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ORIGINAL ARTICLE

Association of physical activities of daily living with the incidence of certified need of care in the long-term care insurance system of Japan: the ROAD study

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Abstract
Background The present study aimed to investigate association of physical activities of daily living with the incidence of certified need of care in the national long-term care insurance (LTCI) system in elderly Japanese population-based cohorts.
Methods Of the 3,040 participants in the baseline examination, we enrolled 1,773 (699 men, 1,074 women) aged 65 years or older who were not certified as in need of care-level elderly at baseline. Participants were followed during an average of 4.0 years for incident certification of need of care in the LTCI system. The Western Ontario and McMaster Universities Osteoarthritis Index (WOMAC) was used assess function. Associated factors in the baseline examination with the occurrence were determined by multivariate Cox proportional hazards regression analysis. Receiver operating characteristic curve analysis was performed to evaluate cut-off values for discriminating between the occurrence and the non-occurrence group.
Results All 17 items in the WOMAC function domain were significantly associated with the occurrence of certified need of care in the overall population. Cut-off values of the WOMAC function score that maximized the sum of sensitivity and specificity were around 4–6 in the overall population, in men, and in women. Multivariate Cox hazards regression analysis revealed that a WOMAC function score $\geq$4 was significantly associated with occurrence with the highest hazard ratio (HR) for occurrence after adjusting for confounders in the overall population (HR [95 % confidence interval (CI)] 2.54 [1.76–3.67]) and in women [HR (95 % CI) 3.13 (1.95–5.02)]. A WOMAC function score $\geq$5 was significantly associated with the highest HR for occurrence in men [HR (95 % CI) 1.88 (1.03–3.43)].
Conclusions Physical dysfunction in daily living is a predictor of the occurrence of certified need of care. Elderly men with a WOMAC function score $\geq$5 and women with a score $\geq$4 should undergo early intervention programs to prevent subsequent deterioration.

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Introduction

Japan is a super-aged society experiencing an unprecedented aging of the population. The proportion of the population aged 65 years or older was 23 % in 2010, and is expected to reach 30.1 % in 2024 and 39 % in 2051 [1]. This leads to an increasing proportion of disabled elderly requiring support or long-term care, imposing enormous economic and social burdens on the country. The Japanese Government started the national long-term care insurance (LTCI) system in 2000 based on the Long-Term Care Insurance Act [2]. The aim was to certify need of care-level elderly and to provide suitable care services according to the level of care required [7 levels, including requiring support (levels 1 and 2) and requiring long-term care (levels 1–5)]. The total number of certified need of care-level elderly was reported to be 5 million in 2011 [2]. Certification of need of care in the national LTCI system is an important outcome in Japan not only because of its massive social and economic burdens, but also because it is urgently necessary to reduce risk and decrease the number of disabled elderly requiring care in their activities of daily living (ADLs). It is critically important to accumulate epidemiologic evidence, including identification of predictors, to establish evidence-based prevention strategies. However, no studies have determined the association of physical ADLs with the incidence of certified need of care in the national LTCI system using large-scale, population-based cohorts. The objective of the present study was to investigate the association of physical ADLs with the incidence of certified need of care in the national LTCI system and determine its predictors in elderly participants of large-scale, population-based cohorts of the research on osteoarthritis/osteoporosis against disability (ROAD) study.

Subjects and methods

Participants

The analysis was based on data collected from cohorts established in 2005 for the ROAD study. Details of the cohorts have been reported elsewhere [3, 4]. Briefly, a baseline database was created from 2005 to 2007, which included clinical and genetic information on 3,040 residents of Japan (1,061 men, 1,979 women). Participants were recruited from resident registration listings in three communities, namely, an urban region in Itabashi, Tokyo, and rural regions in Hidakagawa and Taiji, Wakayama. Participants in the urban region in Itabashi were recruited from those of a cohort study [5] in which the participants were randomly drawn from the register database of Itabashi ward residents, with a response rate in the age group >60 years of 75.6 %. Participants in the rural regions in Hidakagawa and Taiji were recruited from resident registration lists, with response rates in the groups aged >60 years of 68.4 and 29.3 %, respectively. Inclusion criteria were the ability to (1) walk to the survey site, (2) report data, and (3) understand and sign an informed consent form. For the present study, we enrolled 1,773 participants (699 men, 1,074 women; mean age 75.4 years) aged 65 years or older who were not certified as in need of care-level elderly in the national LTCI system at baseline. All participants provided written informed consent, and the study was conducted with approval from the ethics committees of the participating institutions.

Baseline procedures

Participants completed an interviewer-administered questionnaire containing 400 items that included lifestyle information, such as smoking habits, alcohol consumption, and physical activity. At baseline, anthropometric measurements, including height and weight, were taken, and body mass index (BMI) [weight (kg)/height^2 (m^2)] was estimated based on the measured height and weight.

Assessment of physical ADLs

We used the Western Ontario and McMaster Universities Osteoarthritis Index (WOMAC) for assessment of physical ADLs. The WOMAC is a health status instrument, consisting of three domains: pain, stiffness, and physical function. We used the WOMAC function domain to evaluate physical ADLs. It consisted of 17 items: assessing difficulties in descending stairs, ascending stairs, rising from sitting, standing, bending to floor, walking on a flat surface, getting in/out of car/bus, going shopping, putting on socks/stockings, rising from bed, taking off socks/stockings, lying in bed, getting into/out of bath, sitting, getting on/off toilet, heavy domestic duties, and light domestic duties. Each item in the domain is graded on either a 5-point Likert scale (scores of 0–4) or a 100-mm visual analog scale [6, 7]. In the present study, we used the Likert scale (version LK 3.0). Items were rated from 0 to 4; 0, no difficulty; 1, mild difficulty; 2, moderate difficulty; 3, severe difficulty; 4, extreme difficulty. The domain score ranges from 0 to 68. Japanese versions of the WOMAC have been validated [8].

Certification of need of care in the LTCI system

The nationally uniform criteria for long-term care need certification was established objectively by the Japanese Government, and certification of need of care-level elderly

is determined based on evaluation results by the Certification Committee for Long-term Care Need in municipalities in accordance with basic guidelines formulated by the Government. The process of eligibility for certification of need of care in the LTCI system was described in detail by Chen et al. [9]. An elderly person who requires help with ADLs or the caregiver contacts the municipal government to request official certification of care needs. After the application, a trained official visits the home to assess the current physical status of the elderly person, including presence or absence of muscle weakness or joint contracture of limbs, and difficulties in sitting-up, standing-up, maintaining sitting or standing position, transferring from one place to another, standing on one leg, walking, bathing, dressing, and other ADLs. Mental status, including dementia, also is assessed. These data are analyzed to calculate a standardized score for determination of the level of care needs (certified support, levels 1–2; or long-term care, levels 1–5). In addition, the primary physician of the applicant assesses physical and mental status, including information on diseases causing ADL disability and the extent of disabilities caused by them. Finally, the Certification Committee for Long-term Care Need reviews the data and determines the certification and its level.

Follow-up and definition of incident certified need of care

After the baseline ROAD survey, participants who were not certified as in need of care-level elderly at baseline were followed for incident certification of need of care in the LTCI system. Incident certified need of care was defined as the incident certified 7 levels, including requiring support (levels 1–2) and requiring long-term care (levels 1–5). Information on the presence or absence of certification of need of care and its date of occurrence were collected by the resident registration listings in three communities every year up to 2010, and were used for analyses in the present study.

Statistical analysis

All statistical analyses were performed using STATA statistical software (STATA, College Station, TX, USA). Differences in values of the parameters between the two groups were tested for significance using the unpaired Student's t test, the Mann–Whitney's U test, and Chi-square test. We used receiver operating characteristic (ROC) curve analysis to determine a cut-off value of the WOMAC function score for discriminating two distinct groups: an occurrence and a non-occurrence group of certified need of care. Cut-off values were determined that maximized the sum of sensitivity and specificity. Factors associated with the occurrence of certified need of care were determined using Cox proportional hazards regression analysis; hazard ratios (HRs) and 95 % confidence intervals (CIs) were determined after adjusting for region, age, sex, and BMI. Smoking habit and alcohol consumption were not included as confounders because they were not significantly associated with the incidence of certified need of care.

Results

Of the 1,773 participants who were not certified as in need of care-level elderly at baseline, information on

Table 1 Baseline characteristics of population at risk for the certified need of care in the LTCI system

	Men	Women
No. of subjects	699	1,074
Age (years)	75.6 (5.1)	75.2 (5.3)
Height (cm)	160.9 (6.0)	147.9 (6.0)[b]
Weight (kg)	59.4 (9.1)	50.0 (8.3)[b]
BMI (kg/m^2)	22.9 (2.9)	22.8 (3.4)
Smoking (%)	21.0	3.2[c]
Alcohol consumption, %	61.2	23.0[c]
WOMAC function domain		
Descending stairs, pts[a]	0 (0, 0, 1, 1)	0 (0, 0, 1, 2)[d]
Ascending stairs, pts[a]	0 (0, 0, 1, 1)	0 (0, 0, 1, 2)
Rising from sitting, pts[a]	0 (0, 0, 0, 1)	0 (0, 0, 1, 1)[d]
Standing, pts[a]	0 (0, 0, 0, 1)	0 (0, 0, 1, 1)[d]
Bending to floor, pts[a]	0 (0, 0, 0, 1)	0 (0, 0, 1, 1)
Walking on a flat surface, pts[a]	0 (0, 0, 0, 1)	0 (0, 0, 0, 1)
Getting in/out of car/bus, pts[a]	0 (0, 0, 0, 1)	0 (0, 0, 1, 1)[d]
Going shopping, pts[a]	0 (0, 0, 0, 1)	0 (0, 0, 0, 1)[d]
Putting on socks/stockings, pts[a]	0 (0, 0, 0, 1)	0 (0, 0, 0, 1)[d]
Rising from bed, pts[a]	0 (0, 0, 0, 1)	0 (0, 0, 0, 1)[d]
Taking off socks/stockings, pts[a]	0 (0, 0, 0, 1)	0 (0, 0, 0, 1)[d]
Lying in bed, pts[a]	0 (0, 0, 0, 0)	0 (0, 0, 0, 1)[d]
Getting into/out of bath, pts[a]	0 (0, 0, 0, 0)	0 (0, 0, 0, 1)[d]
Sitting, pts[a]	0 (0, 0, 0, 0)	0 (0, 0, 0, 0)[d]
Getting on/off toilet, pts[a]	0 (0, 0, 0, 1)	0 (0, 0, 1, 2)[d]
Heavy domestic duties, pts[a]	0 (0, 0, 0, 1)	0 (0, 0, 0, 1)[d]
Light domestic duties, pts[a]	0 (0, 0, 0, 1)	0 (0, 0, 0, 1)[d]
Total, pts[a]	1 (0, 0, 5, 12)	2 (0, 0, 8, 17)[d]

Except where indicated otherwise, values are mean (SD)

LTCI long-term care insurance system, *BMI* body mass index, *WOMAC* the Western Ontario and McMaster Universities Arthritis Index

[a] Median (10, 25, 75, and 90 percentile)

[b] $P < 0.05$ vs men by unpaired Student's t test

[c] $P < 0.05$ vs men by Chi-square test

[d] $P < 0.05$ vs men by Mann–Whitney U test

Table 2 Association of physical activities of daily living with the occurrence of certified need of care in the LTCI system

Physical activity	Overall population		Men		Women	
	HR (95 % CI)	*P* value	HR (95 % CI)	*P* value	HR (95 % CI)	*P* value
Descending stairs, pts	1.47 (1.26, 1.72)	<0.001	1.29 (0.96, 1.74)	0.089	1.56 (1.30, 1.87)	<0.001
Ascending stairs, pts	1.47 (1.25, 1.73)	<0.001	1.29 (0.93, 1.77)	0.123	1.55 (1.29, 1.86)	<0.001
Rising from sitting, pts	1.58 (1.34, 1.88)	<0.001	1.38 (0.95, 1.99)	0.092	1.67 (1.37, 2.03)	<0.001
Standing, pts	1.64 (1.41, 1.91)	<0.001	1.39 (1.02, 1.90)	0.037	1.73 (1.45, 2.06)	<0.001
Bending to floor, pts	1.57 (1.32, 1.85)	<0.001	1.61 (1.15, 2.27)	0.006	1.57 (1.29, 1.90)	<0.001
Walking on a flat surface, pts	1.57 (1.30, 1.90)	<0.001	1.25 (0.88, 1.77)	0.22	1.78 (1.41, 2.23)	<0.001
Getting in/out of car/bus, pts	1.76 (1.47, 2.10)	<0.001	1.60 (1.14, 2.26)	0.007	1.85 (1.50, 2.29)	<0.001
Going shopping, pts	1.72 (1.46, 2.03)	<0.001	1.55 (1.14, 2.11)	0.005	1.81 (1.48, 2.21)	<0.001
Putting on socks/stockings, pts	1.60 (1.33, 1.92)	<0.001	1.41 (0.98, 2.03)	0.065	1.71 (1.37, 2.12)	<0.001
Rising from bed, pts	1.68 (1.40, 2.03)	<0.001	1.41 (0.98, 2.02)	0.066	1.83 (1.47, 2.29)	<0.001
Taking off socks/stockings, pts	1.64 (1.37, 1.98)	<0.001	1.48 (1.01, 2.16)	0.046	1.72 (1.39, 2.13)	<0.001
Lying in bed, pts	1.82 (1.44, 2.30)	<0.001	1.96 (1.13, 3.40)	0.017	1.79 (1.38, 2.32)	<0.001
Getting into/out of bath, pts	1.71 (1.43, 2.04)	<0.001	1.64 (1.15, 2.33)	0.006	1.75 (1.43, 2.15)	<0.001
Sitting, pts	2.21 (1.73, 2.82)	<0.001	1.92 (1.14, 3.22)	0.014	2.32 (1.75, 3.06)	<0.001
Getting on/off toilet, pts	1.87 (1.52, 2.29)	<0.001	1.51 (1.00, 2.27)	0.05	2.09 (1.63, 2.68)	<0.001
Heavy domestic duties, pts	1.27 (1.09, 1.49)	0.003	1.20 (0.89, 1.62)	0.238	1.33 (1.10, 1.60)	0.003
Light domestic duties, pts	1.68 (1.41, 2.01)	<0.001	1.49 (1.07, 2.07)	0.019	1.80 (1.45, 2.24)	<0.001

Hazard ratios (HRs) and 95 % confidence intervals (CIs) were determined by Cox proportional hazards regression analysis after adjusting for age, sex, body mass index, and region in the overall population, and after adjusting for age, body mass index, and region in men and in women, respectively

LTCI long-term care insurance system

certification of need of care could be obtained in 1,760 (99.3 %) during the average 4.0-year follow-up. Fifty-four men and 115 women were certified as in need of care-level elderly in the national LTCI system, whereas, 1,591 remained uncertified during the follow-up period. The average period for the certification was 2.3 years. Among the above 54 men and 115 women, those who were certified as requiring long-term care level 1, 2, 3, 4, and 5 were 7, 9, 2, 4, 3 men, and 12, 17, 9, 4, 4 women, respectively. One hundred and twenty-six participants died and eight moved away. Incidence of certified need of care in the LTCI system was 2.3/100 person-years in the overall population, and 2.0/100 person-years in men and 2.5/100 person-years in women. Table 1 shows the baseline characteristics of the population at risk for occurrence of certified need of care in the LTCI system. The score of each item in the WOMAC function domain was significantly higher in women than in men in almost all items.

We then investigated association of each item in the WOMAC function domain with the occurrence of certified need of care in the LTCI system (Table 2). All 17 items in the WOMAC function domain were significantly associated with the occurrence of the certified need of care in the overall population and in women. In men, standing, bending to floor, getting in/out of car/bus, going shopping, taking off socks/stockings, lying in bed, getting into/out of bath, sitting, and light domestic duties were significantly associated with the occurrence of certified need of care, whereas other ADLs were not. In addition, the value of HR for each item in the association was higher in women than in men in 15 of 17 items.

Next we determined cut-off values of total score of the WOMAC function domain for discriminating two groups: an occurrence and a non-occurrence group of certified need of care using ROC curve analysis. The area under ROC curve was 0.70 in the overall population, 0.61 in men, and 0.74 in women (Fig. 1). The cut-off value of the WOMAC function score that maximized the sum of sensitivity and specificity was 6, 5, and 6 in the overall population, in men, and in women, respectively. In addition, the sensitivity/specificity was 57.3/75.0 % in the overall population, 45.7/75.0 % in men, and 64.4/72.6 % in women, respectively (Table 3). Furthermore, the cut-off value by which the sum was the second largest was 4 in the overall population, 4 in men, and 4 in women, and the sensitivity/specificity was 65.3/66.7 % in the overall population, 50.0/70.0 % in men, and 72.1/64.5 % in women, respectively (Table 3).

Because ROC curve analysis is a univariate analysis, we performed multivariate Cox hazards regression analysis to determine the cut-off value of the WOMAC function score for best discriminating between an occurrence and a non-

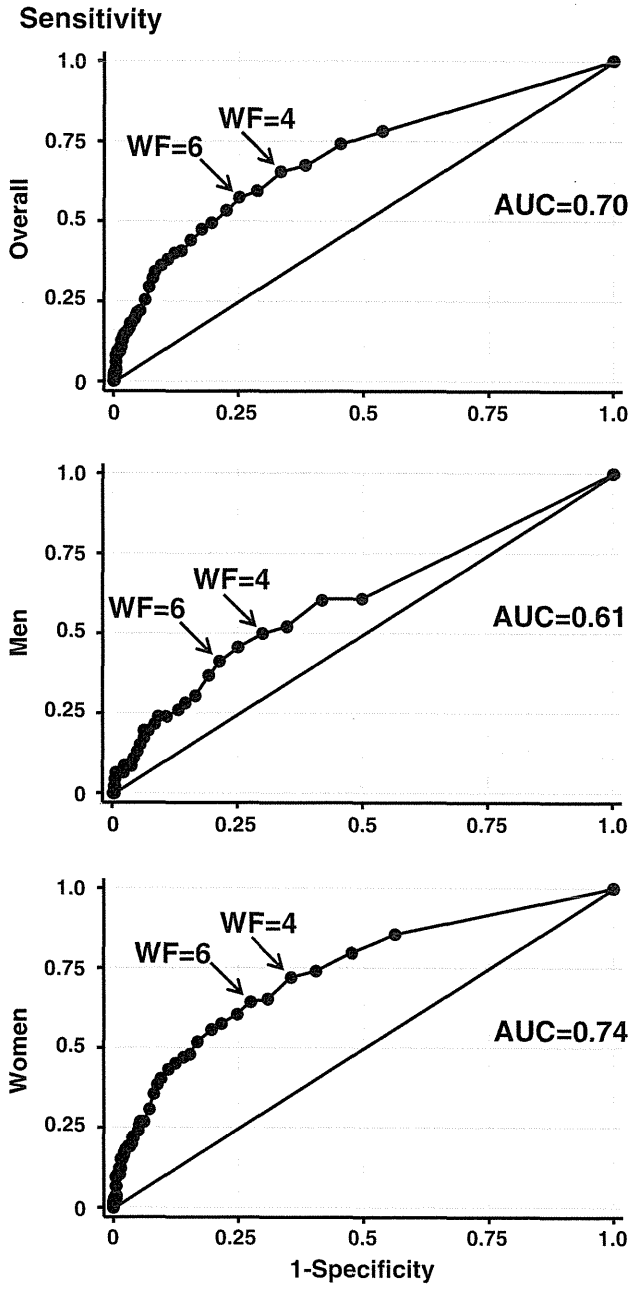

Fig. 1 Receiver operating characteristic (ROC) curve analysis for discriminating the occurrence group of certified need of care in the overall population, in men, and in women. *AUC* area under ROC curve, *WF* WOMAC (Western Ontario and McMaster Universities Osteoarthritis Index) function score

occurrence group of certified need of care after adjusting for age, sex, BMI, and region (Table 4). The group with WOMAC function score ≥4 was significantly associated with the occurrence of certified need of care compared with the group with the score <4 with the highest HR in the overall population [HR 2.54, 95 % CI (1.76–3.67)] and in women [HR 3.13, 95 % CI (1.95–5.02)]. In men, the group with WOMAC function score ≥5 was significantly

Table 3 Sensitivity and specificity of the occurrence of certified need of care determined by the cut-off point of the WOMAC function score

Cut-off point	Overall population			Men			Women		
	Sensitivity (%)	Specificity (%)	Sensitivity + specificity (%)	Sensitivity (%)	Specificity (%)	Sensitivity + specificity (%)	Sensitivity (%)	Specificity (%)	Sensitivity + specificity (%)
WF = 4pts	65.3	66.7	132.0	50.0	70.0	120.0	72.1	64.5	136.6
WF = 5pts	59.3	71.4	130.7	45.7	75.0	120.7	65.4	69.2	134.6
WF = 6pts	57.3	75.0	132.3	41.3	78.6	119.9	64.4	72.6	137.0

WOMAC the Western Ontario and McMaster Universities Arthritis Index, *WF* WOMAC function score

Table 4 Association of groups divided by the WOMAC function score with the occurrence of certified need of care in the LTCI system

	Overall population		Men		Women	
	HR (95 % CI)	*P* value	HR (95 % CI)	*P* value	HR (95 % CI)	*P* value
WF ≥ 4 pts vs WF < 4 pts	2.54 (1.76, 3.67)	<0.001	1.85 (1.01, 3.39)	0.045	3.13 (1.95, 5.02)	<0.001
WF ≥ 5 pts vs WF < 5 pts	2.35 (1.64, 3.36)	<0.001	1.88 (1.03, 3.43)	0.040	2.71 (1.73, 4.27)	<0.001
WF ≥ 6 pts vs WF < 6 pts	2.50 (1.75, 3.58)	<0.001	1.84 (1.00, 3.39)	0.051	3.03 (1.93, 4.76)	<0.001

Hazard ratios (HRs) and 95 % confidence intervals (CIs) were determined by Cox proportional hazards regression analysis after adjusting for age, sex, body mass index, and region in the overall population, and after adjusting for age, body mass index, and region in men and in women, respectively

WOMAC the Western Ontario and McMaster Universities Arthritis Index, *LTCI* long-term care insurance system, *WF* WOMAC function score

Table 5 Association of the WOMAC function score with the occurrence of different certified need of care levels in the LTCI system

Outcome variable	Overall population		Men		Women	
	HR (95 % CI)	*P* value	HR (95 % CI)	*P* value	HR (95 % CI)	*P* value
RSL1–2 and RCL 1–5	1.05 (1.03, 1.06)	<0.001	1.03 (1.01, 1.06)	0.008	1.05 (1.04, 1.07)	<0.001
RCL 1–5	1.05 (1.03, 1.07)	<0.001	1.04 (1.00, 1.07)	0.046	1.06 (1.03, 1.08)	<0.001
RCL 2–5	1.06 (1.04, 1.08)	<0.001	1.04 (1.01, 1.08)	0.015	1.06 (1.04, 1.09)	<0.001
RCL 3–5	1.05 (1.03, 1.08)	<0.001	1.05 (0.99, 1.10)	0.099	1.06 (1.02, 1.09)	0.001
RCL 4–5	1.04 (1.00, 1.08)	0.048	1.02 (0.95, 1.10)	0.501	1.05 (1.00, 1.10)	0.057
RCL 5	1.01 (0.93, 1.09)	0.830	0.99 (0.82, 1.20)	0.945	1.01 (0.93, 1.11)	0.780

Hazard ratios (HRs) and 95 % confidence intervals (CIs) were determined by Cox proportional hazards regression analysis after adjusting for age, sex, body mass index, and region in the overall population, and after adjusting for age, body mass index, and region in men and in women, respectively

WOMAC the Western Ontario and McMaster Universities Arthritis Index, *LTCI* long-term care insurance system, *RSL* requiring support level, *RCL* requiring long-term care level

associated with the occurrence of certified need of care compared with the group with a score of <5 with the highest HR [HR 1.88, 95 % CI (1.03–3.43)].

Furthermore, we examined association of the WOMAC function domain with the occurrence of different certified need of care levels in the LTCI system (Table 5). When the outcome variable of the occurrence was defined as requiring support level (RSL) 1–2 and requiring long-term care level (RCL) 1–5, RCL 1–5, and RCL 2–5, there were significant associations in the overall population, in men, and in women, respectively. When the outcome variable of the occurrence was defined as RCL 3–5, there were significant associations in the overall population and in women. When the outcome variable of the occurrence was defined as RCL 4–5, there was significant association in the overall population.

Discussion

The present study determined association of physical ADLs with the incidence of certified need of care in the national LTCI system in elderly participants of Japanese population-based cohorts. All 17 items in the WOMAC function domain were significantly associated with the occurrence of certified need of care in the overall population. ROC curve analysis showed that cut-off values of the WOMAC function score of around 4–6 maximized the sum of sensitivity and specificity of the occurrence of certified need of care. Furthermore, multivariate Cox hazards regression analysis revealed that the group with WOMAC function score ≥4 was significantly associated with the occurrence of certified need of care with the highest HR after adjusting for confounders in the overall population and in women, while the group with WOMAC function score ≥5 was significantly associated with the highest HR in men.

In the present study, we could not obtain information on causes of certified need of care in the LTCI system. Therefore, we could not analyze the direct association of each causing condition with the WOMAC function domain. The Government of Japan reported that the top five leading causes of certified need of care were cerebral stroke (21.5 %), dementia (15.3 %), asthenia as a result of older age (13.7 %), joint disease (10.9 %) and fall-related fracture (10.2 %), comprising 71.6 % of all causes in 2010 [10]. Based on these data, most of the causes of incident certification in the present study are inferred to be among the top five leading conditions. Although we could not

know the exact percentage of each causing condition, joint disease and fall-related fracture are inferred to represent approximately 20 % in total causes of incident certification in the present study, and cerebral stroke, dementia, and asthenia as a result of older age are inferred to represent approximately 50 % in total causes of incident certification.

The Government of Japan also reported that the percentage of joint disease and fall-related fracture was 16.7 % for the cause of RCL 1–5 [10]. Furthermore, it was 17.6, 19.8, 14.8, 17.4, and 9.8 % for the cause of RCL 1, 2, 3, 4, and 5, respectively [10]. Although we could not know the exact percentage of joint disease and fall-related fracture for the cause of each RCL in the present study, the percentage for the cause of RCL 1–4 is inferred to be approximately 15 % or more based on the data of the Government of Japan, which may be the reason why the WOMAC domain was significantly associated with the occurrence of certified need of care including RCLs 1–4 in the overall population.

The WOMAC physical function domain assesses difficulties in ADLs, including going up/down stairs, getting in/out of a car and bath, shopping, and household duties. Therefore, results of the present study indicate that the severity of physical dysfunction in ADLs predicts subsequent deterioration in ADLs, leading to the occurrence of certified need of care. Previous studies reported that low physical function was a predictor of subsequent ADL disability in the elderly [11, 12]. Although no previous studies have investigated the association of physical ADLs with the incidence of certified need of care in the national LTCI system in large-scale population-based cohorts, those previous findings are consistent with the present results in that low physical activity predicted subsequent deterioration in ADLs.

All 17 items in the WOMAC domain were significantly associated with the occurrence of certified need of care in women. On the other hand, 9 of 17 items were significantly associated with the occurrence of certified need of care in men. In addition, the HR for each item in the association was higher in women than in men for 15 of 17 items. The sex difference identified in this association may be due to the difference in the prevalence of knee osteoarthritis between the sexes. Muraki et al. [13] reported that prevalence of radiographic knee osteoarthritis determined by the Kellgren–Lawrence grade ≥ 2 was 47.0 % in men and 70.2 % in women, respectively, in subjects aged 60 years and older in Japanese population-based cohorts. Therefore, women are more likely than men to be affected by knee osteoarthritis and have difficulties in physical function of the lower extremities, leading to higher scores on the WOMAC function scale. Another reason for the sex differences may be the weaker muscle strength in women; muscle strength in men is higher than that in women in all decades of life [14], which may obscure the association in men, as muscle strength has been reported to be inversely associated with the WOMAC domains [15].

Functional declines in locomotive organs including physical ADLs usually progress slowly and gradually. As such, it may be difficult for people to recognize this decline in their daily life. Therefore, it is of particular importance to raise awareness of the growing risk caused by such disorders, and to take action to improve and maintain the health of the locomotive organs. The Japanese Orthopaedic Association proposed the concept of "locomotive syndrome" in 2007 for the promotion of preventive healthcare of the locomotive organs [16–18]. Locomotive syndrome refers to conditions under which the elderly have been receiving support or long-term care, or high-risk conditions under which they may soon require support or long-term care, that are caused by musculoskeletal disorders [16–18]. Population approaches, including promotion of the concept of locomotive syndrome to both younger and older generations, are important, in addition to high-risk approaches, including identifying those at risk for certified need of care and practicing intervention programs to reduce the risk of certified need of care.

Because the WOMAC function scale is a self-assessment questionnaire that is easy to conduct and evaluate, it can be used to screen elderly persons at high risk of certified need of care in the LTCI system. Multivariate Cox hazards regression analysis showed that a WOMAC function score of 5 in men and 4 in women best discriminated between the occurrence and the non-occurrence group of certified need of care in this study population. Elderly men with a WOMAC function score ≥ 5 had a 1.88-fold higher risk of occurrence of certified need of care compared with elderly men with a score <5. Elderly women with a WOMAC function score ≥ 4 had a 3.13-fold higher risk of occurrence of certified need of care compared with elderly women with a score <4. Elderly persons screened by these cut-off values should receive early intervention for the prevention of subsequent deterioration in ADLs that could lead to certified need of care. Further studies, along with the accumulation of epidemiologic evidence, are necessary to develop intervention programs that are safe and effective for elderly subjects who are at high risk of certified need of care.

There are some limitations in the present study. First, we could not obtain information on causes of certified need of care in the LTCI system. Therefore, we could not analyze the direct association of each causing condition with measured factors, and could not determine the risk factors for occurrence of certified need of care with respect to each causing condition. The Japanese government reported that the top five leading causes of certified need of care were cerebral stroke, dementia, asthenia, osteoarthritis, and fall-related fracture, comprising 71.6 % of all causes in 2010 [10]. Based on these data, most of the causes of incident certification in the present

study are inferred to be among the top five leading conditions. Additional studies are necessary to identify those direct associations. Second, participants at baseline in the present study were those who could walk to the survey site and could understand and sign an informed consent form. Since those who could not were not included in the analyses, the study participants do not truly represent the general population due to health bias, which should be taken into consideration when generalizing the results of the present study.

In conclusion, the present study determined association of physical ADLs with the occurrence of certified need of care in the LTCI system in elderly participants of Japanese population-based cohorts. The severity of physical dysfunction is a predictor of the occurrence of certified need of care. Further studies are necessary to develop intervention programs that are safe and effective for elderly individuals who are at high risk of certified need of care.

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Conflict of interest There are no conflicts of interest.

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ORIGINAL ARTICLE

Prevalence of knee pain, lumbar pain and its coexistence in Japanese men and women: The Longitudinal Cohorts of Motor System Organ (LOCOMO) study

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Abstract The Longitudinal Cohorts of Motor System Organ (LOCOMO) study was initiated in 2008 through a grant from the Ministry of Health, Labour, and Welfare of Japan to integrate information from several cohorts established for the prevention of musculoskeletal diseases. We integrated the information of 12,019 participants (3,959 men and 8,060 women) in the cohorts comprising nine communities located in Tokyo (two regions: Tokyo-1 and Tokyo-2), Wakayama [two regions: Wakayama-1 (mountainous region) and Wakayama-2 (seaside region)], Hiroshima, Niigata, Mie, Akita, and Gunma prefectures. The baseline examination of the LOCOMO study consisted of an interviewer-administered questionnaire, anthropometric measurements, medical information recording, X-ray radiography, and bone mineral density measurement. The prevalence of knee pain was 32.7 % (men 27.9 %; women 35.1 %) and that of lumbar pain was 37.7 % (men 34.2 %; women 39.4 %). Among the 9,046 individuals who were surveyed on both knee pain and lumbar pain at the baseline examination in each cohort, we noted that the prevalence of both knee pain and lumbar pain was 12.2 % (men 10.9 %; women 12.8 %). Logistic regression analysis showed that higher age, female sex, higher body mass index (BMI), living in a rural area, and the presence of lumbar pain significantly influenced the presence of knee pain. Similarly, higher age, female sex, higher BMI, living in a rural area, and the presence of knee pain significantly influenced the presence of lumbar pain. Thus, by using the data of the

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LOCOMO study, we clarified the prevalence of knee pain and lumbar pain, their coexistence, and their associated factors.

Keywords Nation-wide population-based cohort study · Epidemiology · Prevalence · Knee pain · Lumbar pain

Introduction

Musculoskeletal diseases, including osteoarthritis (OA) and osteoporosis (OP), are major public health problems among the elderly; these diseases can affect activities of daily living (ADL) and quality of life (QOL), and can lead to increased morbidity and mortality. According to the recent National Livelihood Survey by the Ministry of Health, Labour, and Welfare in Japan, OA is ranked fourth among diseases that cause disabilities and subsequently require support for ADL, whereas falls and osteoporotic fractures are ranked fifth [1]. Studies have reported increased mortality after osteoporotic fractures at the hip and other sites [2]. An estimated 47,000,000 individuals (21,000,000 men and 26,000,000 women) aged ≥40 years will eventually be affected by either OA or OP [3].

Considering that the population of Japan is aging rapidly, a comprehensive and evidence-based prevention strategy for musculoskeletal diseases is urgently needed. However, only a few prospective, longitudinal studies designed to develop such a strategy have been conducted. Therefore, little information is available regarding the incidence of disability and the prevalence and incidence of musculoskeletal disorders, including knee pain, and lumbar pain, and their associated factors in Japan. The absence of such epidemiological data hampers the rational design of clinical and public health approaches for the diagnosis, evaluation, and prevention of musculoskeletal diseases.

Several cohorts have focused on the prevention of OP, knee OA (KOA), lumbar spondylosis (LS) or disability caused by musculoskeletal diseases. However, since the prevalence of the musculoskeletal diseases has been reported to be high [3], the extent of the population at risk after excluding those who had the target disease at the baseline seems to be small. To identify epidemiological indices, especially the incidence of musculoskeletal diseases and/or disability, a large number of subjects is required. In addition, to determine the regional differences in epidemiological indices, we need a survey of cohorts across Japan.

The Longitudinal Cohorts of Motor System Organ (LOCOMO) study was initiated in 2008 by the members of the committee for 'the prevention of knee and back pain and bone fractures in a large cohort of regionally representative residents from across Japan,' through a grant from the Ministry of Health, Labour, and Welfare of Japan (Director, Noriko Yoshimura). This study aimed to integrate the information of several cohorts established for the prevention of musculoskeletal diseases from 2000 onwards, and to initiate a follow-up examination using the unified questionnaire from 2006 onwards in Japan.

In the present paper, by using the integrated information at the baseline of the LOCOMO study, we tried to confirm the prevalence of clinical symptoms of musculoskeletal diseases, such as knee pain and lumbar pain and their characteristics.

Materials and methods

Participants

Participants in the cohorts were residents of nine communities located in Tokyo (two regions: Tokyo-1, principle investigators (PIs): Shigeyuki Muraki, Toru Akune, Noriko Yoshimura, Kozo Nakamura; Tokyo-2, PIs: Yoko Shimizu, Hideyo Yoshida, Takao Suzuki), Wakayama [two regions: Wakayama-1 (mountainous region) and Wakayama-2 (seaside region); PIs: Noriko Yoshimura, Munehito Yoshida], Hiroshima (PI: Saeko Fujiwara), Niigata (PI: Go Omori), Mie (PI: Akihiro Sudo), Akita (PI: Hideyo Yoshida), and Gunma (PI: Yuji Nishiwaki) prefectures [4]. Figure 1 shows the location of each cohort in Japan, and Fig. 2 provides the timeline of the LOCOMO study. Residents of the nine regions were recruited from resident registration lists in the relevant region. Data for the 12,019 participants were collected and registered as an integrated cohort. Numbers of participants in the LOCOMO study classified by regions of each cohort are shown in Table 1. The smallest cohort consisted of 826 individuals in Wakayama-2, and the largest consisted of 2,613 individuals in Hiroshima.

All participants provided written informed consent, and the study was conducted with the approval of the ethics committees of the University of Tokyo (nos. 1264 and 1326), the Tokyo Metropolitan Institute of Gerontology (no. 5), Wakayama (no. 373), The Radiation Effects Research Foundation (RP03-89), Niigata University (no. 446), Mie University (no. 837 and no. 139), Keio University (no. 16–20), and National Center for Geriatrics and Gerontology (no. 249). Safety of the participants was ensured during the examination and during all other study procedures.

Data collection

The baseline examination of the LOCOMO study consisted of the following: an interviewer-administered questionnaire,

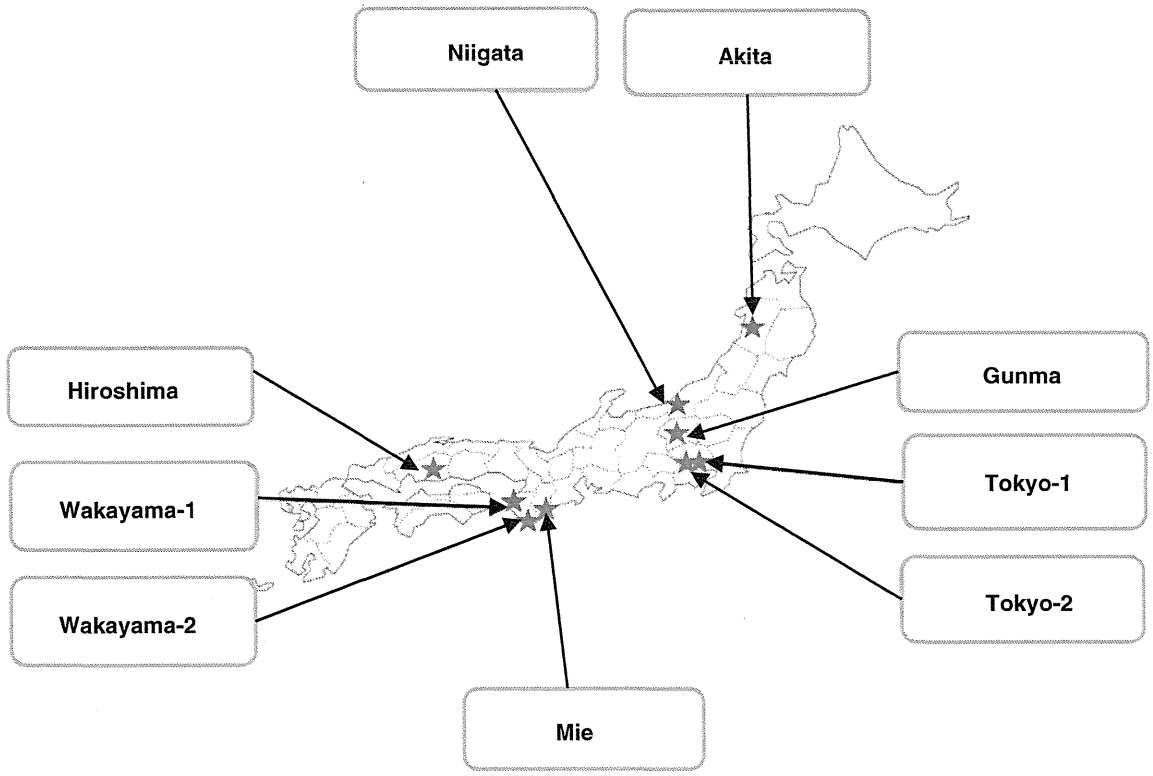

Fig. 1 Locations of the nine different regions from which the study cohorts were derived

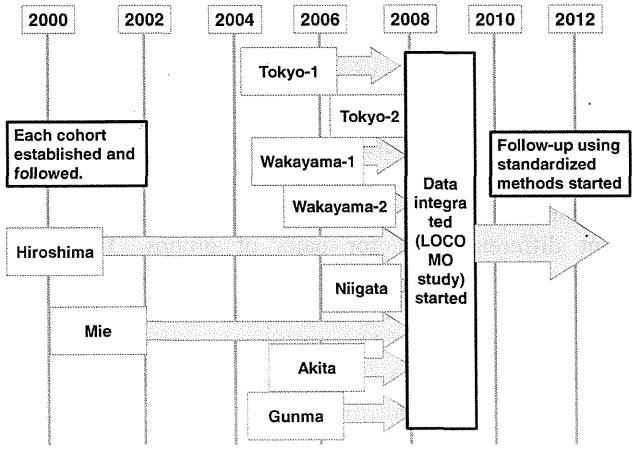

Fig. 2 Timeline of the LOCOMO study

Table 1 Numbers of participants in the LOCOMO study classified by regions of each cohort

Regions of each cohort	Start year	Total	Men	Women
Tokyo-1	2005	1,350	465	885
Tokyo-2	2008	1,453	59	1,394
Wakayama-1 (mountainous)	2005	864	319	545
Wakayama-2 (seaside)	2006	826	277	549
Hiroshima	2000	2,613	794	1,819
Niigata	2007	1,474	628	846
Mie	2001	1,175	423	752
Akita	2006	852	366	486
Gunma	2005	1,412	628	784
Total		12,019	3,959	8,060

anthropometric measurements, medical information recording, radiography, and bone mineral density (BMD) measurement.

Interviewer-administered questionnaire

A questionnaire was prepared by modifying the questionnaire used in the Osteoporotic Fractures in Men Study (MrOS) [5], and some new items were added to the modified questionnaire. Knee symptoms were evaluated using the Western Ontario and McMaster University Osteoarthritis Index (WOMAC) [6]. Health-related QOL was evaluated using the European QOL-5 dimensions instrument (EuroQOL EQ5D) [7] and the Medical Outcomes Study 8-item Short Form (SF-8) [8]. The study staff recorded all the medications administered and their doses.

Anthropometric measurements

Anthropometric factors were measured by well-trained medical nurses. Body mass index [BMI; weight in

kilograms/(height in meters)^2] was calculated on the basis of the current height and weight. Hand grip strength was measured using a Toei Light handgrip dynamometer (Toei Light Co., Ltd., Saitama, Japan). Both hands were tested, and the higher value was used to characterise the maximum muscle strength of the subject. Walking speed was determined by recording the time taken by a subject to walk a determined distance, such as 5 or 6 m, at his/her usual speed. The ability to rise from a chair without using the arms (chair stand) and the ability to perform 5 chair stands was evaluated. The time required to complete the tasks was recorded.

Medical information

Medical information was obtained by experienced medical doctors in each cohort. All participants were questioned about pain in both knees by asking the following questions: 'Have you experienced right knee pain on most days (and continuously on at least one day) in the past month, in addition to the current pain?' and 'Have you experienced left knee pain on most days (and continuously on at least one day) in the past month, in addition to the current pain?' Subjects who answered 'yes' were considered to have knee pain. Lumbar pain was determined by asking the following question: 'Have you experienced lumbar pain on most days (and continuously on at least one day) in the past month, in addition to the current pain?' Subjects who answered 'yes' were considered to have lumbar pain.

In some cohorts (Tokyo-1, Wakayama-1, and Wakayama-2), the participants completed the modified Mini-Mental Status Examination-Japanese version [9] for evaluating cognitive function. Physicians explained any unclear sections of this questionnaire to the participants and assessed the cognitive status on the basis of the completed questionnaire.

Radiography and radiographic assessment

In several cohorts (Tokyo-1, Wakayama-1, Wakayama-2, Hiroshima, Niigata, and Mie), the radiographic examination of knees and/or spine was performed to evaluate the OA or fractures. Plain radiographs were obtained for both knees in the antero-posterior view with weight-bearing and foot map positioning and for the spine in the antero-posterior and lateral views.

The severity of OA was radiographically determined according to the Kellgren-Lawrence (KL) grading system as follows [10]: KL0, normal joint; KL1, slight osteophytes; KL2, definite osteophytes; KL3, narrowing of joint cartilage, and large osteophytes; and KL4, bone sclerosis, narrowing of joint cartilage, and large osteophytes. In the LOCOMO study, joints exhibiting disc-space narrowing alone and no large osteophytes were graded as KL3. In each cohort, radiographs were examined by a single, experienced orthopaedic surgeon who was masked to the clinical status of the participants. If at least one knee joint was graded as KL2 or higher, the participant was diagnosed with radiographic KOA. Similarly, if at least one intervertebral joint of the lumbar spine was graded as KL2 or higher, the participant was diagnosed with radiographic LS.

BMD measurement

In the Wakayama-1, Wakayama-2, and Hiroshima cohorts, BMD of the lumbar spine and proximal femur was measured using dual energy X-ray absorptiometry (DXA) (Hologic Discovery; Hologic, Waltham, MA, USA) during the baseline examination.

OP was defined on the basis of the World Health Organization (WHO) criteria. Specifically, OP was diagnosed when the BMD T scores were lower than the mean lumbar peak bone mass—2.5 SDs [11]. In Japan, the mean BMD of the L2–L4 vertebrae among both young male and female adults has been measured using Hologic DXA [12]. In the present study, lumbar spine BMD < 0.714 g/cm^2 (for both men and women) and femoral neck BMD < 0.546 g/cm^2 (men) or <0.515 g/cm^2 (women) were considered to indicate OP.

Statistical analysis

All statistical analyses were performed using STATA statistical software (STATA Corp., College Station, TX, USA). Differences in proportions were compared using the Chi square test. Differences in continuous variables were tested for significance using analysis of variance for comparisons among multiple groups or Scheffe's least significant difference test for pairs of groups. To test the association between the interaction between the knee pain and lumbar pain, a logistic regression model was used. First, the presence of knee pain was used as an objective variable (0: absence, 1: presence) and age (+1 year), gender (men vs. women), BMI (+1 kg/m^2), regional differences (0: rural areas including Wakayama-1, Wakayama-2, Niigata, Mie, Akita, and Gunma vs. 1: urban areas including Tokyo-1, Tokyo-2, and Hiroshima), and lumbar pain (0: no, 1: yes) were used as explanatory variables. Then, lumbar pain was used as an objective variable, and knee pain was used as an explanatory variable in the identical model. All p values and 95 % confidence intervals (CI) of two-sided analysis are presented.

Results

Table 2 shows the number of participants classified by age and gender. Most participants were aged $\geq$60 years, and

Table 2 Numbers of participants in the LOCOMO study classified by age and gender

Age strata (years)	Total (%)	Men (%)	Women (%)
≤39	125 (1.0)	49 (1.2)	76 (0.9)
40–49	483 (4.0)	183 (4.6)	300 (3.7)
50–59	963 (8.0)	320 (8.1)	643 (8.0)
60–69	3,170 (26.3)	1,161 (29.3)	2,009 (24.9)
70–79	5,041 (41.9)	1,573 (39.7)	3,468 (43.0)
80–89	2,111 (17.6)	627 (15.8)	1,484 (18.4)
≥90	126 (1.1)	46 (1.2)	80 (1.0)
Total	12,019 (100.0)	3,959 (100.0)	8,060 (100.0)

99.0 % of the participants were aged ≥40 years. Two-thirds of the participants were women, and their mean age was 1 year greater than that of the male participants.

Selected characteristics of the study populations, including age, height, weight, BMI, and proportions of participants who smoked and consumed alcohol are shown in Table 3. The participants were considered as smokers and alcohol consumers if they answered 'yes' to the question 'Are you currently smoking/drinking?' in the self-administered questionnaire. The mean values of age and BMI were significantly higher in women than in men ($p < 0.01$). The proportions of both current smokers and alcohol consumers were significantly higher among men than among women ($p < 0.001$).

Table 3 Baseline characteristics of participants in the LOCOMO study classified by age and gender

Variables	Men	Women	p Value (men vs. women)
Age (years)	70.0 (10.6)	71.0 (10.3)	<0.001
Height (cm)	161.1 (6.8)	148.5 (6.4)	<0.001
Weight (kg)	59.3 (9.5)	50.8 (8.6)	<0.001
BMI (kg/m^2)	22.8 (3.0)	23.0 (3.5)	0.007
Smoking (%)	34.0	4.8	<0.001
Drinking (%)	52.4	21.1	<0.001

Values are represented as mean (standard deviation)

BMI body mass index

By analysing the data at the baseline examination, we determined the prevalence of knee pain and lumbar pain. Figure 3 shows the age-sex distribution of the prevalence of knee pain and lumbar pain. Overall, the prevalence of knee pain was 32.7 % (27.9 % in men and 35.1 % in women) and that of lumbar pain was 37.7 % (34.2 % in men and 39.4 % in women). The prevalence of pain in both the knee and lumbar region were significantly higher in women than in men ($p < 0.001$). On the basis of the total age and sex distributions derived from the Japanese census in 2010 [13], our results estimate that 18,000,000 people (7,100,000 men and 10,900,000 women) aged ≥40 years would be affected by knee pain and that 27,700,000 people (12,100,000 men and 15,600,000 women) aged ≥40 years would be affected by lumbar pain.

Further, among 9,046 individuals who were surveyed on both knee pain and lumbar pain at the baseline examination in each cohort, the prevalence of both knee pain and lumbar pain was 12.2 % (10.9 % in men and 12.8 % in women). The prevalence of the coexistence of knee and lumbar pain in the participants aged <40, 40–49, 50–59, 60–69, 70–79, and ≥80 years was 4.0, 4.8, 7.4, 13.0, 13.3, and 11.7 %, respectively, (6.1, 5.3, 6.0, 10.0, 11.5, and 13.2 %, respectively, in men and 2.6, 4.6, 8.1, 14.8, 14.2, and 11.0 %, respectively, in women). The prevalence of both knee pain and lumbar pain increased with age in men, whereas that in women reached a plateau at 60–69 and 70–79 years and then declined. On the basis of the total age and sex distributions derived from the Japanese census in 2010 [13], our results estimate that 6,800,000 people

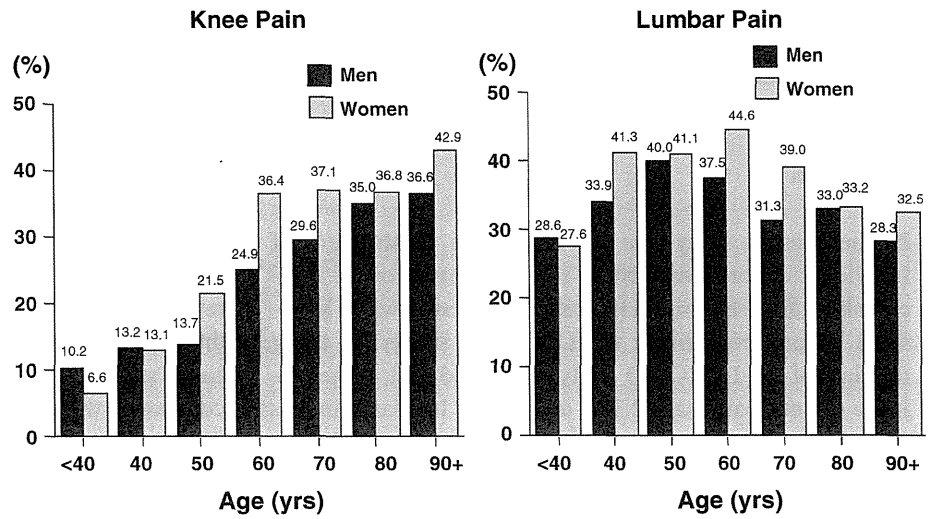

Fig. 3 Prevalence of knee pain and lumbar pain according to age and gender

Table 4 Odds ratios (OR) of potentially associated factors for the presence of knee pain/ lumbar pain vs. absence of pain

Explanatory variables	Reference	OR	95% confident interval	*p*
Knee pain (presence vs. absence)				
Age (years)	+1 year	1.045	1.039–1.051	<0.001***
Gender	0: men, 1: women	1.602	1.441–1.780	<0.001***
Region	0: urban area, 1: rural area	2.419	2.152–2.720	<0.001***
BMI (kg/m^2)	+1 kg/m^2	1.141	1.124–1.158	<0.001***
Lumbar pain	0: absence, 1: presence	1.373	1.243–1.515	<0.001***
Lumbar pain (presence vs. absence)				
Age (years)	+1 year	1.018	1.013–1.023	<0.001***
Gender	0: men, 1: women	1.130	1.023–1.248	0.016*
Region	0: urban area, 1: rural area	2.016	1.801–2.256	<0.001***
BMI (kg/m^2)	+1 kg/m^2	1.020	1.003–1.031	0.021*
Knee pain	0: absence, 1: presence	1.375	1.246–1.518	<0.001***

BMI body mass index

* $p < 0.05$, *** $p < 0.001$

(2,800,000 men and 4,000,000 women) aged ≥40 years would be affected by both knee pain and lumbar pain.

To test the association between the knee pain and lumbar pain, the presence of knee pain was first used as an objective variable (0: absence, 1: presence) and age (+1 year), gender (men vs. women), BMI (+1 kg/m^2), regional differences (0: rural areas including Wakayama-1, Wakayama-2, Niigata, Mie, Akita, and Gunma vs. 1: urban areas including Tokyo-1, Tokyo-2, and Hiroshima), and lumbar pain (0: no, 1: yes) were used as explanatory variables. Then, the presence of lumbar pain was used as an objective variable (0: absence, 1: presence) and age (+1 year), gender (men vs. women), BMI (+1 kg/m^2), regional differences (0: rural areas including Wakayama-1, Wakayama-2, Niigata, Mie, Akita, and Gunma vs. 1: urban areas including Tokyo-1, Tokyo-2, and Hiroshima), and knee pain (0: no, 1: yes) were used as explanatory variables. Table 4 shows the result of the logistic regression analysis. Higher age, female sex, higher BMI, living in a rural area, and the presence of lumbar pain significantly influenced the presence of knee pain. Similarly, higher age, female sex, higher BMI, living in a rural area, and the presence of knee pain significantly influenced the presence of lumbar pain.

Discussion

In the present study, we integrated the information of individual cohorts established for the prevention of musculoskeletal diseases, and created the nationwide large-scale cohorts comprising the LOCOMO study. By using the data of the LOCOMO study, we found that the prevalence of knee pain was 32.7 % and that of lumbar pain was 37.7 %. Both knee pain and lumbar pain were prevalent in 12.2 % of the total population. In the present study, we also clarified that the factors associated with knee or lumbar pain were age, sex, body build, and residential characteristics. In addition, the presence of knee pain affected the lumbar pain, and vice versa. This association remained even after the adjustment for the above-mentioned associated factors. To our knowledge, this is the first study to report the frequency of the knee pain and lumbar pain and to estimate the total number of prevalent subjects, by using a large-scale population-based cohort study in Japan.

With regard to musculoskeletal pain, several population-based epidemiological studies have demonstrated that chronic pain is a highly prevalent condition. Soni et al. [14] reported that the prevalence rates of self-reported knee pain using the baseline data in 1,003 participants from the Chingford Women's Study were 22.97 % in the left knee and 24.80 % in the right knee. The definition of the presence of the knee pain (based on the following two questions: 'Have you had any knee pain in either knee in the last month?' and 'How many days of pain have you experienced in the last month?') was similar but not identical to our definition used in the LOCOMO study, and the subjects' age was younger in the Chinford study than in the LOCOMO study. Therefore, we could not compare the prevalence between the Chinford and LOCOMO studies directly. However, at a glance, the prevalence seems to be higher in the Japanese population. This may be due to the fact that the prevalence of KOA (KL grades ≥2) was higher in the Japanese population than that in the Caucasian population [15]. Verhaak et al. [16] reviewed epidemiological studies on chronic benign pain among adults, including subjects aged between 18 and 75 years, and reported that the prevalence ranged between 2 and 40 % of the population. Coggon et al. did not perform a population-based study, but instead conducted a cross-sectional survey comparing the prevalence of disabling low back pain and disabling wrist/hand pain among groups of workers carrying out similar physical activities in different cultural environments in 18 countries including Japan. They

reported that the 1-month prevalence of disabling low back pain in nurses ranged from 9.6 to 42.6 %, and that of disabling wrist/hand pain in office workers ranged from 2.2 to 31.6 % [17]. We could not compare our results to those of Coggon's results directly because of the difference in the characteristics of the targeted population. However, previous reviews and reports demonstrated that the prevalence of the chronic pain varied in the population surveyed, and therefore, estimating the prevalence and number of patients in pain would require a study that comprises various regions with a large number of subjects. Our LOCOMO study contains 12,019 participants from the cohorts consisting of nine communities in different locations in Japan. Therefore, we believe that our estimation of the prevalence of knee pain and lumbar pain is appropriate, and the number of patients was sufficient.

With regard to the characteristics of subjects with chronic pain, Soni et al. [14] reported that among subjects who could be followed up for 12 years, a higher BMI was predictive of persistent knee pain (odds ratio = 1.14) and incident knee pain (odds ratio = 1.10). Verhaak et al. [16] demonstrated that chronic pain generally increased with age, with some studies reporting a peak prevalence between the ages of 45 and 65 years. These results were not consistent with our results. Moreover, we noted that living in a rural area was associated with the presence of knee pain and lumbar pain, which may be due to the difference of the primary occupation in that area. Muraki et al. [18] reported that the presence of KOA and LS was influenced by the primary occupation of the participants. According to their report, the prevalence of higher K/L grades of KOA and LS was significantly higher among agricultural, forestry, and fishery workers than among clerical workers and technical experts [18]. For occupational activities, sitting on a chair had a significant inverse association with K/L grades ≥ 2 for KOA and LS, whereas standing, walking, climbing and heavy lifting were associated with higher K/L grades for KOA [18]. An association between occupational activities and KOA was also observed in several studies [19–21]. Agricultural, forestry, and fishery workers seemed to be more common in rural areas than in urban areas. In addition, occupational activities, such as sitting on a chair, might be observed more commonly in clerical workers than in agricultural, forestry, and fishery workers. These findings might support the regional differences of pain that were observed in the present study. The main focus of the present study was pain, and not OA; however, the most probable diagnosis underlying knee pain among older people was reported to be OA [22].

There are also several reports regarding the coexistence of pain. The above-mentioned Coggon's investigation indicated that the rates of disabling pain at 2 anatomical sites—the lumbar spine and wrist/hand—covaried ($r = 0.76$) [17]. In their cross-sectional study, Smith et al., examined the presence and sites of chronic pain in 11,797 women. The presence of chronic pain was noted in 38 % of women; among them, the percentage of women experiencing chronic pain at 1, 2, 3, 4, and ≥ 5 sites was 23.2, 24.4, 20.0, 14.3, and 18.2 %, respectively [23]. These results showed that chronic pain coexists at other anatomical sites. In the present study, the prevalence of both knee pain and lumbar pain was 12.2 % (10.9 % in men and 12.8 % in women) among the general population. However, among the subjects with lumbar pain, 37.3 % also had knee pain (39.0 % in men and 36.6 % in women). Unfortunately, in the LOCOMO study, we were unable to collect the data regarding pain at anatomical sites other than knee pain and lumbar pain. Nevertheless, the coexistence of pain was commonly noted, which is inconsistent with previous reports.

There were several limitations in the present study. First, the current subjects do not truly represent the entire Japanese population. We should carefully consider this limitation, especially when determining the generalisability of the results. However, the LOCOMO study is the first large-scale population-based prospective study with more than 12,000 participants. Although it does not comprise the whole population of Japan, the number of participants in the cohorts established for the prevention of the musculoskeletal diseases appears to be biggest worldwide. Second, all the items of our survey in the baseline examination were not recorded in all cohorts. For example, radiographic examination of knees was performed only in Tokyo-1, Wakayama-1, Wakayama-2, Niigata, and Mie prefectures and radiographic examination of the lumbar spine was performed only in Tokyo-1, Wakayama-1, Wakayama-2, Hiroshima, and Mie prefectures. Third, the radiographic findings for OA assessment using KL scales have not been integrated yet, because of the delay in the standardisation of reading methods of the observers. Radiographs should be assessed by a single observer to omit the inter-observer variability, and if this is impossible, then the inter-observer variability among observers should be tested using the standardised criteria. Therefore, in the present study, we could not evaluate the severity of knee/spinal OA or vertebral fractures for assessing knee pain and lumbar pain. After suitable evaluation of intra-observer and inter-observer variability in the assessment of radiography findings and integration of this information, we hope to re-analyse the factors associated with the presence of chronic pain. Moreover, not only OA and fractures, but also rheumatoid arthritis and spondyloarthritis should be considered as parameters for assessing knee pain and lumbar pain. Although collection of the information on the diagnosis may be difficult on a large scale due to the associated cost, it may be possible to obtain this information in at least two cohorts.

In addition, our study has several strengths. First, as mentioned above, the large number of the integrated subjects included in the LOCOMO study is the biggest strength of this study. Moreover, we collected data from nine cohorts across Japan. By using the data of the LOCOMO study, we could compare the regional differences of specific clinical symptoms such as knee pain or lumbar pain, or particular diseases, such as KOA, LS, or OP, as well as its prognosis, such as the incidence of disability or mortality. In particular, we identified regional differences in the prevalences of knee pain and lumbar pain. In addition, we collected a substantial amount of information, via an interviewer-administered questionnaire, dietary assessment, anthropometric measurements, neuromuscular function assessment, biochemical measurements, medical history recording, radiographic assessment, and BMD measurement. However, all items were not recorded in all cohorts and the regional selection bias in each examination should be considered when interpreting the results.

In summary, by using the data of the LOCOMO study, we clarified the prevalence of knee pain and lumbar pain, their coexistence, and their associated factors.

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ORIGINAL ARTICLE

Association of knee osteoarthritis with onset and resolution of pain and physical functional disability: The ROAD study

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Abstract

Objectives. To examine the onset and resolution of pain and physical functional disability using Western Ontario and McMaster Universities Osteoarthritis Index (WOMAC) and their association with knee osteoarthritis (OA) in the longitudinal large-scale population of the nationwide cohort study, Research on Osteoarthritis/osteoporosis Against Disability (ROAD).

Methods. Subjects from the ROAD study who had been recruited during 2005–2007 were followed up 3 years later. A total of 1,578 subjects completed the WOMAC questionnaire at baseline and follow up, and the onset and resolution rate of pain and physical functional disability were examined. We also examined the association of onset of pain and physical functional disability and their resolution with severity of knee OA as well as age, body–mass index and grip strength.

Results. After a 3.3-year follow-up, the onset rate of pain was 35.0% and 35.3% in men and women, respectively, and the onset rate of physical functional disability was 38% and 40%, respectively. Resolution rate of pain was 20.3% and 26.2% in men and women, respectively, and resolution rate of physical functional disability was 16% and 14% in men and women, respectively. Knee OA was significantly associated with onset and resolution of pain and physical functional disability in women, but there was no significant association of knee OA with onset of pain and resolution of physical functional disability in men.

Conclusions. The present longitudinal study revealed the onset rate of pain and physical functional disability as well as their resolution, and their association with knee OA.

Keywords

Knee joint, Osteoarthritis, Epidemiology, Longitudinal studies

History

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Introduction

Knee osteoarthritis (OA), characterized by pathological features including joint space narrowing and osteophytosis, is a major public health issue causing chronic pain and disability among the elderly in most developed countries [1]. The prevalence of radiographic knee OA in Japan is high [2], with 25,300,000 subjects aged 40 years and older estimated to experience radiographic knee OA [3]. According to the recent National Livelihood Survey of the Ministry of Health, Labour and Welfare in Japan, OA is ranked fourth among diseases that cause disabilities that subsequently require support with activities of daily living [4].

The principal clinical symptoms of knee OA are pain and physical functional disability [5], but the correlation of these symptoms with radiographic severity of knee OA is controversial [2,6–8]. Thus it would be interesting to determine whether the impact of radiographic knee OA on pain and physical functional disability differs according to the severity of OA. In terms of disease-specific scales for estimating pain and physical functional disability due to knee OA, the Western Ontario and McMaster Universities Osteoarthritis Index (WOMAC) has been used for Caucasians [9] and Asians [10,11], although these reports were not population-based studies. Furthermore, there is little information on the impact of knee OA on onset of pain and physical functional disability using WOMAC in Japan, although a population survey suggests that the disease pattern differs among races [12–14]. In addition, to the best of our knowledge, although pain and physical functional disability can disappear or improve, there is no information on the impact of knee OA on the resolution of pain and physical functional disability.

Grip strength is a useful marker of muscle function and sarcopenia [15]. There is growing evidence that reduced grip strength is associated with adverse outcomes including morbidity, disability, falls, higher fracture rates, increased length of hospital stay and mortality [16–18]. A previous study also showed that grip strength is related to total muscle strength [19]. Thus, the association of knee OA with pain and physical functional disability may be influenced by grip strength, but again, no studies have examined the association of knee OA and grip strength with onset of pain and disability as well as their resolution simultaneously in the same population using a longitudinal cohort study.

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The objective of the present study was to clarify the onset and resolution rate of pain and physical functional disability using WOMAC in Japanese men and women who were part of the large-scale, longitudinal, population-based cohort study known as the Research on Osteoarthritis/osteoporosis Against Disability (ROAD) study. In addition, we examined the association of body–mass index (BMI), grip strength and severity of knee OA with onset of pain and physical functional disability as well as their resolution in men and women.

Materials and methods

Subjects

The ROAD study was a nationwide prospective study for bone and joint diseases (with OA and osteoporosis as the representative bone and joint diseases) constituting population-based cohorts established in several communities in Japan. As a detailed profile of the ROAD study has already been described elsewhere [2,3,20], only a brief summary is provided here. During 2005–2007, we created a baseline database that included clinical and genetic information for 3,040 inhabitants (1,061 men; 1,979 women) aged 23–95 years (mean, 70.6 years), recruited from listings of resident registrations in three communities: an urban region in Itabashi, Tokyo; a mountainous region in Hidakagawa, Wakayama; and a coastal region in Taiji, Wakayama. All participants provided written informed consent, and the study was conducted with the approval of the ethics committees of the University of Tokyo and the Tokyo Metropolitan Institute of Gerontology. Participants completed an interviewer-administered questionnaire of 400 items that included lifestyle information such as smoking habit, alcohol consumption, family history, medical history and previous knee injury history. Furthermore, subjects were interviewed by well-experienced orthopedists regarding the treatment for knee OA, such as medication, injections, physical therapy, bracing, etc. between the baseline and follow-up study. Anthropometric measurements included height and weight, from which BMI (weight [kg]/height^2 [m^2]) was calculated. Grip strength was measured on bilateral sides using a TOEI LIGHT handgrip dynamometer (Toei Light Co., Ltd., Saitama, Japan), and the better measurement was used to represent maximum muscle strength. During 2008–2010, we attempted to trace and review all 3,040 subjects; they were invited to attend a follow-up interview. The interviews were conducted by the same trained orthopedists who undertook the baseline study during 2005–2007.

Radiographic assessment

All participants underwent radiographic examination of both knees using an anterior–posterior view with weight-bearing and foot map positioning. Fluoroscopic guidance with a horizontal anterior–posterior X-ray beam was used to properly visualize the joint space. Knee radiographs at baseline and follow-up were read in pairs without knowledge of the participant's clinical status by a single well-experienced orthopedist (S.M.), and the Kellgren Lawrence (KL) grade was defined using the KL radiographic atlas for overall knee radiographic grades [21]. In the KL grading system, radiographs are scored from grade 0 to grade 4, with the higher grades being associated with more severe OA. To evaluate the intraobserver variability of the KL grading, 100 randomly selected radiographs of the knee were scored by the same observer more than 1 month after the first reading. One hundred other radiographs were also scored by two experienced orthopedic surgeons (S.M. & H.O.) using the same atlas for interobserver variability. The intra- and inter variabilities evaluated for KL grades (0–4) were confirmed by kappa analysis to be sufficient for assessment (0.86 and 0.80, respectively).

Instruments

The WOMAC, a 24-item OA-specific index, consists of three domains: pain, stiffness and physical function. Each of these 24 items is graded on either a 5-point Likert scale or a 100-mm visual analog scale [22,9]. In the present study, we used the Likert scale (version LK 3.0). The domain score ranges from 0 to 20 for pain, 0 to 8 for stiffness and 0 to 68 for physical function. Japanese versions of the WOMAC have also been validated [23]. In the present study, onset of pain and physical functional disability were defined as WOMAC pain score = 0 at baseline and > 0 at follow up and WOMAC physical function score = 0 at baseline and > 0 at follow up, respectively. Resolution of pain and physical functional disability were defined as WOMAC pain score > 0 at baseline and = 0 at follow up and WOMAC physical function score > 0 at baseline and = 0 at follow up, respectively. Worsening pain and physical functional disability were defined as WOMAC pain and physical function at follow up was worse than at baseline, respectively.

Statistical analysis

The differences in age, height, weight, BMI, grip strength, and WOMAC pain and physical function scores at baseline and follow up between men and women were examined using a non-paired Student's t-test. The prevalence of knee OA was compared between men and women using chi-square test. Tukey's honestly significant difference test after adjustment for age and BMI was used to compare WOMAC pain and physical functional score and differences between baseline and follow up among subjects with KL = 0/1, 2 and 3/4. The non-paired Student's t test was used to compare age, BMI and grip strength between subjects with and without onset of pain and physical functional disability as well as those with and without resolution of pain and physical functional disability. Chi-square test was used to compare prevalence of knee OA between subjects with and without onset of pain and physical functional disability as well as those with and without resolution of pain and physical functional disability. Multiple logistic regression analysis after adjustment for age was also used to determine the association of severity of knee OA with onset of pain and physical functional disability as well as their resolution. In addition, to determine independent association of age, BMI, grip strength and knee OA with onset of pain and physical function as well as their resolution, multiple logistic regression analysis was used with significant variables ($p < 0.01$) in univariate analyses as explanatory variables. Data analyses were performed using SAS version 9.0 (SAS Institute Inc., Cary, NC).

Results

Of the 3,040 subjects in the baseline study during 2005–2007, 125 had died by the time of the review held 3 years later, 123 did not participate in the follow-up study due to bad health, 69 had moved away, 83 declined the invitation to attend the follow-up study, and 155 did not participate in the follow-up study for other reasons. Among the 2,485 subjects who did participate in the follow-up study, we excluded 39 subjects who were younger than 40 years at baseline. Those participating in the follow-up study were younger than those who did not survive or who did not participate for other reasons (responders 68.6 years, non-responders 75.1 years; $p < 0.0001$). The follow-up study participants also were more likely to be women (responders 66.3% women, nonresponders 61.8% women; $P = 0.03$) and were more likely to have knee OA at the baseline examination than either those who did not survive to follow-up or those who did not participate for other reasons (responders 51.5%, nonresponders 60.9%; $P < 0.0001$). Among them, 1,578 subjects provided completed WOMAC questionnaires both at baseline and follow up. We also excluded three subjects