



CENTRAL FORCE

CREATIVE INSIGHTS &
AUDIENCE ANALYTICS

2026

INSIGHTS REPORT

THE JOHOR-SINGAPORE SPECIAL ECONOMIC ZONE (JSSEZ)

**Public Sentiment and
Lived Perspectives**

**Part 1: Perception, Awareness
and the Narrative Landscape**



We hear, but do we listen?

This report is structured to reflect how public sentiment forms and evolves, rather than to advocate for a particular outcome. Respondents' public sentiment is fluid and responsive, and, like the winds of change, it can shift as information, experiences, and visibility of outcomes evolve over time.

The Johor–Singapore Special Economic Zone (JSSEZ) will continue to develop as stakeholders and investments shape the initiative. Yet one constant remains: the hopes and aspirations of the rakyat who continue to seek better opportunities and an improved quality of life.

Sections are organised thematically, and data is presented alongside contextual interpretation. Readers may move sequentially through the report or focus on the sections most relevant to their interests.

We hope you find this insights report as engaging to read as we found it to create.

The Central Force Insights Team

SO WHAT?
CF INSIGHTS SAYS

Look for *SO WHAT? CF INSIGHTS SAYS* panels, which offer interpretive context and practical considerations to support clarity, reflection, and engagement in decision-making and strategic planning.

LAYING THE GROUNDWORK

This publication represents **Part 1** of a multi-part exploration of Johoreans' public sentiment and lived perspectives surrounding the Johor–Singapore Special Economic Zone (JSSEZ). Future parts in this series will be released progressively.

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Part I – Clearing the Fog: Perception, Awareness and the Narrative Landscape

Part II – Conditional Support: Growth, Trust and Expectations

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Part IV – Getting Around: Transport, Connectivity, and Urban Mobility

CEO FOREWORD

It has been about a year since the Johor–Singapore Special Economic Zone (JSSEZ) was officially launched. Over the past twelve months, much has been said about its ambitions, its structure, and its potential—largely from the perspective of government agencies, policymakers, and institutions tasked with driving its success.

We felt this was the right moment to pause and ask a different question.

Not what is planned, but how is it being felt on the ground?

This report was conceived with a simple but important intention: to understand JSSEZ not through policy documents or official statements, but through the lived experiences, expectations, and concerns of Johoreans themselves. It is not an evaluation of implementation, nor a commentary on intent. Rather, it is a snapshot of public sentiment—how development is perceived, what is hoped for, and where uncertainty remains.

At Central Force Insights, we believe that development succeeds not only through sound policy and investment, but through alignment with the people it is meant to serve. Individually, many may feel their voices carry little weight in conversations of this scale. But when those voices are gathered systematically, ethically, and transparently, they form a collective signal—one that deserves to be heard.

This study gives space to that collective voice.

By speaking directly to Johoreans across districts, industries, and life stages, we aim to surface perspectives that may otherwise go unheard. Our role is to ensure that these views are measured rigorously, interpreted responsibly, and presented clearly—so they can meaningfully inform decisions about Johor’s future.

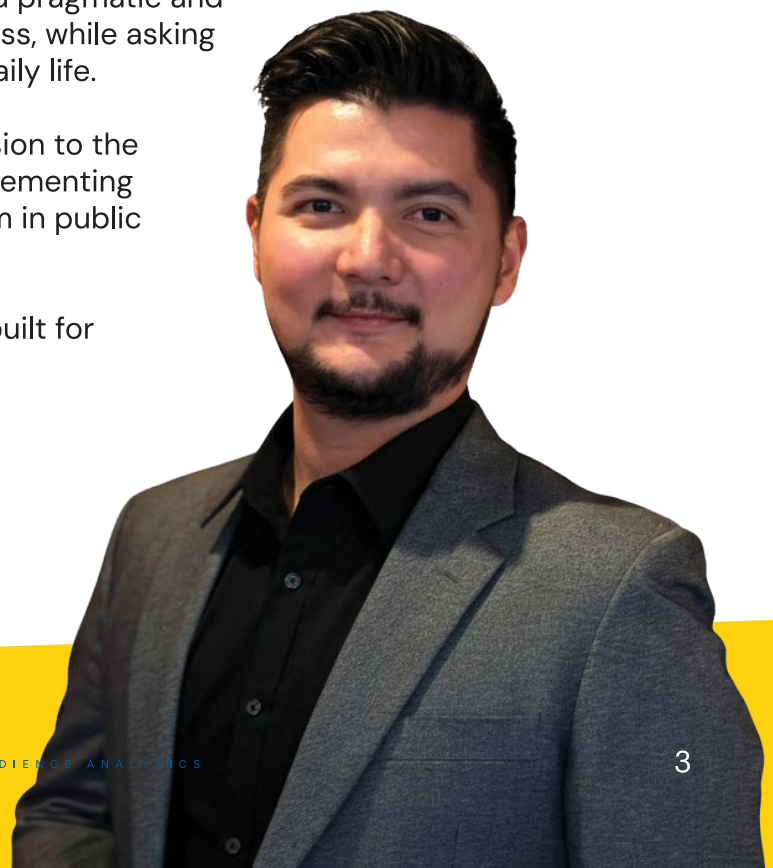
At its core, this report is about giving voice to the rakyat—not as individuals in isolation, but as a collective whose shared experiences and expectations matter. What emerges is neither blind optimism nor outright resistance, but a pragmatic and grounded outlook: one that supports progress, while asking that it be coherent, accessible, and felt in daily life.

We hope this report adds a valuable dimension to the ongoing conversation around JSSEZ—complementing institutional perspectives by anchoring them in public sentiment.

Ultimately, sustainable development is not built for the rakyat. **It is built with them.**

See Toh Wai Yu

Chief Executive Officer
Central Force Insights



EXECUTIVE SUMMARY

This report explores how Johoreans perceive development under the Johor–Singapore Special Economic Zone (JSSEZ), focusing on awareness, expectations, workforce readiness, income perceptions, and mobility conditions. It provides a grounded view of public sentiment, shaped not by abstract policy ambition, but by everyday experience.

Overall, Johoreans are not opposed to development. Public sentiment towards JSSEZ is best described as cautiously supportive and conditional. Awareness remains uneven, but where understanding is higher, support is stronger. This indicates that sentiment is still forming and responsive, placing clarity and credibility at the centre of public acceptance.

Residents consistently assess development through tangible outcomes. Job creation, affordability, mobility, and quality of life emerge as the primary lenses through which JSSEZ is evaluated. Support strengthens when development aligns with these priorities and becomes more guarded when benefits feel distant or difficult to access.

The workforce context reinforces this pragmatism. Johor's labour market is broadly capable, but readiness varies across districts and industries. This points not to a skills shortage, but to a sequencing challenge, where the pace and complexity of economic upgrading must align with existing capabilities and visible progression pathways.

Income expectations further contextualise these views. Johor functions as a baseline economy, offering stability and employability, but with limited perceived upward income mobility. This supports social stability, while also shaping how residents evaluate opportunity and aspiration.

Mobility and connectivity, particularly cross-border travel, remain important pressure points. While internal transport is generally functional, it is sensitive to congestion and load. Cross-border movement is widely experienced as time-consuming and unpredictable, shaping perceptions of job accessibility and work-life balance.

Taken together, the findings point to a central conclusion: the success of JSSEZ will depend less on ambition and more on alignment.

- Alignment between plans and lived experience
- Alignment between investment complexity and workforce readiness
- Alignment between economic growth and everyday realities such as mobility, housing, and cost of living

Johoreans are not asking for perfection. They are asking for development that works in practice and delivers benefits that are visible in daily life. The extent to which JSSEZ achieves this alignment will determine whether public support deepens over time.





METHODOLOGY

This study was conducted to understand Johoreans' awareness, perceptions, and expectations regarding development under the Johor–Singapore Special Economic Zone (JSSEZ), alongside views on workforce readiness, income expectations, and mobility.

RESEARCH DESIGN

- **Methodology:** Computer-Assisted Telephone Interviewing (CATI)
- **Sampling approach:** Probability-based sampling using Random Digit Dialling (RDD)
- **Target population:** Johor residents aged 18 and above
- **Coverage:** Mobile phone users in Johor
- **Sample size:** N = 311 respondents

A probability-based CATI RDD approach was used to ensure that every eligible mobile user in Johor had a known and non-zero chance of selection. This allows findings to be generalised to the broader adult population in Johor within accepted statistical limits.

WHY THIS METHOD WORKS

This approach was deliberately chosen for three key reasons.

1. Population representativeness

RDD CATI enables coverage beyond digitally active or opt-in populations, reaching working adults, older respondents, and lower-engagement segments that are often under-represented in online surveys. This is particularly important when assessing public sentiment on policy and development issues.

2. Reduced self-selection bias

Unlike online panels or open surveys, respondents are not pre-filtered based on interest, awareness, or engagement. This ensures that findings reflect both informed and less-informed segments of the population, which is critical when measuring awareness, neutrality, and conditional support.

3. Clarity and comprehension

CATI allows trained interviewers to clarify questions in real time and ensure consistent understanding across respondents. This improves data quality for complex topics such as economic development, workforce readiness, and transport experiences.

FIELDWORK AND QUESTIONNAIRE

The questionnaire covered the following areas:

- Awareness and understanding of JSSEZ
- Support for development and perceived benefits
- Workforce skills and readiness
- Income expectations and job attractiveness
- Transport and cross-border mobility experiences

Interviews were conducted in Bahasa Malaysia, English, and Mandarin, based on respondent preference. Fieldwork followed standardised CATI protocols, with interviewer training and call monitoring to ensure consistency and reliability.

DATA QUALITY AND INTERPRETATION

Quality control procedures were applied throughout fieldwork, including logic checks and call monitoring.

As with all survey research:

- Findings reflect perceptions at the time of data collection
- Some subgroup analyses are indicative due to smaller base sizes
- Percentages may not total 100% due to rounding or multiple-response questions

The results are intended to provide strategic and directional insight into public sentiment, rather than precise forecasting.

This methodology provides a robust and balanced foundation for understanding how Johoreans perceive development under JSSEZ, ensuring that conclusions are grounded in representative public opinion rather than niche or self-selected views.

AAPOR TRANSPARENCY INITIATIVE DISCLOSURE

Central Force Insights is a member of the *American Association for Public Opinion Research (AAPOR) Transparency Initiative (TI)* and is currently the only Malaysian research organisation participating in this initiative.

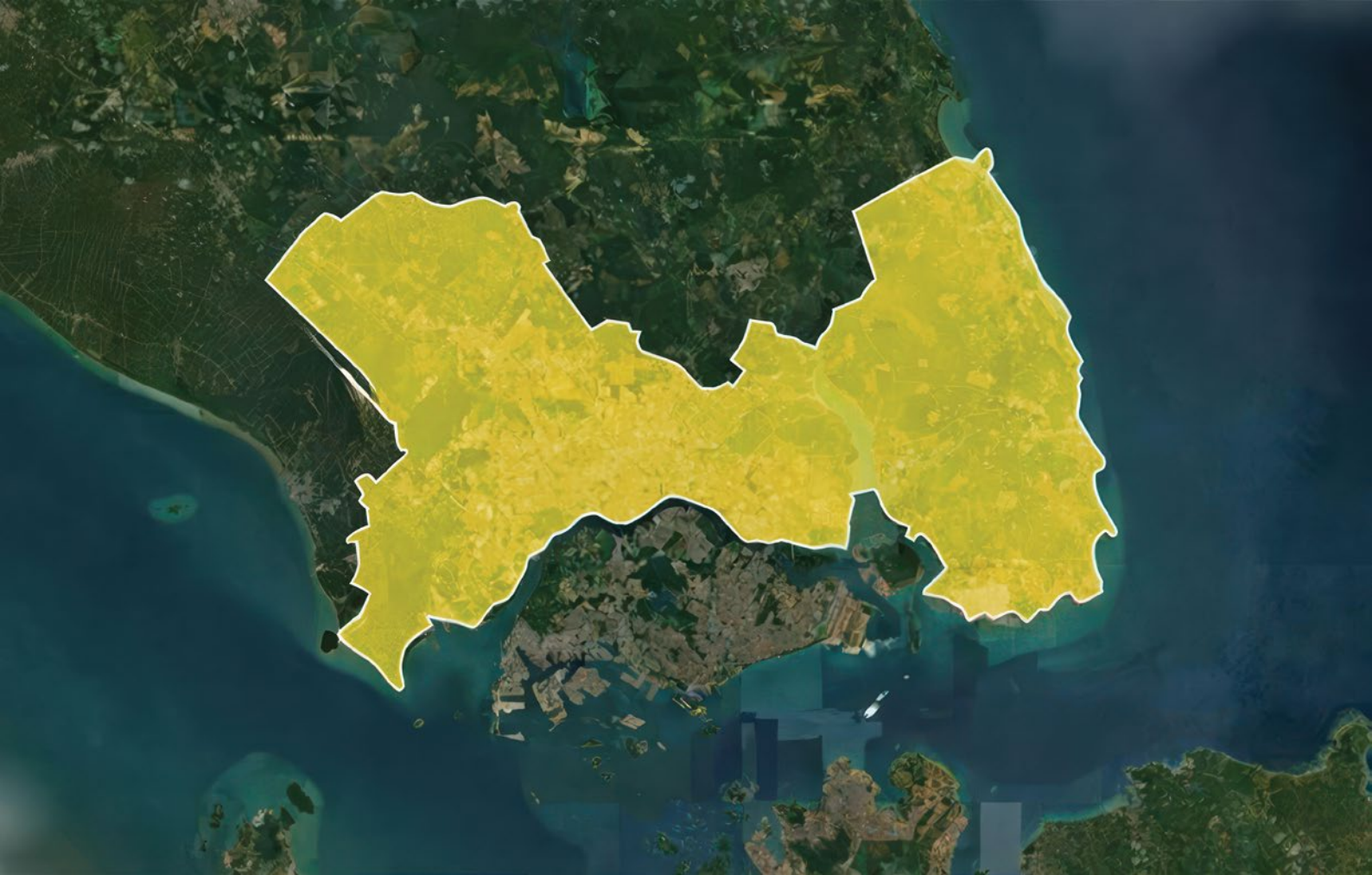
The AAPOR Transparency Initiative is a voluntary commitment by research organisations to uphold transparency in survey-based research by openly disclosing key methodological details. Its purpose is to enable readers to assess the quality, limitations, and interpretation of findings based on clear information about how the data was collected.

In line with this commitment, this report provides clear disclosure of the study's research design, sampling approach, and fieldwork procedures. In addition, the full questionnaire and frequency tables (dataset) used in this study are made available in the Appendix, allowing readers to review the measurement instruments and underlying results in detail.

This approach reflects Central Force International's commitment to ethical research practice, methodological transparency, and responsible interpretation of public opinion data.

Readers who are part of the *Central Force Insights Roundtable* may request engagement related to our research insights. This may include dialogue, data clarification, or deeper exploration of specific findings where additional context would be useful for decision-making, planning, or policy considerations. Contact us at +603-9078 3688 / +6011-5933 6808 or email cforce@cforce-int.com





1.0

Setting realistic expectations for JSSEZ

It is important to know that JSSEZ is not a standalone development or infrastructure project, but rather a comprehensive framework and cross-border collaborative initiative between Malaysia and Singapore, designed to enable multiple industries and sectors, facilitate coordinated development, and guide investment flows between the two economies.

SO WHAT?

CF INSIGHTS SAYS

Viewing JSSEZ as a framework helps set realistic expectations. As a long-term enabler rather than a short-term outcome, its impact will be shaped by how well policies, infrastructure, and investments are aligned over time to support sustainable growth. All stakeholders play a part in its ultimate success.

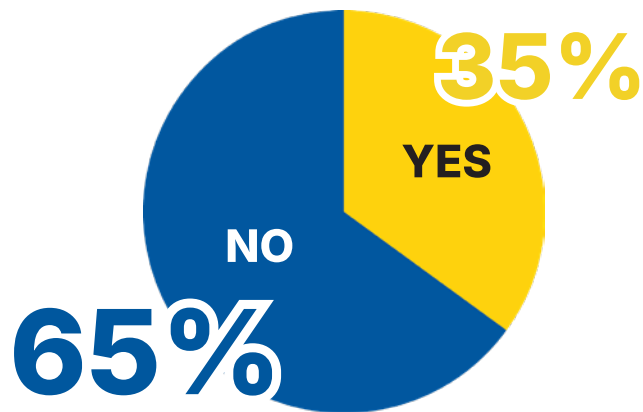
For this reason, the principles of communication, coordination, and continuity are emphasised throughout this Central Force Insights Report.

1.1

Fact: Most of the rakyat within Johor are unaware about JSSEZ

Awareness represents a key driver towards understanding the objectives and initiatives of the JSSEZ. Rakyat who are unaware and uninformed are usually undecided and hesitant, and thus are neutral. Among the uninformed rakyat, perceptions about JSSEZ may correlate with negative perceptions relating to such ambitious projects.

Respondents who are aware of JSSEZ



Public awareness of JSSEZ is currently low. Only 35.4% of Johor residents report having heard of the initiative, while nearly two-thirds (64.3%) remain unaware.

However, low awareness does not necessarily indicate resistance. Instead, it reflects that JSSEZ is still largely perceived as a conceptual initiative, rather than a concrete programme with visible impacts on daily life. This creates both a risk and an opportunity – perceptions have not yet hardened, but uncertainty is widespread.



SO WHAT? CF INSIGHTS SAYS

A question of confidence or uncertainty

It often is not a question of whether the rakyat approves or rejects the idea of JSSEZ, but rather one that can be rephrased towards a question of confidence versus uncertainty. Awareness allows an individual to form relevant and learned opinions.

1.2

Awareness of JSSEZ varies across districts

This section explores how awareness of JS-SEZ differs across districts in Johor, revealing that public understanding is not evenly distributed geographically. The analysis highlights that awareness gaps are not random, but correlate with proximity, economic exposure, and perceived relevance to daily life. These variations help explain why support levels and expectations differ across the state, and why a single, uniform narrative may fail to resonate equally everywhere.

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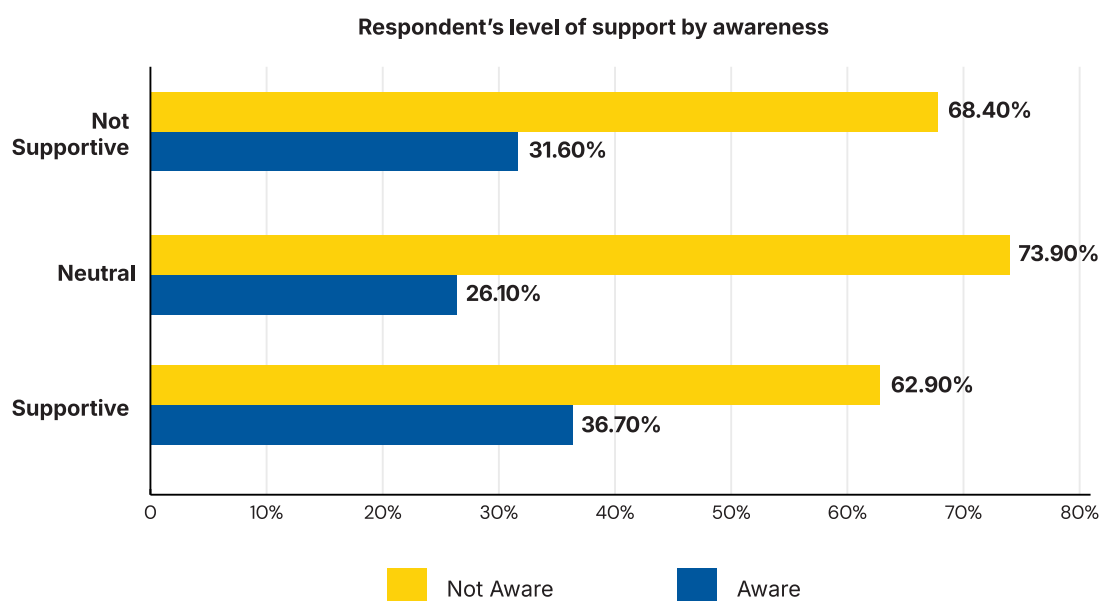
Roundtable participation is extended to selected stakeholders and provides access to deeper engagement with the JSSEZ data, including focused dialogue, data clarification, and deeper exploration of findings to support strategic decision-making, planning, or policy considerations.

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1.3

Awareness of JSSEZ is closely linked to support

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SO WHAT?

CF INSIGHTS SAYS

Most of the rakyat are not actually against JSSEZ – they are simply unaware. Nearly 74% of these neutral voices are simply waiting to be informed.

Awareness is a key driver of positive sentiment. Understanding the JSSEZ initiative correlates with greater endorsement, while low awareness leaves a large portion of Johoreans undecided or unable to form an opinion.



1.4

Clearing the fog of uncertainty around JSSEZ

Section 1.4 examines how different communication channels shape not just awareness of JS-SEZ, but the type of concerns and reactions that emerge. It shows that public sentiment is influenced less by the volume of information and more by where and how people encounter it. Different platforms surface different priorities, anxieties, and expectations—highlighting why communication strategy plays a critical role in how development is understood on the ground.

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1.5

Yes, but how will it benefit Johoreans?

Support for JSSEZ is not a blank check, but is anchored in the hope and belief that it will uplift Johor without adding burdens such as rising cost of living, inflated property prices, and traffic congestion, to name a few. With support comes expectations around how JSSEZ will improve the lives of Johoreans.

Among supportive Johoreans, concerns are centered around tangible, everyday impacts.



Of important note and concern among Johoreans are:

Increased cost of living (23.3%)
Traffic congestion (12.6%)

Rising property prices (14.5%)
Changes in government (9.9%)

These concerns indicate that residents are already anticipating second-order effects of development, rather than responding to abstract policy ideas.

Among neutral and less supportive respondents, two additional patterns emerge:

1. “Unsure” responses are very high (43.5–50%), highlighting uncertainty or lack of information, and
2. Stronger anxiety around employment competition, affordability, and political stability.

This suggests that public sentiment is soft and malleable. Support exists, but it depends on whether development outcomes feel fair, manageable, and clearly communicated.

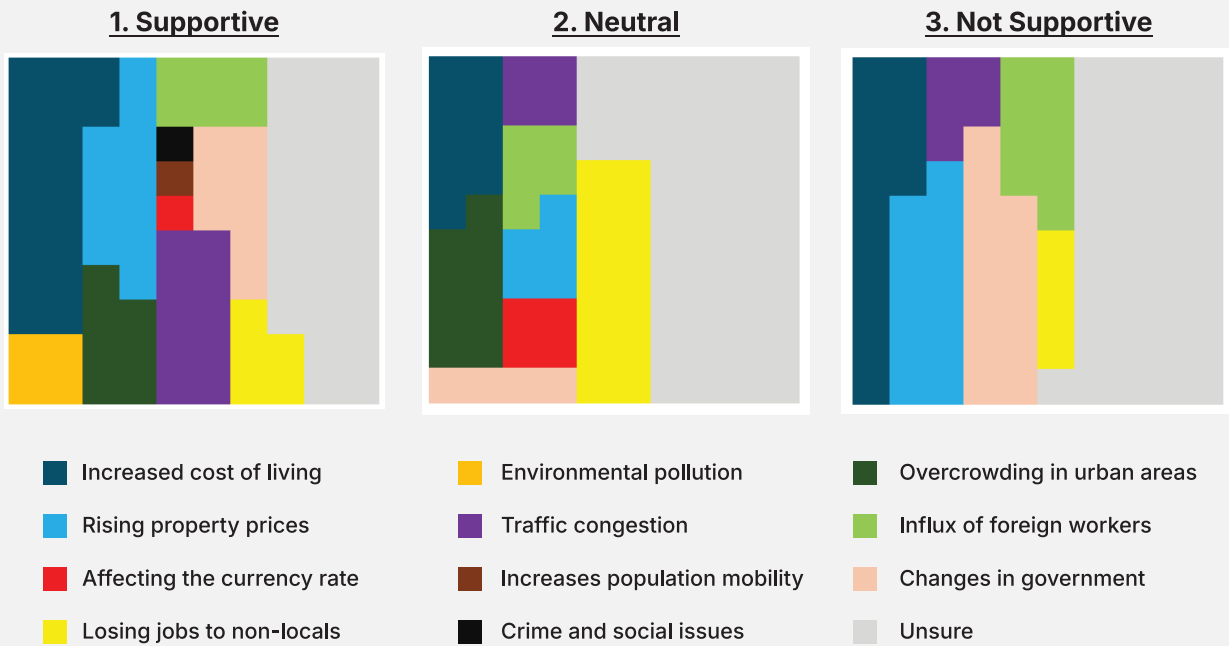
SO WHAT? CF INSIGHTS SAYS

A review of online public discussions easily highlights local sentiment of everyday Malaysians around JSSEZ includes concerns about rising cost of living, property values, and foreign investor influence. Many Johoreans are concerned that the relating activities of JSSEZ would push housing prices higher and make home ownership less attainable for locals. These concerns are real and deserve careful analysis and responsive policy consideration.

Hopeful and optimistic but also concerned

Despite limited awareness, optimism runs high and most Johoreans believe JSSEZ can improve Johor's future. However, there is a discerning underlying hope and expectation towards the realization of tangible benefits in the form of bringing new jobs, housing, tourism, and technology hubs.

Underlying concerns of Johoreans who are 1) supportive, 2) neutral, and 3) not supportive of JSSEZ



SO WHAT? CF INSIGHTS SAYS

The overall acceptance of JSSEZ is high, but it is aspirational rather than informed. Residents imagine visible, everyday benefits such as job opportunities, affordable housing, increased tourism, and new technology hubs as the true markers of progress.

However, this also reveals a translation gap: while government plans emphasize advanced industries and service-led growth, the public's expectations are grounded in tangible improvements they can see and feel. For JSSEZ support to remain strong, clear communication must bridge this gap, showing clearly how high-tech and service-driven investments translate into more local jobs, affordable housing, and improved living conditions.

1.6

How communication channels shape concerns

This section deepens the analysis by linking communication channels directly to the nature of public concerns surrounding JS-SEZ. It demonstrates that concerns expressed by Johoreans are not uniform, but vary depending on the context in which information is consumed. The findings suggest that public apprehension is shaped as much by narrative framing as by policy substance, with implications for trust, reassurance, and long-term support.

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1.7

Turning awareness into confidence

Awareness of JSSEZ is low and uneven, but acceptance is broadly positive. Support is aspirational rather than informed, driven by hope for economic uplift rather than clear understanding of how benefits will materialise.

Public sentiment is shaped largely outside formal government channels, making it highly sensitive to narrative shifts. Concerns focus on affordability, congestion, and governance – issues that will intensify as development becomes visible. Persistent uncertainty signals that incomplete or inconsistent communication could quickly weaken support.

In short, acceptance exists, but it is conditional and fragile. The narratives on JSSEZ thus far has been hopeful and paints a picture of a brighter better Johor. But residents' worries and concerns are centred on tangible, day-to-day impacts on their livelihoods such as cost of living, property prices, traffic congestion, and government stability.

SO WHAT? CF INSIGHTS SAYS

TO STRATEGIZE GOVERNANCE

Treat low awareness as an opportunity to shape understanding before perceptions harden.

Use high-reach channels: Social and news media are platforms to address concerns, not just to announce plans. Reinforce positive narratives through social and news media, while addressing negativity and misconceptions that usually arise from cost of living, property, and traffic.

Targeted communication: Focus on low-awareness districts such as Kota Tinggi and Pengerang with clear, relatable, and localised messaging.

Community engagement: District-level town halls, localised briefings, and transparent yet frequent updates can transform the “don't know” into informed support. Once again, social media allows easier and extended reach in order to engage and help these events gain traction and success.

Practical messaging: The data shows that Johoreans are practical in nature. Anchor communication in everyday realities such as job opportunities, affordable housing projects, improved transportation, and better quality of life, rather than abstract economic strategies.



Ultimately, JSSEZ as a long-term initiative requires communication to be outcome-led, rather than vision-led. The rakyat have goals of their own, and most of their aspirations will hinge upon what JSSEZ can do for them.

TO SHAPE BUSINESS STRATEGY

Stronger acceptance of JSSEZ and the businesses within depends on visible local benefits, not sector prestige. When benefits feel more personal and relatable, confidence naturally ensues.

Clearly defined benefits: The economic and social benefits must be made clear and visible, especially along the lines of employment opportunities, and affordable housing, which align with the vast majority of Johoreans' primary concerns.

Examples of early phase success in select districts should be shared with other districts, especially the ones with lower awareness.

Pre-empt friction points: Address cost-of-living pressures, congested traffic, and possible disruptions with proactive solutions such as increased local hiring, shuttle services, improved supply chain network, entrepreneurship opportunities, etc.

Engage trusted channels: Communicate plans via social media, news outlets, and community conversations to clarify misinformation.

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