LNCS 8206

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Intelligent Data Engineering and Automated Learning – IDEAL 2013

14th International Conference, IDEAL 2013
Hefei, China, October 2013
Proceedings

Springer

Lecture Notes in Computer Science 8206

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ISSN 0302-9743 e-ISSN 1611-3349
ISBN 978-3-642-41277-6 e-ISBN 978-3-642-41278-3
DOI 10.1007/978-3-642-41278-3
Springer Heidelberg New York Dordrecht London

Library of Congress Control Number: 2013948928

CR Subject Classification (1998): I.2.6-7, H.2.8, I.5, I.2.10-11, J.3, F.2.2, H.3, F.1, H.4

LNCS Sublibrary: SL 3 – Information Systems and Application, incl. Internet/Web and HCI

Typesetting: Camera-ready by author, data conversion by Scientific Publishing Services, Chennai, India

Printed on acid-free paper

Springer is part of Springer Science+Business Media (www.springer.com)

Preface

In this digital era and subsequent "data rich but information poor" quandary, the IDEAL conference serves its purposes perfectly – making sense of huge volumes of data, evaluating the complexity of real-world problems, and turning data into information and knowledge. The IDEAL conference attracts international experts, researchers, leading academics, practitioners, and industrialists from communities of machine learning, computational intelligence, data mining, knowledge management, biology, neuroscience, bio-inspired systems and agents, and distributed systems. It has enjoyed a vibrant and successful history in the last 15 years, having been held in over 11 locations in 7 different countries. It continues to evolve to embrace emerging topics and exciting trends. This year IDEAL set foot in mainland China, the fastest growing economy in the world. The conference received about 130 submissions, which were rigorously peer-reviewed by Program Committee members. Only the papers judged to be of highest quality were accepted and included in these proceedings.

This volume contains 76 papers accepted and presented at the 14th International Conference on Intelligent Data Engineering and Automated Learning (IDEAL 2013), held on 20–23 October 2013 in Hefei, China. These papers provided a valuable collection of recent research outcomes in data engineering and automated learning, from methodologies, frameworks, and techniques to applications. In addition to various topics such as evolutionary algorithms; neural networks; probabilistic modelling; swarm intelligent; multi-objective optimization and practical applications in regression, classification, clustering, biological data processing, text processing, and video analysis, IDEAL 2013 also featured a number of special sessions on emerging topics such as adaptation and learning multi-agent systems, big data, swarm intelligence and data mining, and combining learning and optimization in intelligent data engineering.

We would like to thank all the people who devoted so much time and effort to the successful running of the conference, in particular the members of the Program Committee and reviewers, as well as the authors who contributed to the conference. We are also very grateful for the hard work of the local organizing team at the University of Science and Technology of China (USTC), especially Prof. Bin Li, in local arrangements, as well as the help provided by the University of Manchester in checking through all the camera-ready files. Continued support and collaboration from Springer, in particular from the LNCS editor, Alfred Hoffman and Anna Kramer, are also greatly appreciated.

August 2013

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Distance Weighted Cosine Similarity Measure for Text Classification

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Abstract. In Vector Space Model, Cosine is widely used to measure the similarity between two vectors. Its calculation is very efficient, especially for sparse vectors, as only the non-zero dimensions need to be considered. As a fundamental component, cosine similarity has been applied in solving different text mining problems, such as text classification, text summarization, information retrieval, question answering, and so on. Although it is popular, the cosine similarity does have some problems. Starting with a few synthetic samples, we demonstrate some problems of cosine similarity: it is overly biased by features of higher values and does not care much about how many features two vectors share. A distance weighted cosine similarity metric is thus proposed. Extensive experiments on text classification exhibit the effectiveness of the proposed metric.

1 Introduction

Similarity calculation is a basic component for many text mining applications. For example, if we have a perfect method to assess how two text segments are similar, we could build an ideal information retrieval system. In the past years, a lot of metrics [1,2], such as Euclidean distance based metric, Cosine, Jaccard, Dice, Jensen-Shannon Divergence based metric, have been proposed to deal with different kinds of information retrieval and natural language processing problems. Among the existing metrics, Cosine, which measures the angle between two vectors, is the most popular one. It is effectively calculated as dot-product of two normalized vectors.

Given two N dimension vectors $\vec{v}$ and $\vec{w}$, the cosine similarity between them is calculated as follows:

$$\text{Cosine}(\vec{v},\vec{w}) = \frac{\vec{v} \bullet \vec{w}}{|\vec{v}||\vec{w}|} = \frac{\sum_{i=1}^{N} v_i \times w_i}{\sqrt{\sum_{i=1}^{N} v_i^2}\sqrt{\sum_{i=1}^{N} w_i^2}}$$

In mathematics perspective, Cosine similarity is perfect. However, if we check it in text mining perspective, it may not always be reasonable. Let's consider a few example vectors shown in figure 1. Suppose these 3-D vectors are derived from five text segments

H. Yin et al. (Eds.): IDEAL 2013, LNCS 8206, pp. 611–618, 2013.

A, B, C, D, and E. The cosine similarities between segment A and the rest are given in the figure. From the values, we can conclude that segment B is the most similar one of A, as it has the highest cosine. However, is it reasonable? Intuitively, text segments C and E, which both have two common terms with segment A, are more relevant to A than B, which contains only one term. Moreover, the segment E has one more term than segment A, but Cosine(A,E) is much lower than Cosine(A,B). If we regard the additional term as a noise and neglect it, E will have the same vector as A.

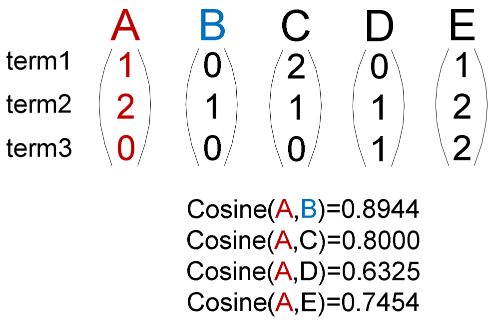

Fig. 1. Cosine similarities between five synthetic vectors

It can thus be derived from the above figure that cosine similarity tends to be overly biased by the features of higher values, but it doesn't care much about how many features two vectors share. In text mining perspective, more features two text segments share, more similar they are. If a part of a text segment is much similar to another segment as whole, the former one is usually thought to be relevant to the latter in Information Retrieval. It is this observation that motivates us to explore more effective similarity metrics than Cosine for text mining.

Because of the proven effectiveness of cosine similarity, we decide to derive new metrics by slightly modifying it. Several distance weighted versions are explored, where distance tends to capture how many features two text segments share. With extensive experiments on a classical text mining problem, i.e. text classification, we obtain a distance weighted cosine metric that performs better than the original cosine metric in most cases. It is also demonstrated with experiments that the similarity metric does have important effects in text mining applications.

The rest of this paper is organized as follows: section 2 introduces the explored distance weighed cosine metrics; section 3 presents extensive experiments on three text classification problems and discussion on the results; Section 4 concludes the paper.

2 Distance Weighted Cosine Similarity Measures

We explore different new similarity metrics with the following evidences or assumptions: 1. cosine similarity is good enough for most text mining applications; 2. more features two text segments share, more similar they are. Therefore, all of the designed metrics have two key components: cosine similarity and distance measure, but they are different in applying different distance measures and assembling strategies.

The explored distance measures, which are expected to capture how many features two vectors share or not, include:

Hamming Distance: it counts how many features two vectors do not share. As vectors may have quite different numbers of valid features, a normalized version, which stands for the percentage of distinct features, is used. Given two N-dimension vectors $\vec{v}$ and $\vec{w}$, a possible formula to calculate this measure is as follows:

$$HD(\vec{v},\vec{w}) = \frac{\sum_{i=1}^{N}(\mathrm{sgn}(v_i)-\mathrm{sgn}(v_i * w_i))}{\sum_{i=1}^{N}\mathrm{sgn}(v_i)} + \frac{\sum_{i=1}^{N}(\mathrm{sgn}(w_i)-\mathrm{sgn}(w_i * v_i))}{\sum_{i=1}^{N}\mathrm{sgn}(w_i)},$$

while sgn(x) is the sign function.

Weighted Hamming Distance: the former measure takes each feature equally important, which is not ideal. A simple improvement is to weight counts with features' values as follows:

$$WHD(\vec{v},\vec{w}) = \frac{\sum_{i=1}^{N} v_i *(1-\mathrm{sgn}(v_i * w_i))}{\sum_{i=1}^{N} v_i} + \frac{\sum_{i=1}^{N} w_i *(1-\mathrm{sgn}(w_i * v_i))}{\sum_{i=1}^{N} w_i}.$$

To assemble ***Cosine*** similarity (dubbed ***Cosine***) and ***Dist***ance measure (dubbed ***Dist***), several strategies can be applied. As ***Cosine*** and ***Dist*** are inverse, we firstly turn the ***Dist*** into some similarity format, e.g. $\frac{1}{Dist+1}$, and then assemble them together with multiplying, averaging, or other strategies. Some possible strategies include:

Multiplying: $\frac{Cosine}{Dist+1}$.

Averaging: $\frac{1}{2}*(Cosine+\frac{1}{Dist+1})$ or $\frac{2*\frac{Cosine}{Dist+1}}{(Cosine+\frac{1}{Dist+1})}$.

All the above formulas can have different variants. For example, we can add some constants like 1/2, give different weights for the two similarities, and use power or log function to reduce the influence of one component. With extensive experiments on text classification problems, we find the following distance weighted cosine metric could achieve better performance than the traditional cosine similarity in almost all the cases.

$$Dw-Cosine = \frac{1}{Dist^2/Cosine + 1} = \frac{Cosine}{Dist^2 + Cosine}$$

The weighted hamming distance measure is used in the above formula.

3 Experiments and Discussion

In order to evaluate the performance of different distance weighted cosine metrics, we conduct extensive experiments on three single-label text classification problems[3].

3.1 Datasets

We experiment with the following three datasets:

***20 Newsgroups*:** this dataset is evenly partitioned into 20 different newsgroups, each corresponding to a specific topic. Its "bydate" version is widely used in literature, as it has a standard training and test split. The training set has 11,293 samples and the test set 7,528 samples.

***Reuters52c*:** it is a single-label dataset derived from Reuters-21578 with 90 classes by Ana Cardoso-Cachopo during her Ph.D. study [4]. Documents with multiple labels in the original Reuters-21578 (90 classes) dataset are discarded and finally the Reuters52c dataset contains 52 categories, 6,532 documents for training, and 2,568 documents for test. The dataset is imbalanced and some categories only have a few documents, e.g. classes *cpu* and *potato*. We use the all-terms version without stemming.

***Sector*:** this dataset is a collection of web pages belonging to companies from various economic sectors. It has 104 categories, 6,412 training samples, and 3,207 test samples.

3.2 Experimental Settings

We use the vector space model (VSM) for data representation, in which the dimension is determined by the size of the dataset's vocabulary. Each document is then represented as a space vector where the words in the document are mapped onto the corresponding coordinates. In the feature-selection phase of the experiments, we removed words that occur only once [5]. The weight of a feature is given as follows:

$$x_i = \frac{(1+\log(TF(w_i,d)))\cdot\log(\frac{|D|}{DF(w_i)})}{\sqrt{\sum_j ((1+\log(TF(w_j,d)))\cdot\log(\frac{|D|}{DF(w_j)}))^2}},$$

which is the same as the standard representation "ltc" in Manning and Schutze [6]. Here, D is the document collection, and TF and DF are a term's frequency in a document d and its document frequency in the collection D respectively.

In classification, we use two widely used algorithms: Centroid and k-Nearest Neighbor [7, 8]. They are all heavily dependent on similarity metrics. With Centroid algorithm, each category is represented by a centroid vector, and a test sample is then classified to the category that has the highest similarity value between its centroid vector and the test sample's vector. With k-Nearest Neighbor algorithm, the category prediction of a test sample is made according to the category distribution among the top k most similar samples in the training set, where a similarity metric is used to find these k Nearest Neighbors.

We evaluate different similarity metrics, including our proposed distance weighted cosine similarity, the original cosine similarity, Jaccard, and others.

3.3 Evaluation Metric

To evaluate the effectiveness of category assignments to documents by classifiers, the harmonic average of the standard precision and recall, F1 measure, is used as follows:

$$\mathrm{F1} = \frac{2recall * precision}{recall + precision}$$

The overall performance on all categories can be computed either by the micro-averaging method or by the macro-averaging method. In micro-averaging, the MicF1 score is computed globally over all the binary decisions. In macro-averaging, the MacF1 score is computed for the binary decisions on each individual category first and then averaged over the categories. The micro-averaged score tends to be dominated by the classifier's performance on common categories, while the macro-averaged score is more influenced by the performance on rare categories.

Table 1. With Centroid classification algorithm, system performance on three datasets with different similarity metrics

Similarity Metric	20 Newsgroups		Reuters52c		Sector	
	MicF1	MacF1	MicF1	MacF1	MicF1	MacF1
Dw-cosine	**84.3916**	**83.6943**	**90.3816**	71.4916	**89.0864**	**89.1664**
Cosine	81.6286	80.8969	89.0187	**71.7848**	87.3402	87.6430
Jaccard	74.5218	73.7537	69.1978	46.2682	76.3018	77.5525

3.4 Results and Discussion

As mentioned in section 2, we conduct extensive experiments with different variants of distance weighted cosine metrics, and find the Dw-Cosine metric performs best. Here we present only the results of this proposed metric from this family. We also experiment with other metrics, e.g Dice and Jensen-Shannon Divergence based metric, but Dice performs similar to Jaccard, and Jensen-Shannon Divergence poorer than Jaccard. So we do not report these metrics' performance here.

Table 1 shows the system performance on three datasets with Centroid classification algorithm. Cosine performs much better than Jaccard on three datasets, and Dw-cosine can increase Cosine's MicF1 with 1.3% to 2.7%. As to the MacF1, Dw-cosine achieves equally good result as Cosine on the Reuters52c dataset, but beats Cosine on the other two datasets with around 2.8% (20 Newsgroups) and 1.5% (Sector), respectively. The improvement is impressive, and it can be seen that choosing a suitable similarity metric is quite important.

To better understand the performance of the three metrics, we depict a column graph in figure 2. Dw-cosine wins the competitions on 5 of 6 tracks, and gains the most on the 20 newsgroups dataset.

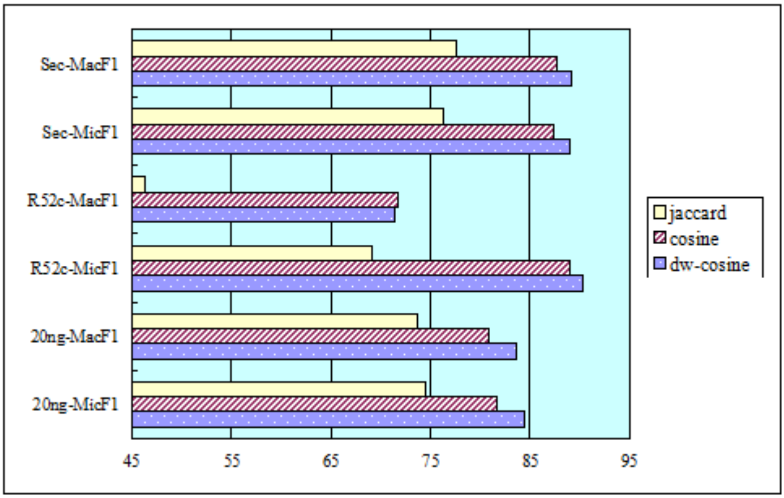

Fig. 2. Visualized system performance on three datasets with Centroid algorithm

Table 2. With k Nearest Neighbour classification algorithm, system performance on three datasets with different similarity metrics, and the values are average of 40 runs (k from 1 to 40)

Similarity Metric	20 Newsgroups		Reuters52c		Sector	
	MicF1	MacF1	MicF1	MacF1	MicF1	MacF1
Dw-cosine	**77.1018**	**76.5166**	88.4940	**68.2012**	**84.8566**	**84.6625**
Cosine	76.1351	75.5760	86.6715	68.1401	82.6458	82.4599
Jaccard	71.4865	71.0726	**89.5113**	63.3028	75.5862	75.3666

Table 2 gives the three metrics' performance with k-Nearest Neighbor algorithm. We vary k from 1 to 40, and then the values in the table are average of these 40 runs. Similar to table 1, Cosine beats Jaccard on 5 tracks, but obtains much poorer MicF1 value on the Reuters52c dataset than Jaccard, which also indicate how important a suitable similarity metric is for a specific text mining problem. Dw-cosine exhibits consistent advantages over Cosine similarity with k-Nearest Neighbor algorithm. It can boost the MicF1 and MacF1 of Cosine from 1% to 2% except for MacF1 on Reuters52c.

T-tests over the 40 runs show that the performance differences in table 2 are all significant but for MacF1 scores of Dw-cosine and Cosine on the Reuters52c dataset.

Similarly, we present a column graph to visualize how these three metrics perform with k-Nearest Neighbor algorithm in figure 3. Dw-cosine and Cosine achieve almost the same MacF1 scores on the Reuters52c dataset, while Dw-cosine shows its biggest advantages over Cosine on the Sector dataset.

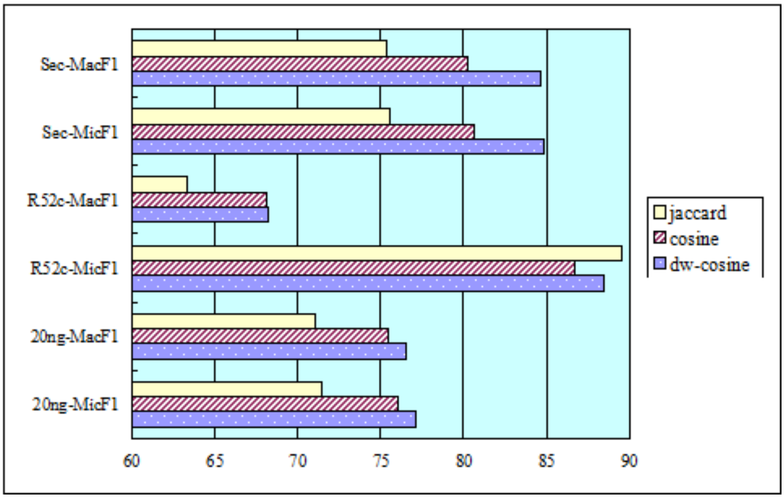

Fig. 3. Visualized average system performance on three datasets with kNN algorithm

4 Conclusions and Future Work

Cosine similarity is widely used in information retrieval, natural language processing, and text mining. It's quite effective, but not perfect. We demonstrate with a few synthetic examples that Cosine similarity tends to be biased by features of higher values and not to pay enough attention to how many features two vectors share. It is this observation that motivates this study. A family of distance weighted cosine metrics is explored and a specific one of this family, i.e. Dw-cosine, achieves consistently better results than the original cosine similarity on three text classification problems. Our experiments also demonstrate that similarity metric may have critical impacts on system performance.

In the future, we would like to experiment with more datasets and apply the proposed distance weighted cosine similarity into other text mining applications, e.g. information retrieval, word sense disambiguation, and so on. We also plan to explore how to detect dataset's properties and suggest suitable similarity metric automatically.

Acknowledgments. This work is supported by the Henan Provincial Research Program on Fundamental and Cutting-Edge Technologies (No. 112300410007), and the High-level Talent Foundation of Henan University of Technology (No. 2012BS027).

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