



**CENTRAL FORCE**  
CREATIVE INSIGHTS &  
AUDIENCE ANALYTICS

# 2026 INSIGHTS REPORT

## **THE JOHOR-SINGAPORE SPECIAL ECONOMIC ZONE (JSSEZ)**

**Public Sentiment and  
Lived Perspectives**

**Part 4: Getting Around  
Transport, Connectivity, and Urban Mobility**



## Where movement shapes possibilities.

Welcome to Part 4 of Central Force's 2026 *Insights Report: The Johor–Singapore Special Economic Zone (JSSEZ): Public Sentiment and Lived Perspectives*. Culminating from the earlier parts, this report turns to the final piece of the equation – how income expectations, mobility, and connectivity shape the ability for Johoreans to participate in the opportunities around them.

The realities of daily life, from commute times to the ease and reliability of getting around, ultimately shape how development is experienced in practice. This report explores how these everyday conditions influence not just movement, but whether opportunity can be realised.

Each publication in this series is designed to be read independently, while together they provide a fuller picture. Part 1, which includes the introduction, CEO foreword, executive summary, and methodology, can be accessed by scanning the QR code on the right.



### 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 4** of a multi-part exploration of Johoreans' public sentiment and lived perspectives surrounding the Johor–Singapore Special Economic Zone (JSSEZ). You may scan the QR code above to download the other parts of this insights report, or contact us directly to request for copies.

Readers who are part of the *Central Force Insights Roundtable* will receive subsequent publications as they become available. For updates, access to future parts, or further information about this research series, please contact Central Force Insights at +603-9078 3688 / +6011-5933 6808 or email [cforce@cforce-int.com](mailto:cforce@cforce-int.com)

- Part I – Clearing the Fog: Perception, Awareness and the Narrative Landscape**
- Part II – Conditional Support: Growth, Trust and Expectations**
- Part III – Workforce in Focus: Talents, Personas and Readiness**
- Part IV – Getting Around: Transport, Connectivity, and Urban Mobility**

## 4.0

# Evaluating opportunity in practice

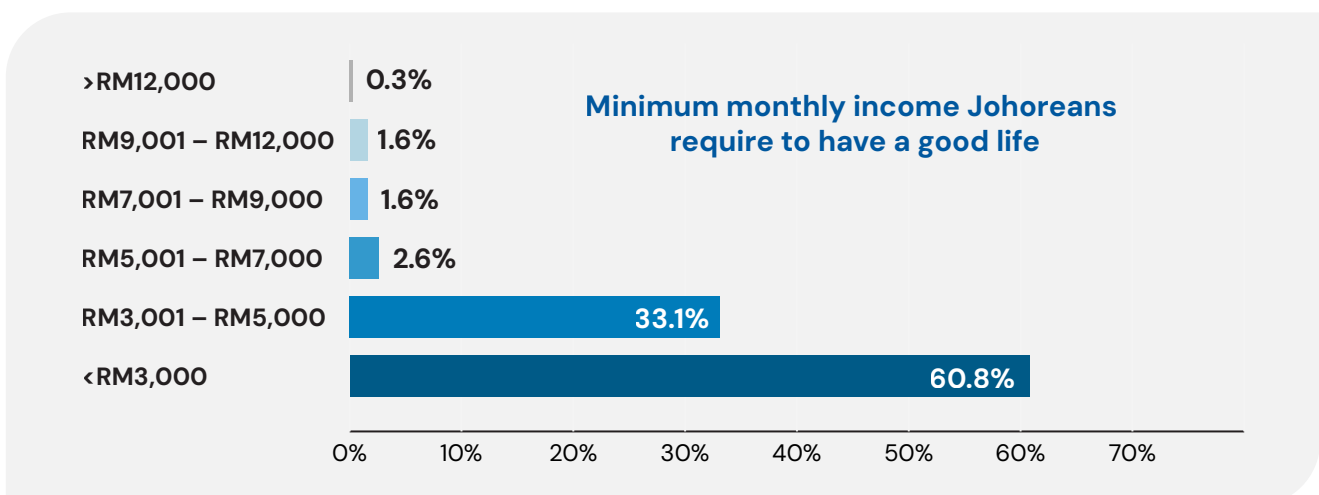
Building on the workforce analysis in Part 3, which examined talent composition, skills readiness, workforce personas, and employment distribution, this section turns to income expectations and perceived job benefits, which play a defining role in determining whether Johor is viewed as a place to build a long-term future.

Understanding these expectations provides deeper insight into how Johoreans assess what is available to them, and how they evaluate income adequacy and job attractiveness in determining what is realistically attainable within Johor's economic environment.

## 4.1

# Minimum income and job attractiveness

Income expectations provide an important lens into how Johoreans evaluate work, opportunity, and quality of life. Rather than reflecting on aspiration alone, these expectations reveal how Johoreans perceive the realistic ceiling of economic mobility within the state.



Johoreans define a “good life” using a relatively modest income benchmark. A clear majority indicate that RM3,000 or below is sufficient to live comfortably, with only a small minority associating a good life with incomes above RM5,000.

This pattern is prevalent across age groups and employment status, including among respondents who currently earn more than these thresholds. Higher earners do not significantly recalibrate their expectations upwards, suggesting that income perceptions are shaped less by personal earnings and more by what Johor is collectively perceived to offer.

This points to a structural ceiling in income expectations. Johoreans are not necessarily unambitious; rather, they have internalised a view of Johor as a place that offers stability and affordability, but with limited upward wage progression.

## 4.2

# Minimum income for a good life in Johor, analysed by income group

Across all income groups, the idea of a “good life” in Johor is strikingly modest. Regardless of whether respondents are B40, M40, or even T20, expectations cluster tightly around RM3,000 to RM5,000. Very few Johoreans, including high earners, associate a good life with higher income levels.

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## 4.3

# Perceived job benefits by minimum income expectations

Across all minimum-income-for-a-good-life groups, Johoreans who believe a lower income is sufficient consistently associate the state with employment fundamentals: job availability, training, basic benefits, and working culture. For them, Johor works as a place to enter, stay employed, and remain stable. Income is not the headline benefit. Security is.

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# SO WHAT?

## CF INSIGHTS SAYS

Overall, the data shows a workforce that values security, balance, and continuity, but has largely adjusted its expectations downward in relation to income growth. This creates a stable equilibrium within Johor's labour market. While this stability supports workforce retention and social cohesion, it is not inherently growth-oriented.

Over time, several structural risks may begin to emerge. **Low wage ceilings may become normalised**, reducing pressure for upward income movement. **Innovation incentives may weaken** as both employers and employees operate within familiar boundaries. At the same time, the state may face **increasing difficulty in attracting and retaining talent** for higher-value and more specialised industries.

In the context of the JSSEZ, this presents a dual reality. Johor remains attractive to investment that values cost efficiency, workforce reliability, and operational scalability. However, ambitions to develop advanced sectors such as digital services, high-value manufacturing, and knowledge-based industries will depend on whether Johoreans can clearly see how skills development translates into tangible career and income progression over time.



Viewed through the lens of human needs and motivation, the findings suggest that Johor's labour market **currently fulfils foundational priorities more effectively than aspirational ones**. Across the lower and middle income expectation groups, employment is naturally based on stability, continuity, and security. As Johoreans' income expectations rise, their priorities begin to shift towards work-life balance, and long-term career and personal growth.

### TO STRATEGISE GOVERNANCE

Wage increases alone are unlikely to change how Johoreans perceive opportunity. Raising income levels may provide short-term relief, but without a clear sense of how careers can grow and progress over time, expectations are unlikely to shift in a meaningful way.

What matters more is visibility, as Johoreans need to see and perceive how they can progress forward. This means making career pathways clearer and easier to understand, showing how upskilling leads to better and more rewarding roles.

There is also a need to communicate development more clearly at ground level. Instead of broad national messaging, more localised and sector-specific narratives can help Johoreans understand where opportunities are emerging, what skills are in high demand, and how they can realistically step into these roles.

Initiatives such as Technical and Vocational Education and Training (TVET) programs and efforts by the Johor Talent Development Council (JTDC) are steps in the right direction. This shows that workforce capability building is being taken seriously. However, upskilling is one part of the equation, and these Johoreans need to clearly see how their skills lead to better jobs and higher income.

Put simply, people need to believe that putting in the effort will make a difference. If gaining new skills does not clearly lead to better jobs or better pay, it becomes harder for expectations to shift, even when more opportunities are available.

## **TO SHAPE BUSINESS STRATEGY**

In a labour market where income expectations are relatively modest, businesses in Johor compete as much on stability, learning opportunities, and career progression as they do on salary.

Firms that invest in structured career pathways, skills development, and internal mobility are more likely to differentiate themselves. This is particularly important in sectors where attracting and retaining capable workers is critical to scaling operations.

At the same time, an over-reliance on prevailing low wage norms may offer short-term cost advantages but ultimately limit productivity gains and innovation over time. Businesses that align workforce development with long-term value creation are better positioned to benefit from the next phase of Johor's economic transformation.

As JSSEZ evolves, employers who can clearly demonstrate career progression, not just employment, will be more effective in attracting and retaining talent in an increasingly competitive environment.

**For Johor to move beyond being a place of stability, progress must be visible and attainable. As the state positions itself for the next phase of growth through digitalisation, advanced industries, and emerging technologies, opportunity must not only exist, it must feel within reach for those expected to pursue it. Without that clarity, even the most ambitious plans risk moving faster than the people they are meant to uplift.**

## 4.4

# Mobility, transport and cross-border connectivity

Income expectations shape how Johoreans evaluate opportunity, but they also influence how far individuals are willing to go in pursuit of it.

When the potential gains in income from better jobs are seen as limited or uncertain, people naturally become more selective about the effort they are willing to invest. Commuting longer distances, relocating, or travelling across the border – whether within the peninsula or into neighbouring Singapore – are not decisions taken lightly, especially when the improvement in income or quality of life is uncertain or not clearly felt.

In this context, mobility becomes an important part of how opportunity is experienced in practice. Transport and connectivity are among the most immediate ways Johoreans experience development. While initiatives such as JSSEZ are often discussed in terms of investment and job creation, Johoreans ultimately assess progress through daily realities such as travel time, congestion, cost, and predictability.

This is particularly relevant in Johor, where movement within the state and across the Johor–Singapore border forms part of everyday life for many Johoreans. Experiences at key travel points, especially where congestion and delays are common, shape not only how Johoreans move, but also how they perceive the accessibility of opportunities available to them.

The sections ahead therefore examine how Johoreans experience mobility within the state, where dissatisfaction concentrates, and which improvements would deliver the greatest perceived relief. Rather than treating transport as a purely technical infrastructure issue, the analysis focuses on lived mobility, how Johoreans move, what frustrates them, and how these experiences shape acceptance of broader economic change.

To provide a clearer picture, we examine three interlinked questions in the sections ahead:

- 1. How satisfied are Johoreans with the state's internal transport system?**
- 2. How do Johoreans experience cross-border connectivity, and where does frustration peak?**
- 3. Which improvements would meaningfully change perceptions and behaviour?**

## The transportation system in Johor

Mobility is a fundamental enabler of economic activity, workforce accessibility, and daily life. Understanding Johoreans' satisfaction with transport, along with variations by district and urbanicity, sets the foundation for assessing connectivity across the state. The sections ahead examines Johor's transportation system.

However, rather than focusing on infrastructure provision alone, the sections ahead considers how mobility is experienced in Johoreans' daily lives, including how often they travel, which modes they rely on, where dissatisfaction concentrates, and which aspects require change and improvement for development to feel meaningful and tangible.

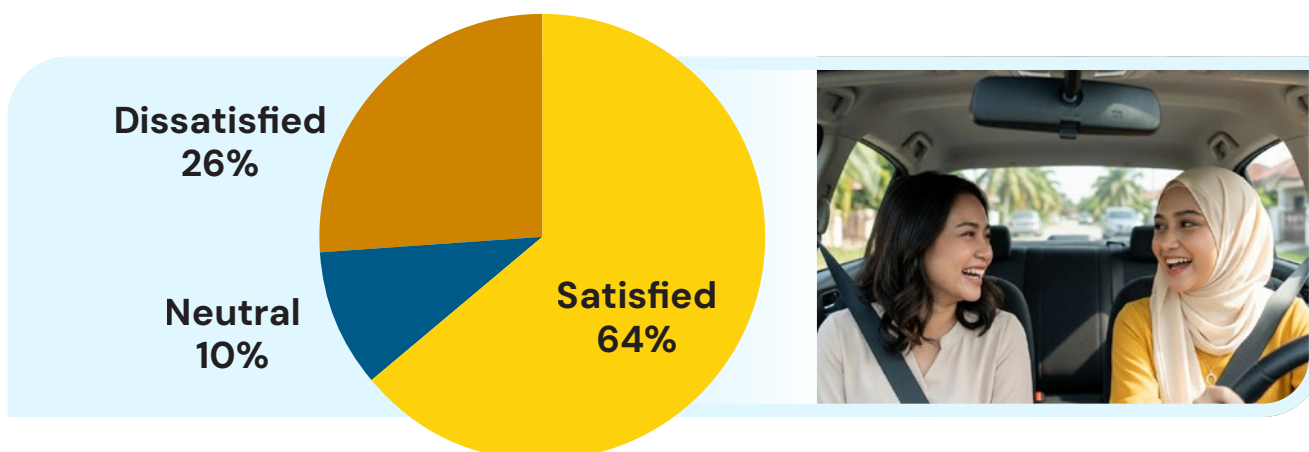
This insight is critical in identifying areas where infrastructure and services support or limit movement, which in turn affects business operations, talent access, and regional development planning.

## Overall satisfaction of transportation in Johor

Overall satisfaction with Johor's transportation system is moderately positive. Around two-thirds of Johoreans report being satisfied, while roughly one-quarter express dissatisfaction, and a smaller segment remains neutral.

This pattern suggests that Johor's transport system broadly meets baseline needs. However, the presence of a sizeable dissatisfied group indicates that functionality is uneven. The system works for many, but not consistently or reliably across locations, times, and travel purposes.

Importantly, positive headline satisfaction should not be interpreted as system resilience. Instead, it reflects adaptation. Residents have learned to cope with congestion, delays, and inefficiencies, rather than benefiting from a transport system optimised for growth.



## Satisfaction with cost, availability, and traffic flow

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## 4.5

# Cross-border connectivity

## Frequency of travel across Johor–Singapore

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## 4.6

# Satisfaction with cross-border connectivity

## Perceptions of cross-border connectivity

Cross-border connectivity is characterised by relatively low satisfaction and a high degree of neutrality, suggesting that Johoreans have adjusted to the system rather than actively approving of it.

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## 4.7

# Satisfaction with cost, availability, and traffic flow

## What Johoreans want improved

When asked what should be prioritised to enhance Johor's transport and cross-border connectivity, responses converge clearly around process efficiency rather than large-scale infrastructure expansion.

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**Cross-border connectivity is not viewed as an opportunity. It is seen as a burden Johoreans endure when they have no better option.**

# Conclusion

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## SO... WHAT'S NEXT?

The insights presented in this report are not meant to just sit on a page. They are meant to be utilised. Should you navigate the Johor economic environment, or committing to business and investment in the state, we at Central Force hope that these insights provide the clarity and confidence needed to make better decisions and enact effective governance.

### ENGAGE WITH CENTRAL FORCE

Good insights do more than inform. They shape direction, reduce uncertainty, and bring greater clarity to what would otherwise be complex decisions. With 30 years of expertise and experience in market insights and audience analytics, Central Force have been partners in supporting the decision-making efforts of both local and global institutions and brands, including Harvard University, the World Bank Group, AmBank Group, 20th Century Fox, YouGov, Pew Research Center, Malaysia Airports, Buena Vista International, Merck, Lafarge, and many more.

What these organisations have in common is not just a need for data, but a need for clarity that leads to action.

This is where we come in, working closely with stakeholders to uncover not just what is happening, but why it matters, and what can be done next. Our approach is grounded, flexible, and designed to translate insight into outcomes that work in practice.

# READY WHEN YOU ARE



## MARKET INSIGHTS RESEARCH

We design and conduct customised research that goes beyond surface-level metrics. From public perception studies to sector-specific deep dives, we uncover not just what people think, but why they think that way, and how those perceptions influence behaviour, decision-making, and conversion.



## AUDIENCE & BEHAVIOUR ANALYTICS

Data becomes powerful when it reveals patterns. We analyse audience behaviour, segmentation, and decision drivers to understand how people move, choose, act, and respond within real-world environments. This allows organisations to align offerings, communications, and strategies with actual behaviour, not assumptions.

## CO-CREATION & STRATEGY LABS

Insight alone is not enough without alignment across stakeholders. Our co-creation sessions bring together teams, decision-makers, customers, and partners to translate insights into actionable strategies. These interactive sessions are designed to challenge assumptions, align perspectives, and build solutions that are grounded in both data and reality.



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**Let's build what works in practice, together. From insight to action, we are ready when you are.**

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MARKET INSIGHTS &  
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