# gesis

#### Leibniz-Institut für Sozialwissenschaften



## Multi-class and Multi-label Text Classification in Python

Lukas Birkenmaier Workshop for Ukraine, 22.02.2024





#### **About me**

#### RWTHAACHEN UNIVERSITY

Universität Konstanz















#### Agenda

- Introduction
- Classification Basics
  - Machine Learning
  - Validation (Accuracy, Precision, Recall, F1 Score)
- Multi-class Classification
  - Model Architecture
  - Validation
  - Live-Coding
- Multi-label Classification
  - Model Architecture
  - Validation
  - Live-Coding



#### Disclaimer

- This is an applied course!
  - Some knowledge of Python is useful. However, you can run the scripts and interpret the output without any python knowledge
  - No mathematical deep-dive, focus on applied setting
  - You are invited to go your own pace (e.g., adapting the scripts to a new dataset)

! The materials are designed so that you can look at them later and copy / paste certain code snippets for your own work!



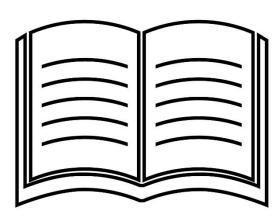
#### By the end of this course, you will have...

- learned the basic terminology around text classification
- understood the difference between multi-class and multi-label classification
- learned the fundamental strategies to evaluate classification tasks
- have applied two classification tasks using python code
- had some evening fun ②

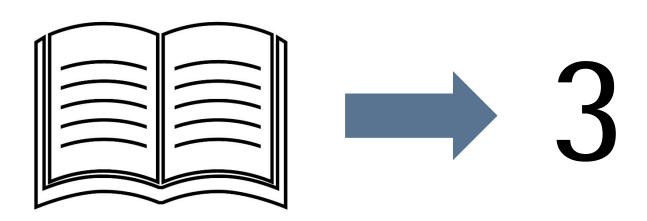


## Introduction



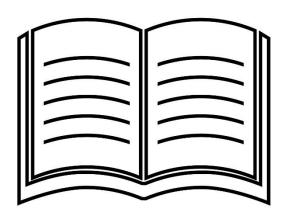


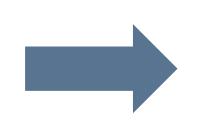
#### **Text Classification**



#### **Text Classification**

"Classification is the process of accurately classifying previously undiscovered data"

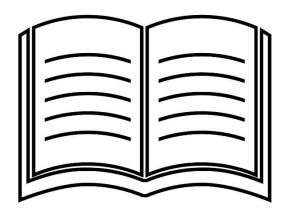




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#### **Text Classification**

"Classification is the process of accurately classifying previously undiscovered data"





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#### Many practical applications, e.g.,

- Spam filtering
- Hate Speech Detection
- Language Identification
- Policy Issue Classification
- Sentiment Analysis



"Great appointment with @ThorstenKlute in <u>Bad Salzuflen</u> during the visit of the holiday language course FIT in German, a pilot project of the #NRW state government, where <u>15 very motivated refugee children</u> can improve their language skills for two weeks."



Serap Güler @SerapGueler

Schöner Termin mit @ThorstenKlute in Bad Salzuflen beim Besuch des Feriensprachkurses FIT in Deutsch, ein Pilotprojekt der #NRW Landesregierung, an dem hier 15 sehr motivierte Flüchtlingskinder zwei Wochen ihre Sprachkenntnisse verbessern können.

...



"The city of <u>Gütersloh</u> prefers <u>migrants</u> in the allocation of building plots & explicitly wishes for a <u>'social and</u> <u>multicultural mixing' of certain areas...</u> This 'mixing' has worked out well so far in Germany..."



•••

Die Stadt Gütersloh bevorzugt Migranten bei der Vergabe von Baugrundstücken & wünscht sich ausdrücklich "eine soziale und multikulturelle Durchmischung" bestimmter Gebiete... 2 2 Hat ja bisher gut funktioniert, diese "Durchmischung" in Deutschland...

guetersloh.de/de-wAssets/doc...



domesticsecurity ‡	economy ‡	education ‡	environment ‡	event ‡	foreign_policy ‡	healthcare ‡	immigration_asylum 💠	infrastru
0.00846947	0.01213120	0.00303444	0.00365524	0.08787690	0.00814045	0.00984293	0.00361202	0.0
0.49173900	0.00862222	0.02396040	0.00722634	0.02777380	0.06010910	0.04110670	0.02433700	0.0
0.00207624	0.84491000	0.00554972	0.02222480	0.00462421	0.00792736	0.01402210	0.00224846	0.0
0.22862300	0.01242660	0.03978020	0.01281590	0.02577220	0.11836900	0.06211580	0.14245400	0.0
0.00511126	0.03454080	0.00846039	0.83044300	0.00420553	0.00625391	0.00853137	0.00338545	0.0
0.00511126	0.03454080	0.00846039	0.83044300	0.00420553	0.00625391	0.00853137	0.00338545	0.0
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0.00702387	0.01145560	0.00168932	0.00467323	0.14338500	0.00775695	0.00697157	0.00317667	0.0
0.00796364	0.01158170	0.00564254	0.01338690	0.00484134	0.00790940	0.00498853	0.00672930	0.0
0.00470961	0.00748688	0.00133547	0.00365910	0.23994900	0.00369224	0.00488763	0.00210484	0.0
0.01782000	0.03557480	0.02762700	0.00729218	0.03514410	0.00532206	0.68964800	0.01338570	0.0
0.00465674	0.01040610	0.00125193	0.00424651	0.16369100	0.00526372	0.00579288	0.00251573	0.0
0.00620032	0.01251060	0.00180104	0.00453758	0.11416200	0.00662017	0.00665563	0.00304615	0.0
0.39065300	0.00464934	0.01538650	0.00697752	0.01480330	0.32360300	0.02635410	0.06719360	0.0
0.00552299	0.00635472	0.00126635	0.00347297	0.30504100	0.00373231	0.00436245	0.00197498	0.0
0.03917740	0.02858820	0.21272500	0.00915515	0.06832960	0.10566500	0.07544480	0.03515130	0.0
0.00752966	0.00798649	0.00198276	0.00385448	0.27171200	0.00458332	0.00559928	0.00233327	0.0
0.00613405	0.01431040	0.00191910	0.00552868	0.08412830	0.00834662	0.00627282	0.00285583	0.0



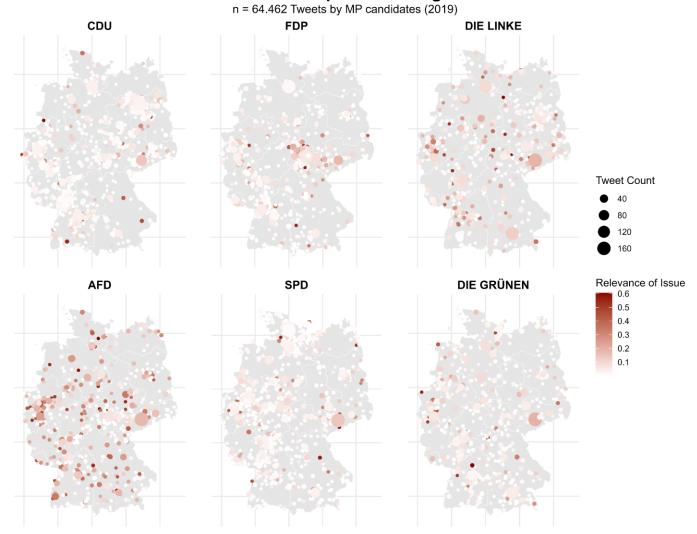
In the dataset, each row represents a Tweet that mentions a place (e.g., a city or a region) Probabilities for belonging to the topic "Immigration"

mesticsecurity ‡	economy ‡	education ‡	environment ‡	event ‡	foreign_policy ‡	healthcare	immigration_asylum ‡	infrastru
0.00846947	0.01213120	0.00303444	0.00365524	0.08787690	0.00814045	0.00984293	0.00361202	0.0
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### Practical Application: Policy Issue and Places\*

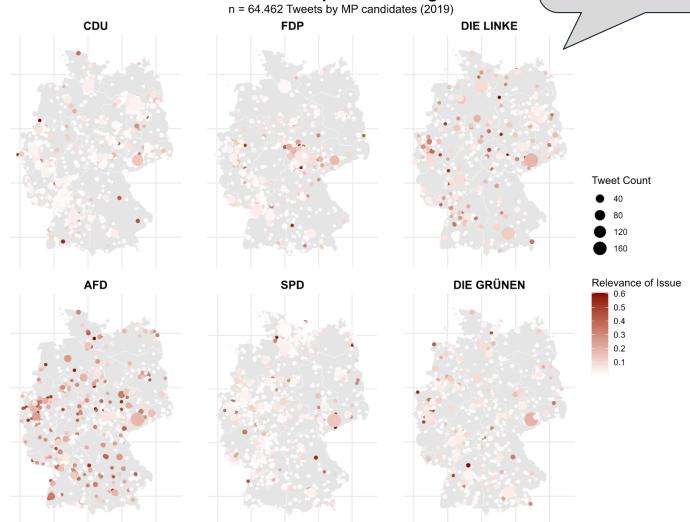
#### **Local Issue Emphasis: Immigration**



#### Practical Application: Policy Issue and

Local Issue Emphasis: Immigration

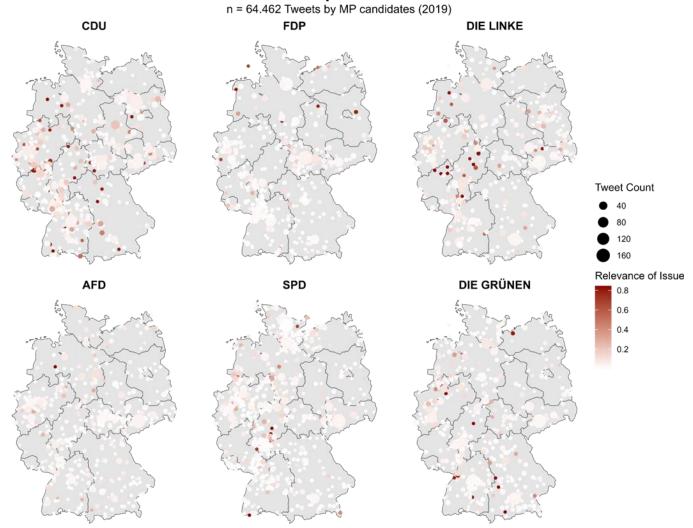
We could further apply sentiment analysis to classify the tweets into "negative", "neutral", or "positive"





### Practical Application: Policy Issue and Places\*

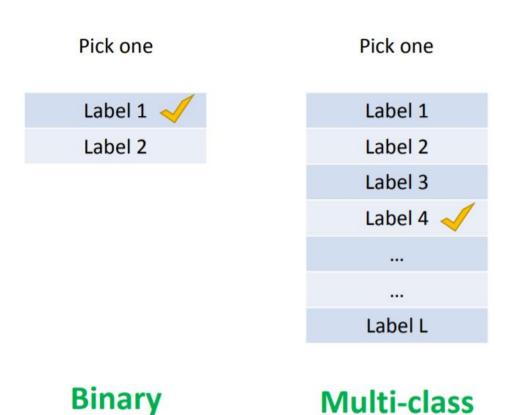
#### Local Issue Emphasis: Healthcare



\*Ongoing work

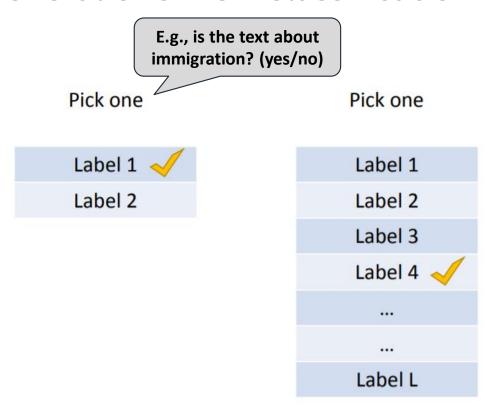


#### **General Overview Classification**





#### **General Overview Classification**



E.g., what is the topic of the text
(against immigration / in favor of immigration / not talking about immigration)

**Binary** 

**Multi-class** 



"Digital
Technologies can
help children to
understand our
ecosystem better"









"Digital
Technologies can
help children to
understand our
ecosystem better"



# Topic: Environment?







"Digital
Technologies can
help children to
understand our
ecosystem better"



# Topic: Digitization?







"Digital
Technologies can
help children to
understand our
ecosystem better"



# Topic: Education?







#### **General Overview Classification**





## Classification Basics



## Machine Learning and LLM

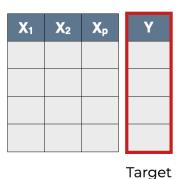


#### **Basics**

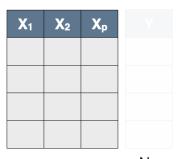
- For supervised text classification, we usually need:
  - Machine Learning Model
  - Labeled Data
    - Training Data
    - Test / Validation Data
  - (Feature Extraction Method)

## Supervised Vs Unsupervised Learning, Explained

Supervised

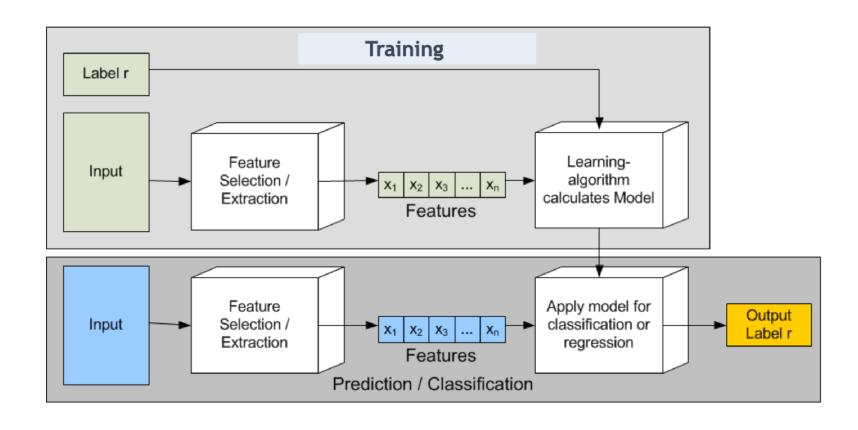


**Un-Supervised** 



No Target

#### Basic Idea behind Machine Learning





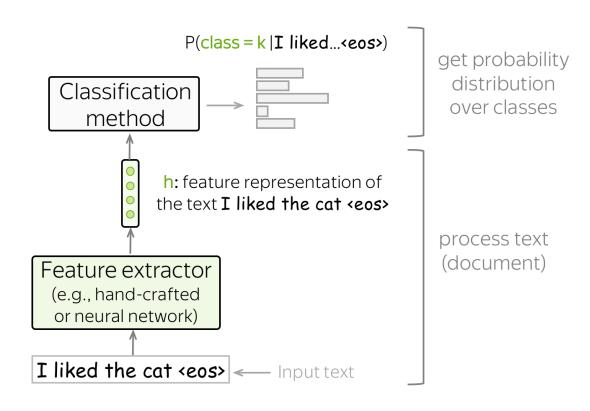
#### Text classifiers have the following structure

#### Feature extractor

- Makes the text machinereadable
- Either manually defined or learned (e.g., with neural networks)
- <u>Same</u> for multi-class and multi-label classification

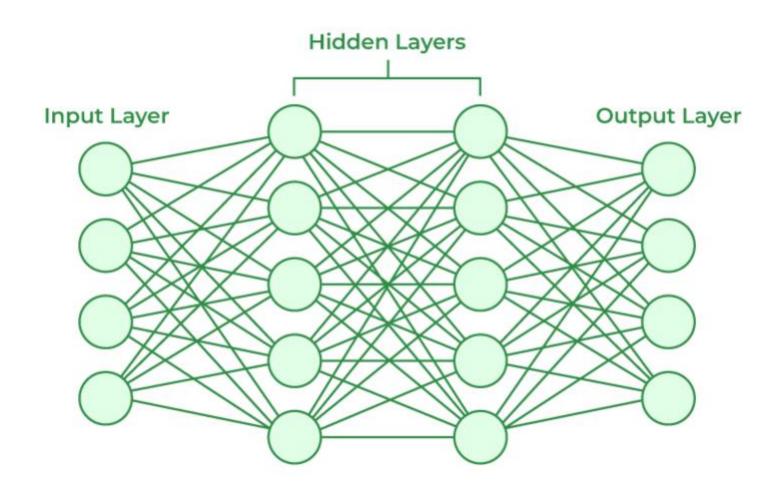
#### Classifier

- Assigns class probabilities given feature representation of a text
- <u>Different</u> for multi-class and multi-label classification



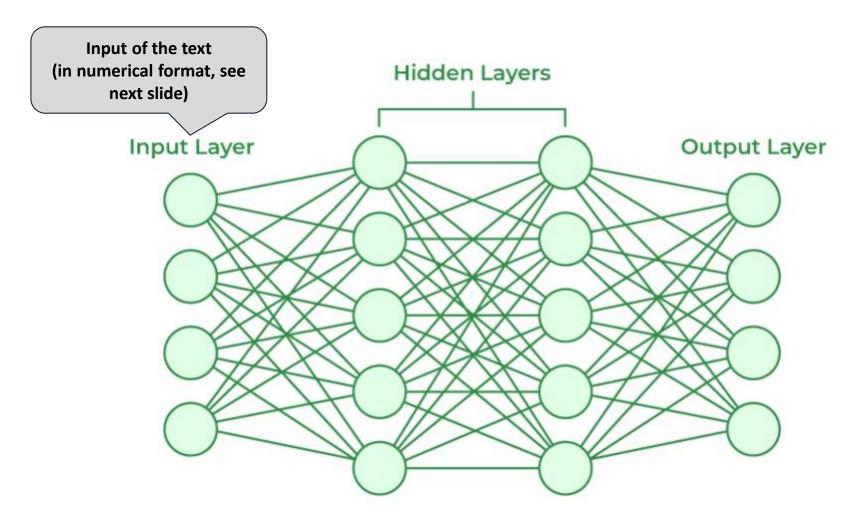


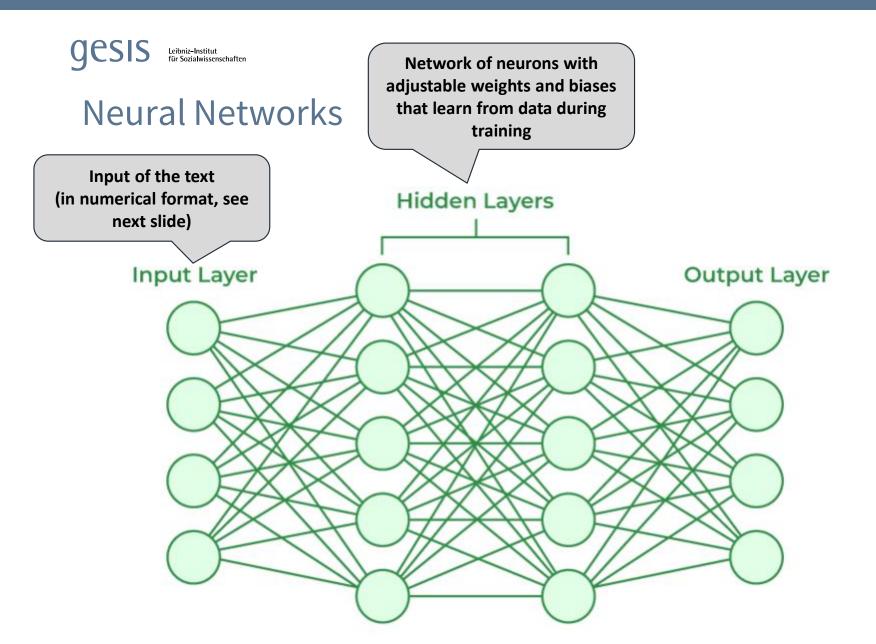
#### **Neural Networks**

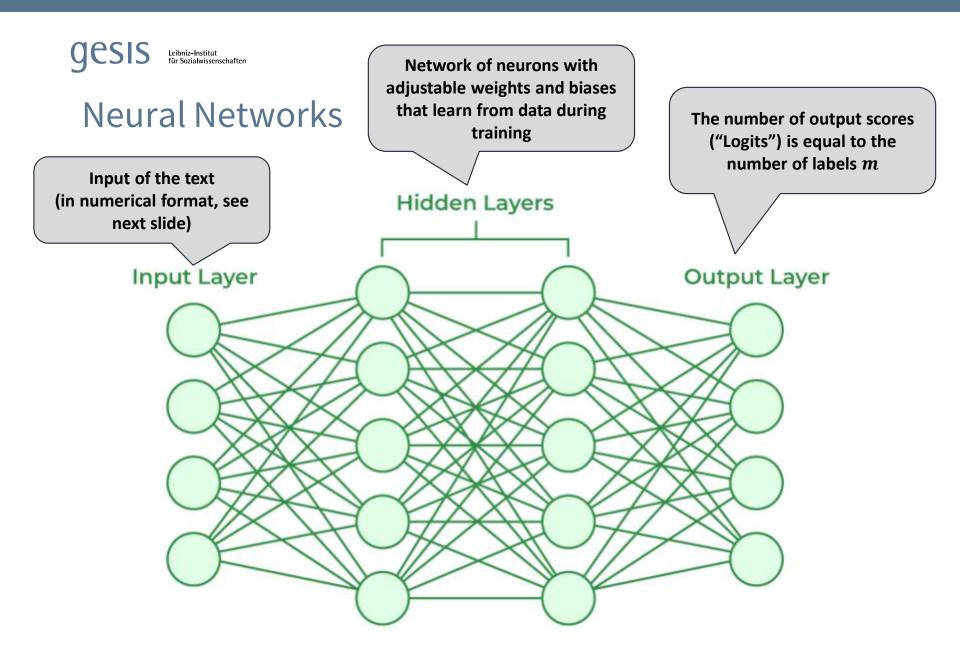


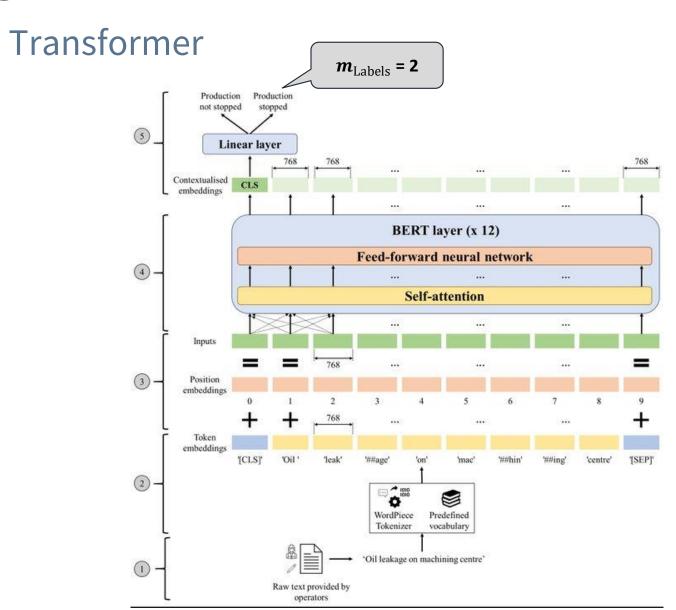


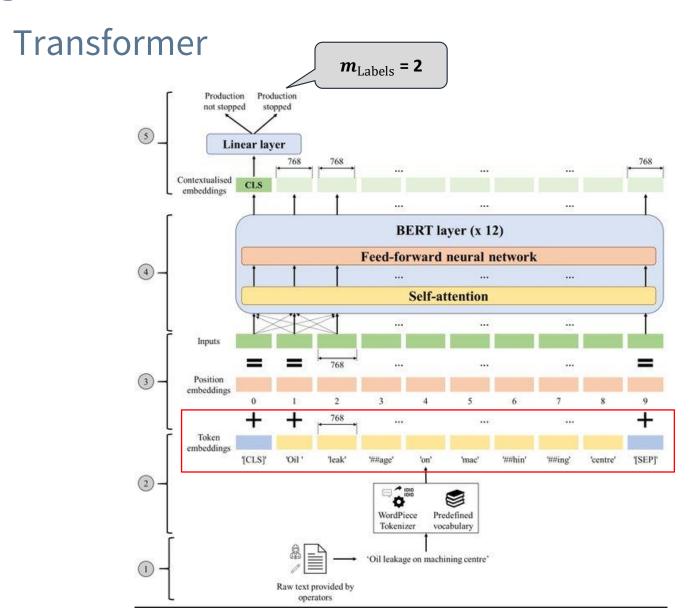
#### **Neural Networks**











Token Embeddings



#### **Embeddings**

```
Token String Token ID Embedded Token Vector
     '<s>' -> 0 -> [ 0.1150, -0.1438, 0.0555, ... ]
   '<pad>' -> 1 -> [ 0.1149, -0.1438, 0.0547, ... ]
    '</s>' -> 2 -> [ 0.0010, -0.0922, 0.1025, ... ]
   '<unk>' -> 3 -> [ 0.1149, -0.1439, 0.0548, ... ]
     '.' -> 4 -> [-0.0651, -0.0622, -0.0002, ... ]
    ' the' -> 5 -> [-0.0340, 0.0068, -0.0844, ...]
      ',' -> 6 -> [ 0.0483, -0.0214, -0.0927, ... ]
     'to'-> 7-> [-0.0439, 0.0201, 0.0189, ...]
    ' and' -> 8 -> [ 0.0523, -0.0208, -0.0254, ... ]
     ' of' -> 9 -> [-0.0732, 0.0070, -0.0286, ...]
      ' a' -> 10 -> [-0.0194, 0.0302, -0.0838, ... ]
```

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Classification Method

Feature Extraction

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# **Embeddings**

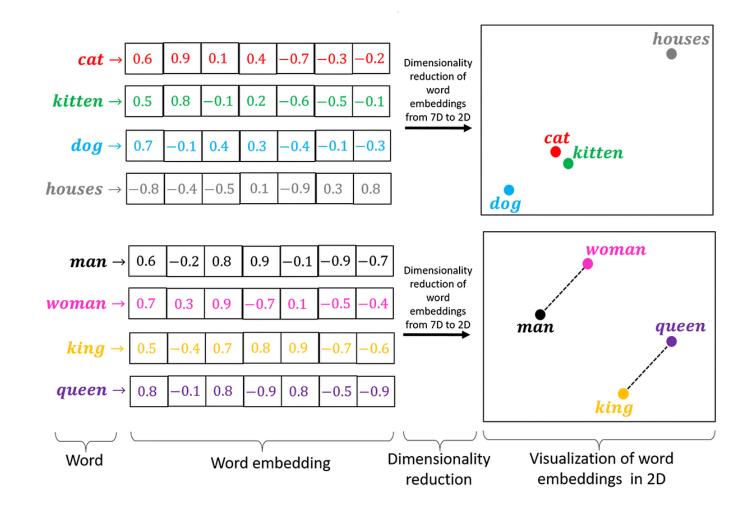
- Input of modern machine learning models (LLMs)
- Basic idea: Words which frequently appear in similar contexts have similar meaning (distributional hypotheses)
- Embeddings:
  - Numerical representations of words/token in highdimensional vectors
  - Vectors have fixed length
  - Information about words semantic properties and syntactic functions are distributed across dimensions
  - Words that are close to each other semantically (e.g., "cat" and "kitten") are close in the vector space



Classification Method

Feature Extraction

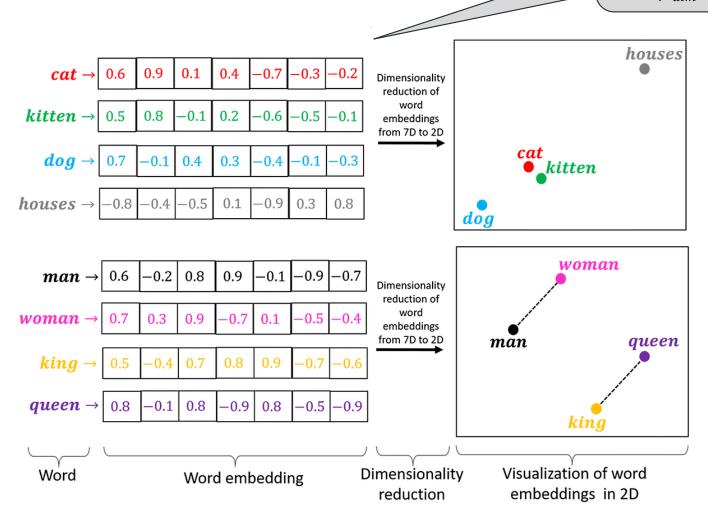
### Feature Extraction: Word-embeddings



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Feature Extraction: Word-embeddings

Usually, we do not know what the dimensions stand for  $(n_{dim}>700)$ 



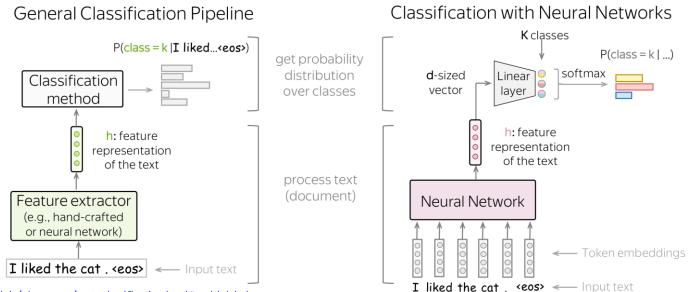




Feature Extraction

# Feature Extraction: Word-embeddings

- For feature extraction, we feed the embeddings of the input tokens to a neural network
- The neural network gives us a vector representation of the input text
- Ultimately, this vector is used for classification.



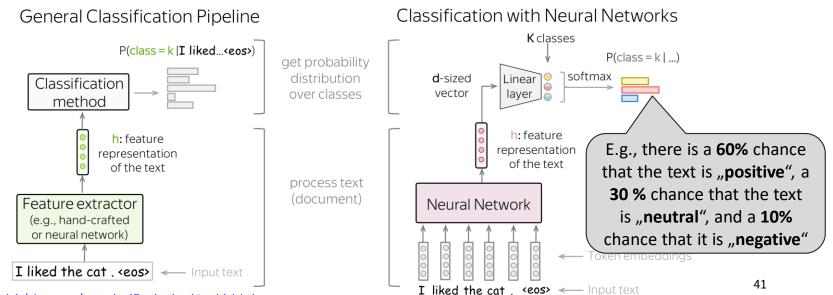


### Classification Method

### Feature Extraction

## Feature Extraction: Word-embeddings

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- Validation is critical task for any classification task
- Making sure that the classification has
  - Little error (random)
  - Free from Bias (systematic)
- Two broad categories
  - Internal Validation (i.e., evaluating the measures and model features, error analysis etc.)
  - External Validation (i.e., comparing with gold-standard data)
- Especially for multi-dimensional social science constructs, validation should be taken seriously!

### For more information:

https://www.tandfonline.c om/doi/full/10.1080/1931 2458.2023.2285765

#### I. Substantive Evidence

Focus: Outline the theoretical underpinning of the measurement

### **Conceptual Foundation**

### Construct definition and operationalization

The definition and operationalization of the construct is based on theory

### Design decisions

Design decisions build upon the conceptualization of the analytical construct

### II. Structural Evidence

Focus: Examine and evaluate the properties of the model and its output

#### **Model Properties**

### Model feature inspection

Characteristics and features of the model are plausible indicators for the construct

### Model metrics evaluation

Method-specific metrics and common thresholds are met

#### Model Output

### **Output inspection**

The measures and their descriptive statistics look plausible

### **Error Analysis**

Systematic biases and errors are considered and evaluated

#### **Systematic Testing**

The output of the model suffices further semantic and computational tests

### III. External Evidence

Focus: Test for how the measures relates to other independent information or criteria.

#### Measure Interrelation

### Human-annotated test set comparison

Correspondence to heldout test set of human annotated labels

### Surrogate label comparison

Correspondence to surrogate data labels

#### Criterion Prediction

### **Criterion Prediction**Prediction of external

criteria or real-world phenomena



IV. Robustness Checks
Robustness to contextual or model-specific factors



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# Criterion Prediction Prediction of external criteria or real-world phenomena

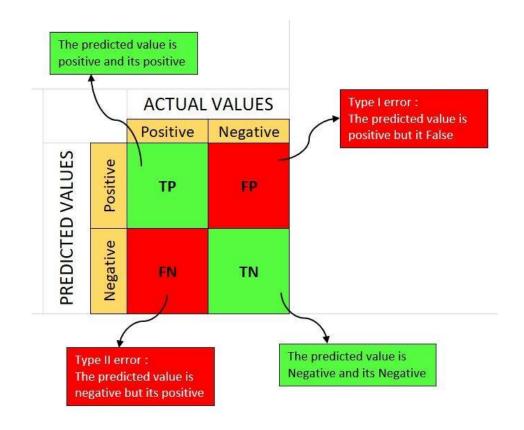






# Validation: Comparison with Labels

- Use Case: We want to classify a text as either having "positive" or "negative" tone
- We therefore compare our predictions against some "actual values" and document our guesses in a Confusion Matrix

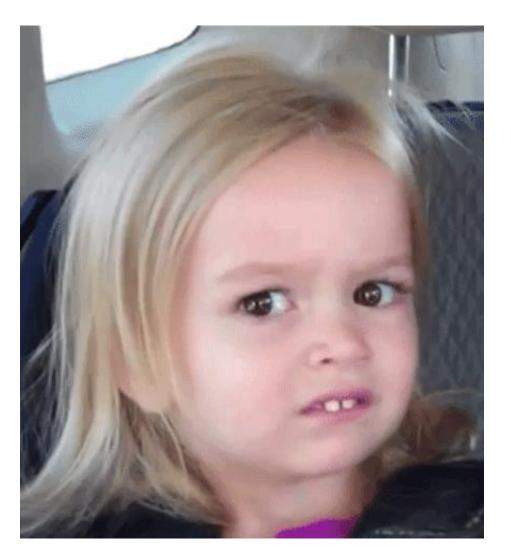


# **Evaluation Metrics**

$$\begin{array}{ll} precision & = & \frac{TP}{TP + FP} \\ \\ recall & = & \frac{TP}{TP + FN} \\ \\ F1 & = & \frac{2 \times precision \times recall}{precision + recall} \\ \\ accuracy & = & \frac{TP + TN}{TP + FN + TN + FP} \\ \\ specificity & = & \frac{TN}{TN + FP} \end{array}$$

# **Evaluation Metrics**

$$\begin{array}{ll} precision & = & \frac{TP}{TP + FP} \\ recall & = & \frac{TP}{TP + FN} \\ F1 & = & \frac{2 \times precision \times recall}{precision + recall} \\ accuracy & = & \frac{TP + TN}{TP + FN + TN + FP} \\ specificity & = & \frac{TN}{TN + FP} \end{array}$$





# $accuracy = \frac{TP + TN}{TP + FN + TN + FP}$

### Accuracy

 We can first calculate the overall *accuracy* of our classifier

### **Predicted**

Accuracy =	TP + TN				
	TP + TN + FP + FN				

 0
 1

 0
 30
 12

 1
 8
 56

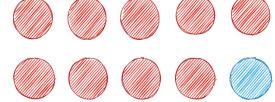
**Actual** 



$$accuracy = \frac{TP + TN}{TP + FN + TN + FP}$$

# Why we need different metrics

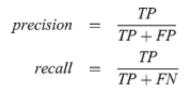
- E.g., for imbalanced data, accuracy does not give the full picture
- When everything is classified as red, our classifier would have an accuracy of 90%
  - True positive = 0 (we never predict the positive class)
  - True negative = 9 (we always predict the negative class)
  - False positive = 0 (we never predict the positive class)
  - False Negative = 1 (we labeled the positive class as neg)

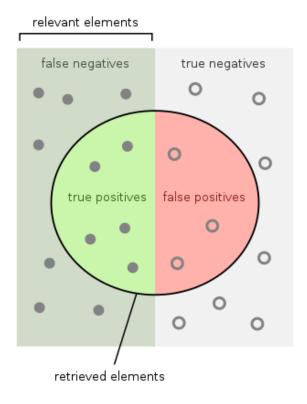


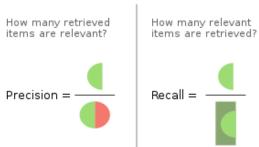
But is this a good classifier?What about the predictions on the blue classes?



# **Precision and Recall**







# Precision (Positive Predictive Value)

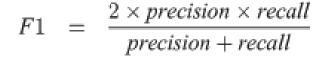
- Definition: The ratio of correctly predicted positive observations to the total predicted positive observations.
- Importance: Critical in scenarios where the cost of false positives is high (e.g., pregnancy test)
- Recall (Sensitivity, True Positive Rate)
- Definition: The ratio of correctly predicted positive observations to all observations that are positive
- Importance: Essential in situations where missing a positive case has a significant consequence (e.g., COVID-test at the beginning of the pandemic)

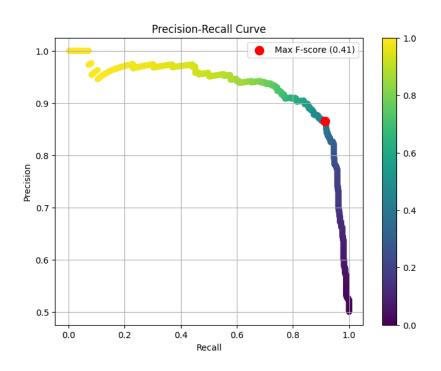


# F1 Score

- The F1 score is the harmonic mean of precision and recall
- It thus symmetrically represents both precision and recall in one metric

F1 Score = 
$$\frac{2}{\frac{1}{\text{Precision}} + \frac{1}{\text{Recall}}}$$
$$= \frac{2 \times \text{Precision} \times \text{Recall}}{\text{Precision} + \text{Recall}}$$







# **Take-aways Validation**

- Calculating (average) accuracy, precision, recall, and F1-score is possible for both multi-class and multi-label classification (we will soon see how)
- Provide immediate metrics of model performance
- Software automates calculation
- More validation is required if the quality (truthfulness) of your predictions is important



# Multi-Class Classification



### **Definitions**

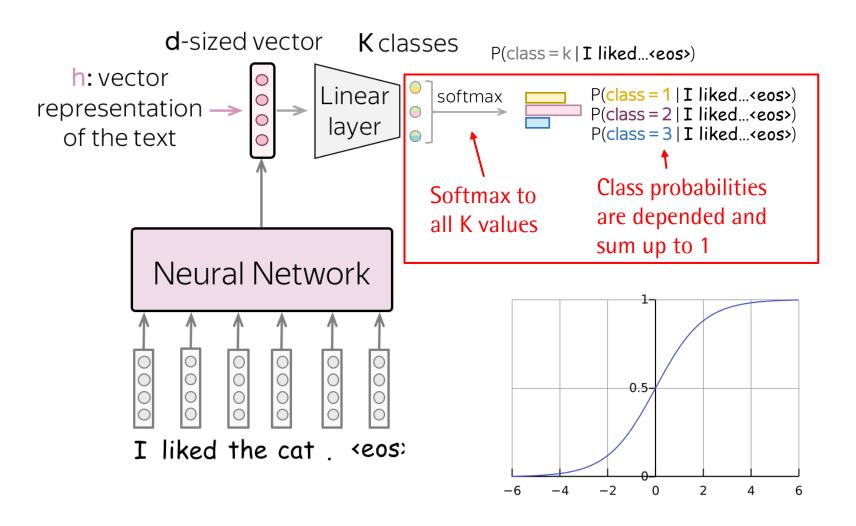
- Multi-class classification is a classification task with more than two classes where each sample can only be labeled as one class.
- Labels are mutually exclusive
- Can be seen as an extension of binary classification
- Requires (usually) no problem transformation
- Probabilities for each class add up to 100%
- E.g., sentiment of a text (positive, neutral, negative)



### Classification Method

Feature Extraction

### **Multi-Class** Classification

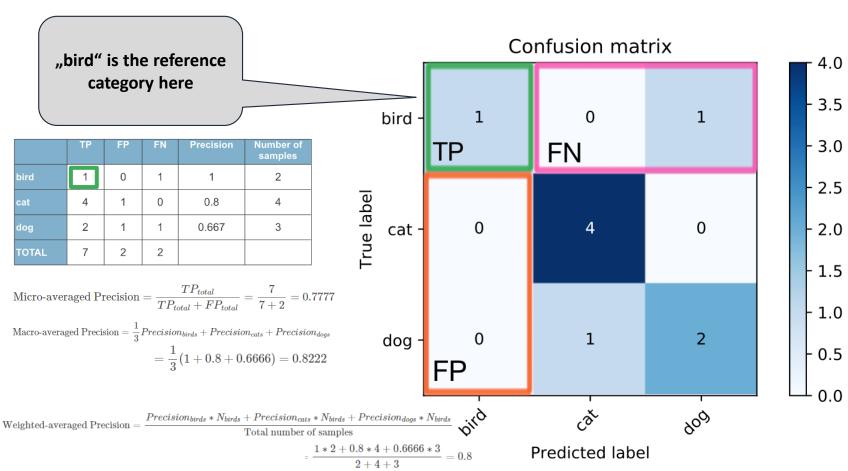




# Main Take-away: For both multi-class and multi-label classification, we need to calculate average performance metrics!

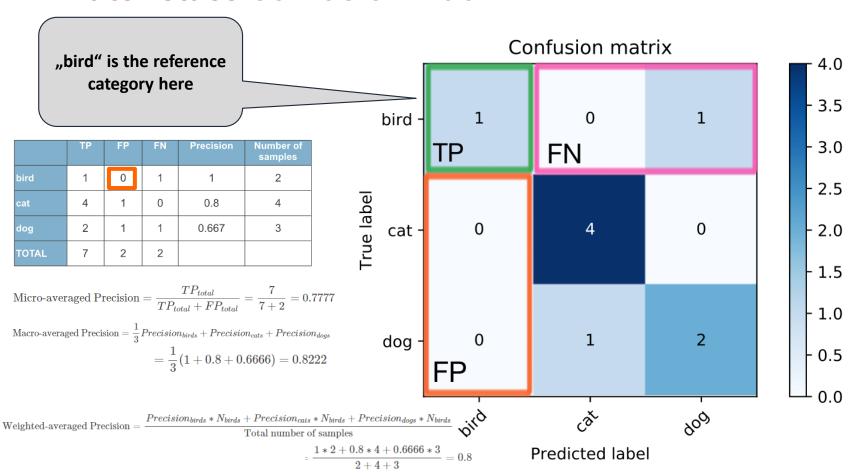


### **Multi-Class** Confusion Matrix



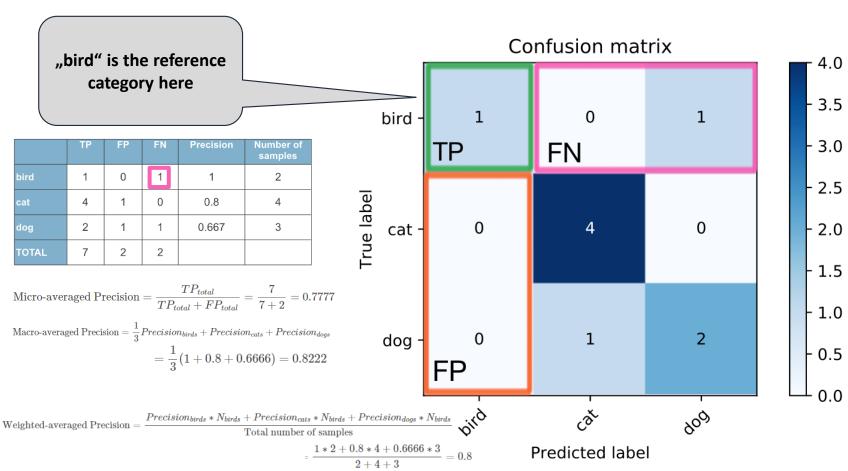


### **Multi-Class** Confusion Matrix





### **Multi-Class** Confusion Matrix





# Both for **multi-class** and **multi-label** classification, we need to average the metrics across classes

Micro-averaged:

all samples equally contribute to the final averaged metric

$$\text{Micro-averaged Precision} = \frac{TP_{total}}{TP_{total} + FP_{total}} = \frac{7}{7+2} = 0.7777$$

	TP	FP	FN	Precision	Number of samples
bird	1	0	1	1	2
cat	4	1	0	0.8	4
dog	2	1	1	0.667	3
TOTAL	7	2	2		

 Macroaveraged: all classes equally contribute to the final averaged metric

$$\begin{split} \text{Macro-averaged Precision} &= \frac{1}{3} \textit{Precision}_{\textit{birds}} + \textit{Precision}_{\textit{cats}} + \textit{Precision}_{\textit{dogs}} \\ &= \frac{1}{3} \big( 1 + 0.8 + 0.6666 \big) = 0.8222 \end{split}$$

 Weightedaveraged: each v classes's contribution to the average is weighted by its size

$$\text{Weighted-averaged Precision} = \frac{Precision_{birds}*N_{birds} + Precision_{cats}*N_{birds} + Precision_{dogs}*N_{birds}}{\text{Total number of samples}} \\ = \frac{1*2+0.8*4+0.6666*3}{2+4+3} = 0.8$$



### **Tutorials**

- Multi-class classification
  - https://colab.research.google.com/github/lukasbirki/Workshop-Classification/blob/main/Multi-Class%20Classification.ipynb

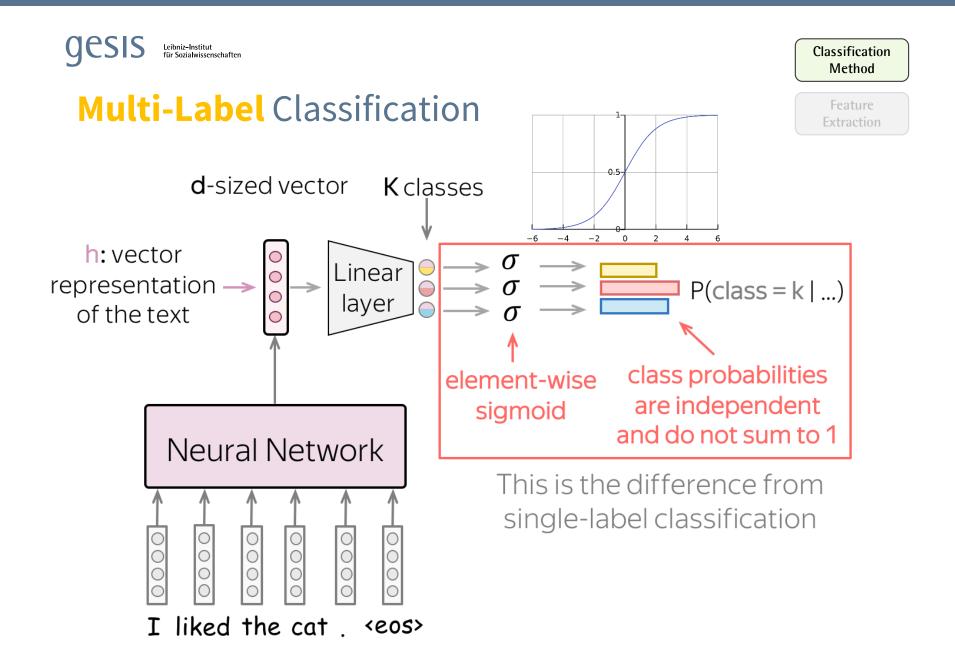


# Multi-Label Classification



### **Definitions**

- Multi-label classification is a classification task labeling each sample with m labels from  $n_{classes}$ , with  $0 \le m \le n_{classes}$
- Labels are not mutually exclusive
- Can be seen as an extension of multi-class classification
- Can require problem transformation
- Separate probabilities for each output class
- E.g., mentions of characters in a specific book chapter





expected	predicted
A, C	A, B
С	С
A, B, C	B, C

expected	predicted
1 0 1	1 1 0
0 0 1	0 0 1
1 1 1	0 1 1





Precision = TP / (TP + FP)

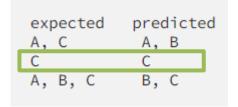
Class A 
$$1/(1+0) = 1$$

Recall = TP / (TP + FN)

 $1/(1+1) = 0.5$ 

F1-Score = 0.667





expected	predicted
1 0 1	1 1 0
0 0 1	0 0 1
1 1 1	0 1 1





Precision = TP / (TP + FP)

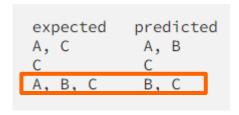
Class A 
$$1/(1+0) = 1$$

Recall = TP / (TP + FN)

 $1/(1+1) = 0.5$ 

F1-Score = 0.667





expected	predicted
1 0 1	1 1 0
0 0 1	0 0 1
1 1 1	0 1 1



Class A: 1 0 1 1

Precision = TP / (TP + FP)

Class A 
$$1/(1+0) = 1$$



expected predicted
A, C A, B
C C
A, B, C B, C



Class A: 1 0 1 1

Precision = TP / (TP + FP)

Class A 1/(1+0) = 1Recall = TP / (TP + FN) 1/(1+1) = 0.5F1-Score = 0.667

Class B Precision = 0.5
Recall = 1.0
F1-score = 0.667

Class C Precision = 1.0 Recall = 0.667 F1-score = 0.8



# Both for **multi-class** and **multi-label** classification, we need to average the metrics across classes

- Microaveraged: all samples equally contribute to the final averaged metric
- $\text{Micro-averaged Precision} = \frac{TP_{total}}{TP_{total} + FP_{total}} = \frac{7}{7+2} = 0.7777$

- Macroaveraged: all classes equally contribute to the final averaged metric
- $$\begin{split} \text{Macro-averaged Precision} &= \frac{1}{3} \textit{Precision}_{\textit{birds}} + \textit{Precision}_{\textit{cats}} + \textit{Precision}_{\textit{dogs}} \\ &= \frac{1}{3} \left( 1 + 0.8 + 0.6666 \right) = 0.8222 \end{split}$$
- Weightedaveraged: each classes's contribution to the average is weighted by its size
- $\text{Weighted-averaged Precision} = \frac{Precision_{birds}*N_{birds} + Precision_{cats}*N_{birds} + Precision_{dogs}*N_{birds}}{\text{Total number of samples}} \\ = \frac{1*2+0.8*4+0.6666*3}{2+4+3} = 0.8$

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### **Tutorials**

- Multi-label classification
  - https://colab.research.google.com/github/lukasbirki/Workshop-Classification/blob/main/Multi-Label%20Classification.ipynb



# Annotaation



# Types of Annotation

### Annotations are required for

- Training / Finetuning
- Evaluation!

### Multiple ways to annotate text

- experts
- trained coders
- crowd workers (since ~2010)
- "Zero-Shot Classification of other LLMs/GPT"?
- (you already have labelled data, but this is often not the case (i))

- see Krippendorff "Content Analysis: An Introduction to Its Methodology" on experts and trained coders
- see Benoit et al. (2016) for optimistic view on crowd coding
  - more opinions: <u>here</u>, <u>here</u>, <u>here</u>
- research on LLMs for annotation: <u>here</u>, <u>here</u>, <u>here</u>, <u>here</u>, and <u>here</u> (but still *many* open meth. questions)



# **Best Practices**



Main Take away:

If humans are unsure how to classify texts, computational methods will fail as well!



# **Best Practices**

- Concept development
- Codebooks & instructions
- Coder training
- Quality assurance

Read <u>here</u> for practical guidance







Text data are very context-dependent!

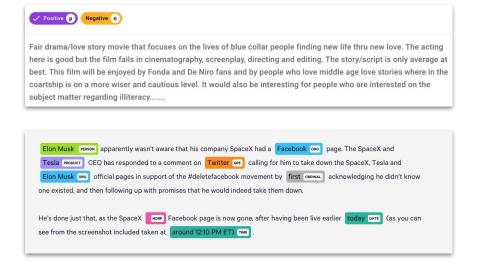
Always inspect your data critically to reflect how your constructs reflect themselves in the text!



# **Concept development**

For instance, concept "populist/non-populist" https://doi.org/10.1017/pan.2022.32

- Level of annotation
  - **document** ⇒ "holistic grading"
  - paragraph ⇒ sequence classification (1+ label per para.)
  - sentence ⇒ sequence classification (1+ label per sent.)
  - pairs of sentences (see here)
  - word ⇒ "token classification" (1 label per word, see here)





# Quality assurance & assessment

### **Annotation quality**

- important for supervised learning
  - bad annotation result in "noisy" labels
  - noisy labels impair ability to learn the relevant signal
- related to replicability: if coders can agree, task should be replicable
- commonly quantified with inter-coder reliability metrics

### **Inter-coder reliability**

- just % agreement is not enough (need to adjust for baseline)
- compute "chanceadjusted" agreement metrics
  - Krippendorff's alpha
  - Cohen's kappa
- read <u>here</u> and <u>here</u>
- https://github.com/Tol oka/crowd-kit

# Thank you!



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# Backup



Classification Method

Feature Extraction

6

3

3

2

# Feature Extraction: Bag of Words

I love this movie! It's sweet, but with satirical humor. The dialogue is great and the adventure scenes are fun... It manages to be whimsical and romantic while laughing at the conventions of the fairy tale genre. I would recommend it to just about anyone. I've seen it several times, and I'm always happy to see it again whenever I have a friend who hasn't seen it yet!



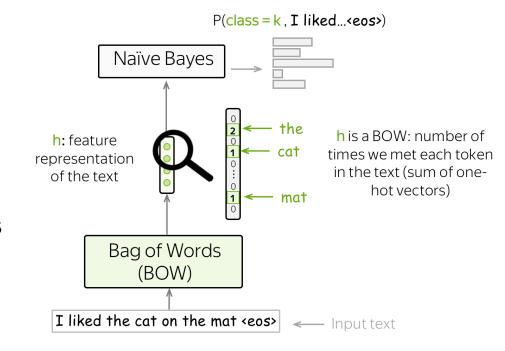


Classification Method

Feature Extraction

# Feature Extraction: Bag of Words

- One-Hot Encoding
- Assumption: word order does not matter
- Limitations
  - Discarding word context
  - Discarding grammatical structure
  - Vocabulary inconsistencies (e.g., grammatical errors, conjunctions)
  - Computationally inefficient (sparse matrix with most elements being 0)



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Classification Method

> Feature Extraction

### **Document-term matrix**

In [114]:	df2											
Out[114]:												
		aa	aabb	aahl	aaptiv	aaron	aavitsland	ab	ababa	abaca	abad	
	0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	564	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	565	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	566	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	567	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
	568	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	

569 rows x 13794 columns



## Feature Extraction: Word-embeddings

- Word embeddings capture similarities in words' meaning and function
  - fixed-length & low-dimensional
  - real-valued ("dense") ⇒ word vectors have no zero entries
  - distributed: information about words semantic properties and syntactic functions distributed across dimensions
- Static vs contextual word embeddings

	Static	Contextualized
Representation	static	dynamic
Context-	agnostic	aware
Models	pre-trained, non- adaptable	finetuning
Examples	Word2Vec, GloVe	BERT, GPT-[X]