# Text Cleaning: An Introduction with R

Social Science Data Analytics Workshop

Caleb Lucas (@calebjlucas)
July 22, 2020

Michigan State University

· A sentence (or two) about me

- · A sentence (or two) about me
- Goals for today:

- · A sentence (or two) about me
- · Goals for today:
  - Understand why text cleaning matters

- · A sentence (or two) about me
- · Goals for today:
  - Understand why text cleaning matters
  - · Clean messy text using R

- · A sentence (or two) about me
- · Goals for today:
  - Understand why text cleaning matters
  - · Clean messy text using R
  - Process/prepare text for analysis using R

- · A sentence (or two) about me
- · Goals for today:
  - Understand why text cleaning matters
  - · Clean messy text using R
  - · Process/prepare text for analysis using R
  - Plan to attend the workshop tomorrow (same time, same place) that covers the next step- text analysis!

\_\_\_\_

Text Analysis- what is it?

 Text analysis uses computers and statistics to extract information (patterns, entities, topics, etc) from text

- Text analysis uses computers and statistics to extract information (patterns, entities, topics, etc) from text
- We typically use text to make inferences about some latent variable

- Text analysis uses computers and statistics to extract information (patterns, entities, topics, etc) from text
- We typically use text to make inferences about some latent variable
  - Observe transcripts, news articles, social media posts, etc.

- Text analysis uses computers and statistics to extract information (patterns, entities, topics, etc) from text
- We typically use text to make inferences about some latent variable
  - Observe transcripts, news articles, social media posts, etc.
  - Make inferences about things we can't directly observe like ideology

- Text analysis uses computers and statistics to extract information (patterns, entities, topics, etc) from text
- We typically use text to make inferences about some latent variable
  - Observe transcripts, news articles, social media posts, etc.
  - Make inferences about things we can't directly observe like ideology
- Or to categorize texts into different classes

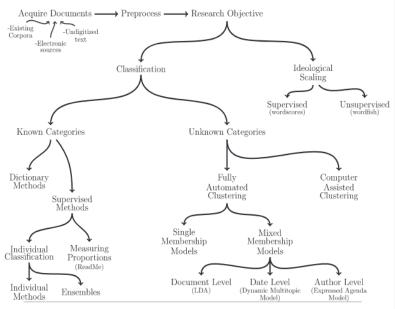


Fig. 1 An overview of text as data methods.

Countless applications:

- Countless applications:
  - Scale the ideology of politicians

- Countless applications:
  - Scale the ideology of politicians
  - Measure relationships between rebel groups using speech about each other

- Countless applications:
  - Scale the ideology of politicians
  - Measure relationships between rebel groups using speech about each other
  - Assist psychological assessments of patients using open-ended questions

- Countless applications:
  - Scale the ideology of politicians
  - Measure relationships between rebel groups using speech about each other
  - Assist psychological assessments of patients using open-ended questions
- Focus of published text models is on what readers want - the question, the math, the results, etc

- Countless applications:
  - · Scale the ideology of politicians
  - Measure relationships between rebel groups using speech about each other
  - Assist psychological assessments of patients using open-ended questions
- Focus of published text models is on what readers want - the question, the math, the results, etc
  - Text cleaning is rarely discussed in detail in published papers

- Countless applications:
  - Scale the ideology of politicians
  - Measure relationships between rebel groups using speech about each other
  - Assist psychological assessments of patients using open-ended questions
- Focus of published text models is on what readers want - the question, the math, the results, etc
  - Text cleaning is rarely discussed in detail in published papers
  - · ... but it can affect results/findings and is hard!

Tons of textual data sources

- Tons of textual data sources
  - Open-ended survey responses

- Tons of textual data sources
  - Open-ended survey responses
  - News articles

- Tons of textual data sources
  - Open-ended survey responses
  - News articles
  - Historical legal documents

- Tons of textual data sources
  - Open-ended survey responses
  - News articles
  - Historical legal documents
  - Social media posts

- Tons of textual data sources
  - Open-ended survey responses
  - News articles
  - Historical legal documents
  - Social media posts
  - · ... many more

- Tons of textual data sources
  - Open-ended survey responses
  - News articles
  - Historical legal documents
  - Social media posts
  - · ... many more
- Text data is not typically formatted nicely for us in nature

- Tons of textual data sources
  - Open-ended survey responses
  - News articles
  - Historical legal documents
  - Social media posts
  - · ... many more
- Text data is not typically formatted nicely for us in nature
  - Dirty documents OCR'ed

- Tons of textual data sources
  - Open-ended survey responses
  - News articles
  - Historical legal documents
  - Social media posts
  - · ... many more
- Text data is not typically formatted nicely for us in nature
  - Dirty documents OCR'ed
  - Messy scraped web pages

- Tons of textual data sources
  - Open-ended survey responses
  - News articles
  - Historical legal documents
  - Social media posts
  - · ... many more
- Text data is not typically formatted nicely for us in nature
  - Dirty documents OCR'ed
  - Messy scraped web pages
  - Poorly formatted web input forms

- Tons of textual data sources
  - Open-ended survey responses
  - News articles
  - Historical legal documents
  - Social media posts
  - · ... many more
- Text data is not typically formatted nicely for us in nature
  - Dirty documents OCR'ed
  - Messy scraped web pages
  - Poorly formatted web input forms
  - · Tweets with emojis, urls, etc.

- Tons of textual data sources
  - Open-ended survey responses
  - News articles
  - Historical legal documents
  - Social media posts
  - · ... many more
- Text data is not typically formatted nicely for us in nature
  - Dirty documents OCR'ed
  - Messy scraped web pages
  - · Poorly formatted web input forms
  - · Tweets with emojis, urls, etc.
  - → Need to clean and prepare for statistical modeling

# Text Cleaning

# Text Cleaning

 Goal: use substantive knowledge to strip text of unhelpful features

- Goal: use substantive knowledge to strip text of unhelpful features
  - Help computer know "msu" and "MSU!" are the same

- Goal: use substantive knowledge to strip text of unhelpful features
  - Help computer know "msu" and "MSU!" are the same
    - $msu = \u006d\u0073\u0075$

- Goal: use substantive knowledge to strip text of unhelpful features
  - · Help computer know "msu" and "MSU!" are the same
    - $msu = \u006d\u0073\u0075$
    - MSU! = u004du0053u0055u0021

- Goal: use substantive knowledge to strip text of unhelpful features
  - · Help computer know "msu" and "MSU!" are the same
    - $msu = \frac{u006d}{u0073}\frac{u0075}{u0075}$
    - MSU! = \u004d\u0053\u0055\u0021
  - Reduce the corpus to meaningful words

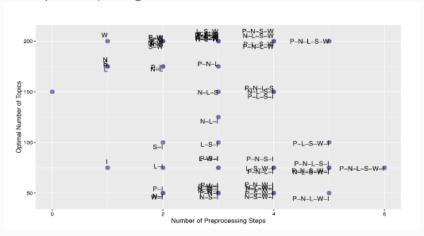
- Goal: use substantive knowledge to strip text of unhelpful features
  - · Help computer know "msu" and "MSU!" are the same
    - $msu = \frac{u006d u0073 u0075}$
    - MSU! = \u004d\u0053\u0055\u0021
  - Reduce the corpus to meaningful words
- Target: punctuation, numbers, lowercasing, reducing words, stopwords, n-grams, infrequent terms

- Goal: use substantive knowledge to strip text of unhelpful features
  - · Help computer know "msu" and "MSU!" are the same
    - $msu = \u006d\u0073\u0075$
    - MSU! = \u004d\u0053\u0055\u0021
  - · Reduce the corpus to meaningful words
- Target: punctuation, numbers, lowercasing, reducing words, stopwords, n-grams, infrequent terms
- How we go about this can have down-stream effects

- Goal: use substantive knowledge to strip text of unhelpful features
  - · Help computer know "msu" and "MSU!" are the same
    - $msu = \frac{u006d u0073 u0075}$
    - MSU! = \u004d\u0053\u0055\u0021
  - Reduce the corpus to meaningful words
- Target: punctuation, numbers, lowercasing, reducing words, stopwords, n-grams, infrequent terms
- How we go about this can have down-stream effects
  - Different cleaning procedures = different results

- Goal: use substantive knowledge to strip text of unhelpful features
  - · Help computer know "msu" and "MSU!" are the same
    - $msu = \frac{u006d u0073 u0075}$
    - MSU! = \u004d\u0053\u0055\u0021
  - Reduce the corpus to meaningful words
- Target: punctuation, numbers, lowercasing, reducing words, stopwords, n-grams, infrequent terms
- How we go about this can have down-stream effects
  - Different cleaning procedures = different results
  - 7 binary preprocessing steps = 128 possible models

#### Denny and Spirling (2018)



1. Fix representational issues

- 1. Fix representational issues
  - Expand contractions, expand abbreviations, make lowercase, etc.

- 1. Fix representational issues
  - Expand contractions, expand abbreviations, make lowercase, etc.
- 2. Keep meaningful words

- 1. Fix representational issues
  - Expand contractions, expand abbreviations, make lowercase, etc.
- 2. Keep meaningful words
  - · Remove common words ('stopwords') like the

- 1. Fix representational issues
  - Expand contractions, expand abbreviations, make lowercase, etc.
- 2. Keep meaningful words
  - · Remove common words ('stopwords') like the
- 3. Remove 'dirty' characters/text

- 1. Fix representational issues
  - Expand contractions, expand abbreviations, make lowercase, etc.
- 2. Keep meaningful words
  - · Remove common words ('stopwords') like the
- 3. Remove 'dirty' characters/text
  - · Correct spelling, remove numbers, etc.

- 1. Fix representational issues
  - Expand contractions, expand abbreviations, make lowercase, etc.
- 2. Keep meaningful words
  - · Remove common words ('stopwords') like the
- 3. Remove 'dirty' characters/text
  - · Correct spelling, remove numbers, etc.
- 4. Analysis-specific steps

- 1. Fix representational issues
  - Expand contractions, expand abbreviations, make lowercase, etc.
- 2. Keep meaningful words
  - · Remove common words ('stopwords') like the
- 3. Remove 'dirty' characters/text
  - · Correct spelling, remove numbers, etc.
- 4. Analysis-specific steps
  - · Normalize synonyms, remove parentheticals, etc.

- 1. Fix representational issues
  - Expand contractions, expand abbreviations, make lowercase, etc.
- 2. Keep meaningful words
  - · Remove common words ('stopwords') like the
- 3. Remove 'dirty' characters/text
  - · Correct spelling, remove numbers, etc.
- 4. Analysis-specific steps
  - · Normalize synonyms, remove parentheticals, etc.
  - Researchers typically 'fall into' these steps as they analyze - leads to important point...

Cleaning is not a series of steps

- · Cleaning is not a series of steps
  - · Clean your corpus

- · Cleaning is not a series of steps
  - Clean your corpus
  - Should be a continual process

- Cleaning is not a series of steps
  - · Clean your corpus
  - Should be a continual process
  - · Clean, inspect, clean, inspect, analyze, clean, ...

- Cleaning is not a series of steps
  - · Clean your corpus
  - Should be a continual process
  - · Clean, inspect, clean, inspect, analyze, clean, ...
  - Text is messier than most other forms of data, takes more time/effort to prepare

- Cleaning is not a series of steps
  - · Clean your corpus
  - Should be a continual process
  - · Clean, inspect, clean, inspect, analyze, clean, ...
  - Text is messier than most other forms of data, takes more time/effort to prepare
  - Take time to read the text (yes!) before/during/after

- Cleaning is not a series of steps
  - · Clean your corpus
  - Should be a continual process
  - · Clean, inspect, clean, inspect, analyze, clean, ...
  - Text is messier than most other forms of data, takes more time/effort to prepare
  - Take time to read the text (yes!) before/during/after
- Most researchers 'do the steps' and then proceed to their analysis

- Cleaning is not a series of steps
  - · Clean your corpus
  - Should be a continual process
  - · Clean, inspect, clean, inspect, analyze, clean, ...
  - Text is messier than most other forms of data, takes more time/effort to prepare
  - Take time to read the text (yes!) before/during/after
- Most researchers 'do the steps' and then proceed to their analysis
- Crucial to always be in cleaning mode

- Cleaning is not a series of steps
  - · Clean your corpus
  - Should be a continual process
  - · Clean, inspect, clean, inspect, analyze, clean, ...
  - Text is messier than most other forms of data, takes more time/effort to prepare
  - Take time to read the text (yes!) before/during/after
- Most researchers 'do the steps' and then proceed to their analysis
- · Crucial to always be in cleaning mode
  - More confidence you have the 'right' data

- Cleaning is not a series of steps
  - · Clean your corpus
  - · Should be a continual process
  - · Clean, inspect, clean, inspect, analyze, clean, ...
  - Text is messier than most other forms of data, takes more time/effort to prepare
  - · Take time to read the text (yes!) before/during/after
- Most researchers 'do the steps' and then proceed to their analysis
- · Crucial to always be in cleaning mode
  - · More confidence you have the 'right' data
  - Limits chance of weird data/results, which is easy to spot with text data

1. So... I JUST GOT ACCEPTED TO MICHIGAN STATE 

©

- 1. So... I JUST GOT ACCEPTED TO MICHIGAN STATE 

  ©
  - so i just got accepted to msu

- 1. So... I JUST GOT ACCEPTED TO MICHIGAN STATE 😊 😊
  - so i just got accepted to msu
- 2. Check out this study by MSU profs- bitly.com/123

- 1. So... I JUST GOT ACCEPTED TO MICHIGAN STATE ❸ ☺
  - so i just got accepted to msu
- 2. Check out this study by MSU profs- bitly.com/123
  - check out this study by msu profs [professors]

- 1. So... I JUST GOT ACCEPTED TO MICHIGAN STATE  $\odot$   $\odot$ 
  - · so i just got accepted to msu
- 2. Check out this study by MSU profs- bitly.com/123
  - check out this study by msu profs [professors]
- 3. The plans by Mich. State U. profs for a cheap ventilator are GREAT y'all

- 1. So... I JUST GOT ACCEPTED TO MICHIGAN STATE 

  ©
  - · so i just got accepted to msu
- 2. Check out this study by MSU profs- bitly.com/123
  - check out this study by msu profs [professors]
- 3. The plans by Mich. State U. profs for a cheap ventilator are GREAT y'all
  - the plans by msu profs [professors] for a cheap ventilator are great yall [you all]

# Text Processing

# **Text Processing**

Ok, you cleaned the text up... now what?

Stemming is a form of word reduction

- · Stemming is a form of word reduction
- · Generally chops off inflections 'ing,' 'ed,' 'es,' etc.

- Stemming is a form of word reduction
- · Generally chops off inflections 'ing,' 'ed,' 'es,' etc.
  - learns, learning, learned → learn

- · Stemming is a form of word reduction
- · Generally chops off inflections 'ing,' 'ed,' 'es,' etc.
  - learns, learning, learned → learn
  - boy's, boys → boy

- Stemming is a form of word reduction
- · Generally chops off inflections 'ing,' 'ed,' 'es,' etc.
  - learns, learning, learned → learn
  - boy's, boys → boy
  - ties → ti

- Stemming is a form of word reduction
- · Generally chops off inflections 'ing,' 'ed,' 'es,' etc.
  - learns, learning, learned → learn
  - boy's, boys → boy
  - ties → ti
  - easily → easili

- Stemming is a form of word reduction
- · Generally chops off inflections 'ing,' 'ed,' 'es,' etc.
  - learns, learning, learned → learn
  - boy's, boys → boy
  - ties → ti
  - easily → easili
- This reduces the corpus' dimensions

- Stemming is a form of word reduction
- · Generally chops off inflections 'ing,' 'ed,' 'es,' etc.
  - learns, learning, learned → learn
  - boy's, boys → boy
  - ties → ti
  - · easily → easili
- This reduces the corpus' dimensions
- Acknowledges "run" and "runs" are different versions of the same word

· Lemmatization returns a word's 'dictionary' form

- · Lemmatization returns a word's 'dictionary' form
  - This is called a 'lemma'

- · Lemmatization returns a word's 'dictionary' form
  - This is called a 'lemma'
- Not just word reduction

- · Lemmatization returns a word's 'dictionary' form
  - · This is called a 'lemma'
- Not just word reduction
  - saw → see

- Lemmatization returns a word's 'dictionary' form
  - This is called a 'lemma'
- Not just word reduction
  - saw → see
  - geese → goose

- Lemmatization returns a word's 'dictionary' form
  - · This is called a 'lemma'
- Not just word reduction
  - saw → see
  - geese → goose
  - easily → easy

- · Lemmatization returns a word's 'dictionary' form
  - · This is called a 'lemma'
- Not just word reduction
  - saw → see
  - geese → goose
  - easily → easy
- This also reduces the corpus' dimensions

- · Lemmatization returns a word's 'dictionary' form
  - · This is called a 'lemma'
- Not just word reduction
  - saw → see
  - geese → goose
  - easily → easy
- This also reduces the corpus' dimensions
- More computationally expensive

- · Lemmatization returns a word's 'dictionary' form
  - · This is called a 'lemma'
- Not just word reduction
  - saw → see
  - geese → goose
  - easily → easy
- This also reduces the corpus' dimensions
- More computationally expensive
- Not available in every language

#### **Data Format**

- We typically format text data as a document term matrix
  - · Rows = documents, columns = terms
- Terms are typically single words, but can be other things that we tokenize the text into
  - · Tokens are just units of the text used in the analysis
  - We can tokenize text into sentences, paragraphs, n-grams (collections of words or sentences), etc.

	Token <sub>1</sub>	Token <sub>2</sub>	 Token <sub>n</sub>
$Doc_1$	0	0	0
$Doc_2$	5	0	3
•••			
Caleb Lucas (@calebjlucas) n	1	0	0

Cleaning text is a messy process with many steps

- 1. Use your knowledge to clean your corpus
- 2. Assess the effect of other choices on your model

- · Cleaning text is a messy process with many steps
- There is not a predetermined set of steps

- 1. Use your knowledge to clean your corpus
- 2. Assess the effect of other choices on your model

- · Cleaning text is a messy process with many steps
- There is not a predetermined set of steps
- · Somewhat different than other types of data

- 1. Use your knowledge to clean your corpus
- 2. Assess the effect of other choices on your model

- · Cleaning text is a messy process with many steps
- There is not a predetermined set of steps
- Somewhat different than other types of data
  - · A great deal of ad hoc decisions

- 1. Use your knowledge to clean your corpus
- 2. Assess the effect of other choices on your model

- · Cleaning text is a messy process with many steps
- There is not a predetermined set of steps
- · Somewhat different than other types of data
  - A great deal of ad hoc decisions
  - Not obvious object type conversions, etc.
- 1. Use your knowledge to clean your corpus
- 2. Assess the effect of other choices on your model

# R sesh!

#### R sesh!

https://github.com/caleblucas/text\_
cleaning