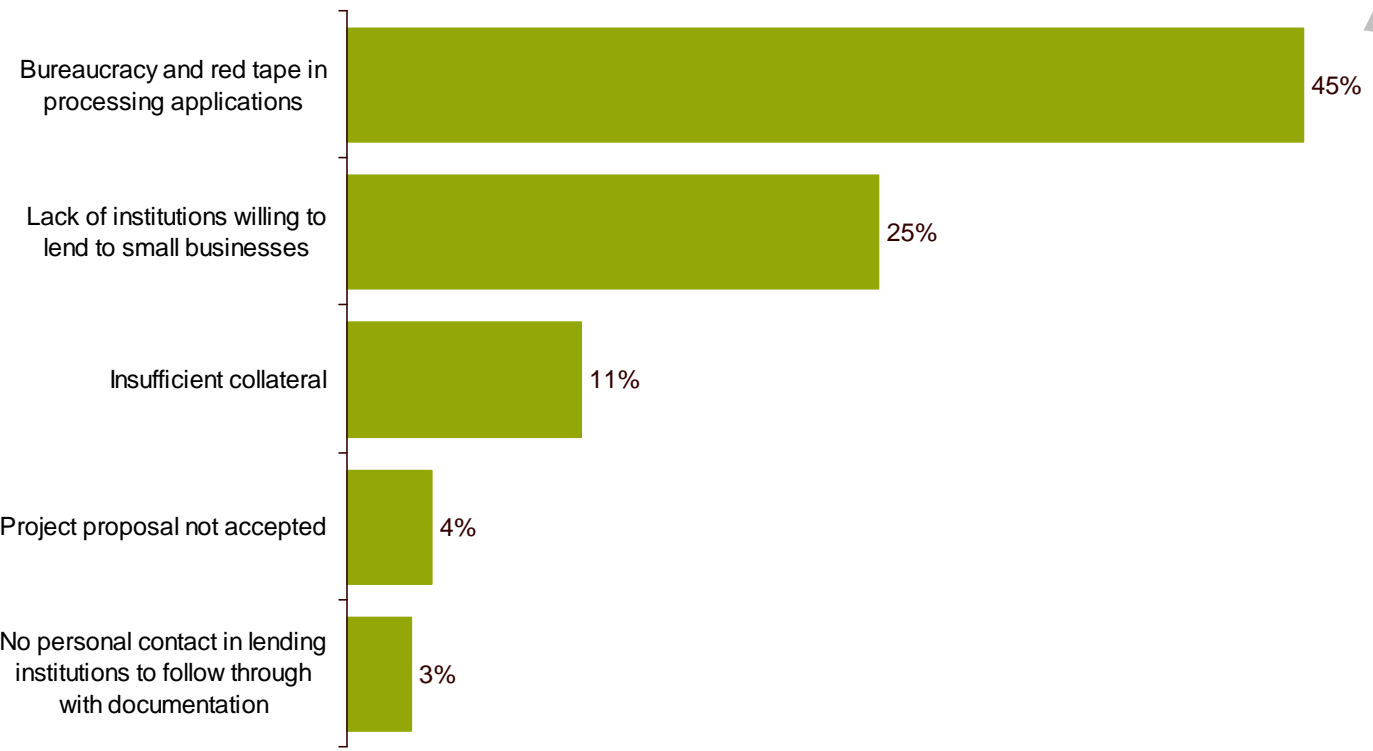
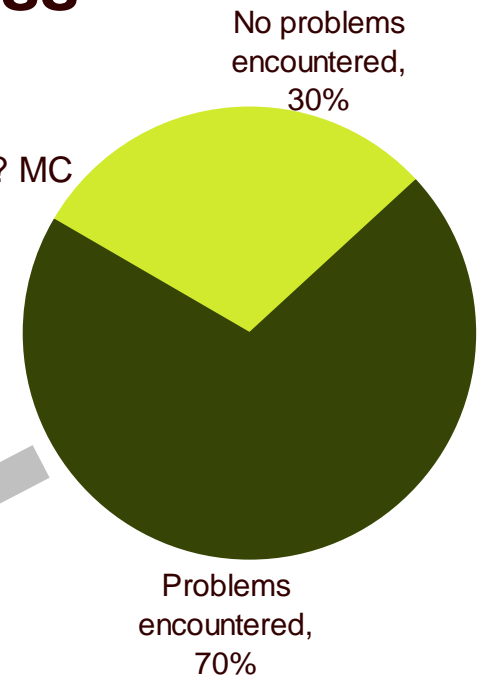
Key Business Concerns – Vietnam

Q11. What are your most pressing business concerns this year (2010)? MC



Problems Encountered in Financing Business – Vietnam

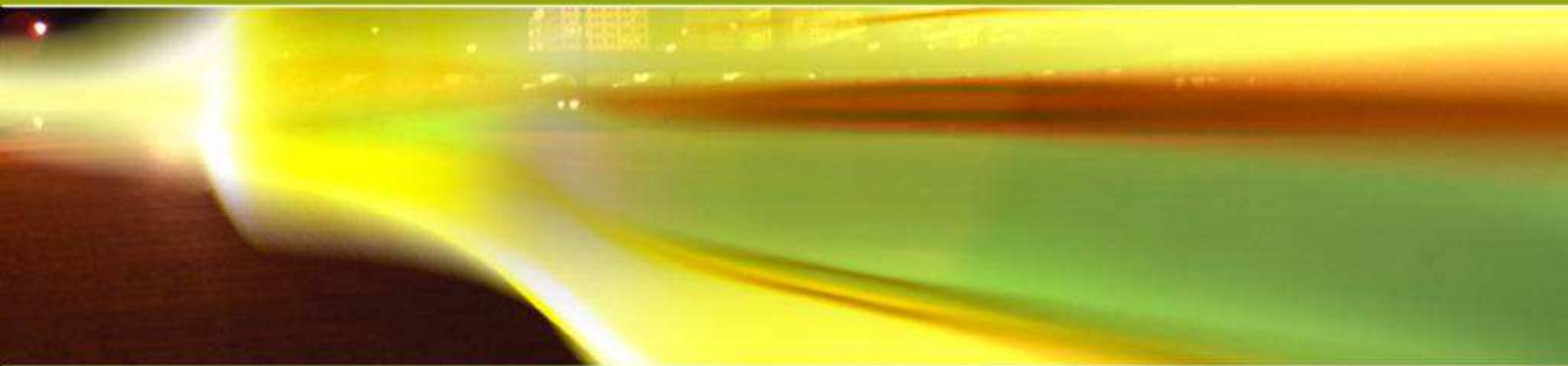
Q12 (Q22). Which of the following problems have you encountered in financing your business? MC



Base : Vietnam in 2010

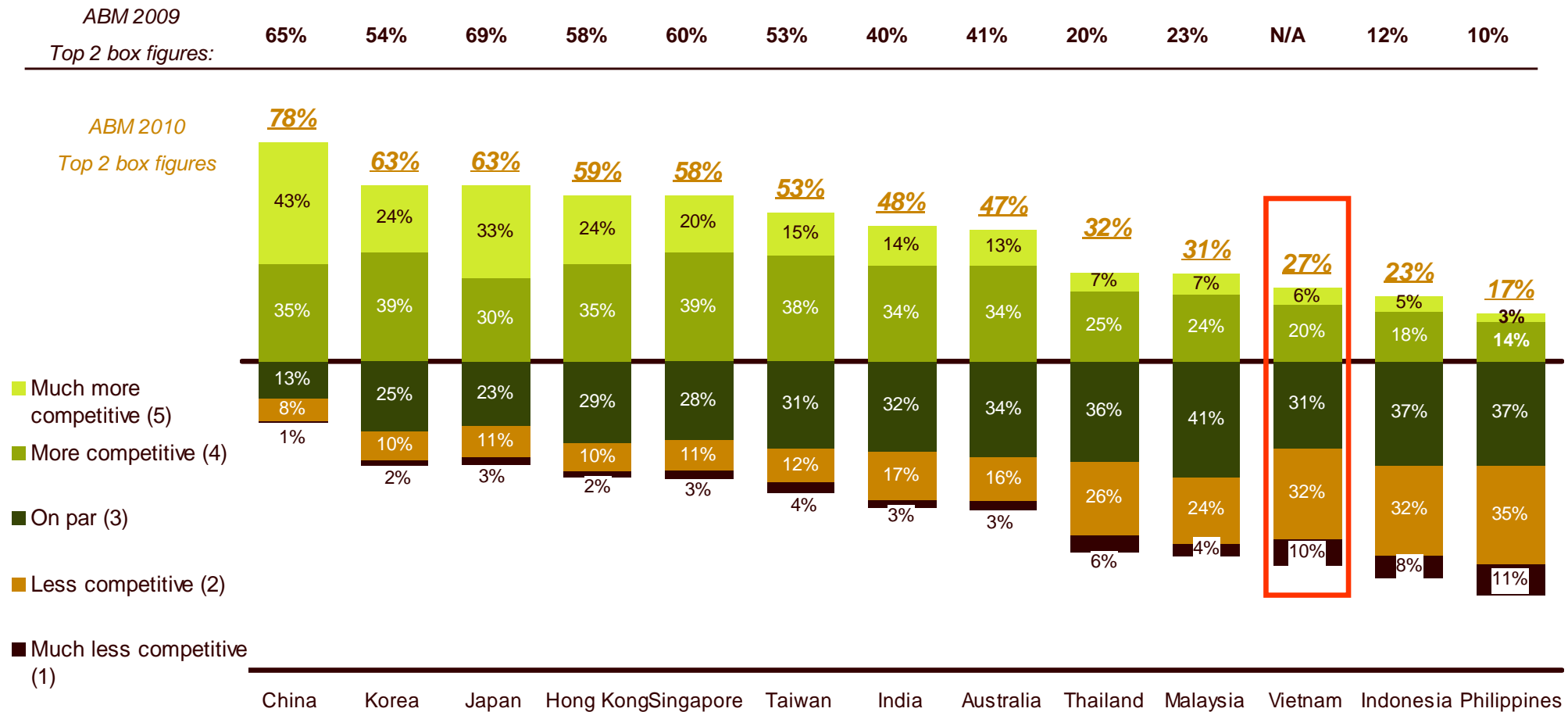
* Vietnam is a new market in 2010

Driving the Competitiveness for SMEs



SME Competitiveness – All Countries

Q15 (Q17). How would you rate SMEs in each of the following countries compared with SMEs in your own country?
Please rate on a scale of 1 to 5, where 5 equals “much more competitive than my own country” and 1 equals “much less competitive than my own country”?



Base : Asia Pacific in 2009, 2010

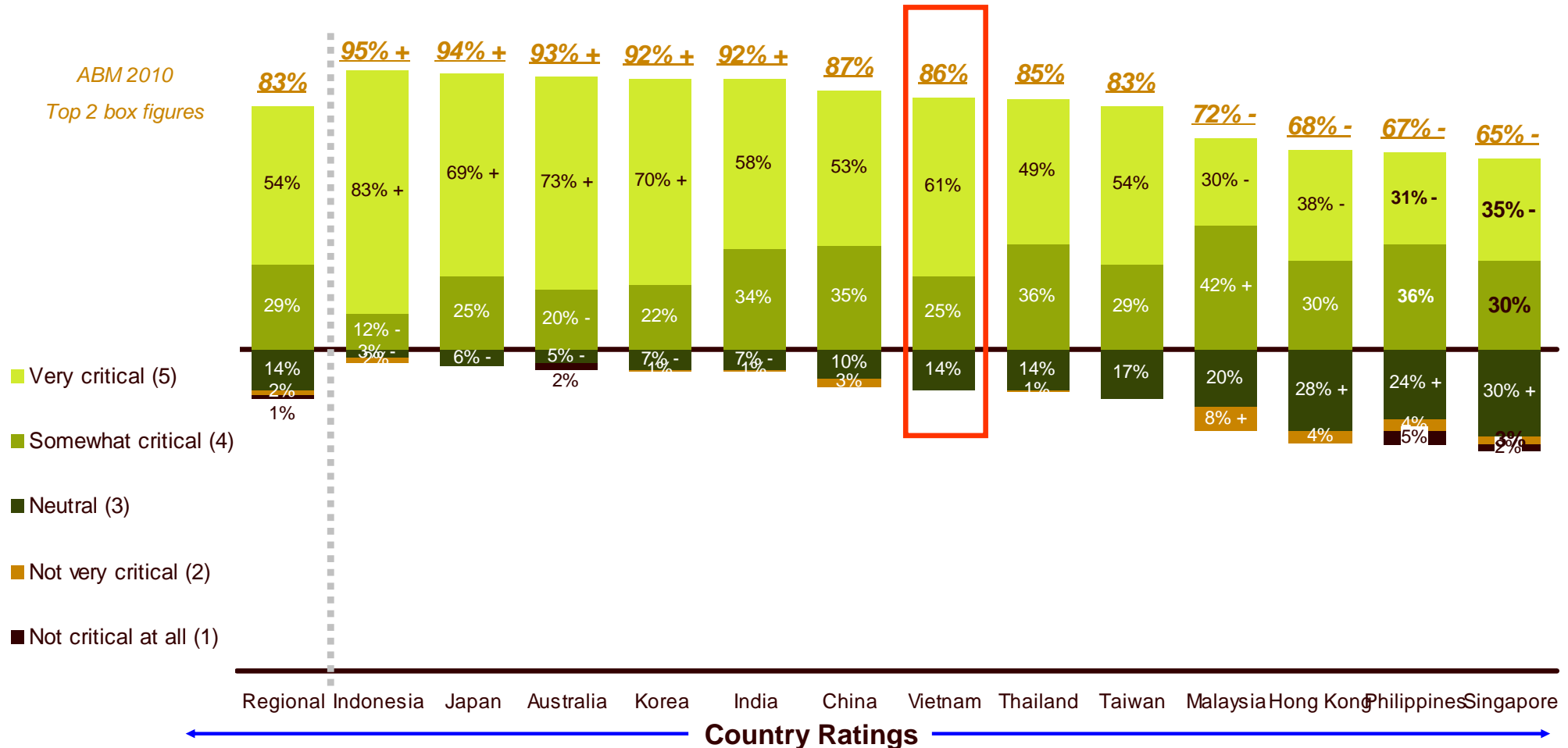
+ / - : Significant change versus 2009 (at 95% confidence level)

* Vietnam is a new market in 2010

Strategic Importance of SMEs to the Economy – All Markets

Q17. How critical are SMEs to the future of your country's economy? Please rate on a scale of 1 to 5, where 5 equals "very critical in driving competitiveness" and 1 equals "not critical at all in driving competitiveness". SC

Mean overall top 2 box score for Asia Pacific region: 83%



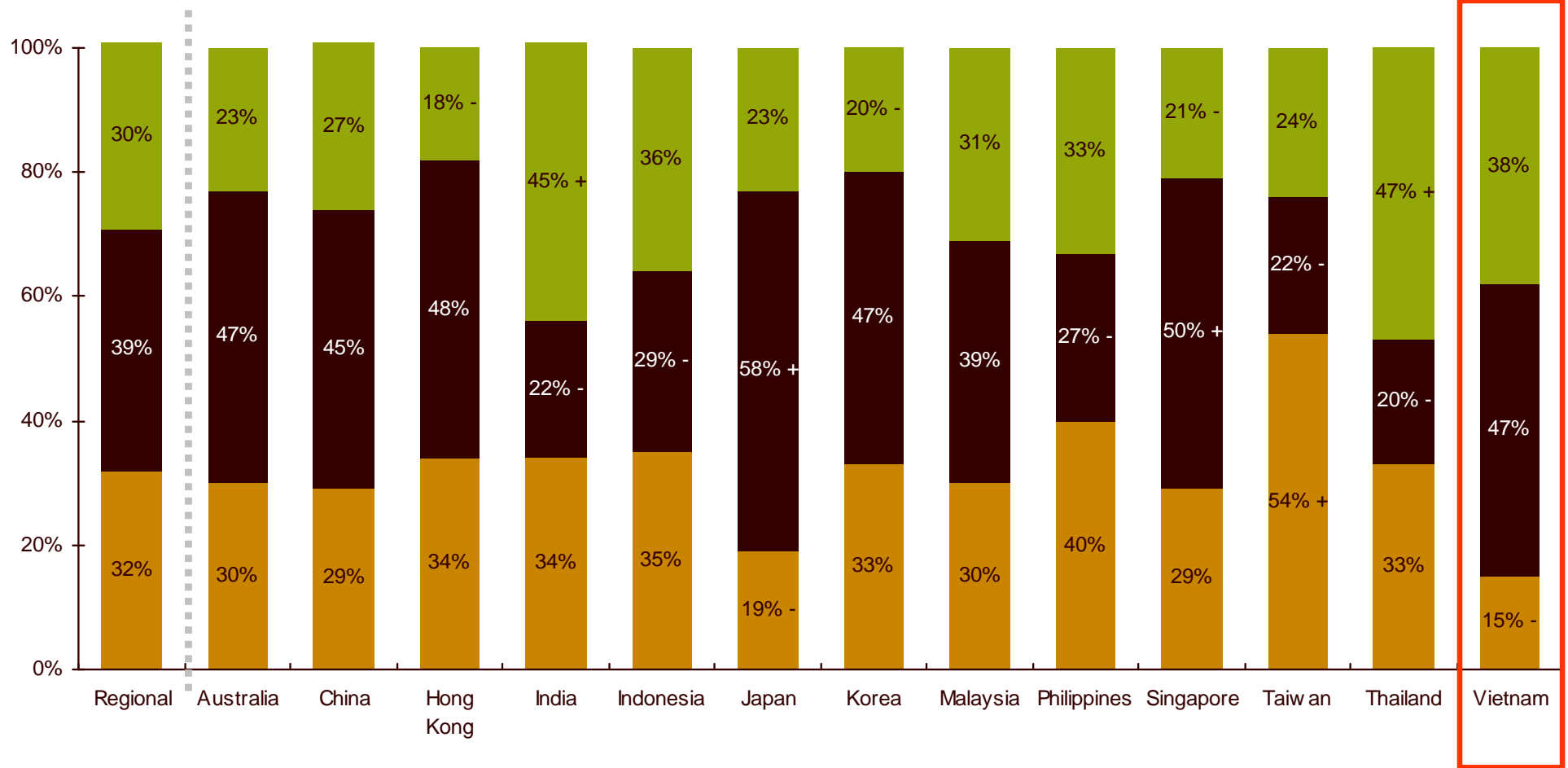
Base : Asia Pacific in 2010

+/- : Significant difference versus Total (at 95% confidence level)

* New question in 2010

Environmental Commitment of SMEs

Q20. Which of the following answer best describes your current thinking about your company and the environment? SC



- I can achieve long-term cost savings by investing in environmentally conscious mechanisms today
- Investing in environmentally conscious mechanisms has a place - but not in my 2010 plans
- Investing in environmentally conscious mechanisms should be addressed by government and big businesses, not SMEs

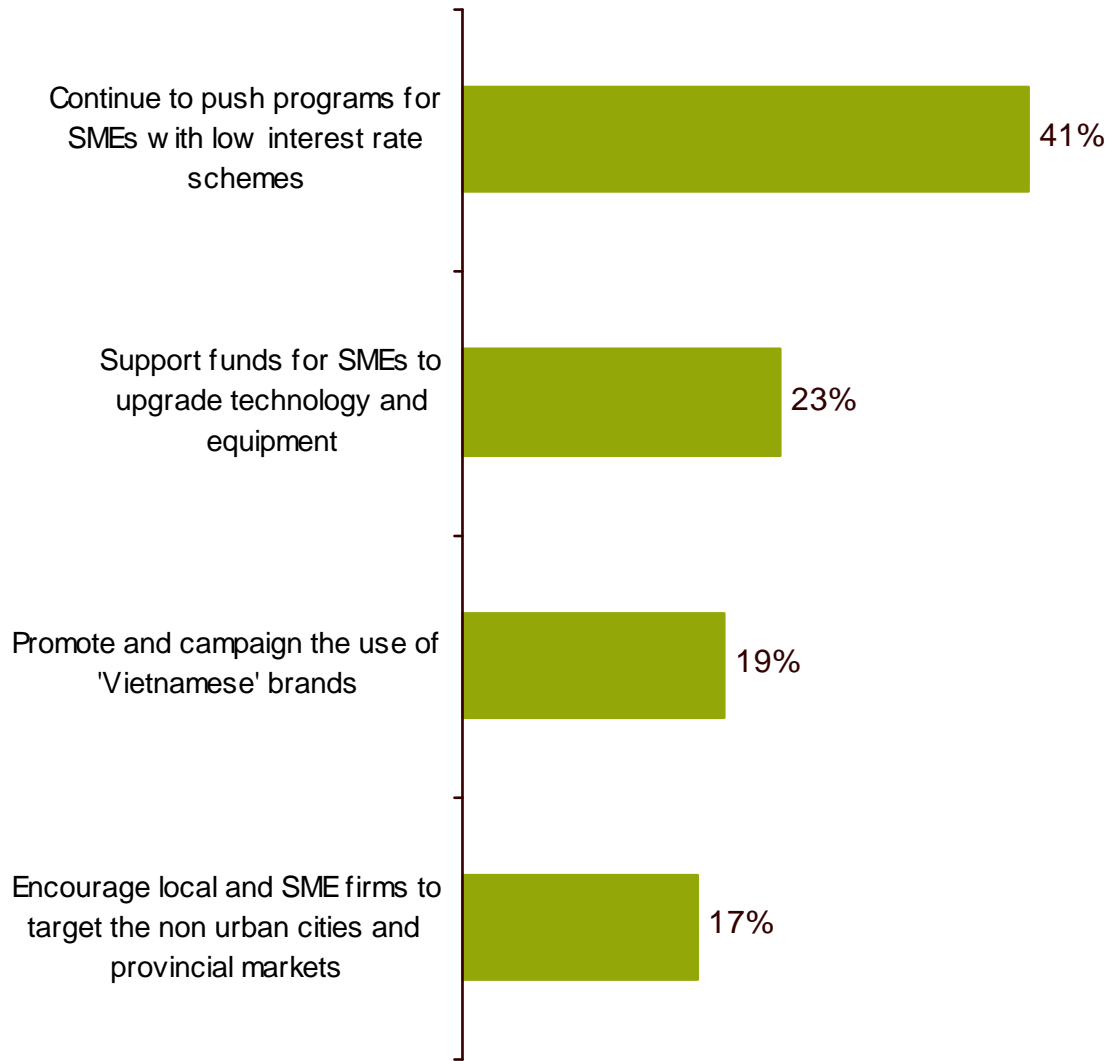
Base : Asia Pacific in 2010

+/- : Significant difference versus Total (at 95% confidence level)

* New question in 2010

Business Issues in Vietnam: Government Policy to Enhance SME Competitive Edge

Q33. Vietnam has opened its doors to foreign investments and there are many challenges for local firms to compete with the international arrivals. What can the government do to enhance the competitive edge of the local firms? SC



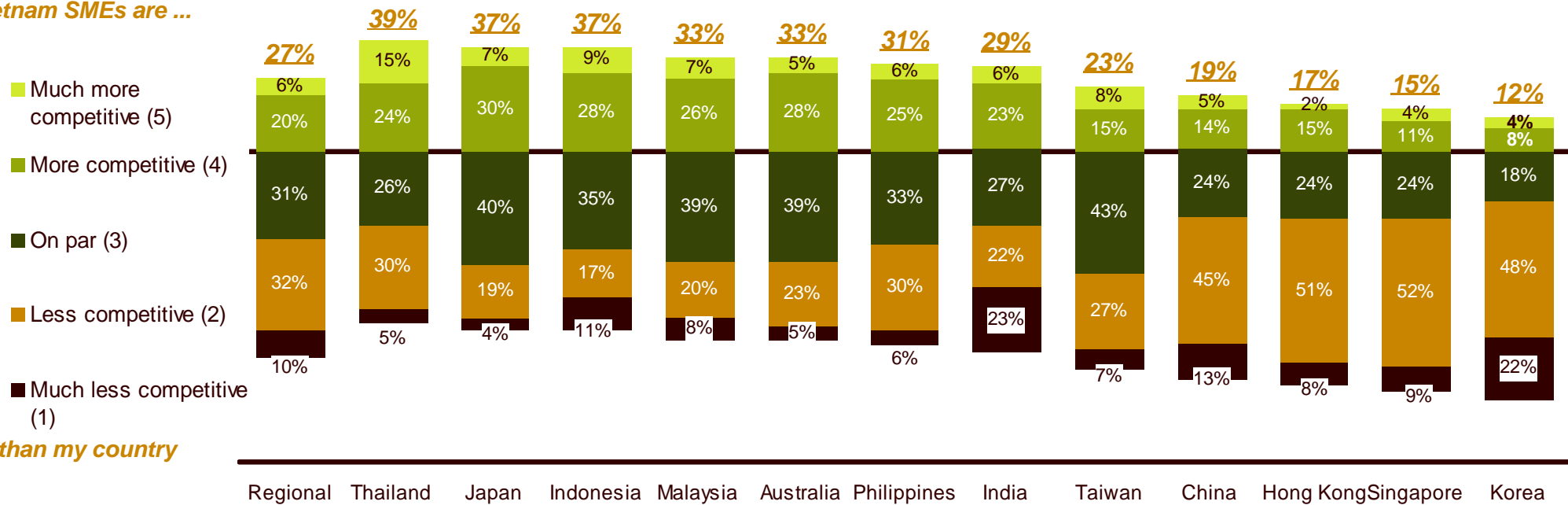
Competitiveness of Vietnam SMEs

– Rated by Each Market

Q15 (Q17). How would you rate SMEs in each of the following countries compared with SMEs in your own country?
Please rate on a scale of 1 to 5, where 5 equals “much more competitive than my own country” and 1 equals “much less competitive than my own country”?

ABM 2010
Top 2 box figures

Vietnam SMEs are ...



... than my country

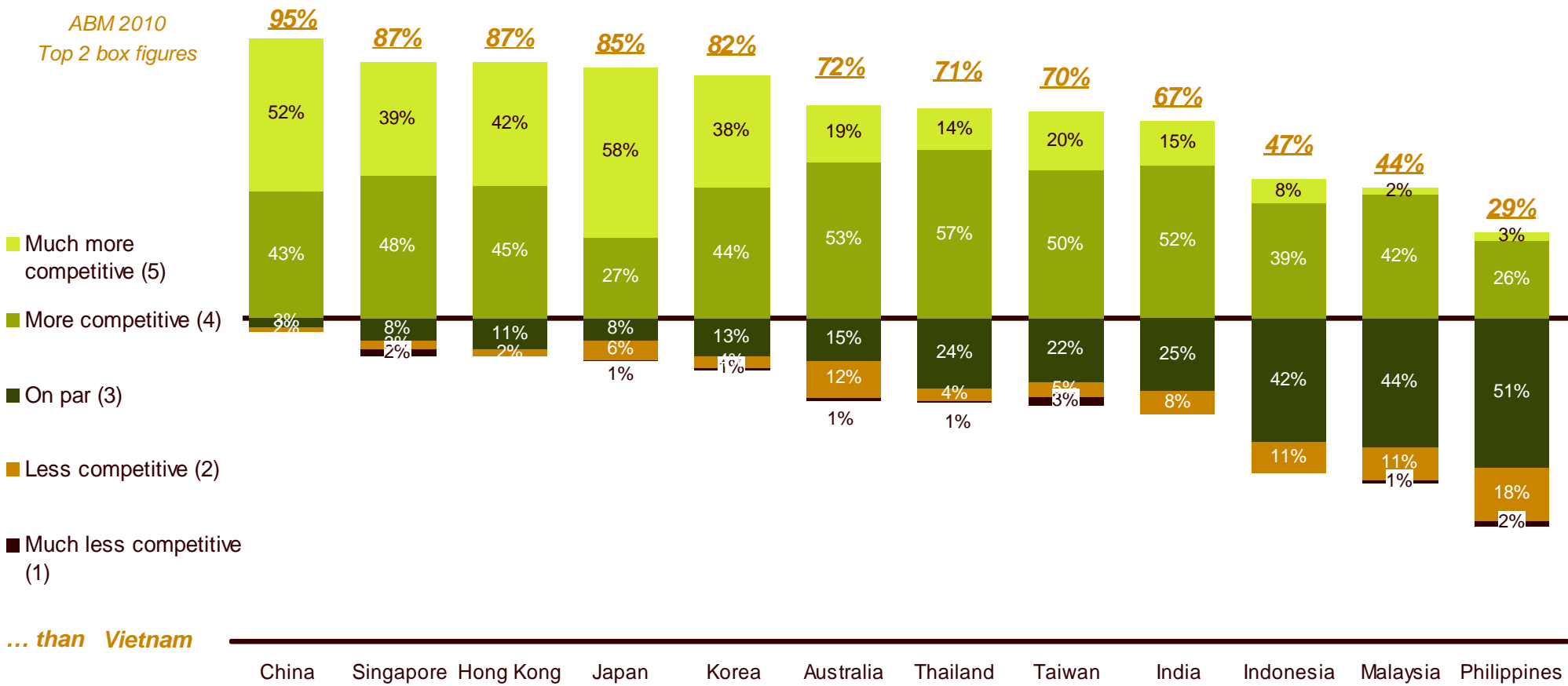
Country Ratings

Base : Asia Pacific in 2010 (excluding Vietnam) (n=1251)

* Vietnam is a new market in 2010

Vietnam SMEs: Rating of SMEs in Other Markets

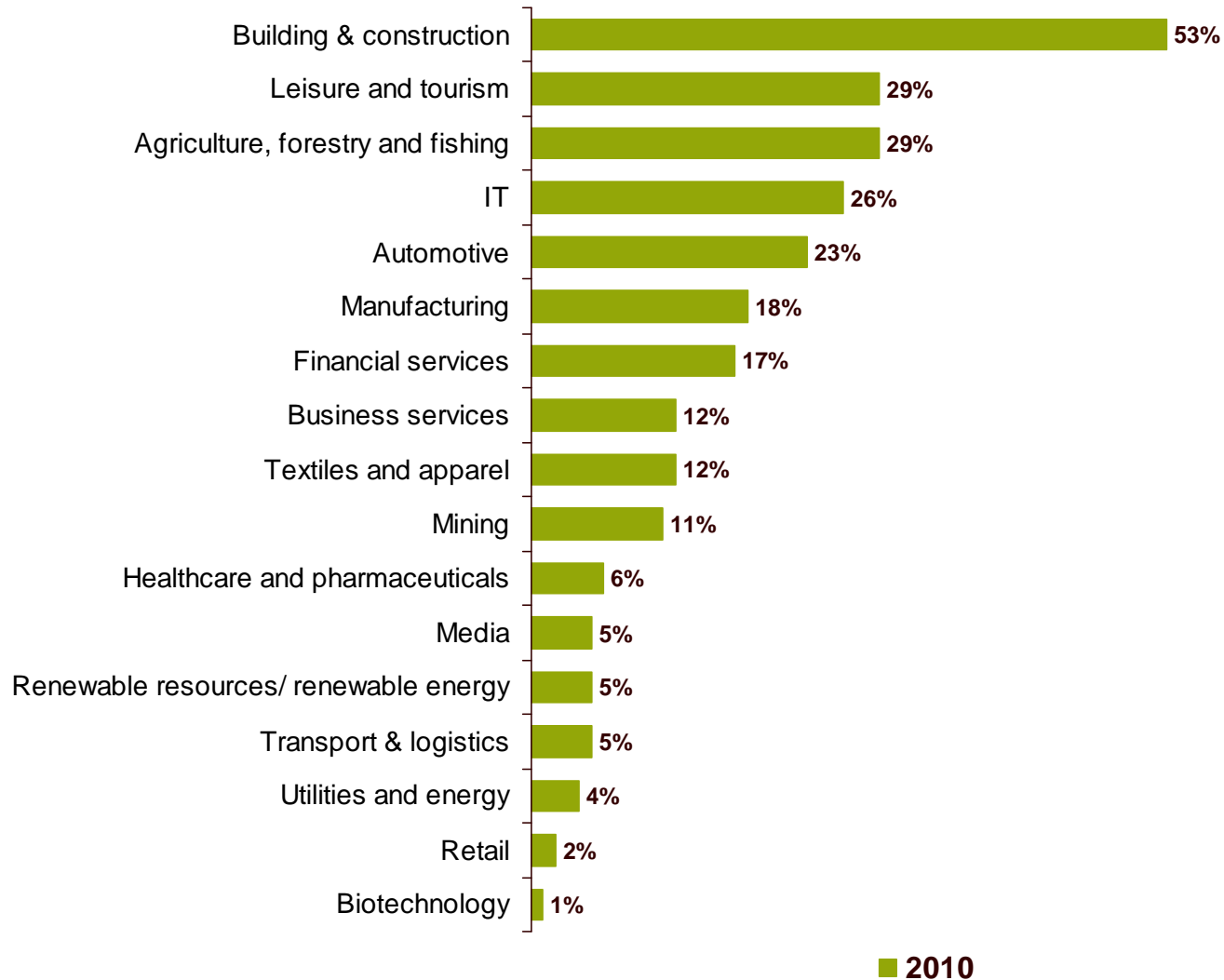
Q15 (Q17). How would you rate SMEs in each of the following countries compared with SMEs in your own country? Please rate on a scale of 1 to 5, where 5 equals “much more competitive than my own country” and 1 equals “much less competitive than my own country”?



Base : SMEs in Vietnam 2010
* Vietnam is a new market in 2010

Key Economic Pillars in the Next 3 to 5 Years – Vietnam

Q8 (Q9). Given the changes in the financial services sector, which three industries will be the key economic pillars for your country over the next 3 to 5 years? MC



Base : Vietnam in 2010

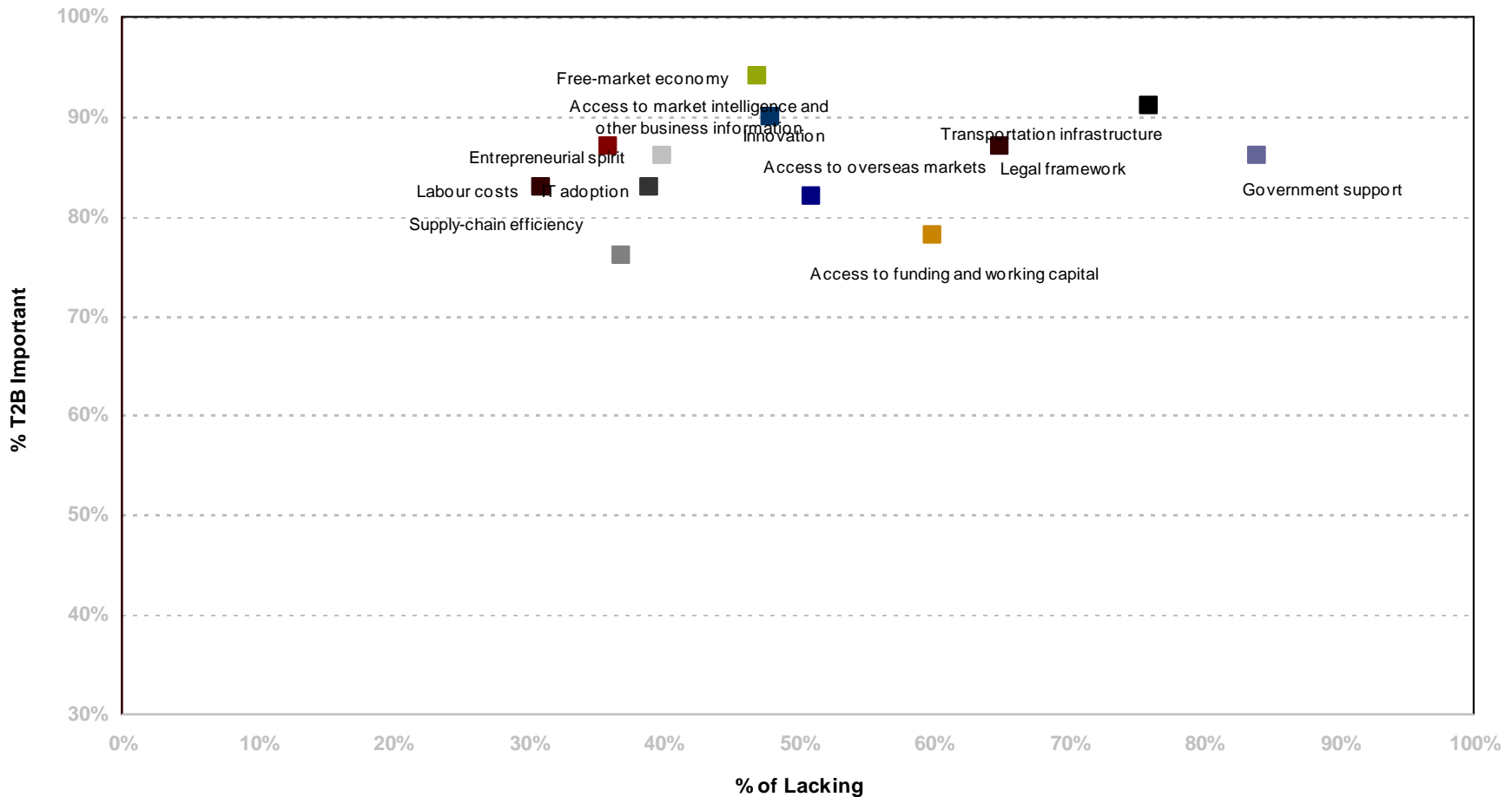
* "Renewable resources/ renewable energy" is a new code in 2010

* Vietnam is a new market in 2010

Contributions & Obstacles to SME Competitiveness

– Vietnam

Q15a (Q18). How important are each of the following factors in contributing to SME competitiveness in your country?
 Q15b (Q19). Which of the following factors do you consider to be lacking and which therefore are obstacles to SME competitiveness in your country?



Thank you

