

# Asian Institutional Transaction Banking Markets

Market Analysis Report  
November 2011





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### **East & Partners Pty Ltd**

Level 39, 2 Park Street Sydney NSW 2000 Australia  
phone: +61-2-9004 7848 fax: +61-2-9004 7070  
www.east.com.au  
ABN: 23 151 025 599

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## Introduction

This report is the twentieth in a six-monthly series of market analysis monitoring demand in the Top 1,000 Institutional Transaction Banking markets of Asia (outside Japan). This Institutional Transaction Banking service complements other services focussed on service provider market share and customer performance in both the Investment Banking and Treasury markets. A similar suite of market analysis programs is run separately every six months across the Australian markets.

The program is unique in delivering quality market intelligence to bank clients for application in account management, business development and market strategy formulation. In addition to the core multi-client content of the program, clients also add proprietary questions to each of these half-annual interviewing sweeps, using the vehicle of this ongoing research as a means of both adding valuable supplementary material to their use of the service and the generation of bespoke, tactical information solutions.

Covering ten countries in Asia, this Institutional Transaction Banking Research Program delivers on a census basis over 90 percent of total demand for corporate banking relationships, services and products from this market segment in the region.

This report delivers detailed data analysis from the customer fieldwork executed during late October/early November 2011. All client proprietary question analysis is subject to separate reporting with individual clients.

## Methodology

The fieldwork for this twentieth round of the six-monthly Asian Institutional Transaction Banking Research Program took place during October/early November 2011 with a near census of the region's Top 1,000 Institutions again being successfully interviewed. This group of 1,000 is based on the Top 100 Institutions as measured by annual revenues in each of the following country markets.

**TABLE A**  
**Geographical Distribution**

	% of Total	
	May 11 (N: 933)	Nov 11 (N: 937)
China	10.1	10.1
Hong Kong	10.3	10.5
India	9.9	9.7
Indonesia	9.9	9.9
Malaysia	10.6	10.4
Philippines	10.1	10.1
Singapore	10.3	10.4
South Korea	9.9	9.7
Taiwan	10.1	9.9
Thailand	8.8	9.3
<b>TOTAL</b>	<b>100.0</b>	<b>100.0</b>

A total of 937 institutional customers were thus successfully interviewed, constituting fully 93.7 percent of this top-of-town marketplace, a continuing, pleasing level of participation that has significant positive impact on the quality of the resulting analyses.

All enterprises were interviewed on a direct basis using the structured Interview Questionnaire, reproduced here as Appendix I, through the individual holding primary responsibility for decision making over the organisation's transaction banking relationships, displayed below in Table B.

**TABLE B**  
**Interviewee Distribution**

	% of Total	
	May 11 (N: 933)	Nov 11 (N: 937)
Chief Financial Officer	62.9	61.4
Group / Corporate Treasurer	36.5	37.5
Finance Director	0.6	1.1
Other	—	—
<b>TOTAL</b>	<b>100.0</b>	<b>100.0</b>

Industry sector distribution of these Top 1,000 institutions interviewed directly reflects the structure of the market's population/universe.

**TABLE C**  
**Industry Sector Distribution**

	% of Total	
	May 11 (N: 933)	Nov 11 (N: 937)
Agriculture, Forestry and Fishing	1.2	1.3
Mining	0.8	1.0
Manufacturing	26.2	26.0
Electricity, Gas and Water Supply	2.6	2.5
Construction	9.8	9.8
Wholesale Trade	11.3	11.5
Retail Trade	9.3	9.4
Accommodation, Cafes and Restaurants	1.7	1.7
Transport and Storage	8.2	8.4
Communication Services	3.1	3.1
Finance and Insurance	12.3	12.1
Property and Business Services	8.2	8.5
Government Administration and Defence	1.6	1.5
Education	—	—
Health and Community Services	—	—
Cultural and Recreational Services	—	—
Personal and Other Services	3.7	3.2
<b>TOTAL</b>	<b>100.0</b>	<b>100.0</b>

# Appendix I

Questionnaire



East & Partners Pty Ltd, a leading specialist market research firm in the business, corporate and investment banking markets of Asia Pacific, works across 11 countries in the region delivering both multi-client and proprietary market analysis services to financial services providers.

The delivery of accurate quantitative analysis on the region's exploding demand for sophisticated transaction, debt, treasury, investment and advisory banking services and products has been uniquely addressed by East's "bottom up" research methodologies for 15 years, based on many thousands of customer interviews annually in Australia, China, Hong Kong, India, Indonesia, Malaysia, Philippines, Singapore, South Korea, Taiwan and Thailand.

East's multi-client demand research and consulting work has enabled the firm to work with virtually every major bank within the region and international clients based in North America and Europe.

**East & Partners Pty Ltd**

Level 39, 2 Park Street Sydney NSW 2000 Australia  
phone: +61-2-9004 7848 fax: +61-2-9004 7070

**[www.east.com.au](http://www.east.com.au)**



BANKING • RESEARCH • ADVISORY • STRATEGY

**East & Partners Pty Ltd**

Level 39, 2 Park St Sydney NSW 2000 Australia

**phone:** +61 2 9004 7848 **fax:** +61 2 9004 7070 [www.east.com.au](http://www.east.com.au)

ABN: 23 151 025 599