Algorithm Chains and Pipelines

For many machine learning algorithms, the particular representation of the data that you provide is very important, as we discussed in Chapter 4. This starts with scaling the data and combining features by hand and goes all the way to learning features using unsupervised machine learning, as we saw in Chapter 3. Consequently, most machine learning applications require not only the application of a single algorithm, but the chaining together of many different processing steps and machine learning models. In this chapter, we will cover how to use the Pipeline class to simplify the process of building chains of transformations and models. In particular, we will see how we can combine Pipeline and GridSearchCV to search over parameters for all processing steps at once.

As an example of the importance of chaining models, we noticed that we can greatly improve the performance of a kernel SVM on the cancer dataset by using the Min MaxScaler for preprocessing. Here's code for splitting the data, computing the minimum and maximum, scaling the data, and training the SVM:

In[1]:

In[2]:

```
# rescale the training data
X_train_scaled = scaler.transform(X_train)

svm = SVC()
# learn an SVM on the scaled training data
svm.fit(X_train_scaled, y_train)
# scale the test data and score the scaled data
X_test_scaled = scaler.transform(X_test)
print("Test score: {:.2f}".format(svm.score(X_test_scaled, y_test)))

Out[2]:
Test score: 0.95
```

Parameter Selection with Preprocessing

Now let's say we want to find better parameters for SVC using GridSearchCV, as discussed in Chapter 5. How should we go about doing this? A naive approach might look like this:

In[3]:

Here, we ran the grid search over the parameters of SVC using the scaled data. However, there is a subtle catch in what we just did. When scaling the data, we used *all the data in the training set* to find out how to train it. We then use the *scaled training data* to run our grid search using cross-validation. For each split in the cross-validation, some part of the original training set will be declared the training part of the split, and some the test part of the split. The test part is used to measure what new data will look like to a model trained on the training part. However, we already used the information contained in the test part of the split, when scaling the data. Remember that the test part in each split in the cross-validation is part of the training set, and we used the information from the entire training set to find the right scaling of the data.

This is fundamentally different from how new data looks to the model. If we observe new data (say, in form of our test set), this data will not have been used to scale the training data, and it might have a different minimum and maximum than the training data. The following example (Figure 6-1) shows how the data processing during cross-validation and the final evaluation differ:

In[4]:

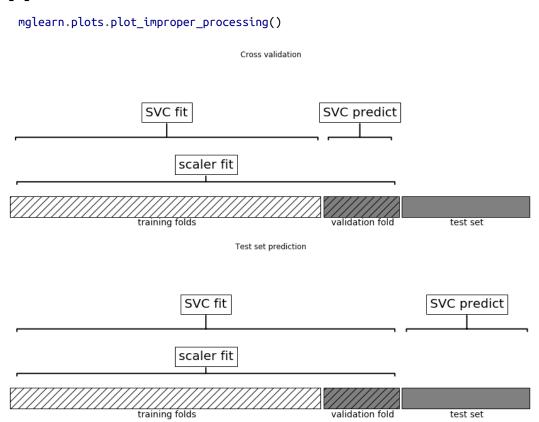


Figure 6-1. Data usage when preprocessing outside the cross-validation loop

So, the splits in the cross-validation no longer correctly mirror how new data will look to the modeling process. We already leaked information from these parts of the data into our modeling process. This will lead to overly optimistic results during cross-validation, and possibly the selection of suboptimal parameters.

To get around this problem, the splitting of the dataset during cross-validation should be done *before doing any preprocessing*. Any process that extracts knowledge from the dataset should only ever be applied to the training portion of the dataset, so any cross-validation should be the "outermost loop" in your processing.

To achieve this in scikit-learn with the cross_val_score function and the Grid SearchCV function, we can use the Pipeline class. The Pipeline class is a class that allows "gluing" together multiple processing steps into a single scikit-learn estima-

tor. The Pipeline class itself has fit, predict, and score methods and behaves just like any other model in scikit-learn. The most common use case of the Pipeline class is in chaining preprocessing steps (like scaling of the data) together with a supervised model like a classifier.

Building Pipelines

Let's look at how we can use the Pipeline class to express the workflow for training an SVM after scaling the data with MinMaxScaler (for now without the grid search). First, we build a pipeline object by providing it with a list of steps. Each step is a tuple containing a name (any string of your choosing¹) and an instance of an estimator:

In[5]:

```
from sklearn.pipeline import Pipeline
pipe = Pipeline([("scaler", MinMaxScaler()), ("svm", SVC())])
```

Here, we created two steps: the first, called "scaler", is an instance of MinMaxScaler, and the second, called "svm", is an instance of SVC. Now, we can fit the pipeline, like any other scikit-learn estimator:

In[6]:

```
pipe.fit(X_train, y_train)
```

Here, pipe.fit first calls fit on the first step (the scaler), then transforms the training data using the scaler, and finally fits the SVM with the scaled data. To evaluate on the test data, we simply call pipe.score:

In[7]:

```
print("Test score: {:.2f}".format(pipe.score(X_test, y_test)))
Out[7]:
    Test score: 0.95
```

Calling the score method on the pipeline first transforms the test data using the scaler, and then calls the score method on the SVM using the scaled test data. As you can see, the result is identical to the one we got from the code at the beginning of the chapter, when doing the transformations by hand. Using the pipeline, we reduced the code needed for our "preprocessing + classification" process. The main benefit of using the pipeline, however, is that we can now use this single estimator in cross_val_score or GridSearchCV.

¹ With one exception: the name can't contain a double underscore, __.

Using Pipelines in Grid Searches

Using a pipeline in a grid search works the same way as using any other estimator. We define a parameter grid to search over, and construct a GridSearchCV from the pipeline and the parameter grid. When specifying the parameter grid, there is a slight change, though. We need to specify for each parameter which step of the pipeline it belongs to. Both parameters that we want to adjust, C and gamma, are parameters of SVC, the second step. We gave this step the name "svm". The syntax to define a parameter grid for a pipeline is to specify for each parameter the step name, followed by ___ (a double underscore), followed by the parameter name. To search over the C parameter of SVC we therefore have to use "svm_C" as the key in the parameter grid dictionary, and similarly for gamma:

In[8]:

```
param_grid = {'svm_C': [0.001, 0.01, 0.1, 1, 10, 100],
              'svm__gamma': [0.001, 0.01, 0.1, 1, 10, 100]}
```

With this parameter grid we can use GridSearchCV as usual:

In[9]:

```
grid = GridSearchCV(pipe, param_grid=param_grid, cv=5)
    grid.fit(X_train, y_train)
    print("Best cross-validation accuracy: {:.2f}".format(grid.best_score_))
    print("Test set score: {:.2f}".format(grid.score(X_test, y_test)))
    print("Best parameters: {}".format(grid.best_params_))
Out[9]:
    Best cross-validation accuracy: 0.98
    Test set score: 0.97
    Best parameters: {'svm_C': 1, 'svm_gamma': 1}
```

In contrast to the grid search we did before, now for each split in the cross-validation, the MinMaxScaler is refit with only the training splits and no information is leaked from the test split into the parameter search. Compare this (Figure 6-2) with Figure 6-1 earlier in this chapter:

In[10]:

```
mglearn.plots.plot_proper_processing()
```

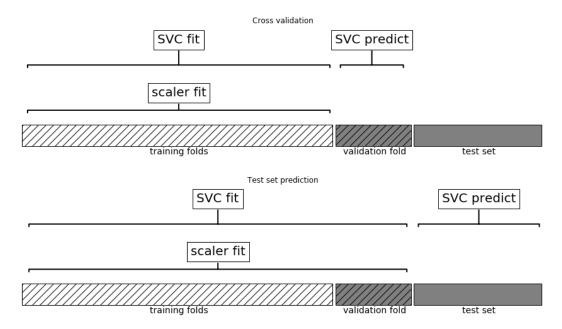


Figure 6-2. Data usage when preprocessing inside the cross-validation loop with a pipeline

The impact of leaking information in the cross-validation varies depending on the nature of the preprocessing step. Estimating the scale of the data using the test fold usually doesn't have a terrible impact, while using the test fold in feature extraction and feature selection can lead to substantial differences in outcomes.

Illustrating Information Leakage

A great example of leaking information in cross-validation is given in Hastie, Tibshirani, and Friedman's book *The Elements of Statistical Learning*, and we reproduce an adapted version here. Let's consider a synthetic regression task with 100 samples and 1,000 features that are sampled independently from a Gaussian distribution. We also sample the response from a Gaussian distribution:

In[11]:

```
rnd = np.random.RandomState(seed=0)
X = rnd.normal(size=(100, 10000))
y = rnd.normal(size=(100,))
```

Given the way we created the dataset, there is no relation between the data, X, and the target, y (they are independent), so it should not be possible to learn anything from this dataset. We will now do the following. First, select the most informative of the 10 features using SelectPercentile feature selection, and then we evaluate a Ridge regressor using cross-validation:

```
In[12]:
   from sklearn.feature_selection import SelectPercentile, f_regression
   select = SelectPercentile(score_func=f_regression, percentile=5).fit(X, y)
   X_selected = select.transform(X)
    print("X_selected.shape: {}".format(X_selected.shape))
Out[12]:
   X_selected.shape: (100, 500)
In[13]:
   from sklearn.model_selection import cross_val_score
   from sklearn.linear_model import Ridge
    print("Cross-validation accuracy (cv only on ridge): {:.2f}".format(
          np.mean(cross_val_score(Ridge(), X_selected, y, cv=5))))
Out[13]:
    Cross-validation accuracy (cv only on ridge): 0.91
```

The mean R^2 computed by cross-validation is 0.91, indicating a very good model. This clearly cannot be right, as our data is entirely random. What happened here is that our feature selection picked out some features among the 10,000 random features that are (by chance) very well correlated with the target. Because we fit the feature selection *outside* of the cross-validation, it could find features that are correlated both on the training and the test folds. The information we leaked from the test folds was very informative, leading to highly unrealistic results. Let's compare this to a proper

In[14]:

cross-validation using a pipeline:

```
pipe = Pipeline([("select", SelectPercentile(score_func=f_regression,
                                             percentile=5)),
                 ("ridge", Ridge())])
print("Cross-validation accuracy (pipeline): {:.2f}".format(
     np.mean(cross_val_score(pipe, X, y, cv=5))))
```

Out[14]:

```
Cross-validation accuracy (pipeline): -0.25
```

This time, we get a negative R^2 score, indicating a very poor model. Using the pipeline, the feature selection is now *inside* the cross-validation loop. This means features can only be selected using the training folds of the data, not the test fold. The feature selection finds features that are correlated with the target on the training set, but because the data is entirely random, these features are not correlated with the target on the test set. In this example, rectifying the data leakage issue in the feature selection makes the difference between concluding that a model works very well and concluding that a model works not at all.

The General Pipeline Interface

The Pipeline class is not restricted to preprocessing and classification, but can in fact join any number of estimators together. For example, you could build a pipeline containing feature extraction, feature selection, scaling, and classification, for a total of four steps. Similarly, the last step could be regression or clustering instead of classification.

The only requirement for estimators in a pipeline is that all but the last step need to have a transform method, so they can produce a new representation of the data that can be used in the next step.

Internally, during the call to Pipeline.fit, the pipeline calls fit and then transform on each step in turn,² with the input given by the output of the transform method of the previous step. For the last step in the pipeline, just fit is called.

Brushing over some finer details, this is implemented as follows. Remember that pipe line.steps is a list of tuples, so pipeline.steps[0][1] is the first estimator, pipe line.steps[1][1] is the second estimator, and so on:

In[15]:

```
def fit(self, X, y):
   X transformed = X
   for name, estimator in self.steps[:-1]:
        # iterate over all but the final step
        # fit and transform the data
       X_transformed = estimator.fit_transform(X_transformed, y)
    # fit the last step
    self.steps[-1][1].fit(X_transformed, y)
    return self
```

When predicting using Pipeline, we similarly transform the data using all but the last step, and then call predict on the last step:

In[16]:

```
def predict(self, X):
   X_{transformed} = X
    for step in self.steps[:-1]:
        # iterate over all but the final step
        # transform the data
        X_transformed = step[1].transform(X_transformed)
    # fit the last step
    return self.steps[-1][1].predict(X_transformed)
```

² Or just fit_transform.

The process is illustrated in Figure 6-3 for two transformers, T1 and T2, and a classifier (called Classifier).

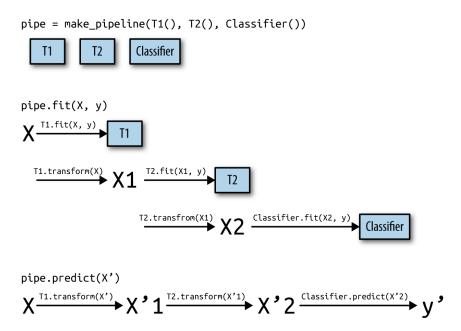


Figure 6-3. Overview of the pipeline training and prediction process

The pipeline is actually even more general than this. There is no requirement for the last step in a pipeline to have a predict function, and we could create a pipeline just containing, for example, a scaler and PCA. Then, because the last step (PCA) has a transform method, we could call transform on the pipeline to get the output of PCA. transform applied to the data that was processed by the previous step. The last step of a pipeline is only required to have a fit method.

Convenient Pipeline Creation with make_pipeline

Creating a pipeline using the syntax described earlier is sometimes a bit cumbersome, and we often don't need user-specified names for each step. There is a convenience function, make_pipeline, that will create a pipeline for us and automatically name each step based on its class. The syntax for make pipeline is as follows:

In[17]:

```
from sklearn.pipeline import make pipeline
# standard syntax
pipe_long = Pipeline([("scaler", MinMaxScaler()), ("svm", SVC(C=100))])
# abbreviated syntax
pipe_short = make_pipeline(MinMaxScaler(), SVC(C=100))
```

The pipeline objects pipe_long and pipe_short do exactly the same thing, but pipe_short has steps that were automatically named. We can see the names of the steps by looking at the steps attribute:

In[18]:

```
print("Pipeline steps:\n{}".format(pipe_short.steps))
Out[18]:
    Pipeline steps:
    [('minmaxscaler', MinMaxScaler(copy=True, feature_range=(0, 1))),
     ('svc', SVC(C=100, cache_size=200, class_weight=None, coef0=0.0,
                 decision function shape=None, degree=3, gamma='auto',
                 kernel='rbf', max_iter=-1, probability=False,
                 random_state=None, shrinking=True, tol=0.001,
                 verbose=False))]
```

The steps are named minmaxscaler and svc. In general, the step names are just lowercase versions of the class names. If multiple steps have the same class, a number is appended:

In[19]:

```
from sklearn.preprocessing import StandardScaler
    from sklearn.decomposition import PCA
    pipe = make_pipeline(StandardScaler(), PCA(n_components=2), StandardScaler())
    print("Pipeline steps:\n{}".format(pipe.steps))
Out[19]:
    Pipeline steps:
    [('standardscaler-1', StandardScaler(copy=True, with_mean=True, with_std=True)),
     ('pca', PCA(copy=True, iterated_power=4, n_components=2, random_state=None,
                 svd_solver='auto', tol=0.0, whiten=False)),
     ('standardscaler-2', StandardScaler(copy=True, with_mean=True, with_std=True))]
```

As you can see, the first StandardScaler step was named standardscaler-1 and the second standardscaler-2. However, in such settings it might be better to use the Pipeline construction with explicit names, to give more semantic names to each step.

Accessing Step Attributes

Often you will want to inspect attributes of one of the steps of the pipeline—say, the coefficients of a linear model or the components extracted by PCA. The easiest way to access the steps in a pipeline is via the named_steps attribute, which is a dictionary from the step names to the estimators:

In[20]:

```
# fit the pipeline defined before to the cancer dataset
    pipe.fit(cancer.data)
    # extract the first two principal components from the "pca" step
    components = pipe.named_steps["pca"].components_
    print("components.shape: {}".format(components.shape))
Out[20]:
    components.shape: (2, 30)
```

Accessing Attributes in a Grid-Searched Pipeline

As we discussed earlier in this chapter, one of the main reasons to use pipelines is for doing grid searches. A common task is to access some of the steps of a pipeline inside a grid search. Let's grid search a LogisticRegression classifier on the cancer dataset, using Pipeline and StandardScaler to scale the data before passing it to the Logisti cRegression classifier. First we create a pipeline using the make_pipeline function:

In[21]:

```
from sklearn.linear_model import LogisticRegression
pipe = make pipeline(StandardScaler(), LogisticRegression())
```

Next, we create a parameter grid. As explained in Chapter 2, the regularization parameter to tune for LogisticRegression is the parameter C. We use a logarithmic grid for this parameter, searching between 0.01 and 100. Because we used the make_pipeline function, the name of the LogisticRegression step in the pipeline is the lowercased class name, logisticregression. To tune the parameter C, we therefore have to specify a parameter grid for logisticregression__C:

In[22]:

```
param_grid = {'logisticregression__C': [0.01, 0.1, 1, 10, 100]}
```

As usual, we split the cancer dataset into training and test sets, and fit a grid search:

In[23]:

```
X_train, X_test, y_train, y_test = train_test_split(
    cancer.data, cancer.target, random_state=4)
grid = GridSearchCV(pipe, param_grid, cv=5)
grid.fit(X_train, y_train)
```

So how do we access the coefficients of the best LogisticRegression model that was found by GridSearchCV? From Chapter 5 we know that the best model found by GridSearchCV, trained on all the training data, is stored in grid.best_estimator_:

In[24]:

```
print("Best estimator:\n{}".format(grid.best_estimator_))
Out[24]:
    Best estimator:
    Pipeline(steps=[
        ('standardscaler', StandardScaler(copy=True, with_mean=True, with_std=True)),
        ('logisticregression', LogisticRegression(C=0.1, class_weight=None,
       dual=False, fit_intercept=True, intercept_scaling=1, max_iter=100,
       multi_class='ovr', n_jobs=1, penalty='l2', random_state=None,
        solver='liblinear', tol=0.0001, verbose=0, warm_start=False))])
```

This best_estimator_ in our case is a pipeline with two steps, standardscaler and logisticregression. To access the logisticregression step, we can use the named steps attribute of the pipeline, as explained earlier:

In[25]:

```
print("Logistic regression step:\n{}".format(
         grid.best_estimator_.named_steps["logisticregression"]))
Out[25]:
    Logistic regression step:
    LogisticRegression(C=0.1, class_weight=None, dual=False, fit_intercept=True,
                      intercept_scaling=1, max_iter=100, multi_class='ovr', n_jobs=1,
                      penalty='l2', random_state=None, solver='liblinear', tol=0.0001,
                      verbose=0, warm start=False)
```

Now that we have the trained LogisticRegression instance, we can access the coefficients (weights) associated with each input feature:

In[26]:

```
print("Logistic regression coefficients:\n{}".format(
         grid.best_estimator_.named_steps["logisticregression"].coef_))
Out[26]:
    Logistic regression coefficients:
    [[-0.389 -0.375 -0.376 -0.396 -0.115 0.017 -0.355 -0.39 -0.058 0.209
      -0.495 -0.004 -0.371 -0.383 -0.045 0.198 0.004 -0.049 0.21
      -0.547 -0.525 -0.499 -0.515 -0.393 -0.123 -0.388 -0.417 -0.325 -0.139]]
```

This might be a somewhat lengthy expression, but often it comes in handy in understanding your models.

Grid-Searching Preprocessing Steps and Model Parameters

Using pipelines, we can encapsulate all the processing steps in our machine learning workflow in a single scikit-learn estimator. Another benefit of doing this is that we can now adjust the parameters of the preprocessing using the outcome of a supervised task like regression or classification. In previous chapters, we used polynomial features on the boston dataset before applying the ridge regressor. Let's model that using a pipeline instead. The pipeline contains three steps—scaling the data, computing polynomial features, and ridge regression:

In[27]:

```
from sklearn.datasets import load_boston
boston = load_boston()
X_train, X_test, y_train, y_test = train_test_split(boston.data, boston.target,
                                                     random_state=0)
from sklearn.preprocessing import PolynomialFeatures
pipe = make_pipeline(
    StandardScaler(),
    PolynomialFeatures(),
    Ridge())
```

How do we know which degrees of polynomials to choose, or whether to choose any polynomials or interactions at all? Ideally we want to select the degree parameter based on the outcome of the classification. Using our pipeline, we can search over the degree parameter together with the parameter alpha of Ridge. To do this, we define a param_grid that contains both, appropriately prefixed by the step names:

In[28]:

```
param_grid = {'polynomialfeatures__degree': [1, 2, 3],
              'ridge__alpha': [0.001, 0.01, 0.1, 1, 10, 100]}
```

Now we can run our grid search again:

In[29]:

```
grid = GridSearchCV(pipe, param_grid=param_grid, cv=5, n_jobs=-1)
grid.fit(X_train, y_train)
```

We can visualize the outcome of the cross-validation using a heat map (Figure 6-4), as we did in Chapter 5:

In[30]:

```
plt.matshow(grid.cv_results_['mean_test_score'].reshape(3, -1),
           vmin=0, cmap="viridis")
plt.xlabel("ridge__alpha")
plt.ylabel("polynomialfeatures__degree")
```

```
plt.xticks(range(len(param_grid['ridge__alpha'])), param_grid['ridge__alpha'])
plt.yticks(range(len(param_grid['polynomialfeatures__degree'])),
             param_grid['polynomialfeatures__degree'])
plt.colorbar()
                      0.001
                               0.01
                                       0.1
                                                        10
                                                                100
                                                                           0.7
                polynomialfeatures_degree
                                                                           0.6
                                                                           0.5
                                                                           0.3
                                                                           0.2
                                                                           0.1
                                        ridge_alpha
```

Figure 6-4. Heat map of mean cross-validation score as a function of the degree of the polynomial features and alpha parameter of Ridge

Looking at the results produced by the cross-validation, we can see that using polynomials of degree two helps, but that degree-three polynomials are much worse than either degree one or two. This is reflected in the best parameters that were found:

```
In[31]:
    print("Best parameters: {}".format(grid.best_params_))
Out[31]:
    Best parameters: {'polynomialfeatures__degree': 2, 'ridge__alpha': 10}
Which lead to the following score:
In[32]:
    print("Test-set score: {:.2f}".format(grid.score(X_test, y_test)))
Out[32]:
    Test-set score: 0.77
Let's run a grid search without polynomial features for comparison:
In[33]:
    param_grid = {'ridge__alpha': [0.001, 0.01, 0.1, 1, 10, 100]}
    pipe = make_pipeline(StandardScaler(), Ridge())
    grid = GridSearchCV(pipe, param_grid, cv=5)
    grid.fit(X_train, y_train)
    print("Score without poly features: {:.2f}".format(grid.score(X_test, y_test)))
```

Out[33]:

```
Score without poly features: 0.63
```

As we would expect looking at the grid search results visualized in Figure 6-4, using no polynomial features leads to decidedly worse results.

Searching over preprocessing parameters together with model parameters is a very powerful strategy. However, keep in mind that GridSearchCV tries all possible combinations of the specified parameters. Therefore, adding more parameters to your grid exponentially increases the number of models that need to be built.

Grid-Searching Which Model To Use

You can even go further in combining GridSearchCV and Pipeline: it is also possible to search over the actual steps being performed in the pipeline (say whether to use StandardScaler or MinMaxScaler). This leads to an even bigger search space and should be considered carefully. Trying all possible solutions is usually not a viable machine learning strategy. However, here is an example comparing a RandomForest Classifier and an SVC on the iris dataset. We know that the SVC might need the data to be scaled, so we also search over whether to use StandardScaler or no preprocessing. For the RandomForestClassifier, we know that no preprocessing is necessary. We start by defining the pipeline. Here, we explicitly name the steps. We want two steps, one for the preprocessing and then a classifier. We can instantiate this using SVC and StandardScaler:

In[34]:

```
pipe = Pipeline([('preprocessing', StandardScaler()), ('classifier', SVC())])
```

Now we can define the parameter_grid to search over. We want the classifier to be either RandomForestClassifier or SVC. Because they have different parameters to tune, and need different preprocessing, we can make use of the list of search grids we discussed in "Search over spaces that are not grids" on page 271. To assign an estimator to a step, we use the name of the step as the parameter name. When we wanted to skip a step in the pipeline (for example, because we don't need preprocessing for the RandomForest), we can set that step to None:

In[35]:

```
from sklearn.ensemble import RandomForestClassifier
param_grid = [
    {'classifier': [SVC()], 'preprocessing': [StandardScaler(), None],
     'classifier__gamma': [0.001, 0.01, 0.1, 1, 10, 100],
     'classifier__C': [0.001, 0.01, 0.1, 1, 10, 100]},
    {'classifier': [RandomForestClassifier(n_estimators=100)],
     'preprocessing': [None], 'classifier__max_features': [1, 2, 3]}]
```

Now we can instantiate and run the grid search as usual, here on the cancer dataset:

In[36]:

```
X_train, X_test, y_train, y_test = train_test_split(
        cancer.data, cancer.target, random_state=0)
    grid = GridSearchCV(pipe, param_grid, cv=5)
    grid.fit(X_train, y_train)
    print("Best params:\n{}\n".format(grid.best_params_))
    print("Best cross-validation score: {:.2f}".format(grid.best_score_))
    print("Test-set score: {:.2f}".format(grid.score(X_test, y_test)))
Out[36]:
    Best params:
    {'classifier':
     SVC(C=10, cache size=200, class weight=None, coef0=0.0,
         decision_function_shape=None, degree=3, gamma=0.01, kernel='rbf',
         max_iter=-1, probability=False, random_state=None, shrinking=True,
         tol=0.001, verbose=False),
     'preprocessing':
     StandardScaler(copy=True, with_mean=True, with_std=True),
     'classifier__C': 10, 'classifier__gamma': 0.01}
    Best cross-validation score: 0.99
    Test-set score: 0.98
```

The outcome of the grid search is that SVC with StandardScaler preprocessing, C=10, and gamma=0.01 gave the best result.

Summary and Outlook

In this chapter we introduced the Pipeline class, a general-purpose tool to chain together multiple processing steps in a machine learning workflow. Real-world applications of machine learning rarely involve an isolated use of a model, and instead are a sequence of processing steps. Using pipelines allows us to encapsulate multiple steps into a single Python object that adheres to the familiar scikit-learn interface of fit, predict, and transform. In particular when doing model evaluation using cross-validation and parameter selection using grid search, using the Pipeline class to capture all the processing steps is essential for proper evaluation. The Pipeline class also allows writing more succinct code, and reduces the likelihood of mistakes that can happen when building processing chains without the pipeline class (like forgetting to apply all transformers on the test set, or not applying them in the right order). Choosing the right combination of feature extraction, preprocessing, and models is somewhat of an art, and often requires some trial and error. However, using pipelines, this "trying out" of many different processing steps is quite simple. When

experimenting, be careful not to overcomplicate your processes, and make sure to evaluate whether every component you are including in your model is necessary.

With this chapter, we have completed our survey of general-purpose tools and algorithms provided by scikit-learn. You now possess all the required skills and know the necessary mechanisms to apply machine learning in practice. In the next chapter, we will dive in more detail into one particular type of data that is commonly seen in practice, and that requires some special expertise to handle correctly: text data.

Working with Text Data

In Chapter 4, we talked about two kinds of features that can represent properties of the data: continuous features that describe a quantity, and categorical features that are items from a fixed list. There is a third kind of feature that can be found in many applications, which is text. For example, if we want to classify an email message as either a legitimate email or spam, the content of the email will certainly contain important information for this classification task. Or maybe we want to learn about the opinion of a politician on the topic of immigration. Here, that individual's speeches or tweets might provide useful information. In customer service, we often want to find out if a message is a complaint or an inquiry. We can use the subject line and content of a message to automatically determine the customer's intent, which allows us to send the message to the appropriate department, or even send a fully automatic reply.

Text data is usually represented as strings, made up of characters. In any of the examples just given, the length of the text data will vary. This feature is clearly very different from the numeric features that we've discussed so far, and we will need to process the data before we can apply our machine learning algorithms to it.

Types of Data Represented as Strings

Before we dive into the processing steps that go into representing text data for machine learning, we want to briefly discuss different kinds of text data that you might encounter. Text is usually just a string in your dataset, but not all string features should be treated as text. A string feature can sometimes represent categorical variables, as we discussed in Chapter 5. There is no way to know how to treat a string feature before looking at the data.

There are four kinds of string data you might see:

- Categorical data
- Free strings that can be semantically mapped to categories
- Structured string data
- Text data

Categorical data is data that comes from a fixed list. Say you collect data via a survey where you ask people their favorite color, with a drop-down menu that allows them to select from "red," "green," "blue," "yellow," "black," "white," "purple," and "pink." This will result in a dataset with exactly eight different possible values, which clearly encode a categorical variable. You can check whether this is the case for your data by eyeballing it (if you see very many different strings it is unlikely that this is a categorical variable) and confirm it by computing the unique values over the dataset, and possibly a histogram over how often each appears. You also might want to check whether each variable actually corresponds to a category that makes sense for your application. Maybe halfway through the existence of your survey, someone found that "black" was misspelled as "blak" and subsequently fixed the survey. As a result, your dataset contains both "blak" and "black," which correspond to the same semantic meaning and should be consolidated.

Now imagine instead of providing a drop-down menu, you provide a text field for the users to provide their own favorite colors. Many people might respond with a color name like "black" or "blue." Others might make typographical errors, use different spellings like "gray" and "grey," or use more evocative and specific names like "midnight blue." You will also have some very strange entries. Some good examples come from the xkcd Color Survey, where people had to name colors and came up with names like "velociraptor cloaka" and "my dentist's office orange. I still remember his dandruff slowly wafting into my gaping yaw," which are hard to map to colors automatically (or at all). The responses you can obtain from a text field belong to the second category in the list, free strings that can be semantically mapped to categories. It will probably be best to encode this data as a categorical variable, where you can select the categories either by using the most common entries, or by defining categories that will capture responses in a way that makes sense for your application. You might then have some categories for standard colors, maybe a category "multicolored" for people that gave answers like "green and red stripes," and an "other" category for things that cannot be encoded otherwise. This kind of preprocessing of strings can take a lot of manual effort and is not easily automated. If you are in a position where you can influence data collection, we highly recommend avoiding manually entered values for concepts that are better captured using categorical variables.

Often, manually entered values do not correspond to fixed categories, but still have some underlying *structure*, like addresses, names of places or people, dates, telephone numbers, or other identifiers. These kinds of strings are often very hard to parse, and their treatment is highly dependent on context and domain. A systematic treatment of these cases is beyond the scope of this book.

The final category of string data is freeform text data that consists of phrases or sentences. Examples include tweets, chat logs, and hotel reviews, as well as the collected works of Shakespeare, the content of Wikipedia, or the Project Gutenberg collection of 50,000 ebooks. All of these collections contain information mostly as sentences composed of words. For simplicity's sake, let's assume all our documents are in one language, English.² In the context of text analysis, the dataset is often called the corpus, and each data point, represented as a single text, is called a document. These terms come from the *information retrieval* (IR) and *natural language processing* (NLP) community, which both deal mostly in text data.

Example Application: Sentiment Analysis of Movie Reviews

As a running example in this chapter, we will use a dataset of movie reviews from the IMDb (Internet Movie Database) website collected by Stanford researcher Andrew Maas.3 This dataset contains the text of the reviews, together with a label that indicates whether a review is "positive" or "negative." The IMDb website itself contains ratings from 1 to 10. To simplify the modeling, this annotation is summarized as a two-class classification dataset where reviews with a score of 6 or higher are labeled as positive, and the rest as negative. We will leave the question of whether this is a good representation of the data open, and simply use the data as provided by Andrew Maas.

After unpacking the data, the dataset is provided as text files in two separate folders, one for the training data and one for the test data. Each of these in turn has two subfolders, one called *pos* and one called *neg*:

¹ Arguably, the content of websites linked to in tweets contains more information than the text of the tweets themselves.

² Most of what we will talk about in the rest of the chapter also applies to other languages that use the Roman alphabet, and partially to other languages with word boundary delimiters. Chinese, for example, does not delimit word boundaries, and has other challenges that make applying the techniques in this chapter difficult.

³ The dataset is available at http://ai.stanford.edu/~amaas/data/sentiment/.