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Trends in Southeast Asia

THE 2017 JOHOR SURVEY:
SELECTED FINDINGS

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NORSHAHRI SAAT AND
SERINA RAHMAN

ISEAS YUSOF ISHAK
INSTITUTE

Trends in Southeast Asia

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FOREWORD

The economic, political, strategic and cultural dynamism in Southeast Asia has gained added relevance in recent years with the spectacular rise of giant economies in East and South Asia. This has drawn greater attention to the region and to the enhanced role it now plays in international relations and global economics.

The sustained effort made by Southeast Asian nations since 1967 towards a peaceful and gradual integration of their economies has had indubitable success, and perhaps as a consequence of this, most of these countries are undergoing deep political and social changes domestically and are constructing innovative solutions to meet new international challenges. Big Power tensions continue to be played out in the neighbourhood despite the tradition of neutrality exercised by the Association of Southeast Asian Nations (ASEAN).

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The 2017 Johor Survey: Selected Findings

By Terence Chong, Lee Hock Guan, Norshahril Saat and
Serina Rahman

EXECUTIVE SUMMARY

- ISEAS commissioned the 2017 Johor Survey to understand Johor residents' attitudes towards state and federal government, the economy, Islamic identity, the Johor royal family, as well as development projects like Iskandar Malaysia. This is a presentation of selected findings from the survey.
- A majority of respondents are satisfied with the Johor government's management of the state. There is mild optimism over the economic future of the state across the board, except for Chinese respondents who are generally more pessimistic. Chinese respondents are more likely to report smaller improvements in the financial situation of their households.
- In terms of identity, there is strong support for *Bangsa Johor* across all demographic segments. However, religious affiliation is the most important for Malay respondents while Chinese and Indian respondents identify themselves as Malaysian citizens first. The idea of introducing public English-medium schools receives overwhelming support from all ethnic groups.
- The Johor royal family is viewed as a good steward of Johor's resources and is believed to look after the personal interests of citizens. Many also believe that the Johor Sultan should intervene in politics when necessary. However, a slight majority agree that the Johor royalty should refrain from business ventures.
- With regard to Islam, the vast majority of Malay respondents see Malaysia as an "Islamic state". This majority also believe that increased Islamic religiosity is a positive development for society. More than half of the Malay respondents would like *hudud* laws to be applied to non-Muslims as well. The majority of Malay respondents also believe that JAKIM should regulate Muslim behaviour and that Malay culture is not becoming more Arabized.

The 2017 Johor Survey: Selected Findings

By Terence Chong, Lee Hock Guan, Norshahril Saat and
Serina Rahman¹

INTRODUCTION

Johor, more than any other Malaysian state, and Singapore enjoy a unique familiarity that has been nurtured by geographical proximity and historic ties. Thousands of Johor residents, many of whom are Malaysians from other parts of the country, make the daily trip across the Causeway to work or study in the island republic.²

There were approximately 1.3 million foreign workers in Singapore as of June 2017.³ It has been estimated that between 450,000 and 500,000 Malaysians are working in various sectors in Singapore, including the approximately 120,000 Malaysian workers who commute daily from Johor.⁴ The two-way traffic averages 400,000 daily, even reaching 430,000 during festive periods, making the Singapore–Johor border one of the busiest in the world.⁵

¹ The authors are Deputy Director, Senior Fellow, Fellow, and Visiting Fellow respectively, at the ISEAS – Yusof Ishak Institute, Singapore. The authors are grateful to Research Officers Pearlyn Y. Pang and Evelyn Tan for their invaluable assistance in preparing this article.

² <<http://www.straitstimes.com/asia/se-asia/many-malaysians-prefer-working-in-singapore-for-higher-wages>> (accessed 31 October 2017).

³ <<http://www.mom.gov.sg/documents-and-publications/foreign-workforce-numbers>> (accessed 31 October 2017).

⁴ <<https://www.thestar.com.my/news/nation/2017/02/20/be-wary-of-lucrative-job-offers-in-spore-cases-of-malaysians-cheated-into-bad-jobs-still-common-says/>> (accessed 31 October 2017).

⁵ <<http://www.straitstimes.com/singapore/transport/430000-travellers-expected-daily-at-land-checkpoints-over-festive-period-ica>> (accessed 31 October 2017).

The strong Singapore dollar also encourages thousands of Singaporeans to travel to Johor for shopping and food, thus providing a boost to the local economy. There are about 5,000 Singaporean families who have set up home in Johor.⁶ These are either retirees who prefer a slower pace of life or adults working in Singapore who have made the trade-off between affordable landed property and the daily cross-border commutes. Cheaper houses, cars, petrol and favourable terms under the Malaysia My Second Home Programme have also made Johor more attractive to foreigners.

Johor's economy has been predicted to do well in the near future. With a GDP of RM104.4 billion, Johor is expected to become Malaysia's second largest state economy in a few years, relegating Sarawak, which has a GDP of RM108.7 billion, to third place.⁷ Selangor, with a GDP of RM251.5 billion occupies the top slot. Since 2011, Johor's economy has grown at a faster rate than Malaysia's as a whole, except for 2013 when their rates mirrored each other. In 2016, Johor's 5.7 per cent growth rate was higher than those of Malaysia's other twelve states.⁸ Much of Johor's growth is due to cheaper properties and goods compared to Singapore, as well as the Iskandar Malaysia development project that is expected to cover 2,200 sq. km when completed in 2025. One of the spillover effects of Iskandar Malaysia is the construction sector's strong growth of 24 per cent in 2016.

Johor is Malaysia's second most populous state with 3.2 million residents, of whom 1.7 million are Malays, 1 million are Chinese, and 200,00 are Indians. It has a relatively young population with 601,000 residents being between 10 and 19 years of age; 630,000 residents between 20 and 29 years of age; and 478,000 residents between 30 and 39 years of age.

⁶ <<http://www.asiaone.com/singapore/about-5000-singaporean-families-have-set-home-johor>> (accessed 31 October 2017).

⁷ <<http://www.freemalaysiatoday.com/category/nation/2017/10/19/johor-to-unseat-sarawak-as-second-largest-state-economy/>> (accessed 2 November 2017).

⁸ Ibid.

In 2013, ISEAS commissioned the Johor Survey to ascertain the attitudes of Johor residents towards Malaysian politics and the economy.⁹ It was then found that social interpretations and perceptions were very much dependent on ethnic identity. More than income or education, ethnicity seemed to be the key determinant of how certain questions were answered.

For example, that survey found that ethnic Chinese respondents were more likely to be dissatisfied with the federal and state governments' performance compared with their Malay and Indian counterparts. Indian and Malay respondents were more optimistic about Johor's political, economic and social future while Chinese respondents, the higher educated, and those from higher income households were more likely to be pessimistic.

With regards to Iskandar Malaysia, the 2013 Johor Survey found that the majority of all respondents are satisfied with its development. The majority of Chinese and Indian respondents were satisfied with the influx of Singaporean investors into Iskandar Malaysia, while Malay respondents tended to be less receptive. Likewise, the survey found that Chinese and Indian respondents were more likely to have a favourable opinion of Singapore and were more open to visiting and working in the city-state. Chinese respondents were most likely to have visited Singapore; followed by Indian respondents; and lastly Malay respondents.

In terms of ethnic affinity between Johor and Singapore, the 2013 Johor Survey found that Malay, Chinese, and Indian Johor residents did not see similarities between themselves and their ethnic counterparts in Singapore. This suggests that national identity superseded ethnic identity. However, while the majority of Chinese and Indian Johoreans did not believe that Malaysians and Singaporeans of the same ethnic group were similar, Malay Johoreans said that they believed that Chinese Malaysians and Chinese Singaporeans were similar to each other; and also that Indian

⁹ Terence Chong, *Johor Survey: Attitudes towards Governance and Economy, Iskandar Malaysia, and Singapore*, Trends in Southeast Asia, no. 4/2014 (Singapore: Institute of Southeast Asian Studies, 2014).

Malaysians and Indian Singaporeans were similar to each other. This may hint at a lack of trust or familiarity on the part of Malay respondents with regard to their fellow Chinese and Indian citizens.

ISEAS commissioned another Johor survey in 2017. The 2017 Johor Survey covers topics such as Johor residents' attitudes towards state and federal government, the economy, Islamic identity and perceptions of Arabization, the Johor royal family, as well as development projects like Iskandar Malaysia, Forest City and Pengerang Integrated Petroleum Complex. This issue of *Trends in Southeast Asia* presents selected findings from the survey.

METHODOLOGY AND SAMPLE

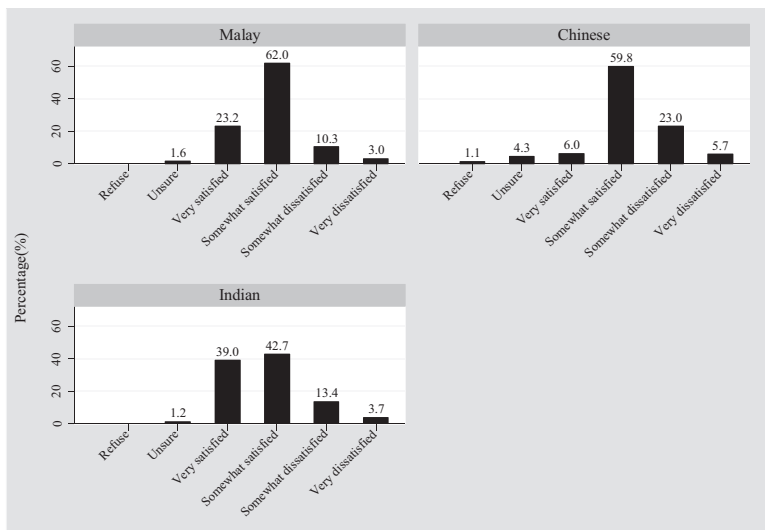
The 2017 Johor Survey was conducted between May and June 2017. A sample of 2,011 respondents were interviewed via fixed-line and mobile phones. Respondents consisted of Malaysian citizens aged 18 and above who resided in Johor. They were selected on the basis of random stratified sampling across districts of residence, controlled by quota for ethnicity, age and gender. A "Johor resident" is defined as one who is registered as a voter in the state.

There were 1,104 (55 per cent) ethnic Malay respondents, 758 (38 per cent) ethnic Chinese respondents, and 149 (7 per cent) ethnic Indian respondents. 340 respondents were between the ages of 21 and 30 years old; 455 respondents were between the ages of 31 and 40 years old; 546 respondents were between the ages of 41 and 50 years old; 409 respondents were between the ages of 51 and 60 years old; and 261 respondents were 61 years old and above. The survey's estimated margin of error is +2.18.

POLITICS

Respondents surveyed were generally satisfied with the state government's management of Johor. 77 per cent reported being satisfied and only 20 per cent dissatisfied. The overall satisfaction with the Johor state government's performance was uniformly positive across all demographic segments. These findings showed a marked uptick in respondents' evaluation of the performance of the Johor state government

Figure 1A: How satisfied or dissatisfied are you with the performance of the Johor state government in managing Johor today? All Johor respondents (n=1003) according to ethnicity.



since 2013. For example, in the 2013 Johor Survey conducted shortly after the 2013 General Elections, only 58 per cent of respondents were satisfied while 24 per cent were dissatisfied.¹⁰

Malay and Indian respondents satisfied with the state government’s performance significantly increased from 31 per cent and 37.2 per cent in 2013 to 85.2 per cent and 81.7 per cent in 2017 respectively (Figure 1A). Only 13.3 per cent of Malay respondents and 17 per cent of Indian respondents were dissatisfied with the Johor state government’s management of the state. In contrast, while Chinese respondents satisfied with the performance of the Johor state government has trended up from 20.5 per cent in 2013 to 65.8 per cent in 2017. Nevertheless close to 30 per cent still indicated they were either “somewhat dissatisfied” or “very dissatisfied”.

¹⁰ For the figures in 2013, see Chong, *Johor Survey*.

Figure 1B: Please rank these people in order of your approval of their performance. All Johor respondents (n=1003), according to ethnicity.

Leaders	1st	2nd	3rd
The Johor royal family	46.0%	14.0%	5.0%
Khaled Nordin, Chief Minister of Johor	19.0%	34.0%	6.0%
The state legislative assembly person in your area	5.0%	6.0%	23.0%
The member of parliament in your area	4.0%	8.0%	21.0%
The member of opposition for your state legislative assembly seat	1.0%	4.0%	5.0%
The member of the opposition for your parliamentary seat	2.0%	3.0%	4.0%

When asked to rank Johor political leaders by their performance, the Johor royal family, Khaled Nordin the current Johor Chief Minister, the state legislative assembly person, and the Member of Parliament were among the top four leaders with the highest ranking (Figure 1B). The Johor royal family was enthusiastically ranked first by nearly half of the respondents (46 per cent) with Chief Minister Khaled Nordin trailing a distant second at 19 per cent. There was a huge gap between Khaled Nordin and the 3rd (state legislative assembly person in your area) and 4th (member of parliament in your area) highest rank political leaders.

Figure 1C shows that the Johor royal family is ranked first by 59.8 per cent of Indian respondents, followed by 52.5 per cent Malay respondents, and by a slightly lower 34.8 per cent by Chinese respondents. Of those who ranked the Chief Minister Khaled Nordin first, 26 per cent were Malay respondents 12.2 per cent Indians and 10.6 per cent Chinese.

Unsurprisingly, Malay respondents ranked the Member of Parliament and state legislative assembly person in their constituencies much higher than the opposition parliamentarian and state legislator — 4.4 per cent and 3.1 per cent to 0.9 per cent and 0.7 per cent respectively. While Indian respondents ranked the state legislator in their constituencies above the opposition state legislative assembly person (85 per cent to 1.2 per cent), both the Member of Parliament in their constituencies and opposition parliamentarian were equally rated by them at a low 1.2 per cent.

Figure 1C: Please rank these people in order of your approval of their performance — First. All Johor respondents (n=1003) according to ethnicity.

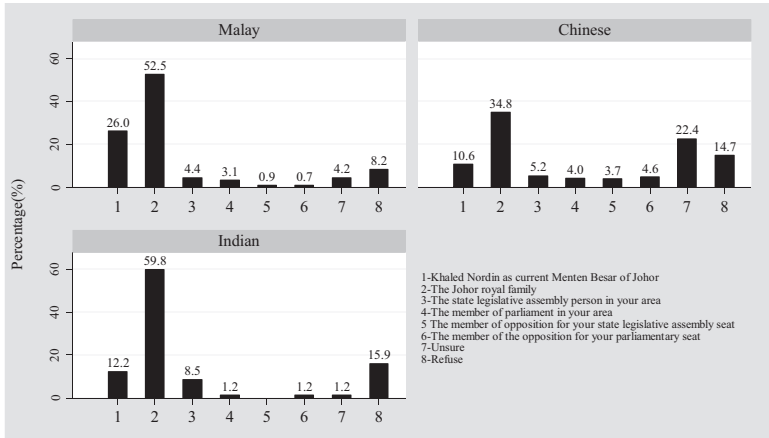
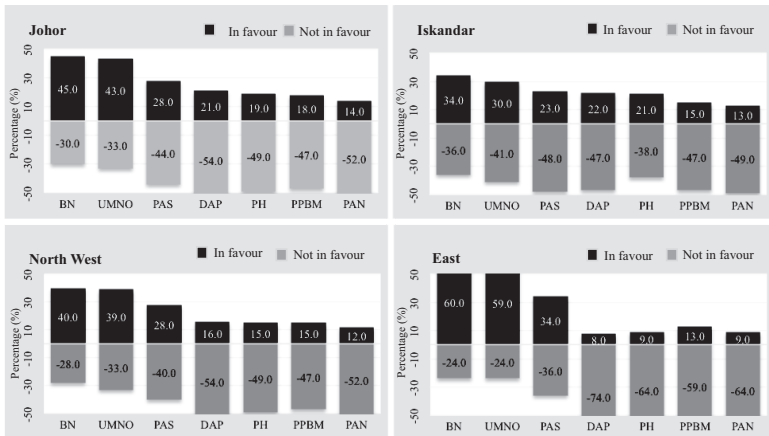


Figure 1D: How much in favour are you of the political parties? All Johor respondents (n=1003), Iskandar respondents (n=405), northwest respondents (n=303), east respondents (n=300).



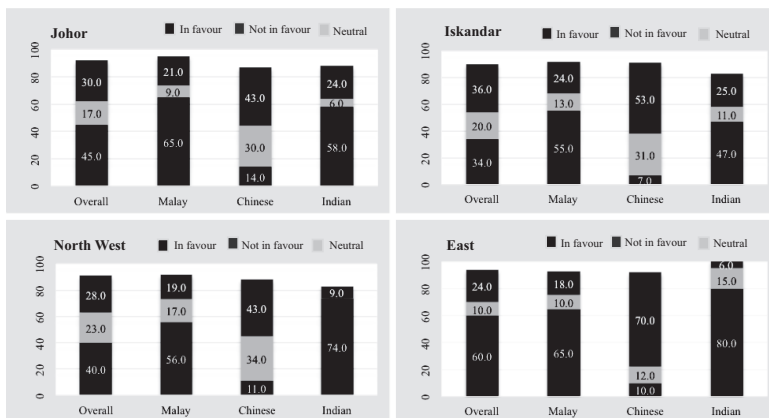
Opposition parliamentarians and state legislator received the highest scores from Chinese respondents at 3.7 per cent and 4.6 per cent. However, perhaps due to the question being a sensitive one, 14.7 per cent of Chinese respondents, 15.9 per cent of Indian respondents and 8.2 per cent of Malay respondents refused to answer. Also, 22.4 per cent of Chinese respondents indicated they were not sure how to rank the political leaders' performance.

Figure 1D shows that while Johor voters still favour Barisan Nasional (BN) over the opposition Pakatan Harapan (PH), there are nevertheless clear regional variations in the pattern of support. For the whole state, BN received 45 per cent favourable and 30 per cent unfavourable responses compared to the 19 per cent favourable and 49 per cent unfavourable for PH. BN is most popular in the largely rural east Johor where the ruling coalition received 60 per cent favourable and 24 per cent unfavourable responses. Conversely, PH found the least support in east Johor, where it received 64 per cent unfavourable and only 9 per cent favourable responses. In the urban Iskandar region, 34 per cent and 21 per cent were in favour and 36 per cent and 38 per cent not in favour of BN and PH respectively. Interestingly, the pattern of support for political parties in northwest Johor is almost similar to that of the pattern for the whole state.

The United Malays National Organization (UMNO) received 43 per cent favourable and 33 per cent unfavourable responses for the whole state with most of the support for the party found in east Johor (59 per cent in favour and 24 per cent not in favour) and least in the Iskandar region (30 per cent and 41 per cent). The survey shows that the new party Parti Pribumi Bersatu Malaysia (PPBM) is slightly better received than Parti Amanah Negara (PAN) in Johor. PPBM and PAN received 47 per cent unfavourable and 18 per cent favourable responses and 52 per cent unfavourable and 14 per cent favourable responses for the whole state; receiving the highest score in Iskandar (47 per cent and 15 per cent, and 49 per cent and 13 per cent) and the lowest in East (59 per cent and 13 per cent, and 64 per cent and 9 per cent).

Similar to UMNO, the Malaysian Islamic Party (PAS) received the most support in the rural east (34 per cent favourable and 36 per cent unfavourable) and the least support in urban Iskandar (23 per cent and 48 per cent). The Democratic Action Party (DAP) received favourable

Figure 1E: How much in favour are you of the political parties? — Barisan Nasional (BN). All Johor respondents (n=1003), Iskandar respondents (n=405), northwest respondents (n=303), east respondents (n=300).



and unfavourable responses of 54 per cent and 21 per cent for the whole state, 47 per cent and 22 per cent for Iskandar, 54 per cent and 16 per cent for northwest, and 74 per cent and 8 per cent for east.

Figure 1E shows that the majority of Malay respondents were in favour of BN in the whole state (65 per cent), Iskandar region (55 per cent), northwest region (56 per cent) and east region (65 per cent). Nevertheless, the ruling coalition also received unfavourable Malay responses; 21 per cent in the whole state, 24 per cent in Iskandar, 17 per cent in the northwest and 18 per cent in the east. Indian respondents' favourable and unfavourable support for BN ranged from 80 per cent and 6 per cent in the east to 74 per cent and 9 per cent in the northwest and a low 47 per cent and 25 per cent in Iskandar.

Overall, the majority of Chinese respondents were not in favour of BN in the whole state (43 per cent), Iskandar (53 per cent), northwest (43 per cent) and east (70 per cent). That more Chinese respondents are probably not in favour of BN may be inferred from the fact that a sizeable percentage of Chinese respondents, 30 per cent in the whole

state, 31 per cent in Iskandar and 34 per cent in the northwest, expressed “neutral” when asked if they were in favour of BN.

In sum, the 2017 Johor Survey finds that the majority of respondents are satisfied with the Johor state government’s management of the state. Without question, the Johor royal family is very well received uniformly across all demographic segments in the state, with the current Chief Minister Khaled Nordin trailing a distant second in popularity. BN and UMNO can continue to count on sizeable support from Malay respondents though the figures fell short of the more than 80 per cent they had garnered in past general elections. On the other hand, Chinese respondents are still firmly not in favour of BN, which means the DAP can expect to retain most of the seats they won in the 2013 General Elections.

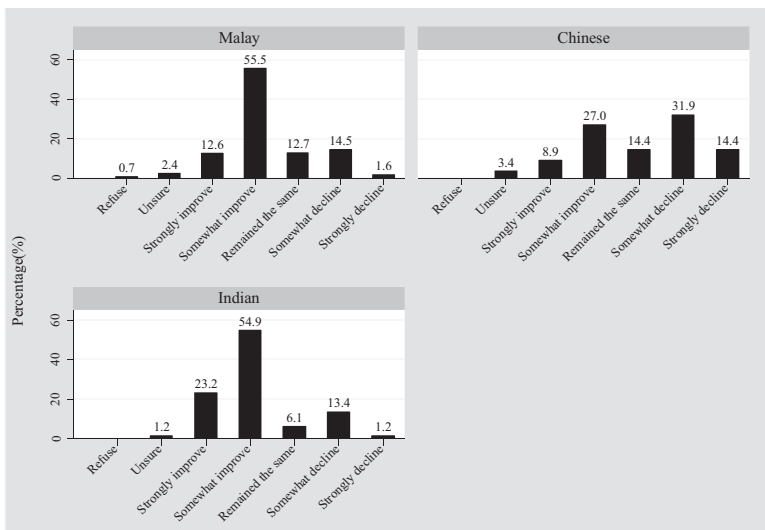
ECONOMY

Johor residents’ attitude towards the economy can be summed up with two points. Firstly, there is mild optimism over the economic future of the state, except among Chinese respondents. Secondly, Chinese respondents were more likely to report fewer improvements in the financial situation of their households.

Figure 2A shows that the majority of Malay and Indian respondents were mildly positive when asked if they thought the Johor economy had improved in the last 5 years. 55.5 per cent and 54.8 per cent of Malay and Indian respondents, respectively, felt that the economy had “somewhat improved”. Indian respondents were most likely to think it had “strongly improved”, at 23.1 per cent. Chinese respondents were most negative with only 27 per cent reporting that the economy had “somewhat improved”. Meanwhile 31.9 per cent of them believed that it had “somewhat declined”. Chinese respondents were also the most likely to feel that the economy had “strongly declined” in comparison to the other two ethnic groups.

A possible reason for the Malay respondents’ positive response could be their central position in public and economic policy decisions. Race-based policies such as the New Economic Policy as well as the presence of mega developments such as Iskandar Malaysia and Forest City may

Figure 2A: In the last 5 years, do you think the Johor economy has strongly declined, somewhat declined, remained the same, somewhat improved, strongly improved? All Johor respondents (n=1003) according to ethnicity.



serve to assure Malay respondents of not just an improving economy but also one whose benefits will trickle down to the community. Indian respondents may be positive because they are starting from a lower economic base compared to the Malay and Chinese communities, and are thus more sensitive to slight improvements.

The negative response from Chinese respondents is not surprising. This is in keeping with prevailing sentiments and survey findings elsewhere. For example, a survey by the Associated Chinese Chambers of Commerce and Industry of Malaysia (ACCCIM) found that most members of the Chinese business community had “a bleak view of the country’s economic outlook”.¹¹ The ACCCIM survey found that 76.1 per cent of respondents were either pessimistic (19.1 per cent) or somewhat pessimistic (57 per cent) about the national economy.

¹¹ <https://www.malaysiakini.com/news/355824> (accessed 2 November 2017).

Figure 2B: In the last 5 years, do you think the Johor economy has strongly declined, somewhat declined, remained the same, somewhat improved, strongly improved? All Johor respondents (n=1003) according to education.

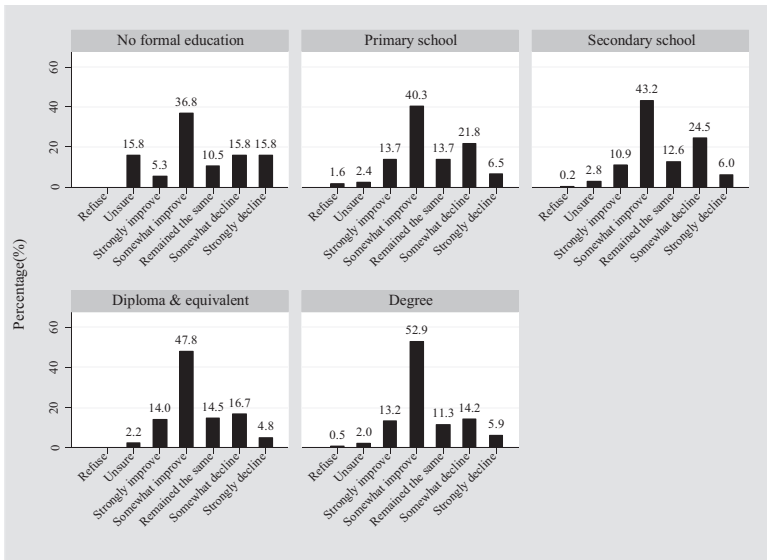


Figure 2B shows the same question, this time cross-referenced with the educational levels of respondents. Not surprisingly, those with lower education were the most negative about the economy. This is because those with fewer academic credentials may feel that they have dimmer prospects in the market place. For example, 31.4 per cent of respondents with no formal education said the economy had “somewhat declined” (15.7 per cent) or had “strongly declined” (15.7 per cent). Likewise, 28.1 per cent of respondents with primary school education said the economy had “somewhat declined” (21.7 per cent) or had “strongly declined” (6.4 per cent). Similarly, 30.3 per cent of respondents with secondary school education either said the economy had “somewhat declined” (24.4 per cent) or had “strongly declined” (5.9 per cent). The negativity is generally lower for the better educated respondents.

Figure 2C: In the last 5 years, do you think the Johor economy has strongly declined, somewhat declined, remained the same, somewhat improved, strongly improved? All Johor respondents (n=1003), excluding respondents with no income data (i.e. “Refuse” or “Unsure”), according to income.

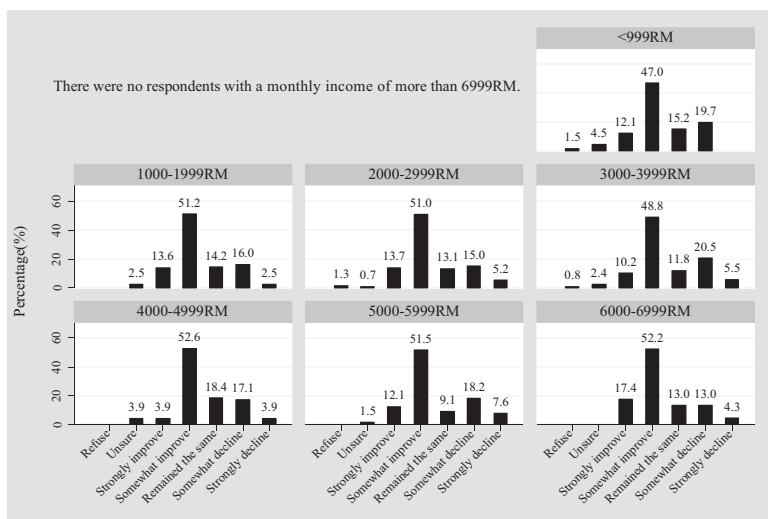


Figure 2C shows that the lowest income group — those earning RM999 and below — were most likely to be negative about the economy. Although 46.9 per cent of this group reported that the economy had “somewhat improved”, a total of 34.8 per cent of them said that the economy had “somewhat declined” (15.1 per cent) or “strongly declined” (19.7 per cent).

Another interesting finding is that while the majority of people across income groups believe that the economy has “somewhat improved” over the last 5 years, a significant percentage believe that it has declined. Across the income groups, starting from those who earn RM1,000 and above, those who believe that the economy had declined range from 18.4 per cent; 20.2 per cent; 25.9 per cent; 21 per cent; 25.6 per cent; and 17.4 per cent.

Figure 2D: In the last 5 years, do you think the Johor economy has strongly declined, somewhat declined, remained the same, somewhat improved, strongly improved? All Johor respondents (n=1003) according to age.

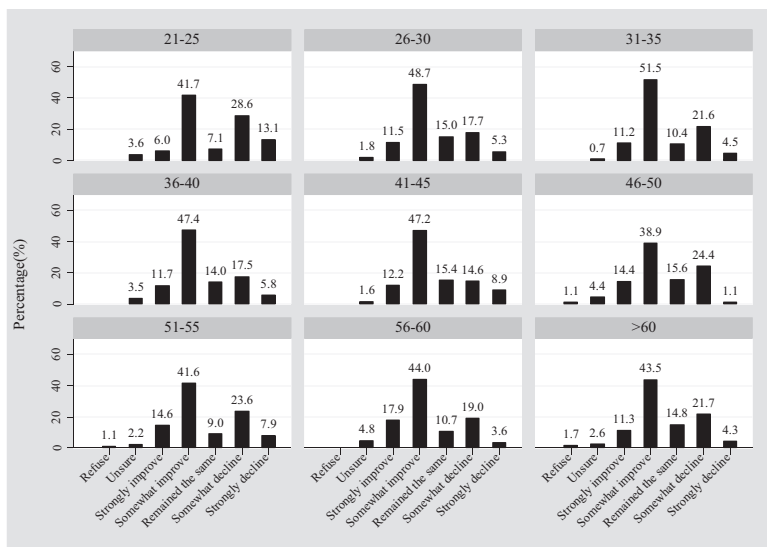
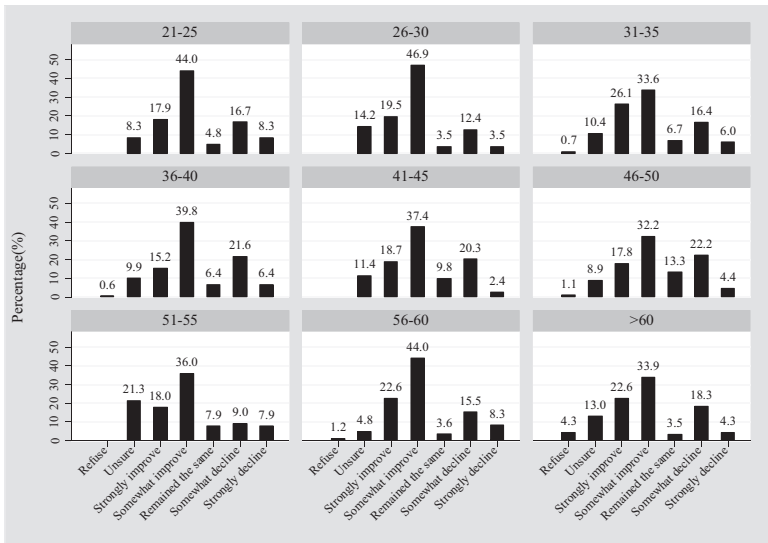


Figure 2D shows that the majority of respondents across age groups believe the economy has “somewhat improved” over the last 5 years. However, there is a significant percentage of respondents — 41.6 per cent — in the 21–25 age group who believe it has declined. This is the highest percentage of people who are negative about the economy across all the age groups.

The survey also asked if respondents believed the economy would improve or decline in the *next 5 years* (Figure 2E). Likewise, it found that the youngest respondents — the 21–25 age group — were the second most pessimistic with 24.9 per cent believing it would “somewhat decline” or “strongly decline”. The most pessimistic was the 36–40 age group with 28 per cent believing the economy would “somewhat decline” or “strongly decline” in the next 5 years. The fact that the youngest

Figure 2E: In the next 5 years, do you expect the Johor economy to strongly decline, somewhat decline, remained the same, somewhat improve, strongly improve? All Johor respondents (n=1003) according to age.



respondents (21–25 age group) and working adults in their prime (36–40 age group) have the least faith in the economy over the *next 5 years* may be cause for some concern.

Figure 2F shows that Malay respondents were the most optimistic about the economy over the next 5 years. Indian respondents were the least optimistic with 45 per cent believing it would decline. Chinese respondents followed with 30.7 per cent of them believing it would decline.

Figure 2G shows some interesting results. Approximately 34.3 per cent of Malay respondents reported that their household financial situation had declined over the last 3 years. This is the highest percentage across the three ethnic groups. This is despite the fact that only 15.9 per cent of Malay respondents believed that the economy had declined in

Figure 2F: In the next 5 years, do you expect the Johor economy to strongly decline, somewhat decline, remained the same, somewhat improve, strongly improve? All Johor respondents (n=1003) according to ethnicity.

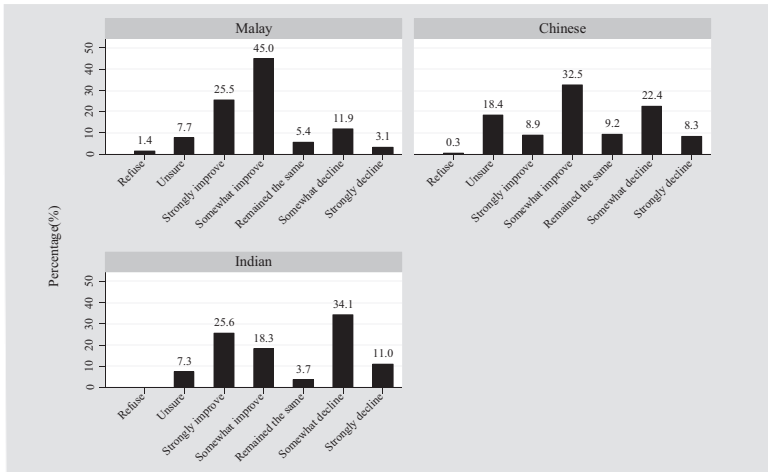
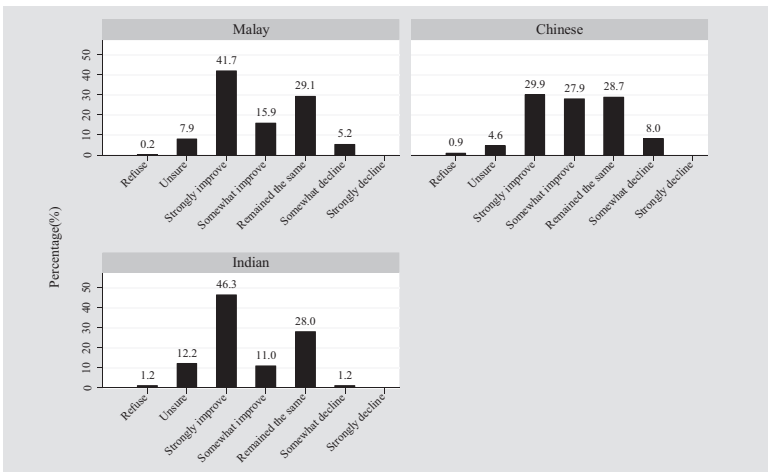


Figure 2G: On a scale of 1–5, how does the financial situation of your household appear now compared to what it was 3 years ago? All Johor respondents (n=1003) according to ethnicity.



the last 5 years (see Figure 2A). This suggests that while more Malay respondents believed that the economy was doing well, fewer of them felt its benefits in their household situation.

Meanwhile, 37.1 per cent of Chinese respondents either felt their financial situation had “somewhat declined” (28.7 per cent) or “strongly decline” (8 per cent). This was followed by Indian respondents with 29.2 per cent who felt their financial situation had declined.

IDENTITY, EDUCATION, AND THE JOHOR ROYAL FAMILY

This section looks at how Johor respondents perceive themselves according to identities such as Malaysian citizen, Johorean, ethnic and religious affiliation. Such self-perceptions are important in multicultural and multi-religious societies where there are often overlapping and contradicting identities. This section also seeks to understand how Johor respondents perceive English-medium schools. Thirdly, it attempts to gauge the popularity of the Johor royal family in the state. The Johor royal family has one of the highest public profiles amongst the Malaysian royalty, often intervening and commenting on public issues.

When asked if they identify with *Bangsa Johor*, 88 per cent of all respondents said they did. The strong identification with *Bangsa Johor* was uniform across all demographic segments (Figure 3A). This attitude was consistent across all ethnic groups, with the Chinese at 90.5 per cent, the Malays at 88.2 per cent and the Indians at 81.7 per cent.

However, although 88 per cent of all respondents identified with *Bangsa Johor*, only 14 per cent saw themselves as *Bangsa Johor* first; compared to 39 per cent of respondents who identified themselves firstly as Malaysian citizen and 33 per cent on the basis of religious affiliation (Figure 3B). Only respondents who identified themselves with their ethnicity first, at 10 per cent, were less than those who identified themselves as *Bangsa Johor* first. In other words, respondents in Johor did not display a strong regional identity, unlike their compatriots in the states of Sabah and Sarawak.

Figure 3A: “I identify with Bangsa Johor”. How far do you agree or disagree with this statement? All Johor respondents (n=1003) according to ethnicity, settlement and age.

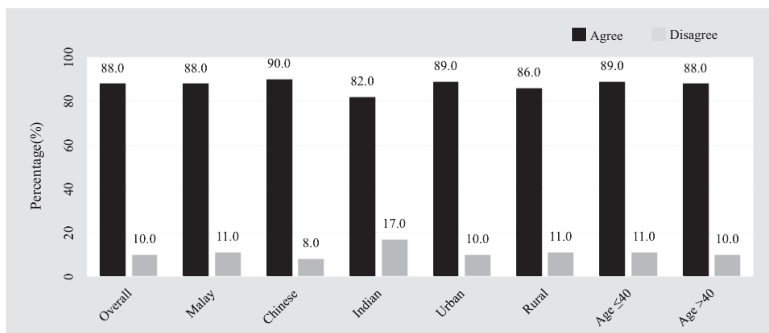


Figure 3B: Rank the following identities according to personal relevance. All Johor respondents (n=1003).

Identities	1st	2nd	3rd	4th
Malaysian citizen	39%	23%	19%	13%
Bangsa Johor	14%	37%	28%	12%
Ethnicity (Malay, Chinese, Indian, others)	10%	19%	26%	34%
Religion (Muslim, Christian, Hindu, Buddhist, Taoist, others)	33%	13%	15%	27%

Consistent with increasing Islamic awareness among Malays throughout the peninsula, 56.5 per cent of Malay respondents in Johor prioritized their religious affiliation first (Figure 3C). 25.5 per cent of Malay respondents saw themselves as Malaysian citizen first (25.5 per cent), *Bangsa Johor* (14.3 per cent) first and Malay first (only 3.3 per cent).

In contrast, only 2.2 per cent of Chinese and 19.5 per cent of Indian respondents identified themselves based on religious affiliation first.

Figure 3C: Rank the following identities according to personal relevance. I see myself first as ... — First. All Johor respondents (n=1003) according to ethnicity.

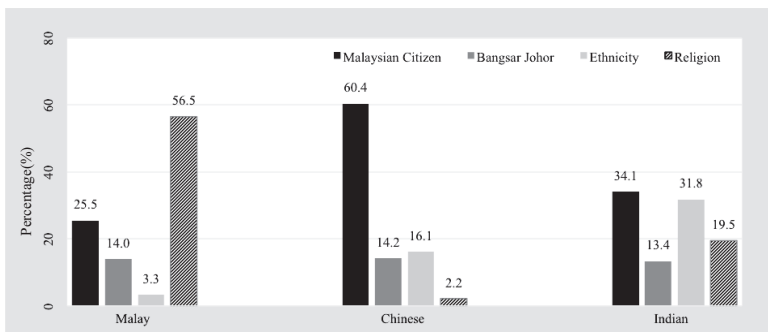
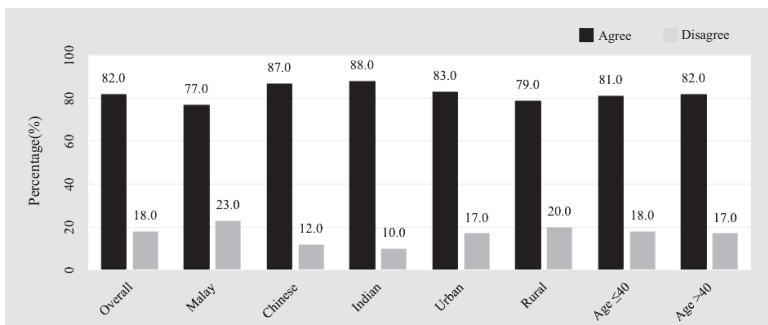
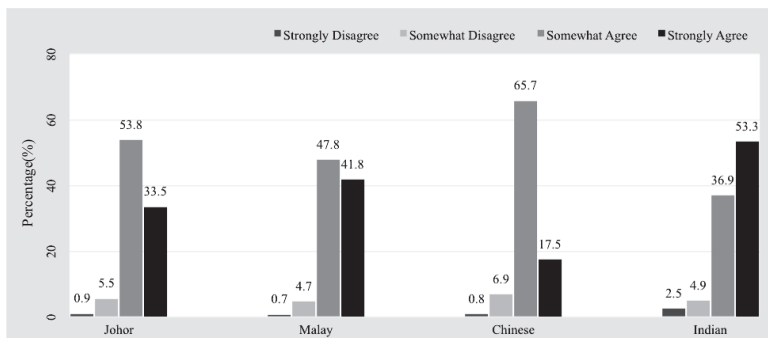


Figure 3D: Do you agree or disagree with the introduction of public English-medium schools? All Johor respondents (n=1003) according to ethnicity, settlement and age.



A majority of Chinese and Indian respondents identified themselves as Malaysian first, at 60.4 per cent and 34.1 per cent respectively. Significantly, Indian respondents who identified themselves with ethnicity first registered a high 31.8 per cent while only 16.1 per cent of Chinese respondents identified themselves in that manner.

Figure 3E: How satisfied or dissatisfied are you with the performance of the Johor royal family? All Johor respondents (n=1003) according to ethnicity.

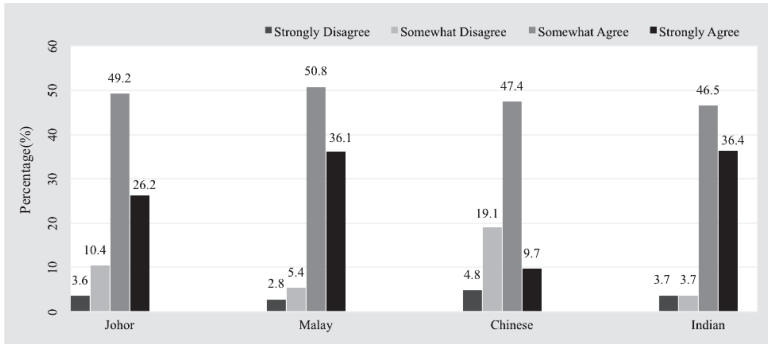


The survey found that a majority of all respondents in the state (82 per cent) supported bringing back public English-medium schools (Figure 3D). This support was strong across all demographic segments, even among Malay and rural respondents who in the past were not supportive of the policy to teach mathematics and science in English.

Among Malay respondents, 77 per cent agreed and 23 per cent disagreed with introducing public English-medium schools. As expected, support for the introduction of public English medium schools was much higher among Chinese respondents (87 per cent) and Indian respondents (88 per cent). In fact, Indian respondents were the most enthusiastic with 57.2 per cent strongly agreeing. Perhaps the very strong support among Johoreans for the introduction of public English-medium schools was due to their cognizance of the success of Singapore’s English-medium national school system in producing graduates who are competent in English and who are internationally employable.

Figure 3E shows that respondents were generally satisfied with the performance of the Johor royal family: 87.3 per cent reported being satisfied and only 14.5 per cent were dissatisfied. Among the ethnic groups, Indian respondents were the most satisfied, with 53.3 per cent declaring being very satisfied and 36.9 per cent somewhat satisfied. 41.8 per cent of the Malay respondents were very satisfied and 47.8 per cent

Figure 3F: “The Johor royal family is a good steward of Johor’s resources”. How far do you agree or disagree with this statement? All Johor respondents (n=1003) according to ethnicity.



somewhat satisfied on the issue. Finally, 65.7 per cent and 17.5 per cent of Chinese respondents report being satisfied and very satisfied respectively with the royal family’s performance.

While 75 per cent of all respondents agreed that the Johor royal family was a good steward of the state’s resources, there was a noticeable variation across ethnicity (Figure 3F). 87 per cent of Malay respondents and 83 per cent of Indian respondents were satisfied with the royalty’s good stewardship of the state’s resources with only 8.2 per cent and 7.4 per cent respectively being dissatisfied.

In contrast, only 57 per cent of Chinese respondents were satisfied with the royalty’s stewardship of the state resources while a sizable 24 per cent were not. Also, 17.2 per cent of Chinese were unsure about the Johor royal family’s stewardship of the state’s resources.

A majority of respondents across all demographic segments generally agreed that the Johor Sultan looked after the personal interests of residents of the state (Figure 3G). Overall, 68.1 per cent were satisfied and only 26 per cent dissatisfied. Indian respondents were the most satisfied with 76.7 per cent satisfied and only 17.1 per cent dissatisfied. 69.4 per cent of Malay respondents were satisfied with the Johor Sultan looking after their interests, with 25.2 per cent of them indicating dissatisfaction.

Figure 3G: “The Johor Sultan looks after my personal interests”. How far do you agree or disagree with this statement? All Johor respondents (n=1003) according to ethnicity.

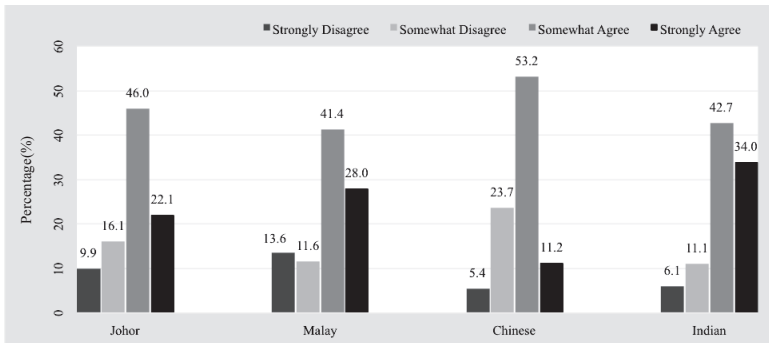
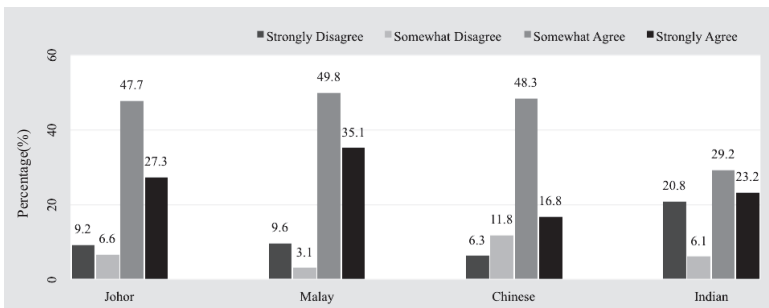
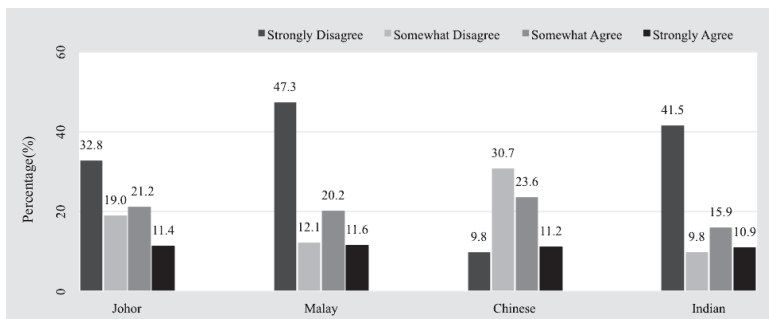


Figure 3H: “The Johor Sultan should intervene in politics when necessary”. How far do you agree or disagree with this statement? All Johor respondents (n=1003) according to ethnicity.



Chinese respondents were the least satisfied with the Johor Sultan looking after their interests, with 64.4 per cent (11.2 per cent strongly agree and 53.2 per cent somewhat agree) reporting being satisfied and almost 30 per cent dissatisfied.

Figure 3I: “The Johor royalty should refrain from business ventures”. How far do you agree or disagree with this statement? All Johor respondents (n=1003) according to ethnicity.



According to Figure 3H, 75 per cent of all respondents felt that the Johor Sultan should intervene in politics when necessary. The highest support came from the Malays (84.9 per cent) and the lowest support from the Indians (53.2 per cent); 65.1 per cent of Chinese respondents supported royal intervention in politics when necessary.

Conversely, 26.9 per cent of Indian respondents did not agree and 14.9 per cent of Chinese and 18.3 per cent of Indian respondents were unsure about the Johor Sultan intervening in politics when necessary. The strong Malay support for the Johor Sultan intervention in politics when necessary was consistent with the community’s acceptance of the Sultan’s traditional role as their “protector”.

According to Figure 3I, 51.8 per cent of the respondents disagreed and 32.6 per cent agreed that Johor royalty should refrain from business ventures. Close to 59 per cent of Malay and 52 per cent of Indian respondents supported the Johor royalty participating in business ventures.

Conversely, 37.2 per cent of Malays and 26.8 per cent of Indians agreed that the Johor royalty should refrain from business ventures. Among Chinese respondents, 40.5 per cent disagreed and 34.8 per cent

agreed that the Johor royalty should refrain from business ventures. Finally, 18.8 per cent of Chinese respondents, 19.5 per cent of Indian respondents, and only 6.2 per cent of Malay respondents were unsure as to whether or not the Johor royalty should refrain from business ventures.

In sum, the 2017 Johor Survey found that there was strong support for *Bangsa Johor* across all demographic segments in the state. Nevertheless, the identification with *Bangsa Johor* ranked much lower than their attachment to being citizens of Malaysia. Among Malay respondents, religious affiliation was the most important while Chinese and Indian respondents identified themselves as Malaysian citizens first. The idea of introducing public English-medium schools received overwhelming support across all ethnic groups.

The respect and popularity of the Johor royal family was confirmed by the positive endorsements from all respondents on the performance of Johor's royal family; the Johor royal family was considered a good steward of Johor's resources, Johor Sultan was believed to be looking after the personal interests of the citizens, and should intervene in politics when necessary. On the question about whether the Johor royalty should refrain from business ventures, the support was slightly more than 50 per cent.

ISLAM AND ARABIZATION

The 2017 Johor Survey also sought to understand Johor residents' attitudes towards Islam's public role, the perception of Arabization in Johor, the implementation of *hudud* laws (punitive Islamic laws), and the relationship between Muslims and non-Muslims. Analysts and scholars have raised concerns about rising religiosity among Malaysian Muslims in general, but little has been said about Johor Muslims specifically.

While Islamic conservatism has long been associated with the opposition PAS (Islamic Party of Malaysia), leaders from UMNO have recently expressed similar thinking. For example, the Najib Razak government allowed PAS President Abdul Hadi Awang to table a private members' bill to amend Act 355 (Syariah Courts (Criminal Jurisdiction) Act 1965), which is intended to allow the shariah courts to mete out more severe punishments.

The Johor Sultan, Ibrahim Iskandar, has also spoken out against conservative Islam. He raised the issue of Arabization, referring to the trend of dressing and speaking like Arabs amongst Malays in order to appear more Islamic.¹² He has also criticized the federal Islamic religious department JAKIM for its requested budget of RM1 billion (S\$322 million),¹³ noting that Islam was a matter for the state and not the federal government. The Sultan also publicly chastised the owner of a laundry shop in Johor for extending its services only to Muslims.¹⁴ While scholars have praised the Sultan for speaking out against exclusivism, the question is whether Johor Malays agree with him. This section presents selected findings on the topics mentioned above.

According to Figure 4A, an overwhelming 89 per cent of Malay respondents agreed that Malaysia was an Islamic state. They agreed despite the fact that Muslims comprised 60 per cent of Malaysia's population. Moreover, while the Malaysian Constitution states that Islam is the religion of the federation, it also guarantees the freedom of other faith groups to practice their religion. Those who agreed with the statement may not have understood the secular underpinnings of the Constitution.

Figure 4B provides a breakdown of Malay respondents who agree that Malaysia is an "Islamic state" according to education: 92.4 per cent of respondents with a diploma agreed that Malaysia is an "Islamic state". This was higher than those who were degree holders (81 per cent) and those with secondary school education (89.5 per cent). Those without any formal education recorded the highest disapproval rates compared to the other categories.

¹² Malaymail Online, "Stop aping Arabs, Johor Sultan tells Malays" <<http://www.themalaymailonline.com/malaysia/article/stop-aping-arabs-johor-sultan-tells-malays#QQWbrX7314Cz5s4U.97>> (accessed 26 September 2017).

¹³ Malaymail Online "Johor Sultan: Why does JAKIM need RM 1b budget" <<http://www.themalaymailonline.com/malaysia/article/johor-sultan-why-does-JAKIM-need-rm1b-budget#HMrGDiEK34aZ6g5C.97>> (accessed 27 September 2017).

¹⁴ *The Star*, "This is no Taliban state", 27 September 2017.

Figure 4A: “Malaysia is an Islamic state”. How far do you agree or disagree with this statement? All Johor respondents (n=1003) according to ethnicity, settlement and age.

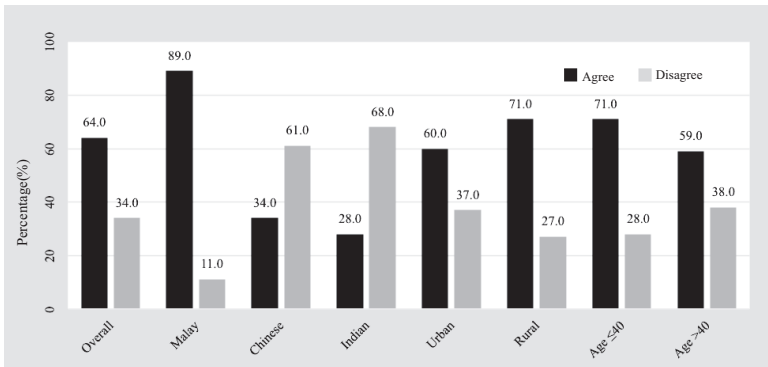


Figure 4B: “Malaysia is an Islamic state”. How far do you agree or disagree with this statement? All Malay respondents (n=573) according to education.

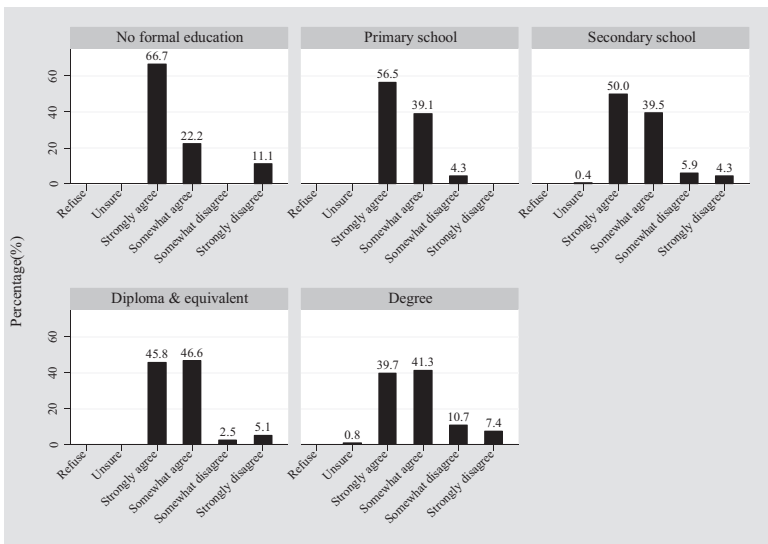
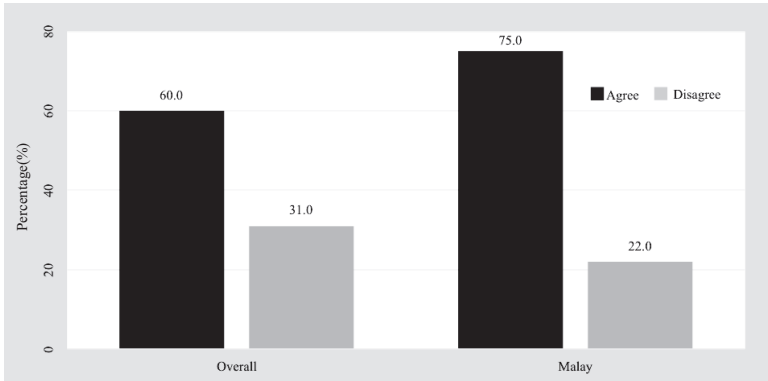


Figure 4C: “I support the application of hudud laws to Muslims ONLY”. How far do you agree or disagree with this statement? All Johor respondents (n=1003) and Malay respondents (n=573).

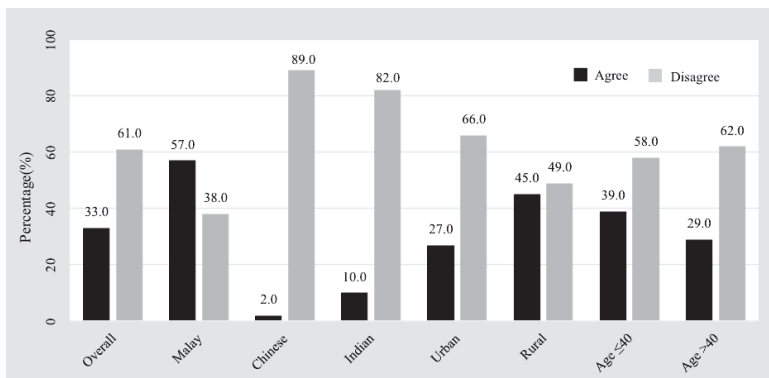


Since the 1980s, PAS has championed the implementation of *hudud* laws in the states it controls such as Kelantan (since 1990), Terengganu (1999–2004), and Kedah (2008–13). Little, however, is known about what Johor residents think about *hudud*, even though it is a Malay-Muslim majority state. The general assumption is that the views of Johor Malays are different from those of PAS because the state has always been a strong UMNO base. The survey findings tell a different story.

Figure 4C shows that three-quarters of the Johor Malay respondents (75 per cent) agree that *hudud* laws should be applied in the state. While it is undeniable that *hudud* laws are mentioned in the Quran, contemporary Muslims are divided as to how these laws should be applied in today’s context. Some have argued that common law reflects a fairer legal system in line with the Islamic spirit of justice, human rights, and equality. In fact, for decades, Muslims in Malaysia have remained committed to their faith, yet have no problems accepting modern laws as part of their religious identity.

There is no significant deviation in answers from the Malay respondents according to education or income group.

Figure 4D: “I support the application of hudud laws to ALL Malaysians”. How far do you agree or disagree with this statement? All Johor respondents (n=1003) according to ethnicity, settlement and age.

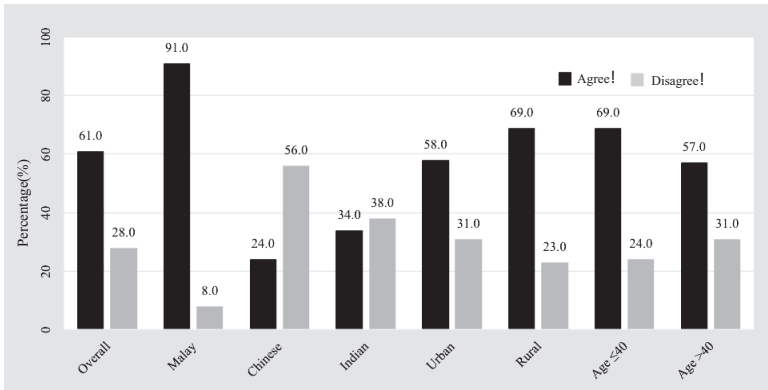


According to Figure 4D, when asked if *hudud* laws should apply to all Malaysians, the majority of Malay respondents (57 per cent) answered positively.¹⁵ There was no significant deviation in answers from the Malay respondents according to education or income group. The Malay respondents who answered this way may not have been familiar with or have little regard for the Malaysian Constitution which upholds freedom of religion. Furthermore, their choice of answer contradicts the Quranic principle of non-religious compulsion.

An explanation for this may be the unquestioning adoption of tenth century Islamic discourse when Muslim jurists were grappling with the Crusaders. These Muslim jurists made the clear distinction between the

¹⁵ Figure 4C shows that 22 per cent of Malay respondents disagree that *hudud* should apply only to Muslims. Presumably these respondents believe that *hudud* should apply to non-Muslims as well. How does this fit in with the finding that 57 per cent of Malay respondents want *hudud* to apply to all Malaysians? This may be explained by the way the questions are phrased. The 4C question was specific in identifying Muslims, while the 4D question was broader in identifying “all Malaysians”, leading respondents to include themselves and their community when they answered.

Figure 4E: “It is acceptable for Muslim authorities like the Department of Islamic Advancement of Malaysia (JAKIM) to regulate the moral behaviour of the Muslims in Malaysia”. How far do you agree or disagree with this statement? All Johor respondents (n=1003) according to ethnicity, settlement and age.

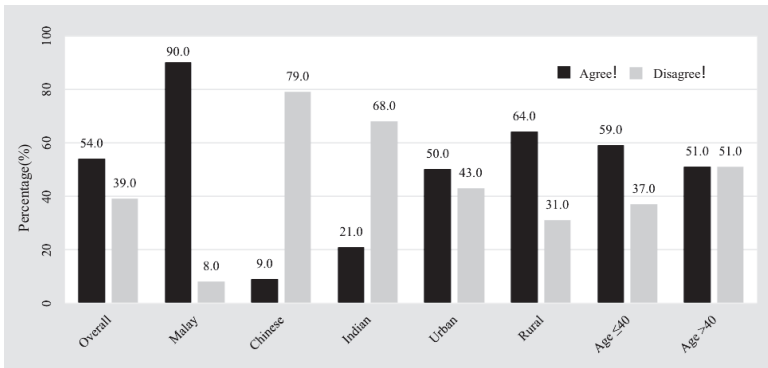


abode of Islam (or land of Islam) where all Islamic laws must be applied and the *abode of non-believers* (land of non-believers). With the majority of Malay respondents believing that Malaysia is an “Islamic state” (see Figure 4A), it is not surprising that 57 per cent of Malay respondents believe that the country is also an *abode of Islam* in which *hudud* laws must be applied to all who live there. Unsurprisingly Chinese and Indian respondents overwhelmingly disagree with the statement at 89 per cent and 82 per cent, respectively.

Figure 4E shows that nine in ten of Malays surveyed believed that JAKIM should regulate Muslim behaviour. This finding, however, ran counter to the Sultan’s view that JAKIM should play a minimal role in the state because it is a federal institution, whereas the Islamic Religious Council of Johor (MAIJ), which is under the Sultan’s authority, should be the one exercising control over Johor Muslims.

The high percentage of Malay respondents also suggests that they do not perceive a boundary between the state and the federation with regards

Figure 4F: “Increased Islamic religiosity (stricter religious laws, more pious believers) is a positive development for Malaysian society”. How far do you agree or disagree with this statement? All Johor respondents (n=1003) according to ethnicity, settlement and age.



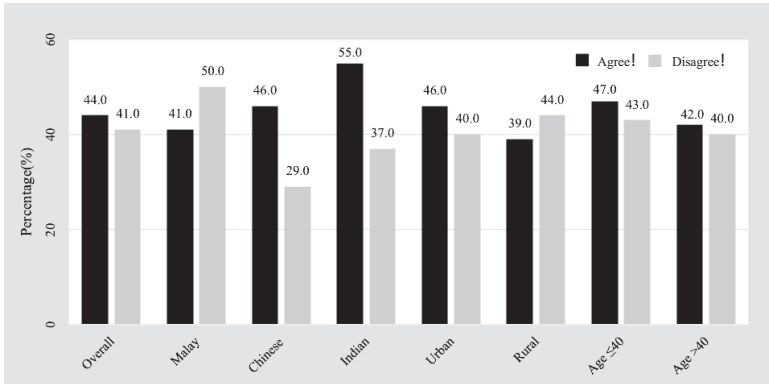
to Islam. Religious authority, for many followers, would transcend such political and governmental boundaries. As such, unlike political and civic institutions that are limited by their jurisdiction, Islamic authorities like JAKIM are able to exercise moral influence and powers of enforcement regardless of jurisdiction.

There is no significant deviation in answers from the Malay respondents according to education or income group.

Figure 4F shows that an overwhelming 90 per cent of Malay respondents believe that increased Islamic religiosity is a positive development for the country. Again, if the vast majority of Malay respondents believe that Malaysia is an “Islamic state”, it stands to reason that they believe that increased religiosity is a positive development. This suggests that, for many of these Malay respondents, issues such as values and morality are important. Greater religiosity is usually seen as a way to safeguard such values and morality.

In contrast, Chinese and Indian respondents agree at 9 per cent and 21 per cent, respectively. Further research needs to be conducted in what the desire for greater religiosity from Malay respondents means for

Figure 4G: “I think Islam in Malaysia has become more influenced by Arab culture in recent years”. How far do you agree or disagree with this statement? All Johor respondents (n=1003) according to ethnicity, settlement and age.



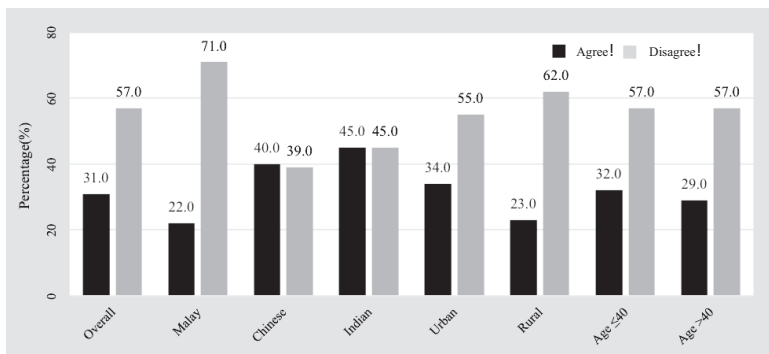
communities of other faiths. Can greater Islamic religiosity be a benign force that confines its impact and influence to the Muslim community? Or will it spill over and encroach into the lives of other communities?

Figure 4G shows that Malay respondents were more likely to disagree that Islam in Malaysia is becoming more influenced by Arab culture (50 per cent). However, a rather significant portion of Malay respondents (41 per cent) agree. Chinese and Indian respondents were more likely to agree at 46 per cent and 55 per cent, respectively.

Figure 4H shows that Malay respondents overwhelmingly disagree that Malay culture is becoming Arabized. This finding runs counter to the Sultan’s view that there is increased Arab influence over Malay culture through the adopting of Arab practices and dressing.

This section concludes with several points. Firstly, the vast majority of Malay respondents see Malaysia as an “Islamic state”. Secondly, a majority of Malay respondents believe that increased Islamic religiosity is a positive development for society. Thirdly, the survey also suggests that Johor Malays are becoming more conservative over issues like *hudud* laws, with more than half asking for these to be applied to non-Muslims as well. Fourthly, the majority of Malay respondents believe

Figure 4H: “I think Malay culture is becoming Arabized”. How far do you agree or disagree with this statement? All Johor respondents (n=1003) according to ethnicity, settlement and age.



that JAKIM should regulate Muslim behaviour and that Malay culture is not becoming more Arabized. Both these findings contradict the Sultan’s views on these issues.

ISKANDAR MALAYSIA, FOREST CITY AND PIPC

The Iskandar Malaysia (IM) economic corridor is Johor’s premier showcase development region. In the 2017 Johor Survey, respondents in all districts register more than 67 per cent satisfaction with IM developments, and more than 62 per cent also agree that there are economic benefits from IM.

There is little variance between rural and urban responses to these questions, but a breakdown by ethnicity indicates that Malay respondents have the most positive views of IM, with 29 per cent indicating that they are very satisfied with IM development (compared to 8.3 per cent of Chinese respondents — as shown in Figure 5A) and 22 per cent strongly agreeing that they stand to benefit economically from IM development (compared to 4.9 per cent of Chinese respondents and 9.8 per cent of Indian respondents — as shown in Figure 5B).

Figure 5A: How satisfied or dissatisfied are you with the developments taking place in the Iskandar Malaysia region? All Johor respondents (n=1003) according to ethnicity.

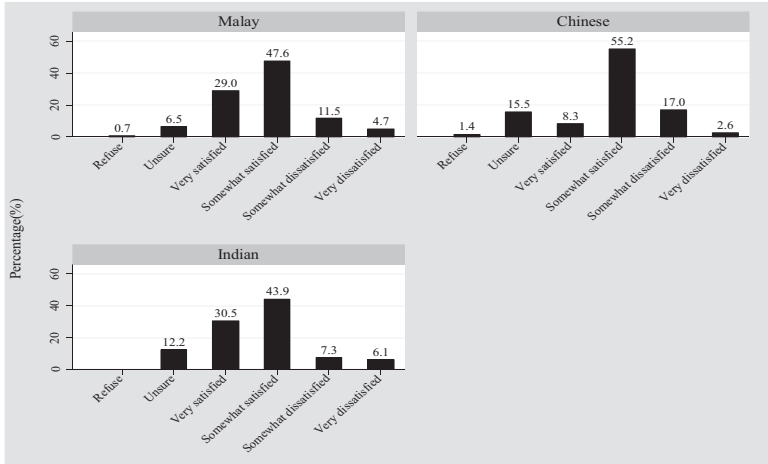


Figure 5B: Do you agree or disagree that ordinary Malaysians benefit economically from Iskandar Malaysia? All Johor respondents (n=1003) according to ethnicity.

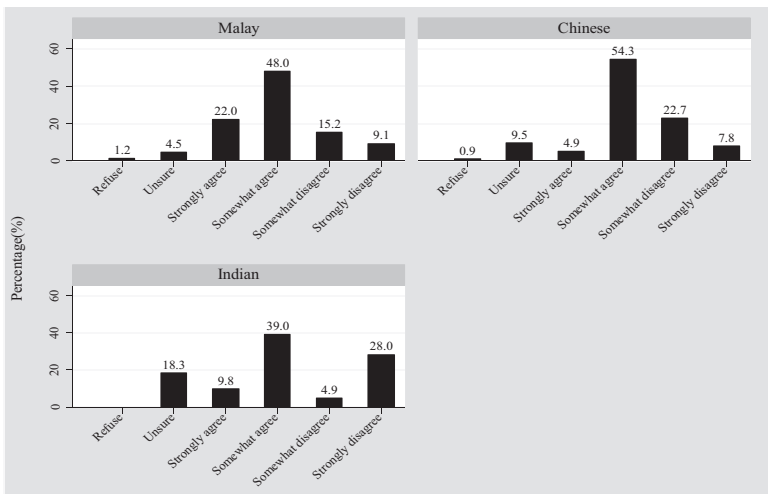


Figure 5C: How satisfied or dissatisfied are you with the influx of Singapore investors into Iskandar Malaysia? All Johor respondents (n=1003) according to ethnicity.

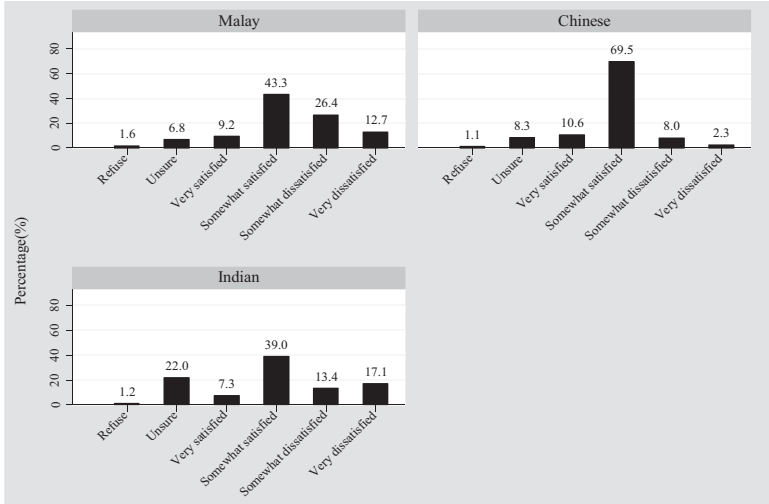
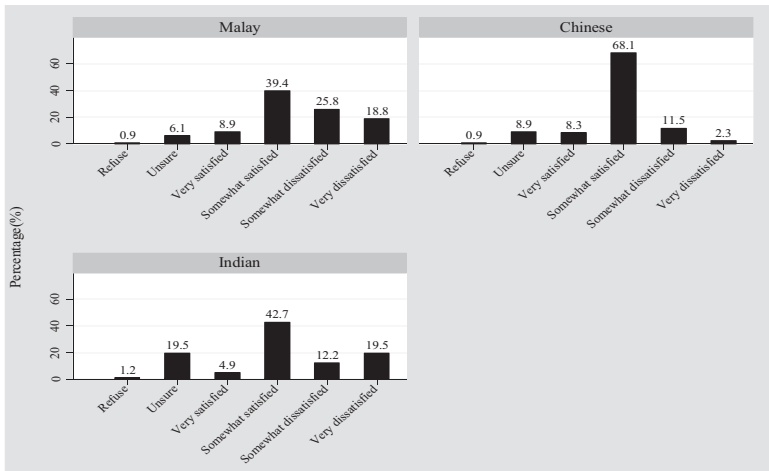


Figure 5D: How satisfied or dissatisfied are you with the influx of China investors into Iskandar Malaysia? All Johor respondents (n=1003) according to ethnicity.



As the majority population with priority access to business opportunities, ethnic Malays are better able to take advantage of commercial prospects in the area, thus resulting in this positive response. Interestingly, of the Indian respondents, 74.4 per cent indicate that they are either satisfied or very satisfied with IM development but only 48.8 per cent agree that they would benefit economically from IM. It is plausible that while these respondents agree that IM benefits the state as a whole, they feel that they have little access to participate directly in the development and are thus unable to agree that they would gain any economic benefits from IM.

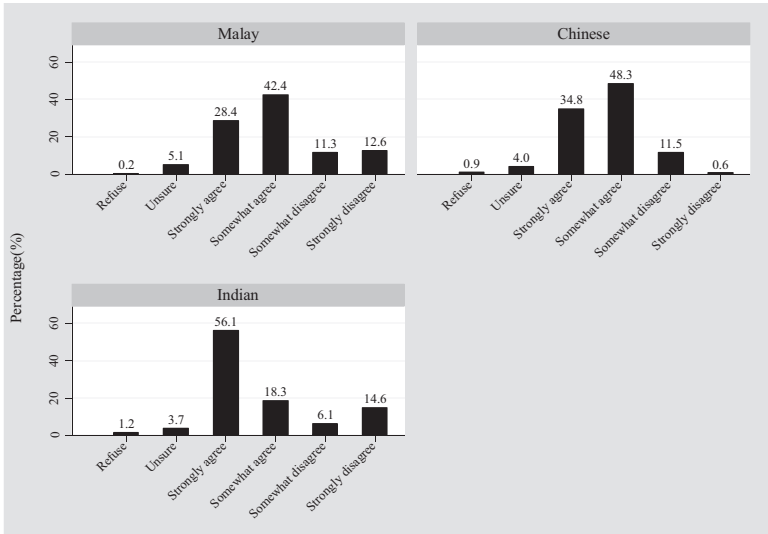
Johorean views of foreign investment into IM were also polled, with specific focus on investments by Singapore and the People's Republic of China (PRC). In general, views of Singaporean investments register higher satisfaction rates (62 per cent) than PRC investments (58 per cent), with rural respondents from within IM registering higher satisfaction rates for both, compared to urban responses from within IM.

A breakdown by ethnicity (as shown in Figures 5C and 5D) shows that the preference for Singaporean investments compared to PRC investments is constant amongst all ethnicities. Chinese respondents register higher satisfaction rates for these foreign investments overall, with 80.1 per cent of all respondents indicating degrees of satisfaction with Singaporean investments and 76.4 per cent indicating degrees of satisfaction with PRC investments.

Interestingly, fewer Malay respondents are satisfied with the investments: 52.5 per cent for Singaporean investments and 48.3 per cent for PRC investments. These differences could boil down to ethnic biases, given that Singapore is seen as a "Chinese-dominated" country.

Indian respondents also indicate relatively low satisfaction with these foreign investments; 46.3 per cent for Singaporean investments and 47.6 per cent for PRC investments. Indian respondents also register high percentages of "unsure" responses: 22 per cent are unsure about Singaporean investments and 19.5 per cent are unsure about PRC investments. Thus, there is no definite picture of Indian respondents' perceptions towards these investments. It is possible that this uncertainty stems from detachment as a result of their belief that they will not benefit economically from IM. If this were the case, they may not take heed

Figure 5E: The following statements concern the economic relationship between Malaysia and Singapore. Please tell us if you agree or disagree with these statements. — I welcome the influx of Singaporean investors into Johor. All Johor respondents (n=1003) according to ethnicity.



of IM investments and might thus be unsure of their satisfaction levels relating to IM.

A comparison of the above results with those in response to a question on whether an influx of Singaporean investments in Johor is welcome is also interesting. As shown in Figure 5E, Chinese respondents are most likely to welcome an influx of Singaporean investments to Johor (83.1 per cent) compared to also relatively high agreement rates by Malay (70.8 per cent) and Indian (74.4 per cent) respondents.

Indian respondents, however, have the largest percentage who strongly agree that an influx of Singaporean investments in Johor is welcome (56.1 per cent). This figure stands in stark contrast to their views of Singaporean investments in IM (7.3 per cent) and of PRC investments

in IM (4.9 per cent). It would be interesting to map exactly where the Indian respondents are from to see if these results are skewed by their presence within or outside Iskandar Malaysia.

Forest City is a large mixed-development project in southwest Johor and part of the Western Gate of IM. It is recognized as a PRC project, with partial ownership by Johor's Sultan Ibrahim Iskandar. A general analysis of responses in relation to Forest City indicate that about 74 per cent of rural respondents are in favour of the development and 61 per cent agree that ordinary Malaysians will benefit economically from the project.

A closer look at the overall results by ethnicity (as shown in Figures 5F and 5G) reveals a more imprecise response. Indian respondents register the most satisfaction with the development (59.8 per cent — with 18.3 per cent indicating that they are “very satisfied”), with Malay respondents not far behind (58.6 per cent — with 16.9 per cent indicating that they are “very satisfied”). However, in spite of the relatively positive perception of Forest City, fewer Indian respondents agree that ordinary Malaysians will benefit economically from the Forest City development (40.2 per cent).

In contrast, 61.4 per cent of Malay and 56.9 per cent of Chinese respondents are in agreement that ordinary Malaysians will benefit economically from Forest City. This inconsistency may be the result of the high percentage of unsure responses to the question of satisfaction with Forest City: 27.3 per cent of Chinese respondents are unsure, while 24.4 per cent and 14 per cent of Indian and Malay respondents respectively indicate that they too, are unsure about the development. More qualitative research and in-depth interviews will be required to determine why respondents might be “satisfied” with a development but in disagreement with its potential to provide economic benefits.

It is also interesting to note that while Malay respondents register relative satisfaction with the development and have the highest agreement with its potential to provide economic benefits, they register the highest dissatisfaction with PRC investments in Forest City (40.7 per cent). Indian respondents register 31.8 per cent dissatisfaction, while Chinese respondents register only 15.8 per cent dissatisfaction. These results

Figure 5F: How satisfied or dissatisfied are you with the developments taking place in the Forest City region? All Johor respondents (n=1003) according to ethnicity.

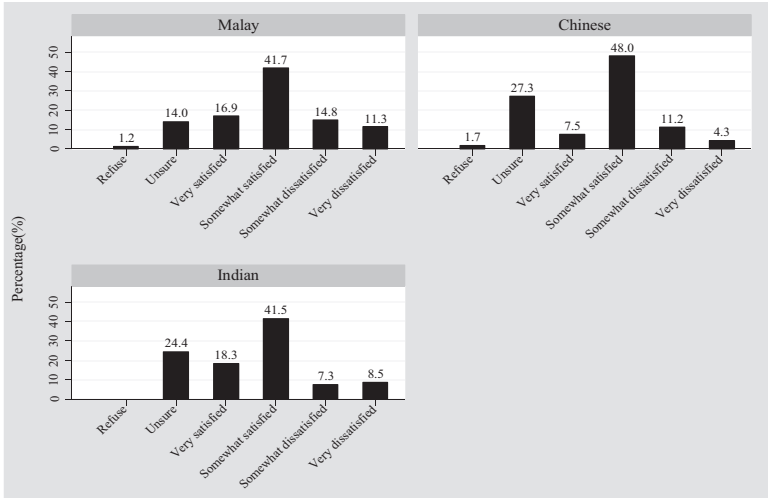
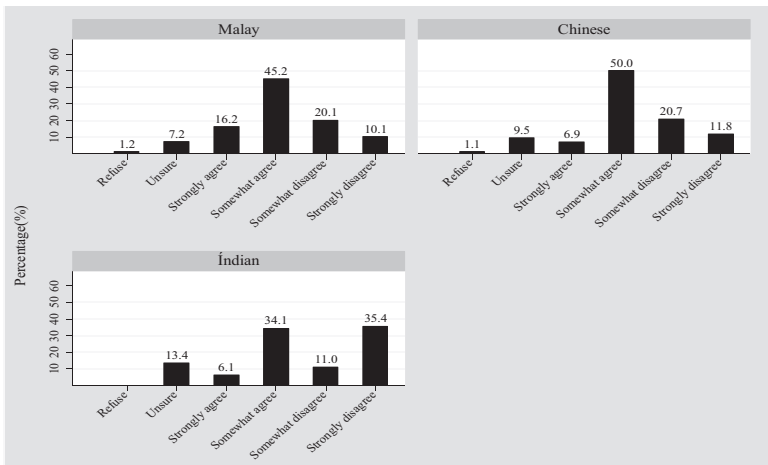


Figure 5G: Do you agree or disagree that ordinary Malaysians benefit economically from Forest City? All Johor respondents (n=1003) according to ethnicity.



are in line with responses to the question on PRC investments in IM and could possibly be attributed to ethnic bias. However, more in-depth interviews will have to be conducted to ascertain the reasons for this.

The Pengerang Integrated Petroleum Complex (PIPC) is the largest development project in southeast Johor, and is not within the Iskandar Malaysia region. Seen as a largely local project, it suffered much controversy when first launched in 2012. Today the overall response to the PIPC has improved with 54 per cent of all respondents indicating a degree of satisfaction with the project. Of those polled in the east, 76 per cent agree that the project will bring them economic benefits. Slightly more rural respondents across Johor (56 per cent) register satisfaction with PIPC than overall urban respondents (53 per cent).

Further analysis of the results by ethnicity (as shown in Figures 5H and 5I) indicate that Malay respondents are the most satisfied with the PIPC developments (70 per cent satisfaction with 23.2 per cent indicating that they are “very satisfied”) and 80.7 per cent indicating that they agree that PIPC will bring them economic benefits. Chinese and Indian responses are less favourable, with only 31.6 per cent of Chinese and 51.2 per cent of Indian respondents indicating satisfaction with the development and 48.5 per cent of Chinese and 43.9 per cent of Indian respondents agreeing that they will garner economic benefits from the project.

It is important to note, however, that 41.1 per cent of Chinese and 41.5 per cent of Indian respondents were unsure about the project and 23.9 per cent and 40.2 per cent respectively are unsure about its potential economic benefits. Such high rates of uncertainty indicate that these results need to be examined further to determine whether low levels of satisfaction or agreement are due to a lack of awareness and understanding of the project, or whether other issues are involved.

One of the main issues raised at the launch of the PIPC was its environmental impact, particularly from the substantial hill-raising, land-clearing and reclamation works required. Five years from its launch, 68.9 per cent of Malay respondents and 63.4 per cent of Indian respondents are still concerned about its environmental impact (as shown in Figure 5J). For the Malay respondents, one reason for this could be the community’s dependence on the sea for their livelihoods and their understanding of how the marine environment would be affected by development on land.

Figure 5H: How satisfied or dissatisfied are you with the developments taking place in the Pengerang region? All Johor respondents (n=1003) according to ethnicity.

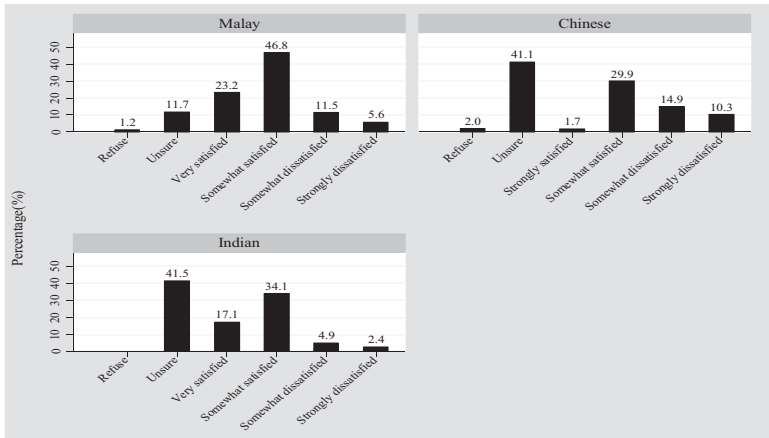


Figure 5I: Do you agree or disagree that ordinary Malaysians like yourself benefit economically from PIPC? All Johor respondents (n=1003) according to ethnicity.

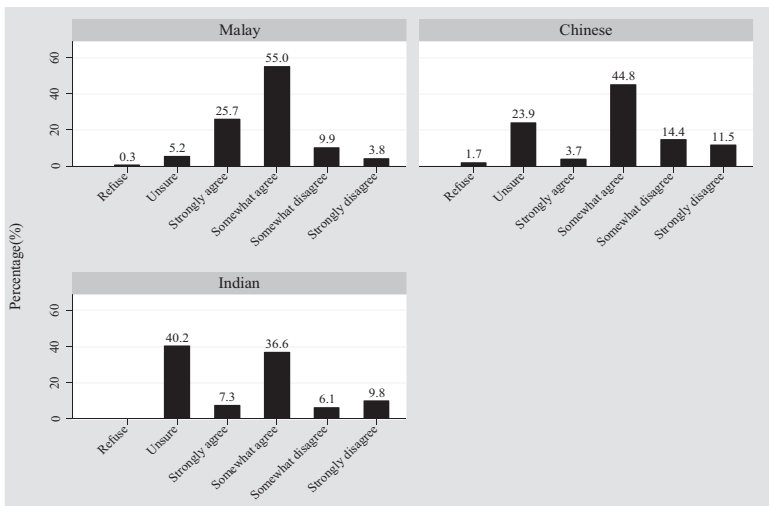
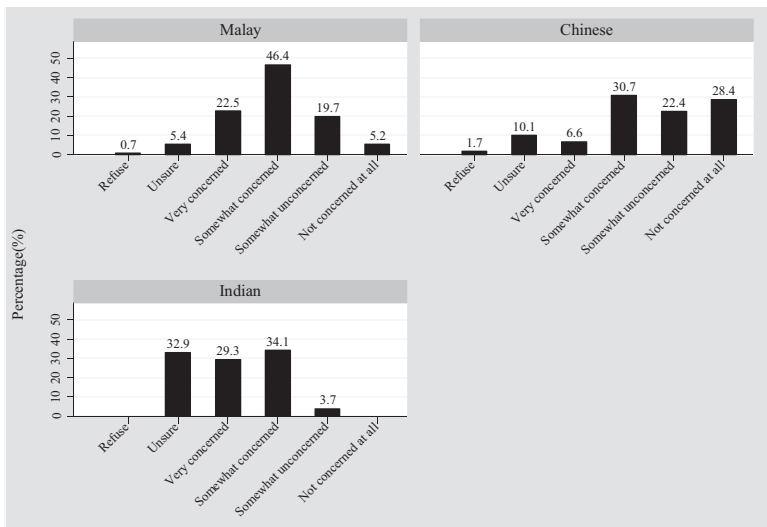


Figure 5J: How concerned or not concerned are you about the environmental impact of PIPC? All Johor respondents (n=1003) according to ethnicity.



While fewer Indian respondents indicate that they are “not concerned at all” about PIPC’s environmental impact (3.7 per cent compared to 50.8 per cent of Chinese respondents and 24.9 per cent of Malay respondents), there is also a high percentage of Indian respondents who indicate that they are unsure about the project’s environmental impact (32.9 per cent). This uncertainty could indicate either a lack of understanding of environmental matters or a lack of clarity of what the PIPC project entails in terms of environmental damage. More in-depth research is necessary to clarify these ambiguities.

While overall responses to IM, Forest City and PIPC are generally positive, a closer analysis by ethnicity reveals some variances in responses. While some of these differences may be attributed to ethnic biases or affiliation, high percentages of unsure responses indicate that further qualitative research is necessary to determine a more precise picture of perceptions on the ground.

CONCLUSION

The 2017 Johor Survey offers several key findings. Firstly, it found that the majority of respondents are satisfied with the Johor government's management of the state. On the economic front there is mild optimism over the future of the state. This is generally true across the board, except for Chinese respondents who are generally more pessimistic. This ethnic factor emerges again in the area of personal finances as Chinese respondents are more likely to say that they have seen smaller improvements in the financial situation of their households. When it comes to perceptions of identity, there seems to be strong support for the idea of *Bangsa Johor*. Again, this is generally true across all demographic segments. However, the survey found that religious affiliation is the most important for Malay respondents while Chinese and Indian respondents identify themselves as Malaysian citizens first. In other words Malay respondents were more likely to prioritize their identity as Muslims over their other identities such as national citizens.

The survey also found that the Johor royal family popular amongst respondents. The royal family is believed by many to be a good steward of Johor's resources and is seen to look after the personal interests of citizens. Many also believe that the Johor Sultan should intervene in politics when necessary. However, a slight majority agree that the Johor royalty should refrain from business ventures. With regard to Islam, the vast majority of Malay respondents see Malaysia as an "Islamic state". This majority also believe that increased Islamic religiosity is a positive development for society. More than half of the Malay respondents would like *hudud* laws to be applied to non-Muslims as well. The majority of Malay respondents also believe that JAKIM should regulate Muslim behaviour and that Malay culture is not becoming more Arabized.

The findings of this survey offer a springboard into more qualitative research. They provide data for hypotheses and assumptions which, while useful, should be further tested by interviews and ethnographic work in order to construct a more comprehensive picture of Johor.

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