STUDY 1: QUALITATIVE DISCOURSE ANALYSIS

Methodology

Context

The study examines the existence of narratives within the Australian energy sector. Australia possesses a rich array of natural resources, helping to fuel its energy sector and long-term economic growth (Geoscience Australia, 2020). In energy consumption per capita, Australia ranks 15th globally (Geoscience Australia, 2020). However, as a result of Australia's resource endowment, the sector relies heavily on fossil fuels, particularly coal (Geoscience Australia, 2020). This proves problematic compared with the growing shift towards cohesive action on climate change and the pursuit of renewable energy sources (PwC, 2019). Alongside political divisions on the sector's future growth opportunities and the influence of powerful corporate and media interests, these factors see the nation's energy sector is on a 'highly transformative path' (PwC, 2019). Given its current transitional status, Australia's energy sector is thus a major theatre for narratives on responsible consumption.

Dataset

Modelled off the approach of (Giesler & Veresiu, 2014), this study finds these narratives emerging from within a sample of publicly available documents (n = 196), specifically company reports, particularly annual reports, and media releases, from the stakeholders defined by the Australian Energy Regulator (AER, n.d.). The Australian Energy Regulator is the central regulator for Australia's energy networks and covered gas pipelines, working across all states and territories except Western Australia (AER, 2020). In recognition that energy is essential to the long-term vitality of Australia's economy, they monitor and report on the activities of 49 market participants, which are categorised under; government agencies and departments, energy institutions, state regulators, ombudsman, representative

groups, consumer organisations, and international organisations (AER, n.d.). For our analysis, we separated these prescribed categories into three broad groups, those of; government, industry, and consumer. Each stakeholder produces a broad array of documents, however the most common across categories are company reports and media releases. Given these document types tend to utilise a similar structure and linguistic mode, and audience targets, they were selected for comparable analysis.

Table 1 provides further descriptive details about the dataset, including the total number of documents sampled per stakeholder type, average number of words per document type and, as stated previously, definitions for each category of stakeholders. The word total of the dataset is 2,528,766. The average number of words per media release is 503. The average number of words per report is 28,435.

Data was manually scraped from the websites of each stakeholder over the course of May 2020. Where organisations represented external interests outside of energy, only documents categorised under the keyword 'Energy' were selected into the sample. One stakeholder, the REC registry, had limited and/or no documentation included in the dataset due to researcher accessibility issues. Documents range in publication from 2015-2020, however are skewed to 2020. This time period has been selected given the UN Sustainable Development Agenda's publication in 2015 (United Nations, 2018) as well as Australia's signing onto the Paris Agreement this same year (Department of Foreign Affairs and Trade, n.d.). Further, Australia's energy policy tends to operate within 5-year milestones with the most recent – the National Energy Productivity Plan 2015-2030 (COAG Energy Council, 2015) – agreed to by the Council of Australian Governments (COAG) in December 2015.

Ethical approval was not required given the use of public data and as outlined in the National Statement 5.1.22-5.1.23 (National Health and Medical Research Council, 2018).

Table 1. Descriptive information for the dataset, broken down by stakeholder category

Stakeholder Classification	AER Categories	Number of Stakeholders	Number of Documents	Total Number of Words	Average Number of Words Per Document
Government	Government Agencies & Departments Energy Institutions State Regulators Ombudsman International	32**	R: 57 MR: 61	R: 2,063,049 MR: 32,356	R: 36,194 MR: 530
Industry	Representative Groups	6	R: 8 MR: 23	R: 113,076 MR: 9,729	R: 14,134 MR: 423
Consumer	Consumer Organisations	10	R: 22 MR: 25	R: 297,793 MR: 12,763	R: 13,536 MR: 511
		n = 48	*n* = 196		
		**1 excluded.			MR = Media Release. R = Report.

Analytical Techniques

Study 1 takes an inductive approach using mixed methods (Creswell, 2014) of qualitative discourse analysis (Creswell, 2013).

The study uses narrative theory and tools of textual analysis, specifically Linguistic Inquiry Word Count (LIWC; Pennebaker, Boyd, Jordan, & Blackburn, 2015), to analyse the dataset. Using the theoretical framework developed by Campbell (1949, 2008), the emergent narratives are framed within the hero's journey thesis, which comprises three broad phases; , and twelve, mutually exclusive, stages; the ordinary world, call to adventure, refusal of the call, meeting of the mentor, crossing the threshold, tests, allies and enemies, approach to innermost cave, the ordeal, the reward, the road back, the resurrection, and the return. This twelve-step process was identified through a bottom-up, inductive approach, echoing the three-stage design of Corbin and Strauss (2015).

The analytical strategy was designed using this three-stage process proposed by Corbin and Strauss (2015). First, open coding through manual techniques were used to identify the overarching thematic account of the observed phenomena, using in-vivo labels for these emergent codes. Second, axial coding was utilised to find the relationships between first-order concepts and aggregate them to second-order themes. Third, the second-order themes have been correlated to existing research on responsible consumption and the hero's journey, heavily iterating between data and literature to derive aggregate categories that were both comparable to and distinctive from what consumer research already charts.

The dataset also incorporated visual elements, including photographs, infographics and visual timelines, which were analysed for their narrative insight. In this, we drew on the text-interpretive approach where visual aspects of a text are considered equally relevant in conveying meaning separately from written text (McQuarrie & Mick, 1999). Modelled off

the approach of Humphreys and Thompson (2014), we thus sought to analyse visual text for the story they told as a whole, following the same coding procedures as in the written text.

Findings

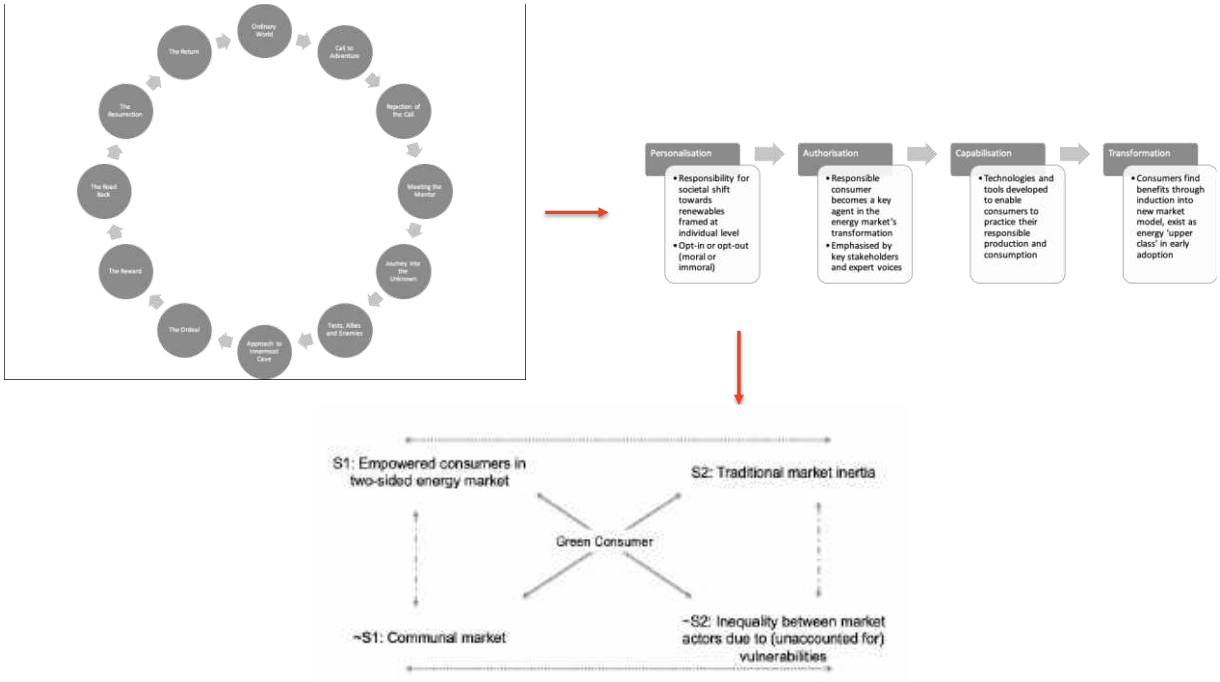
In support of existing literature, we find consumer responsibilisation as a systemic process, through which consumers transition into responsible market actors able to address the central societal issues of our time (Eckhardt & Dobscha, 2019). Due to the transitory nature of Australia's energy market and the urgent concern of climate change, this process of consumer responsibilisation is occurring in real-time.

We extend this existing process of responsibilisation however through applying the narrative template of the hero's journey (Campbell, 1949, 2008) to the consumer transition. Our model (see Figure 1) finds that actors at the meso-level encourage consumers to undertake a transformation into responsible energy market participants through Campbell's twelve phases – the ordinary world; call to adventure; rejection of the call; meeting the mentor; journey into the unknown; tests, allies and enemies; approach to innermost cave; the ordeal; the reward; the road back; the resurrection; and the return. Empowered by their transition into a hero, consumers are then initiated into the responsibilisation process through Giesler and Veresiu (2014) PACT routine. In each phase of personalisation, authorisation, capabilisation, and responsibilisation, consumers find themselves thrust into the role as a central problem-solving agent (Luchs, Phipps, & Hill, 2015), an agent assigned to the role of both resolving the environmental crisis and ensuring Australia's economic future.

Finally, we contribute to existing configurations of the green consumer as we document their existence at the centre of a marketplace rife with tensions (Fontenelle, 2013). The construction of these tensions through a semiotic square is in contrast to Giesler and Veresiu (2014), who position the consumer in the centre of a horizontal market of moral

authorities, including NGOs, corporations and political parties. Our identified market tensions however position the green consumer as the central market actor, a hero designed to strike a balance between naturally opposing standpoints.

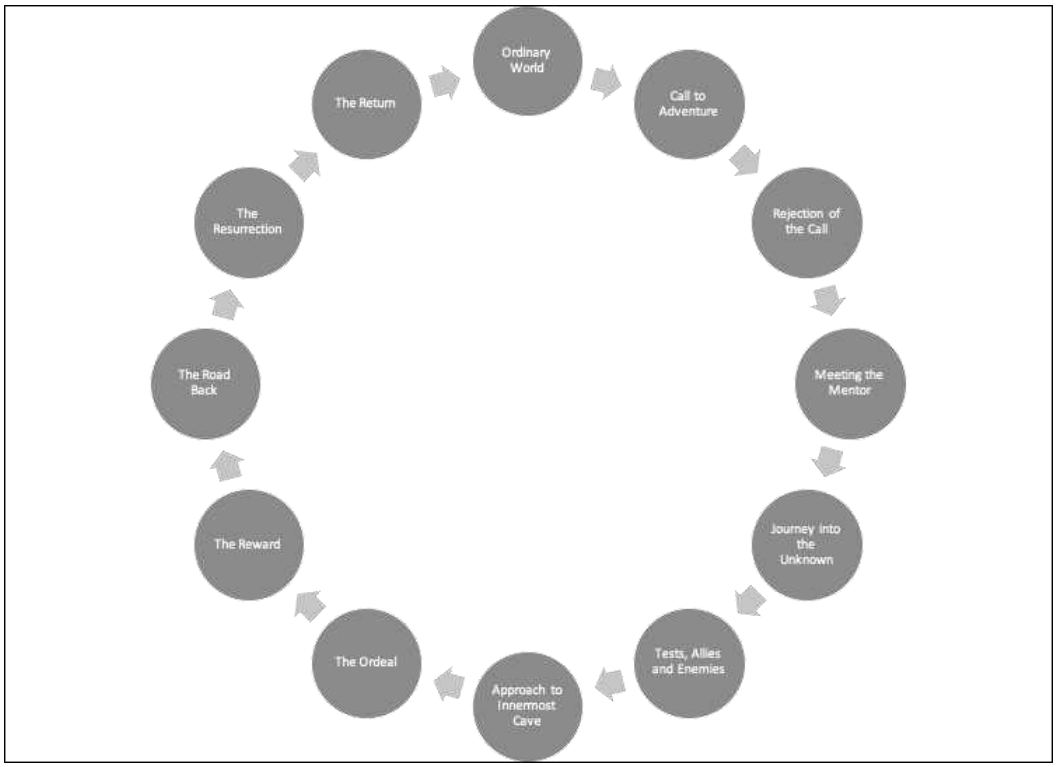
Figure 1. Model.



The Hero's Journey

As a central narrative template involving an individual's transformation into an enlightened state of knowledge, the hero's journey offers consumers a distinct path to responsibilisation. In this, we extend on the work of Coskuner-Balli (2020) who argues that the citizen-consumer is cast into the role of a responsible moral hero in order to achieve the American Dream. In our findings, the hero must journey to achieve a renewable energy future. As seen in Figure 2, the hero's journey comprises 12 stages through which the protagonist travels through. However, our findings show that not every consumer is able to complete their transformation. Due to systemic forces outside of the consumer's control, not all can engage beyond a basic, rhetorical level, even if they feel a moral imperative to do so.

Figure 2. The Hero's Journey.



1. The Ordinary World

In the first stage of the hero's journey, we find the individual in their ordinary world (Campbell, 1949). Within the dataset, stakeholders depict this ordinary world as the Australian energy market, which supplies an essential service to Australian households and businesses. This market however is recognised to be in a state of flux. Across stakeholders and documents, energy is continually positioned as an 'essential' good in whichever form it is supplied. This is evidenced in the report 'Consumer access to external dispute resolution in a changing energy market' (2016) commissioned by Australia and New Zealand Energy and Water Ombudsman Network (henceforth, ANZEWON). The authors clearly describe the centrality of energy for Australians, arguing, 'No matter how energy is supplied, it remains an essential service' (66). The Australian Energy Market Operator (henceforth, AEMO), one of the central policymakers of the National Electricity Market (NEM), echoes this sentiment

in describing ‘reliable energy supply’ as a ‘critical feature of modern life’ in its 2018-19 annual report (15). Furthermore, the consumer organisation the Consumer Action Law Centre (2016) identifies in their report ‘Power Transformed’ that this energy sector has been central to Australia’s economic and social development:

> ‘Australia’s energy market was established to provide Australians with reliable, low cost energy from our abundant fossil fuel resources. Energy was consumed by households and businesses at the end of one-way transmission and distribution networks, often over long distances from where it was generated. This model was the foundation for the growth of Australia’s manufacturing industry, and has provided households with relatively cheap, secure and reliable electricity for decades.’ (12)

The market however is recognised to be in a state of transition, due to its traditional operating model becoming increasingly unsustainable despite the benefits it has historically provided. Both economically and environmentally, the current market structure is questioned for its future success. According to a 2019 report commissioned by the Federal Department of the Environment and Energy, Australia must meet the conditions of the 2015 Paris Agreement through emissions reduction schemes:

> ‘The Paris Agreement established a global goal of limiting global warming to less than 2°C above pre-industrial levels. This requires significant action to reduce emissions to net zero by the second-half of this century. Developed countries, such as Australia, are expected to transition to a low carbon future as soon as possible. This is reflected in Australian States’ and Territories’ emission reduction targets which include aims to achieve net zero emissions by 2050.’ (10)

Having named these global commitments, stakeholders thus present a scenario in which the energy market must transition into a more sustainable form. This is evidenced in a May 2020 media release from Energy Networks Australia (ENA), with the representative group arguing, ‘a 21st century energy system cannot continue to rely on 20th century technology’. This constructed ordinary world thus leads into the second phase of the hero’s journey.

2. Call to Adventure

The call to adventure sees the hero meet a problem, challenge or question they must solve (Campbell, 1949, 2008). Given the recognition that the current state of the market is unsustainable both economically and environmentally, consumers are instructed to increase their energy productivity and efficiency by policymakers. At a national level, the Energy Productivity Plan 2015-2030 (COAG Energy Council, 2015) calls for a 40% improvement in energy productivity by 2030, achieved via energy market reform and the creation of more informed consumers who understand how to reduce their energy consumption levels.

Stakeholders thus promote a new paradigm in the 3 D's – decentralisation, decarbonisation, and digitalisation. These three market trends are depicted as causing a dramatic transformation within the National Energy Market (NEM). According to the Australian Competition and Consumer Commission & Australian Energy Regulator's 2018-19 annual report, the 'market is undergoing a significant transformation, with market dynamics changing as it transitions to a lower emissions generation mix' (163). This narrative framing is promoted via the introduction of an extended metaphor of the energy transition. As the consumer organisation Energy Consumers Australia (henceforth, ECA; 2020) describes in its Power Shift report, the market is shifting from 'the old world' where consumers only interaction with their energy provider was through quarterly bills to a 'new world of energy choices tailored to household needs' (6).

As a result, the role of consumers in the market is shifting dramatically. The Public Interest Advocacy Centre, a consumer organisation, highlight this in their 2018-19 annual report, describing 'a fundamental change to the energy market, shifting power from big retailers and generators to energy users' (22). With their newfound power, consumers are positioned as potentially dominant players in the new energy market of the future.

3. Rejection of the Call

However, due to one or more of a combination of factors, consumers may be unable or unwilling to take the call (Sanders & Van Krieken, 2018). Our findings show significant issues stemming from consumer disengagement in the marketplace, attributed to prior market and policy failures; retailer misconduct; or a general lack of capital for the complexities of the market. This is evidenced across stakeholder groups and documents.

As an example of prior market and policy failings, stakeholders point to failings in their communication and failures to provide adequate education for consumers. ECA (2020) describe the failure of policymakers to address consumer needs, instead focussing on the consumer as a rational economic agent in their 'Power Shift' report. Consumer disengagement has thus increased:

> 'The sector's focus on the 'bill-payer' as the economic agent ignores that the use of energy in the home is the result of a series of lifestyle choices made by adults and children, in the absence of any meaningful or useful information that links these decisions to energy costs.' (9)

The report goes on to argue that market participants tend to limit communicate with consumers to 'cents per kilowatt' (9), instead of communicating on how energy adds value to their life through heat, entertainment, comfort and more. As a result, the Consumer Action Law Centre (2016) describes consumers who 'are not engaged in the energy market and don't make the decisions expected of them' (5) in their 'Power Transformed' report.

Additionally, South Australia's state ombudsman points to retailer misconduct as causing distrust, and therefore disengagement. The Energy and Water Ombudsman, Sandy Canale, highlights how the 'the inability of some retailers to meet demand had affected how all retailers were viewed by consumers' in an October 2018 media release. He extends this to argue that market mistrust has been created where retailers have failed to provide, particularly vulnerable, consumers with payment relief or hardship plans:

> ‘Difficulties in meeting these requirements meant significant and unnecessary hardships for many, especially for those planning to move into new homes and business locations who found themselves blindsided and without connections for months.’

According to a 2019 report commissioned by ANZEWON, those consumers with affordability issues subsequently find themselves ‘at a significant disadvantage’ causing them to lose ‘trust and confidence in the energy sector, more broadly’ (4).

Furthermore, consumers may reject the call due to a disconnect between their everyday life concerns and the issues. With attention instead directed at concerns in their personal situations, including income, health issues and family issues, consumers both consciously and unconsciously choose to disengage from the energy market as a coping mechanism. Avoidance is recognised by ECA in their ‘Future Energy’ research, arguing that for many household consumers they ‘were focused on their everyday lives and often had so much happening that energy was not top of mind. When energy was thought about, associations were often negative’ (12). This type of disconnect causes some consumers to reject the call early on, and without policymakers actively following-up these consumers for their participation they are absent from future benefits.

4. Meeting the Mentor

Those consumers who are able to continue are introduced to a supernatural aid, in the form of an experienced mentor who supplies advice, training and, in some cases, supernatural capabilities, helping them gain confidence and build the skills necessary to undertake the journey (Campbell, 1949, 2008). Above all, the mentor acts to facilitate the individual’s development into a more active participant in the journey (Busch, Conrad, & Steinicke, 2012). In our dataset, such a mentor is apparent in the presentation of case studies of regions that have successfully undertaken a transition into a renewable energy market and are reaping the benefits. South Australia is continually put forward as a ‘world-leader’ in renewables,

offering consumers economic and environmental benefits as well as showing how renewable technologies can offer increasing stability despite extreme weather events. The Australian Energy Market Commission (AEMC) illustrates this in their Annual Report 2019, claiming 'South Australia in particular is now a world-leading adopter of renewable generation' (8).

5. Journey into the Unknown

With the confidence provided by the mentor, the hero thus begins the process of crossing the threshold, either literally or figuratively leaving behind their ordinary world to move into a new, unknown world (Campbell, 1949, 2008). In our dataset, this journey into the unknown is constructed by presenting fictious active consumers who pursue energy efficient behaviours, and who are ready and willing to continue this with new renewable technologies and greater information supply. Stakeholders often imagine consumers as active market participants, arguing that most already try to manage their energy usage. ECA (2020) describes a utopian consumer segment already 'switching off appliances and lights when they're not in use, using off-peak hot water, as well as buying more energy efficient appliances, and installing solar panels' (11) in the 'Power Shift' report. Internationally, the UK's Office of Gas and Electricity Markets 2019 State of the Market report describes idealised consumers who 'make active choices to reduce their energy consumption for environmental and financial reasons' (104).

6. Tests, Allies & Enemies

Now thoroughly entrenched in the unknown world, the hero faces a series of tests, with the aid of allies and the threat of enemies who challenge their potential to complete the journey (Campbell, 1949, 2008). We find within our dataset, enemies are imagined as market participants, particularly retailers, who act improperly, whilst allies are other consumers, new

market entrants offering new and affordable technologies and market participants who seek to work with consumers on reforming the NEM. Alongside these enemies and allies, our dataset describes a complex series of tests the consumer must navigate based on changing regulation and uncertainty from politicians and policymakers.

In our dataset, these fictional tests take shape as practical barriers in regulatory ambiguity and resultant consumer disengagement in the market. The Energy and Water Ombudsman New South Wales finds regulation a significant hurdle in its 2018-19 annual report, as it fails to match the pace of technological innovation:

> 'The consumer protection framework for energy was built around the highly centralised (and regulated) systems of the past. These protections urgently need to be updated to encompass the wide range of new energy products and services to ensure that consumers, especially those experiencing financial vulnerability, are not further at risk'. (38)

The Council of Australian Governments further reports this hurdle in their 2019 Health of the Electricity Market report, describing a system in which 'it is clear that the rules are barely manageable' (43). Instead, The Council describes rules that have 'grown to a point of incomprehension for most people and are far too prescriptive' (43).

These regulatory failings see consumers without the correct information and resources. The Energy and Water Ombudsman for Victoria considers this a critical factor for consumer engagement in their 2018-19 annual report, particularly amongst customers in embedded electricity networks, for example large-scale apartment buildings or public housing, 'customers in embedded electricity networks have technically been able to choose their retailer since 2018, but practical barriers remain' (55).

Our dataset is further marked by fictional trials resulting from low consumer confidence. According to ECA, low confidence is a significant barrier amongst all consumers, with findings from their Future Energy research determining:

> ‘Informing consumers about alternative sources of energy is an opportunity area, demonstrated by the low awareness of sources other than solar and wind. Consumers sought more renewables into the future, but were disengaged from the matter due to their lack of understanding of the topic (e.g. how it works, pros and cons, what it would cost). Not fully understanding the subject matter meant that consumers were unaware of other ways in which they could contribute to increasing the uptake of renewables’. (105)

Facing these complex tests is further made difficult by the creation of enemies, who take shape as market participants who actively undermine positive consumer experiences. These enemies make it difficult for consumers to engage in the market. The Consumer Action Law Centre (2015) finds that ‘energy retailers are failing to provide adequate customer service generally, and hardship services more specifically, to the most vulnerable Victorians’ with hardship programs ‘not yet accepted as standard practice across the retail sector, and some retailers still do not have comprehensive models for working with vulnerable customers’ in their ‘Heat or Eat’ report (43). Findings from the Australian Competition and Consumer Commission and Australian Energy Regulator’s 2018-19 annual report further describe how enforcement is still critical to ‘address misrepresentations made by providers in the energy and telecommunications sectors’ (81).

However, despite these negative forces and regulatory hurdles, consumers do find allies in other consumers, new market entrants and a growing shift towards greater collaboration from market leaders. Household consumers are continuously praised for their high adoption rates of solar technologies, with the Australian Government’s Clean Energy Regulator (henceforth, CER) reporting, ‘One in five Australian homes now generate their own renewable energy and reduce carbon emissions through rooftop solar’ in a 2018 media release. These consumer allies are further reinforced by the introduction of new market entrants, who seek to assist consumers on their journey through offering technological innovations. In their 2018-19 annual report, the AEMC describes a how ‘global energy battery providers like Tesla and Sonnen’ are ‘partnering with local energy entrepreneurs to

provide new deals on battery and solar PV [solar photovoltaics; solar panels installed on the roof of homes and businesses that generate electricity from exposure to sun (Clean Energy Council, 2018)] options' (9) to foster domestic innovation.

This manufacturing of allies is further evidenced as stakeholders seek to promote an ethos of collective orientation. State ombudsman highlight the need for all market participants to promote this spirit of collaboration, with the Energy and Water Ombudsman for South Australia describing this philosophy in its 2018-19 annual report:

> 'It is important that we, and all agencies, state and national, take a position that emphasises collaboration, connection and information sharing to help suppliers, providers, installers and consumers understand what the changes mean and how best to prepare for them.' (12)

The Energy and Water Ombudsman for Victoria further describes its overall goal, 'To foster effective, collaborative relationships and drive continued customer service improvement by the energy and water industries' (11) in its 2018-19 annual report. Through setting this standard of positive collaboration, stakeholders actively position themselves as allies for consumers to continue their journey.

7. *Approach to Innermost Cave*

As the hero continues into the unknown world, they begin their approach to the innermost cave where they take a moment for organisation and self-reflection (Campbell, 1949, 2008). Within our dataset, consumers ability to continue their journey beyond the innermost cave is made difficult by affordability issues. Despite the cost benefits of renewable technology and the assistance from the allies outlined previously, vulnerable consumers tend to find themselves unable to engage in the market due to high start-up costs, as argued by the Consumer Action Law Centre (2016) in their 'Power Transformed' report:

> ‘For example, solar panels are now relatively cheap for many Australian households, and solar financing agreements are reducing the upfront costs even further. However the cost of panels is still prohibitive for the vast majority of the most vulnerable households, who might benefit most from generating their own electricity and reducing their energy bills. In addition, many low-income consumers are renting their homes, creating further barriers to solar installation and the uptake of other energy products and services that affect the household fabric’. (30)

Despite preparations made in terms of education and technological development, these more vulnerable travellers are unable to continue through with the journey due to prohibitive costs or barriers stemming from their socio-economic status. As a result, only those who understand their options, can afford the initial capital and who have capacity as property owners to install these renewable technologies at home may continue on.

8. *The Ordeal*

The ordeal is the climax, during which the hero faces their greatest challenge and vicariously experiences death, for example the death of an ally, the breakdown of a relationship or a betrayal (Campbell, 1949, 2008). The ordeal is the make-or-break point, in which the hero’s survival is uncertain. Survival however gives the hero the right to a reward and a chance to rejoice in their achievements thus far (Buchanan-Oliver & Seo, 2012). This challenge questions whether to continue, however the hero’s ability to overcome this resistance starts the passage into the journey’s final stage (Sanders & Van Krieken, 2018).

Within our dataset, the ordeal is depicted as the risk the consumer faces in engaging in the renewable market and the uncertainty that stems from a market in transition. The Consumer Action Law Centre (2016) describes how the adoption of new and innovative business models creates an inherent burden of risk on consumers, causing increasing uncertainty, in their ‘Power Transformed’ report. The Centre describes the potential for previous market allies or renewable technologies to fail consumers, in spite of their earlier potential:

> ‘As new energy products and services arise, they challenge the efficacy of traditional energy consumer protections which do not always apply to innovative business models. This creates risk for consumers who may not understand what protections apply in the event of a dispute...’ (36)

The AEMC further describes this uncertainty in its 2018-19 annual report, highlighting how efficiency may be reduced if new technologies are adopted due to their mismatch with the existing grid structure:

> ‘But non-synchronous generators like wind and solar have no or low inertia. Systems with lots of non-synchronous generation are weaker and harder to control. They have less time to recover from sudden equipment failures before frequency collapses.’ (18)

As a result, only those consumers willing and able to take on this burden of risk, both in terms of economic cost and energy stability, continue on their journey.

9. *The Reward*

As the hero enters the final stages of their journey, they are first given a reward for their progress thus far. For consumers, this reward is offered in the form of financial compensation and freedom to self-manage their energy use. Stakeholders position these rewards as an outcome of consumer adoption of renewable technologies, with these providing significant cost reductions for not just the individual consumers but the market more broadly. As described by the AEMC in their 2018-19 annual report, the consumer journey offers rewards ‘for their investments in solar, batteries and smart home systems in ways that could reduce costs for everyone through a more efficient grid’ (10). Concurrently, the AEMO provides a visualisation of the consumer reward in its 2018-19 annual report, as seen below:

Rewards are provided via ‘frictionless delivery of energy services’, ‘operational excellence’ and ‘easy access to the grid’. When compared to the current depiction of the energy market as complex, confusing and highly uncertain unreliable, this reward offers consumers an ideal vision for the future energy market operations.

10. *The Road Back*

Whilst rewarded, the hero is still within the unknown world and thus must begin the road back (Campbell, 1949). Here, the hero faces a challenge to ensure they return to the ordinary world having confronted the original stimulus problem or solved the question first posed. Within our dataset, the road back sees the consumer confronting their responsibilities under the new energy future within the realities of the contemporary marketplace.

Caught between the vision of a clean future grid and the current state of the market, consumers are once more reminded of the market transition and their potential status as market agents. Reasserting the paradigm of the 3 D’s, ENA (2020) describes the transition into a decentralised system in their ‘Consumer Engagement’ report, writing of the shift as ‘a system that was once centralised and ‘one-way’ (‘a small number of large things’), is

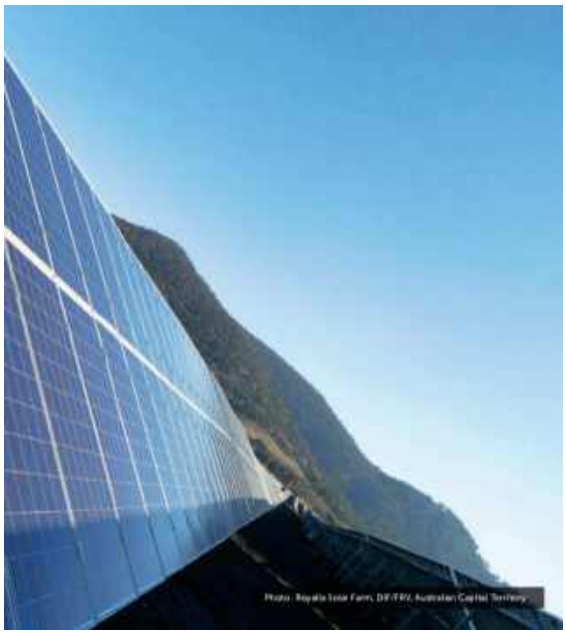
increasingly decentralised and two-way ('a large number of small things')' (6). However, they remind consumers of the difficulties they face in this transition and return to the original metaphor of the old vs. new world. ENA continues to highlight the discrepancy between the existing system and the imagined energy future arguing; 'the future grid will mean connecting record levels of solar and other renewables into areas of the network not originally designed for two-way electricity flows' (1). The representative group further extends this in a May 2020 media release, with CEO Andrew Dillion asserting, 'a 21st century energy system cannot continue to rely on 20th-century technology'.

As a result, whilst stakeholders craft consumers as responsible heroes, these consumers face a delay in the ability to exercise this position given the current state of market transition.

11. The Resurrection

The road back culminates in the resurrection, an event during which the individual must apply their newfound knowledge and capabilities and showcase their abilities as a hero (Campbell, 1949, 2008). Our dataset utilises visual imagery to display this resurrection, which displays the Australian landscape as an ideal environment in which renewable energy technologies can thrive, despite the previously outlined concern over the reliability of renewable technologies. As seen below, the CER celebrates renewable technologies, specifically wind and solar power, under blue skies and sunshine to emphasise the complementary climate of Australia to these innovations. With the landscape appearing endless, the potential contribution of renewables in Australia's energy future also appears limitless. The Federal Department of Energy and Environment further presents the integration of renewable technologies within Australia's energy grid, incorporating an aerial image of solar panels atop suburban homes in a May 2020 media release. Once more under

blue skies and with bright sunshine, solar appears appear as wholly assimilated within the energy grid, lending both credibility and stability to the imagined renewable future.



Images from Clean Energy Regulator, Annual Report 2017-18.

Image from Department of Energy and Environment media release, May 2020.

12. The Return

The return sees the hero cross back over the threshold, exiting their unknown world as a transformed individual (Fowler & Droms, 2010). In this final sequence, the hero brings back with them an imagined 'elixir', which serves to assist in improving their ordinary world and may constitute the knowledge, awareness and insight gained from their passage (Campbell, 1949, 2008). The CER presents consumers in this state of return through reporting the year-on-year increase in the adoption of renewable energy systems in 2018 and 2019 media releases. Featuring two distinct infographics, the media releases highlight an energy system under continuous development from consumer's journey. In the 2018 infographic, Australians are encouraged by the notion they have installed a 'record two million solar PV systems', with 20% of homes now utilising rooftop solar. Featuring rates of installation per state and territory, the infographic also describes the different rates of progress achieved in each and develops a competitive spirit between these regions. In the 2019 infographic, consumers are shown to have utilised their education to extend outside of solar power and

into wind and hydro power. Despite rates of adoption not having dramatically increased year-on-year, consumers are still cast as heroic leaders in trialling these newer innovations.

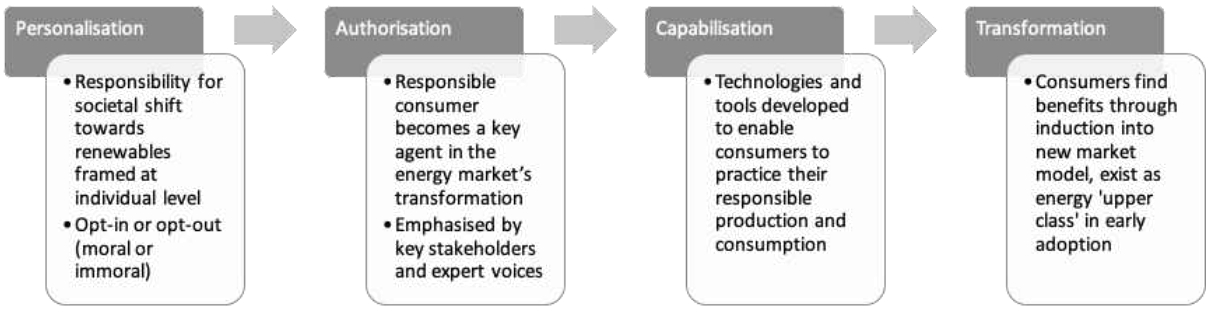
Clean Energy Regulator (2018).

Clean Energy Regulator (2019).

PACT Routine

Our findings indicate the hero's journey as the narrative template through which consumers are cast in their role as responsible consumers. Following this journey, consumers are then initiated through a process of responsibilisation, as described in the PACT routine proposed by Giesler and Veresiu (2014). In the same way as the protagonist in the hero's journey, consumers confront a problem before entering a process of discovery that requires them to solve this issue. By the routine's end, consumers can choose to alter their own attitudes and beliefs and their behaviours to address this problem (Luchs et al., 2015). This PACT routine has been adapted into this specific Australian energy context in Figure 2.

Figure 3. PACT Routine.



Personalisation

As previously defined, the first phase of personalisation sees responsibility shifted from the systemic level to that of individual decision-making, with the solutions for large-scale social, political, environmental, or financial problems repositioned onto consumers (Luchs et al., 2015; Shamir, 2008). Policymakers, regulators and commercial bodies seek to establish the responsible consumer as the central problem-solving agent, developing a scenario where the choices of these individual consumers are deemed essential to avoid negative, and often irreversible, consequences (Giesler & Veresiu, 2014). Within our dataset, the fallout from the global environmental crisis looms large, with frequent alarmism

highlighting the extent to which 'the cost of unaddressed climate change is projected to rise significantly over time' (133), as described by a UK Office of Gas and Electricity Market (2019) report. To address this, policymakers and market participants describe a market made up of small-scale energy users, each of whom contributes to total output and emissions through their choices to purchase household appliances, switch off lights, or install of solar panels. The Council of Australian Governments (2015) describes this personal responsibility within the policy aims of the National Energy Productivity Plan 2015-2030:

> 'Australia's total energy use is the sum of many choices of energy users, large and small. It's made up of millions of decisions to switch equipment on and off, purchase buildings, vehicles, appliances and equipment, and select individual energy products and services.' (14)

Individual consumers thus become central agents for change in the energy transition.

Furthermore, our dataset finds personalisation occurring at the level of advocacy, where consumers are deemed responsible for shifting the marketplace into a more sustainable future. This process of personalisation sees consumers already invested in the 'fight against climate change' and willing to take on an active role in avoiding further environmental damage. Market participants frequently reference a consumer-driven transformation where individuals are demanding environmentally sustainable technologies and products ahead of policy changes and market introductions. This is recognised by the Council of Australian Governments (2015) in the National Energy Productivity Plan 2015-2030, with consumers heard to be 'changing the ways they use energy and the services they choose, and are becoming the driving force in the market' (6). The AEMC 2018-19 annual report describes an advanced consumer segment that is 'interested in renewable energy and want to help fight climate change' (14). ENA (2020) further describes how 'consumers have clearly stated a desire to participate in the co-design of any new energy future' (43) in their report, 'Open Energy Networks Project: Energy Networks'. As a result, consumers are deemed responsible

for pressuring government, policymakers and industry bodies to pursue a sustainable transition through demand signalling and other forms of market activism.

Authorisation

Following this redefinition of the problem at the level of the consumer, responsibility must undergo a process of authorisation. This legitimises the new problem definition through use of expert voices from fields such as science and economics presenting their knowledge on the problem and recommendations for how individuals can solve it (Giesler & Veresiu, 2014). Within our dataset, authorisation also stems from a recognition that Australia's economic future is heavily reliant on the energy industry and thus a transition into the two-sided, renewable market, in which green consumers are a key participant, is essential for future growth and development.

The use of expert voice appears frequently throughout media releases, with various industry and non-industry voices given a platform to legitimise the energy transition and assist in the positioning of consumers within this future. Discussion revolves around how consumers will be both empowered and rewarded by their participation. The Australian Energy Market Operator uses the credibility of its CEO and Managing Director Audrey Ziberlman to promote the benefits of a two-sided market in a April 2020 media release;

> 'A two-sided market will fundamentally change the way energy is traded to benefit consumers. As the energy system transitions, we have the opportunity to harness technology and establish a new market framework which empowers and rewards all energy system users, from small customers to large generators...'

Additionally, positive reinforcement is evident through the inclusion of success stories, tales of both international and domestic industry participants who have successfully taken on their given responsibility. Case studies effectively authorise consumer involvement in the energy grid, lifting such involvement out of mere policy and enabling its effectiveness in real

time. As seen in the below extract, the CER engages in case studies throughout its annual report and additional progress reports titled ‘A word from the industry’, whereby it highlights industry success stories and innovative new developments that are enabling individual participation to occur effectively. EnergyAustralia, one of Australia’s major energy providers, is described as successfully implementing a ‘demand response trial’ that has emerged under Australia’s emergent ‘new, modern energy system’. Managing Director Catherine Tanna describes how the approach ‘puts customers in control’ and gives those taking part an economic reward via reduced costs.

This is furthered in the inclusion of case studies from international markets, particularly from UK-based stakeholders including the Office of Gas and Electricity Markets in their State of the Market report, which present the UK as having achieved ‘significant reductions in greenhouse gas emissions’ (7) through a shift into renewable technology and

greater consumer participation in the marketplace. These exemplar models legitimise the position of individual consumers as central agents for change in the energy transition.

Capabilisation

In the third stage of capabilisation, new markets created to turn this solution into a tangible reality, providing tools for managing and monitoring individual's habits and behaviours (Giesler & Veresiu, 2014). Through the development of new technological capabilities and policy programs, consumers can take on their new responsibilities with greater ease. These tools and programs are central in our dataset, with focus specifically given to Energy Made Easy – the Australian Competition and Consumer Commission & Australian Energy Regulator's price comparative website – as well as the development of new technologies such as smart meters, solar PVs and battery storage to help consumers understand their consumption at an individual level. The Australian Energy Market Commission describes this potential in its 2018-19 annual report. Increased participation proposes both economic freedom and practical, logistical benefits for able consumers:

> 'Personalised portals, energy management systems and other digital platforms will give customers a way to buy, sell and use energy where, how and when they want it. Smart technologies mean households and businesses can take advantage of demand response – and that means the power system can avoid the cost of more spending on poles and wires to service new peaks in electricity demand for only a few hours a year.' (22)

These digital tools provide a key mechanism for both education and empowerment, providing consumers a way to adapt their behaviours for their personal economic benefit and to address problems within the energy grid itself. The AEMC promotes the use of smart meters to 'help get the most out of new technologies like rooftop solar, storage and energy efficient appliances' (65) in its 2018-19 annual report. Additionally, these tools enable

consumer education through giving ‘information about energy consumed by smart appliances – making it easier for consumers to move their use to off-peak times if they choose’ (65).

At a federal level, The Energy Made Easy webpage is positioned as a central tool for consumer engagement in energy consumption, helping to ‘equip consumers with information and confidence to engage in a challenging and transforming market environment’ (163) in the 2018-19 annual report of the Australian Competition and Consumer Commission and Australian Energy Regulator. At a state level, policy such as Victoria’s Default Market Offer enables easy price comparison, empowering consumers to understand and educate themselves on the energy market and their rights and responsibilities within it. Council of Australian Government’s describes this process in its report on the Health of the Electricity Market:

> ‘To identify the best deal available consumers can now more easily compare energy plans with the implementation of a Default Market Offer and the Victorian Default Offer on 1 July 2019. As well as reducing standing offer prices, these schemes provide a common benchmark price against which all prices are compared.’ (16)

In combination, these new technologies and tools for education and price comparison enable consumers to take on their responsibilities in the new market structure.

Transformation

The final phase of transformation promotes the individual consumer as an independent, rational agent. As identified by Luchs et al. (2015, p. 1460), transformed consumers will be conscientious of the fact that their behaviour affects others, believing themselves ‘morally enlightened’, and will thus engage in behaviours that match these values. The enlightened individual may be encouraged to build relationships with others in their network and act as an exemplary model of a pro-active and market-leading consumer. In our dataset, the transformation process occurs via a modelling of Australia’s energy future in which the responsible consumer is considered a fundamental economic actor, working

alongside other morally enlightened market participants for the benefit of all. ENA clearly defines this role in their May 2020 report, 'Open Energy Networks Project: Energy Networks'. In the below infographic, 'Figure 7. How DER can operate in Australia', a potential future for responsible consumers is depicted. Consumers move from self-consumers to prosumers, where they become market providers and exist within a system of peer-to-peer trading. This transition exemplifies the idealised neoliberal market structure defined by Shamir (2008), where the 'greatest possible amount of control in the hands of those closest to the problems' under the guise of self-determination (7).

However, given the market's existing tensions, the responsible consumer of the present faces a complex environment and finds themselves caught between opposing standpoints. At opposite ends of the spectrum, the green consumer faces a choice between taking up the role of a prosumer, empowering themselves with new technologies and becoming an active participant in the demand-driven energy market, or continuing to operate

under the traditional market, which is rife with cultural inertia and practical barriers. Additionally, the green consumer finds themselves caught between two potential futures; a communal market in which all market actors work towards equality – socially, environmentally, and politically. In this non-competitive landscape, issues of vulnerability, affordability and security are openly shared and addressed with market participants working towards a positive and collaborative landscape for all actors. In opposition to this, however, the green consumer faces an unequal market whereby market participants are weakened by pre-existing vulnerabilities, including socio-economic status, gender, living situation, cultural background, and geographical location. In this era of conscious capitalism (Eckhardt & Dobscha, 2019), the green consumer becomes the key means of resolving these tensions through the exercise of their market power. If these types of behaviours are adopted, these consumers ensure Australia's economic future and continue its historic competitive advantage within the resource sector. As described in the National Energy Productivity Plan 2015-2030 (COAG Energy Council, 2015), transformed consumers contribute not just at an individual and communal level, but also to Australia's international standing:

> 'By increasing our energy productivity we strengthen our economy and help safeguard our environment. Businesses reduce their energy costs through innovation and modernising their infrastructure – improving their output and making them more competitive. Household consumers benefit through lower energy bills and increased home comfort. At the same time, Australia reduces its carbon footprint and contributes to the global challenge of mitigating climate change. It's a win, win, win for Australia.' (6)

The Responsible Consumer in Australia's Energy Future

From the hero's journey via the PACT routine, a responsible consumer is created. This leads into an additional finding from our dataset, which sees the constructed responsible green consumer caught within four narrative prospects, pictured in Figure 4. Based on Gerimas' (1966) theory of the semiotic square (Chandler & Munday, 2011), we develop a

semiotic square for the Australian energy market where contradictory realities sit at opposing standpoints, creating a dynamic system of competing voices and potential options for the responsible consumer to pursue. Accordingly, S1 and S2 and ~S1 and ~S2, sit in opposition to one another, whilst S1 and ~S1 and S2 and ~S2 complement one another (Corso, 2014). Further, S1 and ~S2 and S2 and ~S1 contradict one another, with the existence of one diminishing the potential existence of the other (Corso, 2014). In our dataset, we find two oppositional relationships – S1 vs. S2, and ~S1 and ~S2:

S1: Empowered consumers in two-sided energy market.

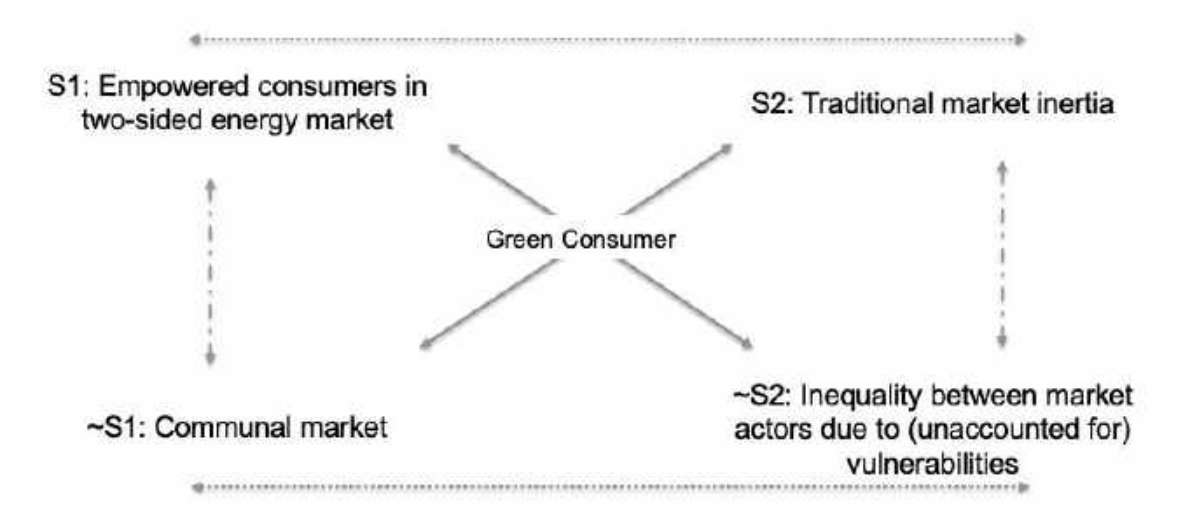
S2: Traditional market inertia.

~S1: Communal market (all market actors equal, including environment).

~S2: Inequality between market actors due to (unaccounted for) vulnerabilities.

We will demonstrate these complementary and contradictory relationships with evidence in the following sections.

Figure 4. Semiotic Square



S1: Empowered consumers in two-sided energy market.

Our findings emphasise a focus on developing a two-sided energy market, within which individuals play a newly developed role as not just consumers but as producers, i.e. prosumers (Jacobs, 2017). The AEMC builds this future scenario of demand-side participation, depicting a market 'where all types of energy users actively buy and sell electricity' in a April 2020 media release.

'Prosumers' utilise the benefits of new renewable technologies, such as solar photovoltaics, and are encouraged to generate and sell their own electricity to neighbours, creating small systems of microgrids in both urban and regional areas and triggering further decentralisation. ANZEWON (2016) clearly envisage this type of market in the evolution of the consumer into an active market leader in their 'External Dispute Resolution' report:

> 'As industry changes, the role of the consumer is also evolving. Participating in the energy market increasingly means taking a more active role in choosing among products and services and understanding, monitoring and managing consumption. Many consumers are transforming into so- called 'prosumers' – consuming energy, but also producing and selling it. The availability of home battery storage and... development of new trading mechanisms may soon open up ... avenues for trade, allowing producer-consumers to sell the energy ... not only back to the grid, but also to... tenants and neighbours.' (9)

Empowered by increased education and digitalisation, the green consumer transforms into an active participant in the energy grid, able to choose when and how they take part in the marketplace. The Council of Australian Governments recognises the newfound options available to consumers and the economic freedom this provides in an April 2020 media release. The Council finds for those consumers willing and able to engage in renewable technologies and their benefits, they find themselves with significant rewards in choice, flexibility, and financial returns:

> ‘A two-sided market will change all that because consumers and those who participate in the wholesale market on their behalf will be active in responding to price. When prices are high, they can conserve their own use and supply electricity to the market and when prices are low, they can increase their use.’

Additionally, this market is modelled off the growth of peer-to-peer trading in recent years, as described by the ANZEWON (2016). In their ‘External Dispute Resolution’ report, they depict an energy market similar to ‘sharing economy platforms such as ride-sharing and accommodation services’ (3), for example Uber and Airbnb. These participative schemes enable increasing levels of involvement, with consumers functioning in both passive and active roles. The hypothetical two-sided energy market thus enables those consumers who are willing and able to actively engage in the energy grid, to become a central agent for change.

S2: Traditional market inertia.

However, the two-sided energy market remains in adolescence. Whilst depicted as the ideal market system of the future and towards which Australia is progressing, it continues to be halted by the cultural and practical barriers existing within the traditional market. This market inertia stems from three main factors; concern over the security and reliability of the two-way system; out-dated regulation and continuing political conflict; and mistrust in the market. Additionally, various stakeholders point to a status quo that appears unwilling to transition into this new future. Together, these factors create a high degree of uncertainty on the extent to which the new renewable market is achievable.

First, our dataset shows significant concern over the security and reliability of renewable technologies. The voices of representative groups, ombudsman and state regulators are particularly dominant in articulating this doubt, often arguing against a rapid transition into renewables before sufficient regulation has been developed and before a nationally consistent approach to climate change is established. As a state regulator, the Economic Regulation

Authority of Western Australia highlights the potential inefficiencies and even failures of adding new renewable technologies into the system in their 2019 Annual Report, claiming, 'These technologies can create network stability problems for network operators and system operators to ensure a secure and reliable power system' (40). The anxieties around new technologies appear to stem from their perceived infancy and lack of testing for market viability, although this concern potentially conceals a larger fear the future of industry if renewables penetration continues at higher and higher rates. This fear is evident in ECA's (2020) commentary on the market's cultural barriers in their 'Power Shift' report:

> 'Foremost was the role of culture. The Brattle Group found a system marked by inertia. They heard about an industry resistant to change, with a 'can't do' mentality. That culture is acting as a hard brake on innovation.' (43)

Second, alongside this technological uncertainty, political ambiguity and regulatory inefficiencies appear as a major source of tension amongst industry bodies, with multiple references made to these as practical barriers to an efficient energy evolution. As a representative group, Australian Petroleum Production and Exploration Association describe a marketplace marred by uncertainty in their 2017-18 annual report, 'Unfortunately, the political situation offered a more mixed picture for our industry' (5). They further highlight how 'existing regulatory duplication, inefficiency and uncertainty are the major deterrents to investment' (8). Additionally, they argue that uncertainties around the Federal Government's climate policy has created 'the hotchpotch of programs regulating greenhouse gas emissions in various jurisdictions across Australia' (20). This uncertainty extends beyond representative groups, with the consumer organisation St Vincent de Paul Society claiming, 'The status quo of policy uncertainty, lack of coordination and unreformed markets is increasing costs, undermining investment and worsening reliability risks' in a 2017 media release. With this operating environment as the backdrop, the current market appears increasingly flawed.

Third, stakeholders describe a lack of trust as halting the potential success of a renewable market. Both international and domestic stakeholders report market mistrust as a significant contributing factor towards consumer disengagement in the markets of essential services. According to the UK's Office of Gas and Electricity Markets 2019 consumer survey, levels of trust continue to decline, amongst both engaged consumers and those that are unengaged. This is due primarily to policy failings and retailer misconduct, causing consumer confidence to fall. This is expanded by Victoria's state regulator, the Essential Services Commission, in their 2018-19 annual report, arguing the market is impeded since, 'people are more sceptical about the effectiveness of some markets for essential services' (8), including those for energy, as well as telecommunications and water. The Consumer Action Law Centre (2016) argues in its 'Power Transformed' report that 'consumers don't trust, and are not engaged in, the energy market' and tend to avoid participation in the marketplace due to perceptions it's 'too confusing, too much 'hassle' or not genuine as all products all seem the same' (10). This ultimately 'creates an inertia within the energy market which is hard to overcome' (10).

In combination, these factors create an inherently flawed market, without sufficient policy direction or regulatory frameworks and facing the threat of technological innovation and a rapid decline in consumer trust. Whilst it appears industry leaders have taken important steps to recognising the need for improvements and increased collaboration, evident in the 2019 Joint Statement signed by seven key National Energy Market stakeholders; the EUAA, St Vincent de Paul Society, Energy Networks Australia, Energy Efficiency Council, Clean Energy Council, AI Group and Australian Energy Council, there remain a variety of practical and cultural barriers actively against the establishment of a two-sided energy market, and indeed the presence of a green consumer.

~S1: Communal market (all market actors equal, including environment).

In contrast to this complex depiction of the current state of the Australian energy market, our findings also highlight an ideal future within which all market actors are considered equal, including the environment. Within this non-competitive landscape, energy providers, government, consumers, and other industry participants appear to work together for the common good and without the bickering and blaming witnessed in S2. The Independent Competition and Regulatory Commission of the Australian Capital Territory notes this balanced approach in their 2018-19 annual report, seeking to 'promote effective competition in the interests of consumers while facilitating an appropriate balance between efficiency, environmental and social considerations' (4). Across stakeholders, key phrasing incorporates 'collaboration' and 'co-designing', emphasising the design of a collective movement for change where all voices are heard without motive for self-interest. The consumer organisation, Consumer Action Law Centre (2016), propose this communal market structure in their 'Power Transformed' report, arguing that, 'Addressing the challenge will require a concerted whole-of-market response at the structural, regulatory and product level' (5).

Stakeholder engagement is argued as critical under this scenario, with representation provided via open workshops, surveys, reference groups, and other similar collaborative tools. The Australian Pipelines and Gas Association, a representative group, extends this as far as creating a hashtag - #BetterTogether – designed as a collective ethos where the aim is to develop common understanding and aspirations. As reported in a 2020 media release:

> 'The workshops were co-designed with customers and chaired by an independent facilitator to promote active, customer-led discussion. The focus of subsequent workshops will be working with customers to develop solutions in response to the needs identified. The #Better Together ethos is ideal for this type of exercise where the main requirement is listening to and learning from stakeholders to create a common understanding of what their needs are before trying to develop ways to address those needs.'

This collective orientation also incorporates environmental concerns, with technological innovation used to avoid irreversible damage to wildlife. The Australian Government's Clean

Energy Regulator, Renewable Energy Target, provides insight in their July 2019 progress report into a Tasmanian wind farm which is negatively affecting Tasmanian Wedge-Tailed Eagles, an endangered species. In their case study extract, 'A word from industry', the renewable energy company Goldwind Australia's Managing Director, John Titchen, discusses 'the importance of balancing the need for clean, renewable energy while protecting Tasmania's unique wildlife' (13). With the aim of a 'successful coexistence of avian wildlife and wind energy', aerial monitoring and detection technology ensures renewables do not come at the cost of native wildlife. The communal market thus finds all market participants striving to create a system that benefits all. Additionally, with responsibility actively shared across participants, the responsibilities of central consumer figure are reduced.

~S2: Inequality between market actors due to (unaccounted for) vulnerabilities.

However, this idyllic depiction is opposed by an inherently inequitable market where systemic failures leave vulnerable consumers of the present and future generations powerless. Vulnerable consumers include those who are culturally and linguistically diverse (CALD), the elderly, renters and those living in social housing, facing physical, intellectual and/or mental health issues, lone people, single parents, those experiencing family and/or domestic violence and/or economic abuse, and those living in regional areas. With one or more of these, consumers become vulnerable to issues of affordability and disconnections, technological inaccessibility, retailer misconduct, and other factors that serve to create an 'energy divide'. Unsurprisingly, our dataset finds consumer organisations the most likely to highlight the potential hardships vulnerable consumers face in the energy market and the emergence of this 'energy divide'. ECA (2020) describe this divide as 'a divide that leaves some people behind without the energy they need while others are able to access and benefit from technology and services that make their energy more affordable' (11) in their report

‘Power Shift’. For the St Vincent de Paul Society (2019), this energy divide creates a risk that ‘may further split the community into an energy underclass and an energy upper-class, as transmission and distribution network costs are reallocated to benefit one group at the expense of another’ (5) in a discussion paper. St Vincent de Paul Society further stresses this issue in a 2018 media release, signed by 35 additional consumer and advocacy groups:

> ‘The burden of rising energy costs falls mostly on low-income households, and this problem is compounded by the poor energy performance of most low-income housing. Unless there is a nationally coordinated plan that is inclusive and equitable, households already struggling will be left behind and further disadvantaged.’

As a result, despite the development of modern technologies, educational programs and increased collaboration between stakeholders, there are still critical groups of consumers left out of the energy market, both in terms of genuine recognition in policy and ability for active participation. The market thus becomes divided ‘between who can take advantage of opportunities to reduce their energy costs and those who cannot’, according to a Queensland Council of Social Services media release.

STUDY 2: QUANTITATIVE TEXT ANALYSIS

Methodology

We supplemented the qualitative discourse analysis with quantitative automated text analysis (Humphreys, Wang, Fischer, & Price, 2018) in Study 2. We sought to validate our qualitative findings as well as understand representations across stakeholders and determine the correlation between market position and narrative focus.

To corroborate our qualitative findings, researchers utilised both the existing and custom dictionary options of LIWC (Pennebaker et al., 2015). A popular tool for textual analysis, LIWC has been successfully used across consumer research and psychological sciences. The program analyses text by counting the frequencies of words represented in over 70 different psychologically relevant categories, including linguistic processes, psychological processes, personal concerns and spoken categories. By scanning a text against its internal dictionary, LIWC produces the percentage of words from the text belonging to each of the categories. Alongside these internal dictionaries, users can construct custom dictionaries to analyse specific categories, relevant to their individual dataset.

We ran our dataset through LIWC utilising the internal dictionaries of LIWC2001, LIWC2007 and LIWC2015. From these dictionaries, we deduced the most relevant categories, considering their use in prior research as representative constructs. Furthermore, we analysed the dataset using categories adapted from the custom dictionaries of 'Sustainability' developed by Humphreys (2014) and 'Forest' developed by Xu and Bengston (1997). Where necessary, these categories were adapted in line with our Australian context.

We utilised the findings of Pietraszkiewicz et al. (2019) to assess our constructs of 'empowerment' and 'communal market'. Based on their judgment, we determined the use of LIWC2015 categories *Family* (e.g. daughter, husband, aunt), *Friends* (e.g. buddy, friend, neighbour), *Social* (e.g. hug, honey, pa) and *Affiliation* (e.g. share, relation, social) as

representative of our ‘communal market’ construct. Further, we sought the work of Tausczik and Pennebaker (2010) to include the category of first-person plural pronouns *We* (e.g. we, us, our), given its use in promoting group collaboration and interdependence.

Additionally, we used the findings of Pietraszkiewicz et al. (2019) to develop a variable for ‘empowerment’. As described in their study, agency can be represented in the LIWC2015 categories of *Cause* (e.g. create, make, effect), *Achievement* (e.g. earn, hero, win), *Reward* (e.g. approach, confident, earn), *Insight* (e.g. think, know, consider), *Power* (e.g. up, over, best) and *Work* (e.g. job, majors, team). We thus sought to create our construct of ‘empowerment’ through analysing these categories together.

To assess our construct of ‘inequality’ we used LIWC2007 category of *Exclusive* (e.g. but, without, exclude) alongside the third-person singular pronoun *Shehe* (e.g. she, her, him) and plural pronoun *They* (e.g. they, their, they’d). This was developed from the work of Tausczik and Pennebaker (2010) who see exclusive words frequently used to make distinctions between what is and what is not in a group or category. Additionally, whilst previous literature tends to focus on the use of first- and second-person pronouns to assess social hierarchies, these studies tend to focus on individual’s self-narratives, for example those contained in personal letters (Kacewicz, Pennebaker, Davis, Jeon, & Graesser, 2014). In contrast however, our data is sourced from grey literature, which places more emphasis on structured and formal content and tends to avoid this type of pronoun usage due to its public nature. Given this, we found these categories of *Exclusive*, *Shehe* and *They* most logical in distinguishing the ‘Us vs. Them’ dynamic apparent between unequal consumer groups.

To assess our construct of ‘market inertia’, we utilised the LIWC2007 category of *Inhibition* (e.g. block, constrain, stop), which has previously been used to represent reduced cooperation between group members (Rand, Kraft-Todd, & Gruber, 2015).

Finally, to assess the existence of our fictional responsible consumer, we analysed the custom Sustainability dictionaries of *Protect* (e.g. defend, guard, protect), *Individual* (e.g. consumer, voter, purchaser) and *Humans* (e.g. human, humanity, person) (Humphreys, 2014). These custom dictionaries helped to develop a construct representative of the responsible 'citizen-consumer' (Coskuner-Balli, 2020). From here, we sought to use the *Life-support* (e.g. climate change, environmentally sustainable, solar energy) category derived from the custom 'Forest' dictionary developed by Xu and Bengston (1997) to develop this responsible consumer as distinct to energy and sustainability. Ultimately, this construct extended the existing LIWC analysis to incorporate a central theme within our dataset.

To test the extent to which these dictionaries were related and could be aggregated together, we conducted a Pearson's correlation matrix, reported in **Table 2**.

Table 2. LIWC Validation for Construct Categories

Pearson's Correlation to Determine LIWC Construct Validity

(N = 196)

S1 – Empowerment

		1	2	3	4	5	6
1.	Insight	1	.298**	0.66	-0.127	.152*	.221*
2.	Cause	.298**	1	.242**	.013	.116	.122
3.	Achieve	.066	.242**	1	.238**	.589**	.427**
4.	Power	-.127	.013	.238**	1	.336**	.192**
5.	Reward	.152*	.116	.589**	.336**	1	.184**
6.	Work	.221**	.122	.427**	.192**	.184**	1

**. Correlation is significant at the 0.01 level (2-tailed).
*. Correlation is significant at the 0.05 level (2-tailed).

~S1 – Communal Market

		1	2	3	4	5
1.	Social	1	.304**	.364**	.712**	.514**
2.	Family	.304**	1	.007	.132	.058
3.	Friend	.364**	.007	1	.349**	.204**
4.	Affiliation	.712**	.132	.349**	1	.716**
5.	We	.514**	.058	.204**	.716**	1

**. Correlation is significant at the 0.01 level (2-tailed).
*. Correlation is significant at the 0.05 level (2-tailed).

~S2 – Inequality

		1	2	3
1.	Exclusive	1	.274**	0.281**
2.	Shehe	.274**	1	.141*
3.	They	.281**	.141*	1

**. Correlation is significant at the 0.01 level (2-tailed).
*. Correlation is significant at the 0.05 level (2-tailed).

Responsible Citizen Consumer *('**respconsumer**')*

		1	2	3
1.	Protect	1	.346**	.205**
2.	Individual	.346**	.1	.045
3.	Humans	.205**	.045	1

**. Correlation is significant at the 0.01 level (2-tailed).
*. Correlation is significant at the 0.05 level (2-tailed).

Responsible Energy Consumer

		1	2
1.	Respconsumer	1	.190**
2.	Life Support	.190**	1

**. Correlation is significant at the 0.01 level (2-tailed).
*. Correlation is significant at the 0.05 level (2-tailed).

Findings

We first conducted a Pearson's correlation to assess the relationships between *empowerment* and *market inertia* (S1 and S2, respectively) and *communal market* and *inequality* (~S1 and ~S2, respectively). Our findings showed a positive correlation between *empowerment* and *market inertia* ($r = .226$, $p < .01$) and *communal market* and *inequality* ($r = .293$, $p < .01$). We also conducted a Pearson's correlation to assess the relationships between *empowerment* and *communal market* (S1 and ~S1, respectively) and *market inertia* and *inequality* (S2 and ~S2, respectively). We found a positive correlation only between *empowerment* and *communal market* ($r = .211$, $p < .01$).

We then conducted a regression to test the extent to which S1 and S2, and ~S1 and ~S2 contributed to the presence of the responsible energy consumer at the centre of our Figure 4. Under the regression model, the dependent variable is defined as the construct *energy consumer*. The independent variables are the narratives described in the semiotic square – *empowerment, inertia, communal market* and *inequality*.

In the first step, empowerment, inertia, communal market and inequality were entered, and they predicted 20.6% of the variance in the responsible energy consumer. The ANOVA test ($F(4) = 13.680$, $p < .05$) showed significant prediction of the dependent variable by the independent variables. The model found empowerment ($\beta = .20$, $t = 3.018$, $p < .05$), inertia ($\beta = .221$, $t = 3.334$, $p < .05$) and inequality ($\beta = .289$, $t = 4.298$, $p < .05$) to be significant predictors. Communal market was not a significant predictor ($t = .450$, $p = .653$).

To test for differences between stakeholders and narrative focus, we analysed empowerment, inertia, communal market, and inequality with a one-way MANOVA with stakeholder type as the between-subject factor. The results revealed an effect of stakeholder type on the variables ($\lambda = .82$, $F_{(8, 380)} = 4.86$, $p < .001$). Between subjects, our results find that communal market (F (2, 193) = 6.54, $p < .01$) and inequality (F (2, 193) = 13.86, $p <$

.001) differ for stakeholder type. Post hoc tests using the Bonferroni correction revealed inequality to have significant differences between consumer and government (mean diff. = .24, *SE* = .06, $p < .001$) and consumer and industry (mean diff. = .36, *SE* = .07, $p < .001$). Additionally, communal market was revealed to have a significant difference between consumer and government (mean diff. = .51, *SE* = .15, $p < .01$).

Summary

In Study 1, we used qualitative discourse analysis to understand the systemic narratives existing within our dataset. Our findings corroborate Giesler and Veresiu's (2014) findings on consumer responsibilisation as a systemic process, whereby consumers become responsible for broad social issues through a routine of personalisation, authorisation, capabilisation, and transformation (PACT). However, we extend this and find that for consumers to engage in this PACT routine, they are first positioned as heroes within the narratives of meso-level stakeholders. By constructing consumers as protagonists undertaking a hero's journey, consumers become the central problem-solving agents necessary for the completion of the PACT routine. Finally, our findings reveal a complicated reality for this responsible consumer, as they exist in a marketplace rife with tensions. Their existence is important to strike a balance between the contrasting narratives within the semiotic square.

In Study 2, we used automated text analysis using LIWC to validate our findings of the responsible consumer and the semiotic square, as well as differences between stakeholder type and narrative focus. In our Pearson's correlation, we found a significant positive correlation between empowerment and market inertia; and communal market and inequality, respectively. In our regression analysis, we found a significant prediction between the responsible consumer and the narratives of empowerment, inertia and inequality. We further conducted a one-way MANOVA to test differences between stakeholder types and narrative

focus. We found significant differences between consumer and government and consumer and industry for inequality, and consumer and government for communal market.

These findings will subsequently be discussed for their relationship to previous literature and their theoretical implications outlined. Additionally, their practical implications will be recognised and discussed, seeking to understand how the tensions within the semiotic square can be resolved through the achievement of either the empowering of vulnerable consumers and the development of a communal market to remove existing market inertia.

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Appendix

1.1 Data Sources

Source	Type
Government agencies and departments	
Australian Competition and Consumer Commission	– ACCC & AER Annual Report 2018-19 – Restoring Electricity Affordability & Australia's Competitive Advantage, Final Report June 2018 – 3x media releases
Clean Energy Regulator	– Annual Report, 2017-18 – 5x media releases, 2018-20
Clean Energy Regulatory – Renewable Energy Target	– The Renewable Energy Target 2018 Administrative Report, July 2019 – Progress in 2017: Delivering Australia's 2020 Renewable Energy Target, May 2018 – Tracking Towards 2020: Encouraging renewable energy in Australia, March 2017
REC registry*	Inaccessible – must provide log-in details
COAG Energy Council	– National Energy Productivity Plan 2015-2030 – National Energy Productivity Plan Annual Report 2018 – The Health of the National Electricity Market 2019 - Volume 1: The ESB Health of the NEM Report - Volume 2: Major Reports 2019, AEMC, AEMO and AER – 3x media releases, 2020
Department of Environment and Energy	– Department of the Environment and Energy Annual Report 2018-19 – Department of Industry, Innovation and Science Annual Report 2018-19 – Achieving Low Energy Existing Commercial Buildings in Australia Final Report, October 2019 – 4x media releases, 2020

National Competition Council	– Annual Report 2018-19
Productivity Commission	– Annual Report 2018-19 – Shifting the Dial: 5 Year Productivity Review, August 2017 – Digital Disruption: What do governments need to do? Research Paper, June 2016 – 3x media releases, 2015-20
Energy institutions	
Australian Energy Market Operator	– Annual Report 2019 – 3x news articles, 2020
Australian Energy Market Commission	– Annual Report 2018-19 – 3x media releases, 2020
State regulators	
Essential Services Commission of Victoria	– Annual Report 2018-19 – Victorian Energy Market Report 2018-19 – 3x media releases, 2020
Essential Services Commission of South Australia	– Annual Report 2018-19
Independent Competition and Regulatory Commission of ACT	– Annual Report 2018-19
Independent Pricing and Regulatory Tribunal of NSW	– Solar Feed-In Tariffs 2020/21 Final Report, April 2020 – Performance and Competitiveness of the NSW Retail Gas Market 2018/19 Final Report, November 2019 – Performance and Competitiveness of the NSW Retail Electricity Market 2018-19, November 2019 – 3x media releases, 2016-20
Economic Regulation Authority of WA	– Annual Report 2018-19 – 3x media statements, 2017-20
Queensland Competition Authority	– Annual Report 2018-19
Office of the Tasmanian Economic Regulatory	– Annual Report 2018-19 – Energy in Tasmania Report, 2018-19 – 3x media releases, 2019-20
Utilities Commission of the Northern Territory	– Annual Report 2018-19
Ombudsman	
ACT Civil and Administrative Tribunal	– Annual Review 2018-19
NSW Energy and Water Ombudsman	– EWON Annual Report 2018-19 – Queen Margaret University: EWON NSW Independent Five Year Review 2019 Report, October 2019 – KPMG: EWON Expanded Jurisfiction Final Report, May 2018 – Rising Inequality in the Energy Market: Safeguarding Consumer Protection Report, September 2016 – Australia and NZ Energy and Water Ombudsman Network reports (coalition of ombudsman, collected via EWON) - University of Sydney: What will energy consumers expect of an energy and water ombudsman scheme in 2020, 2025, and 2030? October 2019 - External Dispute Resolution (EDR) Access Report, June 2016 – 4x media releases, 2017-20
NT Ombudsman	– Annual Report 2018-19 - Part 1 - Part 2
Queensland Energy and Water Ombudsman	– Annual Report 2018-19 – 3x media releases, 2018-19
South Australian Energy and Water Ombudsman	– Annual Report 2018-19 – 3x media releases, 2018-20
Tasmanian Energy Ombudsman	– Annual Report 2017-18
Energy and Water Ombudsman Victoria	– Annual Report 2019 – Affordability Report July-December 2019, March 2020

Western Australia Energy and Water Ombudsman	– Annual Report 2018-19 – 3x media releases, 2018-19
Commonwealth Ombudsman	– Annual Report 2018/19
Representative groups	
Australian Energy Council	– Solar Report: First Quarter 2020 – Acil Allen Consulting: Wholesale Electricity Costs Victorian Default Offer 2020 Report, October 2019 – KPMG: Coordinating Electricity Market Reform Report, October 2019 – 3x media releases, 2020
Australian Gas Association	– 3x news flashes, 2020
Australian Petroleum Production and Exploration Association	– Annual Report, 2017-18 – 4x media releases, 2020
Australian Pipelines and Gas Association	– 2x media releases, 2020 – 3x news briefs, 2020
Energy Networks Australia	– Open Energy Networks Project: Energy Networks, Report May 2020 – Consumer Engagement Report, April 2020 – 4x media releases, 2020
Energy Users Association of Australia	– EUAA National Gas Discussion Paper, April 2019 – EUAA Key Policy Position, May 2017 – 4x media releases, 2019-20
Consumer organisations	
Consumer Action Law Centre	– Issues Paper 2; Consumer Protections in an Evolving Market: Traditional Sale of Energy – 2020 Retail Energy Competition Review, February 2020 – Energy Assistance Report, July 2019 – Power Transformed Report, July 2016 – Fix It! How to fix the energy market rule making process to improve competition and consumer outcomes. Report, November 2015 – Heat or Eat Report, August 2015 – 3x media releases, 2019-20
COTA Australia	– COTA Energy Survey 2014, February 2015 – 2x media releases, 2018
Energy Consumers Australia	– Power Shift Final Report, March 2020 – Future Energy Vision Consumer Expectations Research, 2019 - Small-Medium Business Findings - Household Findings – 3x media releases. 2019-20
Ethnic Communities Council Australia	– Annual Report 2019 – Experiences of Energy Consumption for CALD Communities, Research Report, April 2016 – 1x Energy Advocacy News, 2015
National Retail Association	– 2x media releases, 2015-19
Public Interest Advocacy Centre	– Annual Report 2018-19 – PIAC Evaluation of Consumer Engagement by NSW DNSPs, 2017-18, August 2018 – Close to the Edge – a Qualitative and Quantitative Study, November 2018 – 5x media releases, 2019-20
Queensland Council of Social Services	– Annual Report 2018-19 – Shifting Power Report, November 2018 – Community Energy in Queensland Report, August 2018 – 3x media releases, 2018-20
St Vincent de Paul Society	– Alviss Consulting: NEM Report – no ‘guarantee’ for consumers, November 2018 – Alviss Consulting: NEM Report – The Umpire Strikes Back Report, December 2019

	– Alviss Consulting: Additional Fees and Charges Before & After July 2019, December 2019 – Options for an equitable distributed energy resource future – a discussion paper, September 2019 – 2x media releases, 2017-20
Tasmanian Council of Social Services	– Annual Report 2017-18 – 2x media releases, 2019-20
UnitingCare Australia	– Issues Paper – Review of Governance Arrangements for Australian Energy Markets, May 2015 – 2x media releases, 2015
International	
Council of European Energy Regulators	– Annual Report 2019 – 4x media releases, 2019-20
Ministry of Business, Innovation and Employment – New Zealand	– Energy in New Zealand Annual Report 2019 – Electricity Price Review, May 2019 – 4x media releases, 2019-20
New Zealand Commerce Commission	– Annual Report 2019 – 2x media releases, 2019
Ofgem – United Kingdom	– 2019 Consumer Survey, February 2020 – Annual Report and Accounts. 2018-19, July 2019 – State of the Energy Market Report 2019 – 2x media releases, 2020
US Department of Energy	– Annual Energy Outlook 2020, January 2020 – International Energy Outlook 2020, September 2019
US Federal Energy Regulatory Commission	– Annual Report 2019