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Title: Carotid Wall Longitudinal Motion in Ultrasound Imaging

Subtitle: An expert consensus review

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1 **Title: Carotid Wall Longitudinal Motion in Ultrasound Imaging**

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3 **Abstract:** Motion extracted from the carotid artery wall provides unique information for vascular
4 health evaluation. Carotid artery longitudinal wall motion corresponds to the multiphasic arterial
5 wall excursion in the direction parallel to blood flow during the cardiac cycle. While this motion
6 phenomenon has been well characterized, there is a general lack of awareness regarding its
7 implications for vascular health assessment or even basic vascular physiology. In the last decade,
8 novel estimation strategies and clinical investigations have greatly advanced our understanding of
9 the bi-axial behavior of the carotid artery, necessitating an up-to-date review to summarize and
10 classify the published literature in collaboration with technical and clinical experts in the field.
11 Within this review, the state-of-the art methodologies for carotid wall motion estimation are
12 described, and the observed relationships between longitudinal-motion-derived indices and
13 vascular health are reported. The vast number of studies describing the longitudinal motion pattern
14 in plaque-free arteries, with its putative application to cardiovascular disease prediction, point to
15 the need for characterizing the added value and applicability of longitudinal motion beyond
16 established biomarkers. To this aim, the main purpose of this review is to provide a strong base of
17 theoretical knowledge, together with a curated set of practical guidelines and recommendations
18 for longitudinal motion estimation in patients, to foster future discoveries in the field, toward the
19 integration of longitudinal motion in basic science as well as clinical practice.

20 **Keywords:** Carotid Artery; Ultrasound; Longitudinal Motion; Cardiovascular Risk Factors;
21 Vascular Health; Atherosclerosis; Arteriosclerosis; Motion Estimation; Speckle-Tracking;
22 Block-Matching

23 **Introduction**

24 The carotid artery is often referred to as the “sentinel of atherosclerosis”, this vessel being a
25 common site of early-stage development of the disease (Rusconi, et al. 2011). The presence and
26 progression of pathological manifestations of systemic vascular disease can be monitored with a
27 myriad of medical imaging modalities. Ultrasound is relatively inexpensive, time-efficient, non-
28 invasive and non-ionizing, (trans-) portable, and offers a spatial resolution that is well suited for
29 the study of large vessels such as the carotid artery. One of the most important aspects of ultrasound
30 is its capacity to achieve temporal imaging, thus enabling the acquisition of cine loops (i.e., movies
31 composed of image sequences) at a frame rate of 30 Hz or more. Such an asset makes possible the
32 analysis of wall distension and associated dynamic metrics of arterial stiffness and strain, which
33 are known pre-clinical markers of cardiovascular disease (CVD) in both healthy and clinically
34 diseased populations (Townsend, et al. 2015). For all these reasons, carotid ultrasound exams for
35 CVD screening are widely integrated in routine clinical practice worldwide.

36 The motion of arterial tissues during the cardiac cycle is relevant within the context of CVD risk
37 evaluation, as mechanical deformation reflects vessel elasticity, and is putatively inversely
38 associated with arterial stiffness, an independent predictor of all-cause mortality and morbidity
39 (Ben-Shlomo, et al. 2014). Importantly, the degree of disease burden in preclinical or subclinical
40 stages can be evaluated in the carotid artery by quantifying the alteration of the biomechanical
41 tissue dynamics, specifically the shear, stretch, and compression of the vessel wall (Mozaffarian,
42 et al. 2015) (Vlachopoulos, et al. 2011). During the cardiac cycle, the multi-layered carotid artery
43 wall follows a repeatable and complex pulsatile behavior. Different well-established motion types
44 include cross-sectional distension (Gamble, et al. 1994) and circumferential strain (Swillens, et al.
45 2011). Of recent interest is the so-called “*longitudinal motion*”, corresponding to the displacement

46 of the tissue layers in the direction parallel to the blood flow, namely, along the long axis of the
47 vessel (Persson, et al. 2003) (Figure 1).

48 The study of longitudinal wall motion has seen an increasing amount of interest over the last two
49 decades, with more recent studies unveiling a complex motion pattern, and suggesting that
50 measures of longitudinal wall motion may offer distinct and independent information for CVD
51 risk prediction and vascular health compared to established risk factors (Svedlund, et al. 2011)
52 (Zahnd, et al. 2012) (Taivainen, et al. 2018). An extensive description of the pathophysiology of
53 arteriosclerosis and atherosclerosis relevant to longitudinal motion is available in the
54 Supplementary Material. While significant strides have been made in the measurement and
55 interpretation of carotid artery longitudinal motion, it has been ignored by most vascular
56 investigations, contributing to a relative paucity of knowledge, while the regulatory mechanisms
57 and implications of longitudinal motion on the vascular system remain to be fully determined.
58 Ultimately, the actual added value of longitudinal motion in comparison to the use of traditional
59 biomarkers for CVD risk detection still needs to be determined.

60 To comprehensively describe longitudinal motion and its implications, experts in the field have
61 been solicited to contribute to this consortium review, within the scope of plaque-free carotid wall
62 in preclinical and subclinical arteries. Readers interested in plaque-motion assessment may refer
63 to the Supplementary Material. The two main objectives of this project are: 1) review the
64 methodological developments in the quantification of longitudinal wall motion in humans; and 2)
65 review the evidence examining the relationships between longitudinal wall motion and risk factors,
66 independent of conventional markers of radial and circumferential stiffness. To this end, this paper
67 is structured to cover the state-of-the-art methodological and clinical achievements in the field,
68 targeting both scientific and clinical audiences.

69 **Carotid artery longitudinal motion**

70 **Seminal observations**

71 Longitudinal motion was first observed by studying the motion of markers placed on the surface
72 of the open abdominal aortic artery in dogs (Lawton and Greene 1956). Although this initial study
73 demonstrated a distinct motion along the axis of the vessel, the measured amplitude was relatively
74 small, and the phenomenon was attributed to breathing-induced motion. These findings have then
75 been reproduced by other teams in the thoracic artery of dogs (Patel, et al. 1969) (Patel, et al. 1961)
76 and rats (Deng, et al. 1994). Due to the coarse resolution of ultrasound scanners along the lateral
77 direction at the time, longitudinal motion was often neglected as the cross-circumferential motion
78 was more prominent (Nichols, et al. 1997). Nevertheless, a study involving the tracking of
79 piezoelectric element markers sutured onto the porcine carotid artery (Tozzi, et al. 2001) confirmed
80 the existence of longitudinal motion, independent of breathing-related causes and with an
81 amplitude approximately equal to half of the inner-diameter variation. Subsequently, the presence
82 of a well-defined motion pattern with a magnitude of approximately one millimeter (similar to the
83 amplitude of the motion across the radial direction) was verified *in vivo* in the carotid artery in
84 humans (Persson, et al. 2003) (Golemati, et al. 2003) using B-mode ultrasound images. A growing
85 interest then developed in the scientific and clinical communities, and a number of studies were
86 carried out to progressively characterize this phenomenon, as described in the remainder of this
87 section. Longitudinal motion is often referred to with a slightly different terminology between
88 various research groups of the community, as for example “Longitudinal Kinetics” (LOKI (Zahnd,
89 et al. 2015a)) or “Carotid Artery Longitudinal Wall Motion” (CALM (Au, et al. 2017)). The
90 generic term “longitudinal motion” will be adopted throughout the present article.

91 **Initial thorough characterization**

92 The first thorough characterization of longitudinal motion was performed by Cinthio *et al.* in 2006
93 (Cinthio, et al. 2006). Motion of the vessel tissues during the cardiac cycle was precisely measured
94 with a so-called "*echo tracking*" method (Cinthio, et al. 2005) in the common carotid arteries of
95 ten healthy subjects. Several crucial findings were established and corroborated by subsequent
96 studies, as described below.

97 Presence of a multiphasic pattern

98 Longitudinal motion obeys a specific motion pattern with four distinct phases during the cardiac
99 cycle, as displayed in Figure 1. A primary anterograde motion in early systole, in the same
100 direction as the blood flow (also called the A1 phase, or systolic anterograde phase), a retrograde
101 motion, later in systole (R phase, or systolic retrograde phase), a secondary anterograde motion,
102 in diastole (A2 phase, or diastolic anterograde phase), and a gradual return to the equilibrium
103 position. The immediate reproducibility of the phenomenon was also validated via the acquisition
104 of ultrasound clips for a duration that ranged between four and six consecutive cardiac cycles,
105 which has been replicated in subsequent investigations (Ahlgren, et al. 2012) (Au, et al. 2018b)
106 (Cinthio, et al. 2018).

107 Presence of an intramural shear stress and shear strain

108 Longitudinal motion was assessed within regions at different depths within the wall layers
109 (namely, intima-media complex, tunica adventitia, and surrounding tissues). It was observed that
110 the overall motion amplitude was decreasing with intramural depth, thus generating a longitudinal
111 shear stress and shear strain within the tissues (Cinthio, et al. 2006). Comparing simultaneous
112 measurements between the intima-media and adventitial regions, reproducible assessment of the
113 inter-layer strain angle could be performed, which corresponded approximately to one radian. A

114 variety of phenomena related to longitudinal shear were assessed in subsequent studies, and the
115 corresponding findings are reported in the dedicated subsection “Characterization based on
116 intramural shear strain and shear stress”.

117 Presence of longitudinal motion in peripheral arteries

118 It was further investigated whether longitudinal motion was present in other arteries (Cinthio, et
119 al. 2006). Measurements were conducted in a subset of three healthy volunteers, in the abdominal
120 aorta, the brachial artery, and the popliteal artery. Although the phenomenon was less marked, the
121 presence of longitudinal motion and the accompanying intramural shear strain was confirmed in
122 these peripheral arteries. The discrepancy in amplitude was putatively due to several factors, such
123 as the physiological differences in the arterial tree, the muscular nature of both the abdominal and
124 brachial arteries, the deeper location of the aorta causing a lower frame-rate, the smaller motion
125 resulting in noisier measurements, and the greater distance to the heart. The vast majority of the
126 studies published since have thus been focusing on the carotid artery, as the small displacements
127 of the peripheral arteries have not been demonstrated to be as reproducible as in the central
128 vasculature. The remainder of this review specifically refers to carotid artery longitudinal motion.

129 **Methodological approaches**

130 Since the initial evaluation of carotid wall longitudinal motion in humans *in vivo* (Persson, et al.
131 2003) (Golemati, et al. 2003), an increasing number of motion-tracking techniques have been
132 designed to address this task (Golemati, et al. 2012) (Golemati, et al. 2016). Several challenges
133 inherent to either ultrasound imaging (e.g., speckle noise and artifacts) or vessel physiological
134 behavior (e.g., abrupt motion patterns) must be considered for reliable motion-tracking. As a result,

135 specialized and advanced methodologies were gradually developed to specifically extract
136 longitudinal motion.

137 **Wall motion extraction based on B-mode images**

138 B-mode is the most well-known representation of ultrasound imaging: this modality, characterized
139 by a specific grayscale speckle pattern, is used to represent structural information that can be
140 interpreted visually on the scanner monitor. Three major motion-tracking approaches are used to
141 extract the motion from B-mode ultrasound image sequences: block matching (BM), optical flow
142 (OF), and feature matching (FM). These techniques, and the related studies focusing on
143 longitudinal motion, are listed in Table 1 and discussed thereafter. Further approaches based on
144 computer-aided diagnosis were also introduced, mostly to investigate the severity of atheromatous
145 plaques, and are discussed in the Supplementary Material.

146 Block matching

147 Block matching is a conventional technique in the field of motion estimation, and widely used to
148 perform speckle tracking in image sequences. The general underlying principle is to find, within
149 the $(n+1)^{\text{st}}$ image, the most probable location of a target region, denoted as the reference pattern,
150 from the n^{th} image. Estimation is performed either by minimizing a difference metric with
151 operators such as the sum of squared differences, or by maximizing a similarity metric with
152 operators such as the normalized cross correlation. Among the most critical parameters is the size
153 of the analyzed speckle pattern and of the maximal authorized displacement (namely, the “block”
154 and the “search window”, respectively).

155 Strategies directly based on traditional BM have been successfully applied to assess longitudinal
156 motion. In an early study (Golemati, et al. 2003), the extracted motion waveforms were rather
157 coarse, likely due to a large block size and no sub-pixel interpolation. However, thus obtained

158 reproducible and well-defined patterns contributed to the feasibility of *in vivo* examinations. A
159 BM method known as “echo tracking”, using a small block size (originally defined as a 0.7×0.7
160 mm^2 region), enabled accurate tracking of salient speckles in carefully acquired images (Cinthio,
161 et al. 2005). Nevertheless, reduced block sizes are unlikely to provide robust results in general
162 routine clinical scans, where image quality is often poor.

163 Adaptive BM approaches were introduced to tackle the issue of speckle decorrelation across time.
164 Such approaches generally correspond to a mathematical model involving a control scheme, as
165 well as an evolution scheme, capable of representing the expected temporal motion and
166 compensating for tracking errors. The Kalman filter was exploited to model the temporal changes
167 in the location of the target block (Gastouniotti, et al. 2011) (Gastouniotti, et al. 2013), as well as in
168 its gray levels (Gastouniotti, et al. 2011) (Gastouniotti, et al. 2013) (Zahnd, et al. 2013) during the
169 cardiac cycle.

170 A BM approach based on the consideration of two previous frames (as opposed to only one in the
171 classical techniques) was proposed to increase the tracking robustness (Albinsson, et al. 2014).
172 Adding one extra reference block in a BM scheme was proposed to use different reference blocks
173 (Albinsson, et al. 2014): here, the actual pixel values of the previous frame were used, as opposed
174 to Kalman-based methods, where the reference block was predicted. A more advanced method
175 was later proposed, involving an affine block motion model, able to consider rotation and scaling
176 of the tracked pattern, in addition to rigid translation (Golemati, et al. 2012). A scheme based on
177 luminance optimization was also proposed to take into consideration the progressive variations of
178 pixel values across time and to maximize the matching potential (Yli-Ollila, et al. 2013).

179 A nonlinear state-space approach based on an elasticity model of the carotid wall and including a
180 H_∞ filter was further proposed and adapted to carotid wall motion estimation (Gao, et al. 2016)
181 (Gao, et al. 2017b) (Gao, et al. 2017a). The major benefit of these approaches is their ability to

182 deal with noisier data and provide robust and accurate tracking results when conventional BM
183 approach would likely fail.

184 The combined use of multiple blocks was investigated in several studies. These approaches are
185 based on the following principle: at a given time-step, the motion is independently estimated with
186 a series of adjacent or partly overlapping blocks, and the resulting motion is obtained via the
187 averaging of all contributions. The rationale for multi-block matching is to increase the robustness
188 by diminishing the influence of any single block that may fail. Such approaches include five
189 (Zahnd, et al. 2011b), six (Tat, et al. 2017), or sixteen (Zahnd, et al. 2012) blocks. A method based
190 on the consideration of multiple frames per estimation and a parabolic sub-sample interpolation in
191 high frame-rate cine loops (1300–1500 Hz) was further developed (Albinsson, et al. 2018). Several
192 advanced search strategies, initially introduced in radiofrequency imaging (Shi and Varghese
193 2007) (Lopata, et al. 2009), were successfully applied in B-mode imaging to improve computation
194 time, such as a coarse-to-fine interpolation scheme (Zahnd, et al. 2011b) and a sparse-to-dense
195 tracking scheme (Albinsson, et al. 2014).

196 Going one step further, the extraction of a dense motion field was recently addressed (Zahnd, et
197 al. 2018). Here, the temporal motion across the full width of the image is estimated by placing a
198 block in each column (typically, more than 350). A combinatorial analysis scheme based on
199 dynamic programming is used to simultaneously extract the motion of each block (as opposed to
200 one after the other), while enforcing motion rules and enabling fast computational times. Results
201 from this study enabled assessing the degree of motion homogeneity across the length of the vessel.

202 Optical flow

203 Optical flow consists in determining the velocity field across different temporal frames (Horn and
204 Schunck 1981). The fundamental difference between OF and BM is the adoption of the Eulerian
205 paradigm (i.e., motion is evaluated through a static window) instead of the Lagrangian scheme

206 (i.e., motion is evaluated by dynamically following a target). Complex motions involving rotations
207 and deformations are usually better captured via OF-based approaches than BM (Hein and O'brien
208 1993).

209 Applied in the context of carotid longitudinal motion, OF has been successfully used in several
210 studies (Murray, et al. 2007) (Golemati, et al. 2012) (Salles, et al. 2012), as listed in Table 1. It
211 was shown that the general waveform shape of the wall motion was different when extracted by
212 BM and OF, although their peaks occurred at the same time instants of the ECG signal (Stoitsis,
213 et al. 2006). The maximum velocity and extracted motion in the radial and longitudinal direction
214 was shown to be greater using BM (Stoitsis, et al. 2006). The estimated wall motion on the same
215 B-mode images by OF and BM in radial direction were reported to be more similar compared to
216 the longitudinal direction (Stoitsis, et al. 2006). In the presence of either Gaussian or speckle noise,
217 it has been reported that weighted least-squares OF outperformed BM, particularly in poor-quality
218 images that are typically observed in clinical populations (Golemati, et al. 2012).

219 Feature matching

220 An original approach based on automatic extraction of several salient image regions was recently
221 introduced (Scaramuzzino, et al. 2017). Detectors such as Scale-Invariant Feature Transform
222 (SIFT), Speed Up Robust Features (SURF), and Maximally Stable Extremal Regions (MSER)
223 were used to identify target points. The main advantage of this approach is its robustness, since
224 only salient points are considered for tracking, and re-selected at each time-step. Moreover, this
225 method has potential to be fully automatic since regions are determined by the above-mentioned
226 descriptors. [Additionally, shear strain evaluation in different anatomical layers is also possible by](#)
227 [using feature matching via the tracking of points located in different anatomical layers, offering a](#)
228 [similar potential for depth-specific shear evaluation as provided by certain BM approaches \(Shi,](#)
229 [et al. 2008\) \(Idzenga, et al. 2014\).](#) However, a generally encountered drawback of FM approaches

230 is the constant re-selection of target points and the averaging of their respective motion vectors,
231 making both precise single-point and full dense-field motion estimation impossible.

232 **Wall motion extraction based on radiofrequency signals**

233 Tracking methodologies based on radiofrequency (RF) signals were introduced in 1985 to estimate
234 the radial motion via an autocorrelation approach (Kasai, et al. 1985). As opposed to B-mode
235 imaging, RF-based motion tracking involves the computation of the phase shift (i.e., in the
236 frequency domain) between two subsequent time steps to determine the corresponding spatial
237 displacement. Of note, acquisition and export of RF signals usually necessitates research-oriented
238 scanners, as this functionality is generally not available in clinical devices. An overview of the
239 approaches developed toward carotid wall motion estimation is summarized in Table 2, and
240 detailed thereafter.

241 Concerning small inter-frame displacements, a BM-based method has been developed in an
242 iterative manner (Albinsson, et al. 2018). Phase-based estimation on radio-frequency signals has
243 been applied on phantom and in vivo carotid for simultaneous wall motion and flow estimation
244 ([Hasegawa and Kanai 2008b](#)) ([Perrot, et al. 2017](#)) ([Perrot, et al. 2018a](#)) ([Fekkes, et al. 2018](#)).
245 Phase-sensitive methods have been recently applied for 2D motion estimation using 2D frequency
246 spectra of RF echo signals using the complex analytical signal obtained by modulating the
247 ultrasonic field (Jensen and Munk 1998), by the Hilbert transform (Chen, et al. 2004) (Sumi 2008)
248 ([Hasegawa and Kanai 2009](#)) ([Salles, et al. 2015](#)), or by the wavelet transform (Rizi, et al. 2014)
249 ([Yousefi Rizi, et al. 2014](#)). The Hilbert transform was repeatedly used to generate a complex
250 analytical signal from RF data using correlation-based estimators ([Hasegawa and Kanai 2009](#)).
251 Following a similar approach, phase correlation and sub-sample interpolation were successfully
252 applied ([Zambacevičienė and Jurkonis 2019](#)). Fourier-based methods ([Hasegawa and Kanai](#)
253 [2006a](#)) ([Hasegawa and Kanai 2006b](#)) ([Hasegawa and Kanai 2008a](#)) were also introduced. A paired

254 1D and 2D motion estimation technique with shifted cross spectra developed to assess the phase
255 shift was put forward, and showed increased accuracy with a smaller spatial window than
256 conventional 2D motion estimators (Hasegawa 2016). One advantage of Fourier-based approaches
257 is their intrinsic ability to achieve sub-pixel accuracy without the need for spatial interpolation,
258 which can result in greater accuracy compared to speckle tracking in B-mode (Miyajo and
259 Hasegawa 2018) (Miyajo, et al. 2019). It was shown that the 2D phase-sensitive method (Miyajo
260 and Hasegawa 2018) outperformed BM method in terms of accuracy (bias errors and standard
261 deviations) in motion estimation at a high frame rate that was realized by parallel beamforming
262 (Miyajo, et al. 2019). This is especially important along the longitudinal direction of the artery,
263 since the image across this axis is generally coarser than the radial counterpart.

264 An approach relying on synthetic aperture imaging was specifically designed as an unconventional
265 beamforming strategy to generate a pressure field with a controlled carrier frequency in the
266 transverse direction (Jensen and Munk 1998). This real-time technique, referred to as “US-
267 tagging” (in reference to the principle of magnetic resonance imaging tagging), consists of the
268 transmission of an unfocused wave, subsequently received with a dynamic quadratic focusing
269 combined to dynamic apodization (Chen, et al. 2004) (Liebgott, et al. 2007). Building upon the
270 potential offered by such marked signals, a local phase-based optical flow method was devised for
271 subpixel estimation (Basarab, et al. 2009), and was applied in vivo in the context of longitudinal
272 motion on so-called RF-2D images (Zahnd, et al. 2015b). A similar approach leveraging high
273 frame-rate imaging (10,000 Hz) was also introduced (Salles, et al. 2015), bridging the gap between
274 the association of longitudinal motion and pulse wave velocity (PWV). For 2D velocity vector
275 estimation of tissue motion, plane wave imaging has been used along with transverse oscillation
276 and an efficient frequency domain estimator (Salles, et al. 2015). It is noteworthy that unitary
277 displacements greater than half of the signal wavelength (be it determined by the carrier frequency
278 along the radial direction, or by the synthetic aperture along the longitudinal direction) cannot be

279 ascertained via phase-tracking methods, since they fall under the effect of aliasing (Basarab, et al.
280 2009) (Hasegawa 2016), therefore justifying the demand for a sufficiently high frame-rate.

281 Inspired by the field of computer vision, an approach known as “motion video amplification” was
282 proposed to magnify the tiny and subtle deformation of the vessel wall in B-mode ultrasound
283 carotid image sequences (Perrot, et al. 2018b). While large-scale deformations are not amplified,
284 low-amplitude deformations within the vessel wall (such as longitudinal motion, radial motion,
285 deformation caused by the passage of the pulse wave) are substantially magnified up to a factor of
286 1000, and can be easily perceived by a clinician with the naked eye. This technique opens up new
287 possibilities for the evaluation of complex motion patterns, as the small phase W and phase X
288 displacements described in Section “Characterization based on directional wall displacements”.

289 Of note, this technique requires the acquisition of high frame-rate sequences (>2500 Hz), which is
290 only available on a limited number of research-oriented ultrasound systems.

291 **Available tools**

292 The Velocity Vector Imaging (VVI) software platform (VVI, Research Arena 2; TomTec Imaging
293 Systems GmbH, Unterschleissheim, Germany) is a commercially available tool that was used to
294 investigate the association of longitudinal motion with cardiovascular risk in man and mouse
295 (Svedlund, et al. 2011) (Svedlund and Gan 2011a) (Svedlund and Gan 2011b). This technique,
296 initially designed to measure heart dynamics, involves the positioning of a multi-segment
297 horseshoe-shaped skeleton in the image, using a total of 20 control points. Applied to the carotid
298 artery, one segment (approximately 5 mm long) can be positioned on a region of interest in the
299 intima-media complex. Of note, the VVI displays the measured temporal trajectory, together with
300 the corresponding motion amplitude, but does not support any export of the time series for finer
301 analysis. Despite relevant clinical findings (Svedlund, et al. 2011) (Svedlund and Gan 2011a)
302 (Svedlund and Gan 2011b), a thorough evaluation of the tracking performances (Zahnd, et al.

303 2013) demonstrated poor accuracy and reproducibility, while being tedious and time consuming
304 due to substantially high amount of manual operations required to run VVI.

305 The MyLab desktop analysis software (Esaote, Firenze, Italy) is a commercially available tool that
306 was used to extract longitudinal shear values (Zhang, et al. 2014). However, although this
307 technique was specifically designed for ultrasound carotid data, quantitative reports of the tracking
308 performance per se are not publicly available, to the best of the authors' knowledge.

309 The CAROLAB software platform (Zahnd, et al. 2019) is a freely available¹ tool that has been put
310 forward to analyze ultrasound image sequences of the carotid artery. The motivation behind
311 CAROLAB is to encapsulate several previously published and thoroughly validated
312 methodologies for wall segmentation (Zahnd, et al. 2017b) and motion estimation (Zahnd, et al.
313 2013) (Zahnd, et al. 2018) within an efficient graphical user interface.

314 A web-based platform named CAROTID has been developed, integrating motion-based
315 Computer-Aided Diagnosis (CAD) functionalities for patients with carotid atherosclerosis
316 (Gastounioli, et al. 2014).

317 **Clinical studies**

318 A growing body of work has contributed to establish a number of associations between carotid
319 wall longitudinal motion and vascular health. Although all findings are based on longitudinal
320 motion analysis, different types of motion-derived features have been considered, and the literature
321 on plaque-free wall motion can be classified in the following three main categories. First, the total
322 amplitude of the wall excursion, also referred to as the peak-to-peak amplitude, has been used to
323 quantify the overall wall displacement. Second, the intramural shear strain has been evaluated by

¹ <https://www.creatis.insa-lyon.fr/carolab/>

324 measuring the motion across the depth of the different tissue layers. Third, the directional wall
325 displacements based on the tri-phasic waveform, corresponding to the specific and complex shape
326 and pattern of the trajectory, has been studied to characterize the different anterograde and
327 retrograde phases during the cardiac cycle. Additional studies specifically involving the motion of
328 atheromatous plaques are mentioned in the Supplementary Material.

329 **Characterization based on peak-to-peak motion amplitude**

330 Peak-to-peak motion amplitude has been repeatedly demonstrated to bear an association with
331 cardiovascular health status, while being independent from established cardiovascular risk factors
332 and other noninvasive measures of arterial stiffness and subclinical carotid atherosclerosis
333 (Svedlund, et al. 2011) (Zahnd, et al. 2012) (Taivainen, et al. 2017). Although peak-to-peak
334 amplitude does not capture the tri-phasic complexity of the full motion pattern, it is an easily
335 described measurement that provides general information about longitudinal wall motion. A
336 number of findings, detailed hereafter, indicate that longitudinal motion does not simply replicate
337 information already captured by other indices and markers, but instead represents added value to
338 CVD risk estimation.

339 Peak-to-peak motion amplitude was observed to vary with age in an inverted-U shaped relationship
340 (Cinthio, et al. 2018) (Au, et al. 2019), as well as to demonstrate a progressive decline in magnitude
341 as a function of disease status. In comparison to younger adults, longitudinal motion amplitude
342 was significantly reduced in elderly patients with coronary artery disease (n=16; 0.54 vs. 0.11 mm
343 (Svedlund and Gan 2011b)), in elderly diabetic patients (n=26; 0.48 vs. 0.31 mm (Zahnd, et al.
344 2011b)), as well as in adults with periodontal disease (n=126: 0.42 vs. 0.15 mm (Zahnd, et al.
345 2012)). Moreover, the peak-to-peak amplitude of longitudinal motion was found to be decreased
346 with the presence of coronary artery disease or myocardial ischemia, independent of arterial
347 stiffness (n=14 (Au, et al. 2017)). The effects of catecholamine and beta-blockade was

348 investigated, demonstrating profound changes in longitudinal displacement and intramural shear
349 strain of the porcine carotid artery (n=5 (Ahlgren, et al. 2011)) (n=5 (Ahlgren, et al. 2009)). An
350 inverse correlation was shown between systolic blood pressure and both the peak-to-peak
351 amplitude and the retrograde motion amplitude (n=19 (Yli-Ollila, et al. 2013)) (n=287 (Taivainen,
352 et al. 2018)). The association between longitudinal motion and conventional measures of
353 arteriosclerosis was further supported, with the peak-to-peak and retrograde amplitudes being
354 directly correlated with carotid artery distensibility and inversely correlated with PWV,
355 independent of brachial flow-mediated dilatation and intima-media thickness (IMT) (n=292
356 (Taivainen, et al. 2017)). It was also demonstrated that the peak-to-peak motion amplitude
357 represented a predictor for 1-year cardiovascular outcome in patients with suspected coronary
358 artery disease, independent of cross-sectional stiffness and IMT (n=441 (Svedlund, et al. 2011)).
359 A study conducted in a children population established a weak correlation between longitudinal
360 motion and arterial stiffness, indicating that longitudinal motion is not a reliable surrogate marker
361 of arterial stiffness in children (n=191 (Proudfoot, et al. 2019)). In a multi-ethnic study, a notable
362 but non-statistically significant association was found to support that longitudinal displacement
363 predicted coronary heart disease and cardiovascular disease events (n=389 (Gepner, et al. 2015))
364 and (n=791 (Gepner, et al. 2019)). Comparing the peak-to-peak amplitude in wall regions located
365 closer to the head or closer to the heart, it was reported that the measured amplitude was
366 consistently reduced in sites further away from the heart, potentially due to a progressive
367 attenuation of the forces along the length of the artery (Zahnd, et al. 2015a).

368 **Characterization based on intramural shear strain and shear stress**

369 Wall shear strain is theorized to play a role in atherosclerosis progression and vasa vasorum
370 circulation (De Korte, et al. 2011). The fundamental impact of longitudinal shear strain and
371 longitudinal shear stress onto vascular health and arterial aging has been shown via theoretical

372 hemodynamic models (Humphrey, et al. 2009). Shear strain can be calculated based on the
373 amplitude of longitudinal motion of intima-media, adventitia and surrounding tissue at end-
374 diastole and at maximum excursion (Cinthio, et al. 2006). It was found that the amplitude of
375 longitudinal motion was greater when measured in regions of interest (ROIs) located within
376 innermost tissues compared to more peripheral ROIs, which can be explained by the fact that the
377 intima-media complex, with a larger relative elastin component, is more compliant, whereas the
378 collagen-rich adventitia is likely fixed to the surrounding tissues. Shear strain was initially
379 quantified *in vivo* in ten healthy volunteers with angles close to 1 radian (Cinthio, et al. 2006).
380 Similar results were reported by considering the mean maximum shear strain of healthy volunteers
381 (n=10) (Nilsson, et al. 2010). Building upon these findings, another study investigated the presence
382 of intramural shear strain between elderly diabetic patients (n=14), elderly healthy controls (n=14),
383 and young healthy controls (n=14): for both healthy cohorts, a sharp shearing angle, corresponding
384 roughly to 1 radian, was perceptible between the intima-media complex and the tunica adventitia,
385 whereas the shearing pattern was substantially more attenuated for the at-risk cohort, potentially
386 reflecting stiffer vessels (Zahnd, et al. 2011a). The retrograde intramural shear strain, as well as
387 the retrograde amplitude in both the intima-media complex and adventitia layer, were reported to
388 be significantly reduced in individuals with spinal cord injury (n=7) compared to able-bodied
389 controls (n=7) (Tat, et al. 2017). Finally, the presence of a temporal delay between the motion of
390 the different layers was reported in 20 healthy subjects: longitudinal motion was initiated in the
391 intima-media complex, and reached the tunica adventitia after 18.9 ms, on average (Yli-Ollila, et
392 al. 2016b).

393 **Characterization based on directional wall displacements**

394 Although the presence of a general multiphasic bidirectional pattern was established (cf. Section
395 “Presence of a multiphasic pattern”) (Cinthio, et al. 2006), a certain amount of inter-subject

396 variability has been repeatedly reported (Ahlgren, et al. 2012) (Yli-Ollila, et al. 2013) (Yli-Ollila,
397 et al. 2016b) (Yli-Ollila, et al. 2016a) (Taivainen, et al. 2017) (Zahnd, et al. 2017a) (Qorchi, et al.
398 2017) (Cinthio, et al. 2018). Motion patterns were found to be subject-specific, and can either be
399 described as retrograde-oriented, bidirectional, or anterograde-oriented (Ahlgren, et al. 2011) (Yli-
400 Ollila, et al. 2013) (Au, et al. 2018a), as illustrated in Figure 2. However, regardless of inter-subject
401 variability, intra-subject longitudinal waveform patterns have been shown to remain stable over a
402 4-month period (Ahlgren, et al. 2012), over a 12-month period in children (Au, et al. 2019), as
403 well as in response to 12 weeks of supervised exercise training in healthy adults (Au, et al. 2020).
404 These results suggest that motion waveform patterns contain more information than the bare peak-
405 to-peak amplitude, and may be viewed as “vascular fingerprints” or “vessel signatures”, which can
406 putatively represent complementary information toward vascular health evaluation. It is however
407 noteworthy that a certain amount of intra-subject variability was reported, in both beat-to-beat and
408 day-to-day situations (n=10) (Ahlgren, et al. 2012), (n=10) (Au, et al. 2016), (n=19) (Yli-Ollila, et
409 al. 2013): for this reason, it was recommended to analyze the average of four consecutive
410 waveforms (Au, et al. 2018b).

411 Three general motion patterns observed in a range of healthy adults have been defined (Yli-Ollila,
412 et al. 2013): primarily anterograde (forwards from the equilibrium position), primarily retrograde
413 (backwards from the equilibrium position), and bi-directional (oscillating around the equilibrium
414 position). The three primary phases (i.e., A1, R, A2) of longitudinal motion are thought to be
415 regulated by systemic factors such as local shear stress, blood pressure, and left ventricular rotation
416 (Cinthio, et al. 2006) (Ahlgren, et al. 2015) (Au, et al. 2016) (Yli-Ollila, et al. 2016a) (Yli-Ollila,
417 et al. 2016b) (Taivainen, et al. 2017) (Au, et al. 2018a) (Proudfoot, et al. 2019). Longitudinal
418 motion of the wall adjacent to plaque has been investigated in some studies and was demonstrated
419 to reveal useful information about the status of the regional tissue area. It was shown that the mean
420 amplitude of longitudinal separation of anterior and posterior walls was similar to their radial

421 separation (n=29) (Golemati, et al. 2003), as observed in a mixed group of healthy (plaque-free,
422 young and elderly) adults, and symptomatic and asymptomatic plaque patients. Both the systolic
423 anterograde and retrograde components of longitudinal motion are reduced during the early arterial
424 stiffening process (n=19) (Yli-Ollila, et al. 2016a). A study conducted in 292 participants
425 demonstrated that anterograde motion increased and retrograde motion decreased with increasing
426 number of cardiovascular risk factors (Taivainen, et al. 2017). The measured retrograde amplitudes
427 showed an inverse correlation with blood pressure, body mass index, total cholesterol, and
428 triglycerides (n=287) (Taivainen, et al. 2018). While some evidence suggests that the A1 phase
429 may be of value (Taivainen, et al. 2018), other studies have not replicated meaningful cross-
430 sectional associations with arterial stiffness or cardiovascular risk factors (Au, et al. 2017)
431 (Proudfoot, et al. 2019). Taken together, these results are in accordance with the observation that
432 the accumulation of cardiovascular risk factors ultimately lead to a shift toward an anterograde-
433 dominant pattern in individuals with overt atherosclerotic disease (Taivainen, et al. 2017) (Yli-
434 Ollila, et al. 2016a) (Yli-Ollila, et al. 2016b).

435 The radial-axial length was explored to further characterize the association between longitudinal
436 motion and arterial distension. It was demonstrated that the diameter variation accompanying
437 follows a partly linear relationship with longitudinal motion (n=20) (Yli-Ollila, et al. 2016b). A
438 stable phase difference was also established between the blood pressure signal and longitudinal
439 motion, hence suggesting a direct association between longitudinal motion and arterial stiffness
440 (n=20) (Yli-Ollila, et al. 2016b). The radial-axial displacement can be used to analyze the total
441 length of the corresponding hysteresis loops, as displayed in Figure 3, taking into consideration
442 the full 2D displacement of the arterial wall. Radial-axial length has been shown to correlate with
443 arterial stiffness in healthy adults (n=292) (Taivainen, et al. 2017), and be positively associated
444 with longitudinal motion amplitude in children over a one-year period (n=114) (Au, et al. 2019).
445 The elastic properties of the carotid artery were further analyzed with a model coupling axial and

446 radial stress (n=10 healthy adults), suggesting that both displacement directions are coupled from
447 a biomechanical point of view and should be considered collectively (Soleimani, et al. 2016).

448 A recent study contributed to characterize more finely the multiphasic pattern of the wall with the
449 addition of two distinct phases in the A1-R-A2 scheme: phase W, corresponding to a rapid
450 retrograde motion just prior to the time-point of minimum diameter preceding the A1 phase, and
451 an anterograde phase X, corresponding to a small anterograde movement around the time of the
452 dicrotic notch in the distension wave (Cinthio, et al. 2018). These novel phases were found to
453 noticeably differ between middle-aged and older patients compared to younger patients (n=135)
454 (Cinthio, et al. 2018). Although these phases W and X are not systematically observed in all
455 participants due to their small magnitudes, they may provide additional clues as to how
456 longitudinal motion and radial distension are coupled, particularly at periods of rapid pressure
457 changes such as the arrival of the forward pressure wave and the dicrotic notch, as displayed in
458 Figure 2.

459 To characterize the complex motion waveform patterns in detail, several additional features have
460 been proposed, but not yet widely adopted. Peak velocity and acceleration were demonstrated to
461 be relevant parameters associated with cardiovascular risk factors (Yli-Ollila, et al. 2016a) (Yli-
462 Ollila, et al. 2016b). The root mean square value was introduced to quantify the waveform
463 integrated intensity, and could be used to discriminate at-risk participants (n=49) from healthy
464 controls (n=30) (Makūnaitė, et al. 2019). A variety of so-called “kinematic features”, such as
465 Kurtosis and skewness, were also put forward as tentative risk markers for atherosclerosis
466 (Gastounioti, et al. 2014). Motion (in-)homogeneity was recently investigated in a study where the
467 entire width of the exploitable wall image was tracked in 62 elderly patients at high cardiovascular
468 risk (Zahnd, et al. 2018). Here, the amplitude-independent index σ_X was introduced to quantify
469 the motion similarity between adjacent regions along the length of the vessel. A strong correlation

470 was observed between σ_X and the presence of coronary artery disease (β -coefficient =0.586,
471 $p=0.003$).

472 **Hypotheses about the factors causing longitudinal motion**

473 Despite the light shed by preliminary studies, understanding of the physiological cause of carotid
474 wall longitudinal motion is still far from complete (Au, et al. 2016) (Au, et al. 2018a). The origin
475 of the local anterograde and retrograde peaks of longitudinal motion in the systolic and diastolic
476 phases of heart cycle have been the focus of initial experimental studies (Cinthio, et al. 2006)
477 (Ahlgren, et al. 2012) (Ahlgren, et al. 2015) (Au, et al. 2016) (Au, et al. 2018a) (Dempsey, et al.
478 2018). A central problem in developing a mechanistic framework for longitudinal motion is the
479 large inter-subject variability in motion patterns. Further differences in longitudinal motion
480 patterns among subjects of the same age and gender have also been remarked (Ahlgren, et al.
481 2012). Conceivably, any hypothesis about the origin of longitudinal motion in humans must
482 account for this variability and unify individuals who exhibit dominant anterograde or retrograde
483 wall displacements.

484 While there is a paucity of experimental evidence to support a central motion hypothesis, emphasis
485 has been placed on a “compartment” model, wherein local wall shear stress dictates the
486 anterograde motion component, while some central cardiovascular phenomenon dictates the
487 retrograde motion component (Au, et al. 2016). With respect to the anterograde longitudinal
488 displacement, the energy resulting from the blood friction could putatively provoke longitudinal
489 motion of the innermost wall layers, which in turn also contributes in some extent to drag the
490 outermost wall layers (Yli-Ollila, et al. 2016b). Temporal alignment of the peak anterograde
491 motion and peak local blood velocity was observed (Cinthio, et al. 2006) (Au, et al. 2016),
492 supporting an initial relationship between these factors. However, follow-up experimental pressor

493 response studies in both human (Au, et al. 2018a) and porcine (Ahlgren, et al. 2011) (Ahlgren, et
494 al. 2015) models were unable to relate the increased magnitude of wall shear stress to changes in
495 the anterograde motion component, possibly due to confounding changes in blood pressure in
496 response to exaggerated pressor reflexes in both cases. There currently exists no evidence of a
497 causal relationship between the forward shear component and the initial anterograde displacement
498 of the arterial wall.

499 With respect to the retrograde motion component, a key observation from cross-sectional studies
500 is the fact that retrograde displacement is often of greater magnitude than the preceding
501 anterograde displacement in young adults (Au, et al. 2016). Given the mismatch in displacement
502 magnitudes, it was theorized that active cardiovascular events may be key determining factors in
503 the tri-phasic motion patterns (Cinthio, et al. 2006). For example, the apical traction of the aortic
504 valve annulus in late systole (Simonson and Schiller 1989) could contribute to stretch the carotid
505 artery upstream, while a rigid fixation downstream is provided by both the bifurcation and the
506 petrous portion of the temporal bone where the internal carotid enters the skull. This hypothesis is
507 also supported in pigs, showing that the length of a segment of the common carotid artery changes
508 during the cardiac cycle (Tozzi, et al. 2001), as well as using in vivo B-mode image sequences,
509 and showing that longitudinal motion was substantially larger in regions located close to the heart
510 compared to regions close to the head (Zahnd, et al. 2015a). Only two studies to date have
511 investigated the potential role for cardiac involvement in the regulation of longitudinal wall
512 motion. The temporal- and magnitude-based relationships have been detailed between the
513 retrograde component and both longitudinal excursion of the left ventricular base (a surrogate for
514 displacement of the aortic valve) and rotation of the left ventricle using simultaneous capture of
515 carotid and ventricular motion (Au, et al. 2016). While the excursion of the left ventricular base
516 was unrelated to the retrograde component, the left ventricular rotation was identified as a potential
517 correlate of retrograde magnitude. A follow-up experimental study (Au, et al. 2018a) indicated a

518 weak-to-moderate relationship between left ventricular rotation and retrograde displacement,
519 providing preliminary evidence for the retrograde component of a compartment model. Indirect
520 evidence from right-left comparisons complicates these findings, where no dependence was found
521 between longitudinal motion amplitude and the echoscopic neck side (Svedlund and Gan 2011b).
522 This is noteworthy since the left common carotid artery is directly connected to the aorta, whereas
523 the right common carotid artery is connected to the aorta via the S-shaped brachiocephalic trunk.
524 Therefore, the initial pulling force by the aortic traction (known as the tricuspid annular plane
525 systolic excursion) should hypothetically be further attenuated in the right side and could
526 potentially be reflected by smaller motion amplitude.

527 Several other hypotheses regarding the potential causes of longitudinal motion have been
528 proposed, albeit without experimental evidence. Anterograde displacement may also be accounted
529 for by the passage of the pulse wave, locally causing the expansion of the internal diameter, and
530 likely also generating a damping mechanism across the axial direction. While no studies have
531 experimentally investigated the second anterograde (A2) displacement, others have posited that a
532 passive elastic component may dictate a retrograde return to an equilibrium position, making it an
533 ideal candidate for stiffness estimation from longitudinal motion data (Au, et al. 2017). Given that
534 the A2 phase also occurs in anterograde-dominant motion traces, it may also be explained by the
535 multiple reflection and re-reflection pulse waves at the interface of regions with different vascular
536 impedance (Nichols, et al. 1997) that is a probable cause of the second anterograde motion.

537 Finally, an active component from the wall itself cannot be excluded. It is hypothetically possible
538 that the mechanical deformation of the vessel contributes to the inrush/washout cycle in which the
539 nutrients contained in the blood are transported through the layers to nourish peri-adventitial
540 tissues. The development of specific image-based tools and the design of biophysiological studies
541 are required to further investigate the key evolutionary basis for longitudinal motion.

542 **Guidelines for optimal image acquisition and analysis**

543 Compared to traditional arterial measurements, such as IMT, image acquisition for the purpose of
544 longitudinal motion estimation is more challenging, as it requires collecting a long high-quality
545 image sequence rather than one still frame. There also is a need for standardizing the acquisition
546 and management of these data. This section is devoted to technical and practical recommendations
547 with respect to these needs.

548 **Challenges related to longitudinal motion**

549 While conventional measures of arterial distension are concerned with the axial (i.e., along the
550 beam axis) resolution, longitudinal measurements are primarily influenced by lateral (i.e.,
551 perpendicular to the beam axis) resolution. In general, lateral resolution is determined by the
552 physical arrangement of the piezoelectric elements in the probe head, and is generally coarser than
553 the axial resolution, which depends on the ultrasound wave carrier frequency. Lateral resolution
554 has a major impact on feature extraction techniques, namely block matching, which relies on stable
555 salient patterns within the vascular wall. This is in part because the arterial wall is composed of
556 several concentric layers, and the gray-level of these regions exhibits a homogeneous longitudinal
557 profile along the vessel length, whereas the radial profile respects a well-defined pattern of
558 intensity change caused by the juxtaposition of several anatomical layers. Optimizing the spatial
559 resolution in the lateral direction will improve motion-tracking quality, ultimately leading to more
560 precise measurements of longitudinal motion.

561 Several intrinsic factors, such as speckle decorrelation, out-of-plane motion, motion artifacts,
562 acoustic shadowing, and false echoes can degrade ultrasound images. The time-variant contrast
563 and intensity of the carotid ultrasound image, caused by the blood flow, also hinder the motion
564 estimation (Yousefi Rizi, et al. 2014). Another issue to consider is the non-rigid nature of the wall

565 motion, where deformable tissues may cause drastic changes in the tracked speckle pattern
566 (Golemati, et al. 2012). High variability of image quality, due to subject-specific vessel geometry
567 and tissue echogenicity should also be taken into consideration. Extraneous factors, such as
568 scanner model, sonographer expertise and habits, and custom analysis programs also contribute to
569 the variability across different studies. A series of recommendations toward a more efficient and
570 uniform procedure has been proposed (Au, et al. 2018b).

571 **Ultrasound parameter settings**

572 The central frequency of the probe should typically be comprised between 6 and 12 MHz for a
573 satisfactory trade-off between image penetration and axial resolution, as recommended by the
574 Mannheim consensus (Touboul 2015). The focal depth should be set to the far wall. The image
575 depth must fully encompass the region of the far wall and include some peri-adventitial tissues in
576 order to provide enough space for the motion-tracking algorithm to operate (typically between 3
577 and 4 cm deep). Images with a depth beyond 4 cm will result in lower performances because of a
578 poorer frame-rate and a coarser pixel size. To reach sufficient accuracy, the spatio-temporal
579 resolution is recommended to be within the range of 25 Hz or higher for the frame rate, and 50 μm
580 or lower for the pixel size. For studies examining the velocity or acceleration of the wall, the
581 required frame rate should be even greater. The persistence of the scanner should be set to zero to
582 avoid inter-frame blurring. Contrast, brightness, and time gain compensation should be correctly
583 configured so that no regions suffer from under- or over-exposure, specifically limiting
584 background noise in the lumen. The intima-media complex must be clearly visible, and the lumen-
585 intima and media-adventitia anatomical interfaces should appear as a pair of clearly perceptible
586 contours. In the case of an arterial site with an atherosclerotic plaque, the luminal interface should
587 appear as a sharp contour, and if possible, the intima-media complex on both sides of the plaque
588 should also exhibit clearly perceptible edges. The tissues, especially within the intima-media

589 complex, should exhibit a grainy speckle texture. If possible, no marking should be present within
590 the imaging location (e.g., ECG signal trace, manual point or line annotations, text indications
591 such as carotid side or patient name), in order to preserve the original pixel greyscale values that
592 are necessary for the motion-tracking algorithm. The far wall of the common carotid artery should
593 be the primary outcome of motion tracking, as a fluid-tissue echo boundary has improved quality
594 for block-matching algorithms. Images should optimally be exported in DICOM format, rather
595 than via a frame-grabber and video conversion, in order to preserve spatio-temporal quality.

596 The spatio-temporal characteristics of the motion, as well as the capacity of an ultrasound system
597 to resolve them, should be briefly discussed. Regarding the spatial resolution, a generic ultrasound
598 pixel size is typically around 50 μm . Since the peak-to-peak distension amplitude of longitudinal
599 motion is roughly 1 mm, the excursion of the tracked point along the longitudinal direction usually
600 corresponds to less than 20 pixels. This coarse degree of quantization should be considered when
601 attempting to study the details of the trajectory waveforms. Improving the temporal resolution may
602 play a role in improving block-matching success and enhance the sensitivity to detect subtle
603 changes in longitudinal motion over time or between populations. For instance, a typical resting
604 heart rate of 80 beats per minute results in a complete motion cycle of approximately 0.75 seconds.
605 Assuming a general ultrasound frame-rate of 30 Hz, one cycle of longitudinal motion corresponds
606 to 23 images. Given that the large systolic longitudinal displacements would occur in the first third
607 of a cardiac cycle, that leaves only 8 frames to quantify the X, A1, R, and W phases, discussed
608 previously in Section “Presence of a multiphasic pattern”, which is likely inadequate to detect
609 subtle changes in motion phases in an individual over time. Studies that report on specific phases
610 of longitudinal motion typically rely on frame-rates around 60-100 Hz, which is considered as the
611 lower end required to detect rapid changes in wall direction during the cardiac cycle (Cinthio, et
612 al. 2018) (Au, et al. 2017).

613 **Participant preparation**

614 As acquisition considerations for longitudinal motion are largely similar to that of other vascular
615 measurements, it is recommended to follow the general protocol put forth for similar vascular
616 health evaluation, such as pulse wave velocity (Van Bortel, et al. 2012) and flow-mediated dilation
617 (Thijssen, et al. 2010, Alley, et al. 2014). Procedures should take place in a quiet, temperature-
618 controlled room, with a dim light to improve *in situ* image visualization. Prior to the acquisition,
619 participants should avoid moderate-to-vigorous physical activity for 24 hours, refrain from tobacco
620 or marijuana smoking for 12 hours, and avoid eating or drinking fluids besides water for at least 2
621 hours. Upon arrival, the participant should be given 10-20 min to relax in the supine position in
622 order to ensure resting heart rate and blood pressure during data collection. During the acquisition,
623 participants should be in the supine position, with the neck slightly extended (Touboul, et al. 2012)
624 (Gutierrez and Rundek 2016). Due to the sensitivity of motion-estimation algorithms and the
625 complexity of longitudinal motion patterns, it is paramount to avoid any artifactual motion while
626 images are being acquired in order to ensure that the motion fully corresponds to the natural
627 displacement of the arterial wall. Therefore, it is crucial that the participant remains perfectly still,
628 with the neck muscles completely relaxed. For short measurements (under 10 seconds), breath-
629 hold of the subject is preferable, in order to reduce breathing-related issues in longitudinal motion
630 tracking. The breath-hold should be performed by avoiding the Valsalva effect (i.e., in the middle
631 of a normal breathing routine, without excessive inspiration prior the breath-hold). In addition, the
632 subject should avoid swallowing saliva and refrain from talking during imaging.

633 **Image acquisition**

634 One challenge that persists in image acquisition is deciding the location in which longitudinal
635 motion should be measured to standardize observations between subjects. The presence of a
636 progressive attenuation of the motion amplitude along the common carotid artery whereby total

637 displacement is attenuated closer to the bifurcation was demonstrated (Zahnd, et al. 2015a). In the
638 absence of clear advantages of one method over the other, similar placement as the Mannheim
639 consensus (Touboul 2015) is recommended. If possible, the analyzed region should be a flat (non-
640 tilted, non-curved) segment of the common carotid artery on the far wall. Far wall is preferable
641 over near wall since the fluid-to-tissue echo boundary has improved quality for block-matching
642 algorithms. The probe should be placed two cm away from the carotid bifurcation in such a way
643 that the bifurcation appears on one side of the image to landmark placement with repeated
644 measurements. The probe orientation should also be consistently maintained so that the left and
645 right side of the image correspond to the same direction (e.g., caudal or cranial) across different
646 acquisitions. There is currently no indication whether the right or left carotid artery is preferable
647 for standardizing longitudinal motion measurements; consistency should be maintained for
648 repeated measurements intra- and inter-participants.

649 The probe should be aligned in the longitudinal vessel axis plane so that out-of-plane motion is as
650 low as possible during the entire cardiac cycle. It is the responsibility of the operator to ensure that
651 the probe remains perfectly static during the entire acquisition. As motion-tracking approaches
652 vary, at least approximately two cm length of wall should be available for analyses. In order to
653 account for intra-individual variability in motion-derived indices, it was demonstrated that
654 averaging the values across four cardiac cycles resulted in a reduced variability of thus measured
655 indices (Au, et al. 2018b). Acquisition should ideally be gated with a simultaneous reference ECG
656 signal.

657 **Image analysis**

658 It is recommended to assess longitudinal motion on a specific region of the intima-media complex
659 that remains visible through the entire duration of the clip, such as a salient echo (Cinthio, et al.
660 2005) or a well-perceptible and contrasted speckle pattern (Zahnd, et al. 2013). In addition, it is

661 important that the analyzed region (i.e., the distance from the carotid bulb) is kept constant
662 within the study population, as longitudinal motion amplitude is known to vary along the carotid
663 artery (Zahnd, et al. 2015a). If ECG is unavailable, simultaneous measurement of the internal
664 diameter changes over time generally helps the identification of different cycles. Moreover,
665 analyzing the wall motion over an extended number of frames increases the risk of speckle
666 decorrelation and loss of the tracked pattern. To address this issue, long recordings can either be
667 analyzed cycle-by-cycle with approaches optimized for a single heartbeat (Tat, et al. 2017), or as
668 a whole with dedicated tracking methods (Zahnd, et al. 2013).

669 **Discussion and conclusion**

670 During the last decade, both the technical and clinical communities have collaborated towards the
671 establishment of a large body of work to characterize carotid wall longitudinal motion in
672 ultrasound. Current results enable asserting the capacity of methodological tools to obtain accurate,
673 robust, reproducible, and (semi-) automated quantification of longitudinal motion. Furthermore,
674 the association between several indices derived from longitudinal motion and the presence of
675 cardiovascular risk factors shows that longitudinal motion can be a surrogate marker for
676 atherosclerosis, and strongly suggests that this patho-physiological phenomenon is a valid
677 candidate for vascular health assessment and putatively for early-stage cardiovascular risk
678 prediction.

679 Determination of the origins of longitudinal motion pattern will greatly aid the interpretation of
680 motion measurements for cardiovascular risk assessment. For example, discovery of passive
681 stiffness components of the motion trace would identify a primary health outcome for future cross-
682 sectional or interventional studies that is supported by existing conventional arterial stiffness

683 literature. Additional stimulus-response studies isolating the different phasic components of the
684 motion pattern would greatly support this research direction.

685 Building upon this knowledge, one of the leading questions to shape future studies is to determine
686 whether and how longitudinal motion quantification is appropriate to be incorporated into routine
687 clinical practice. Accordingly, it has become required to confirm the added value of longitudinal
688 motion indices in large clinical trials, including different types of subjects at risk, and a variety of
689 additional CVD markers. Such prospective trials, with long-term follow-ups, will be key to
690 identify the most robust longitudinal-motion-derived indices for disease diagnosis, prevention and
691 monitoring. The investigation of potential associations between such indices and i) other
692 ultrasound-image-based indices such as IMT and texture, and ii) disease biomarkers, such as
693 biochemical indices, will allow a more integrated and in-depth approach to arterial biomechanics.

694 Concluding, longitudinal motion is a promising yet relatively unexploited marker. By reaching out
695 to different expert communities, the aim of this review article was to raise awareness about the
696 existence of this patho-physiological phenomenon. Knowledge gathered in previous studies
697 gradually contributed to establish clinical hypotheses, as well as methodological frameworks.
698 Determining the definitive clinical applicability and added value of carotid ultrasound longitudinal
699 wall motion beyond traditional cardiovascular risk markers remains the mission of the community
700 in future explorations.

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Table 1. Wall motion extraction techniques based on B-mode ultrasound imaging (chronological order).

Study	Year	Technique	Data	Accuracy evaluation	
				Criteria	Score
Golemati et al. (Golemati, et al. 2003)	2003	Block Matching (BM)	11 symptomatic subjects 9 asymptomatic subjects	No quantitative evaluation of the accuracy	-
Persson et al. (Persson, et al. 2003)	2003	Echo tracking	1 healthy volunteer	No quantitative evaluation of the accuracy	-
Cinthio et al. (Cinthio, et al. 2005)	2005	Echo tracking	1 healthy volunteer 1 agar phantom	Mean differences compared with two high-resolution triangulation lasers.	Longitudinal: $5.9 \pm 40.5 \mu\text{m}$ Radial: $28.5 \pm 19.5 \mu\text{m}$
Stoitsis et al. (Stoitsis, et al. 2006)	2006	BM & Optical Flow (OF)	10 healthy volunteers	Cross-correlation coefficient between BM and OF	Longitudinal: $0.32 \pm 0.39 \text{ mm}$ Radial: $0.72 \pm 0.22 \text{ mm}$
Gastouniotti et al. (Gastouniotti, et al. 2011)	2011	BM + Kalman filtering as an adaptive strategy with (a) updating the reference block (b) updating the displacements	5 young healthy volunteers (ages: 25–32 years) 4 elderly healthy volunteers (ages: 44–73 years)	Tracking accuracy compared to conventional BM	Adaptive BM minimized the warping index and yielded average displacement error reductions of 24% with respect to BM. Estimation bias reduction of 30% with respect to BM. Jitter over varying center frequencies reduction of 64% with respect to BM.
Zahnd et al. (Zahnd, et al. 2011b)	2011	Multi-BM ruled by a deformable skeleton model	26 young healthy volunteers 26 elderly diabetic subjects	Qualitative evaluation only (visual control by two experts)	-
Golemati et al. (Golemati, et al. 2012)	2012	Comparison of several existing methods: OF, weighted least-squares OF (WLSOF), BM, and affine block motion model (ABMM)	Real image template and Field II	Average warping indices between OF, WLOF, BM and ABMM	WLSOF: $105 \mu\text{m}$ ABMM: $120 \mu\text{m}$ BM: $405 \mu\text{m}$ OF: $694 \mu\text{m}$
Salles et al. (Salles, et al. 2012)	2012	Phase-based OF	1 healthy volunteer	Qualitative evaluation only	-
Zahnd et al. (Zahnd, et al. 2012)	2012	Multi-BM guided by contour segmentation	126 Indigenous Australians with periodontal disease 27 healthy age- and sex-matched Caucasian controls	Qualitative evaluation only (visual control by two experts)	-
Zahnd et al. (Zahnd, et al. 2013)	2013	Kalman-based BM	57 young healthy volunteers 25 diabetic patients	Average absolute error (\pm STD) from manual reference tracings	Longitudinal = $20 \pm 19 \mu\text{m}$ Radial = $84 \pm 107 \mu\text{m}$
Gastouniotti et al. (Gastouniotti, et al. 2013)	2013	Adaptive BM	40 subjects 1 in silico phantom	Tracking accuracy compared to conventional BM	Adaptive BM algorithm, yielding a 47% accuracy increase with respect to the conventional BM

Yli-Ollila et al. (Yli-Ollila, et al. 2013)	2013	BM + luminance optimization	19 healthy volunteers	Reproducibility	Cronbach's α coefficient, 0.59–0.97
Albinsson et al. (Albinsson, et al. 2014)	2014	Lagrangian BM	20 healthy volunteers 1 Simulated (Field II (Jensen 1996)) 1 in silico phantom	Absolute tracking error compared to Cinthio et al. (Cinthio, et al. 2005)	In silico: improvement of tracking accuracy (mean=48%, p<0.005) Phantom: improvement of tracking accuracy (mean=43%, p<0.01) In vivo: reduction of block size with similar tracking performance (mean=19%, p<0.01)
Gao et al. (Gao, et al. 2015)	2015	BM + h_{∞} filter	50 subjects	Mean absolute tracking difference compared with manual annotations	Mean absolute estimation error: Longitudinal 96 μ m Radial 46 μ m
Salles et al. (Salles, et al. 2012)	2015	Phase-based BM	1 simulated RF clip (FieldII) 10 healthy volunteers	Mean absolute amplitude difference, evaluated on a numerical phantom	Longitudinal: 9.9 \pm 7.9 μ m Radial: 4.2 \pm 3.4 μ m
Yli-Ollila et al. (Yli-Ollila, et al. 2016b)	2016	Transfer function analysis	19 healthy volunteers	Reproducibility	Longitudinal: Cronbach's α coefficient, 0.59–0.97 Radial: Cronbach's α coefficient, 0.68–0.93
Tat et al. (Tat, et al. 2016)	2016	Multi-BM	23 healthy volunteers 12 patients	Not specified	-
Gao et al. (Gao, et al. 2017b)	2017	Elasticity-based state-space approach	37 healthy volunteers 103 patients	Correlation coefficient (r) and root mean square error (RMSE) against manual tracings	Radial: r = 0.9897, RMSE= 25.98 μ m Longitudinal: r=0.9536, RMSE= 142.82 μ m
Scaramuzzino et al. (Scaramuzzino, et al. 2017)	2017	Automatic detection and matching of multiple salient points + Scale invariant feature transform	1 in silico phantom 18 healthy volunteers 16 patients	Accuracy Average absolute error (\pm STD), Maximum variation Coefficient, Correlation coefficient	In silico: Intima-media complex: 23 \pm 15 μ m Adventitia: 19 \pm 18 μ m In vivo: Intima-media complex: 9.5 (variation coefficient, over 5 repeated measures) Adventitia: 13.8% (variation coefficient, over 5 repeated measures) Compared with visual assessment performed by 2 physicians: r= 0.7
Gao et al. (Gao, et al. 2017a)	2017	Nonlinear state space with a time-variant control signal based on a mathematical model of the carotid dynamics	30 simulated sequences 22 healthy volunteers 81 patients	Intra-class correlation	In silico: accuracy 0.1161–0.1260 mm In vivo: Longitudinal: Intra-class correlation \geq 0.9948 95% CI = 0.8871 mm Radial: Intra-class correlation \geq 0.9966 95% CI = 0.4159 mm
Zahnd et al. (Zahnd, et al. 2018)	2018	Dynamic BM	62 elderly patients at high cardiovascular risk	Average absolute error (\pm STD) from manual reference tracings	150 \pm 163 μ m
Albinsson et al. (Albinsson, et al. 2018)	2018	Parabolic sub-sample and grid slope sub-sample interpolation for 2D BM	1 healthy volunteer 1 phantom 1 in silico simulation (Filed II)	Absolute sub-sample estimation errors	Reduced by 24% on phantom data Reduced by 15% on in silico data

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Table 2. Wall motion extraction techniques based on RF ultrasound signals (chronological order).

Study	Year	Technique	Hardware, format of RF data	Data	Performance
Ribbers et al. (Ribbers, et al. 2007)	2007	Cross correlation	fr=25Hz, fs=39MHz, fc=11MHz, 15-6L linear array Philips Sonos 7500 real-time 3D echoscanerB	1 physical phantom 12 patients	No quantitative analysis of the <i>in vivo</i> results was performed.
Zahnd et al. (Zahnd, et al. 2015b)	2015	Local Phase-Based OF (Basarab, et al. 2009)	fr=91Hz fs=50MHz, fc=4MHz, fs50MHZ, ULA-OP research scanner,	20 young healthy volunteers 6 elderly patients	Longitudinal: 98±84 μm Radial: 55±44 μm
Salles et al. (Salles, et al. 2015)	2015	Transverse oscillations (Liebgott, et al. 2010)	fr=10kHz fc=5MHz fs=40MHz L14-5W/60 array Ultrasonix SonixTouch US system (Richmond, BC, Canada)	- 3 artery numerical phantoms	Mean axial error: 4.2 ± 3.4 μm Mean lateral errors: 9.9 ± 7.9 μm the stiffnesses of the 3 vessel phantom walls investigated were estimated with an average relative error of 2.2%.
Hasegawa et al. (Hasegawa 2016)	2016	Phase tracking with frequency spectra	fr=1302Hz fs=31.25 MHz fc=7.5MHz linear array PU-0558, Ueda Japan Radio) (scanner RSYS0002, Microsonic, Tokyo, Japan)	1 phantom	Bias error 1D: Ra=11.5%, Lo=2.0% Bias Error 2D: Ra= 3.0%, Lo= 2.0%
Zambacevičienė et al. (Zambacevičienė and Jurkonis 2019)	2018	Phase correlation and sub-sample algorithm	fr=52Hz fs=40MHz fc=14-5 MHz Linear array Scanner Ultrasonix sonixTouch (Analogic Ultrasound, Canada)	1 phantom	NRMSE of detected motion amplitude: 0.21 to 0.41 μm and the coefficient of correlation= 0.95 to 0.98 in case of any determined longitudinal motion function when the phase correlation, sub-pixel algorithm and additional filtering were used.
Miyajo et al. (Miyajo and Hasegawa 2018)	2018	Matching performed in the 2D Fourier domain	Scanner α-10, Aloka. fr=3472Hz fs=40MHz fc=10MHz	1 phantom 1 healthy volunteer	Bias error and standard deviation in the lateral velocity estimates: 0.048 and 0.282mm/s
Perrot et al. (Perrot, et al. 2018b)	2018	Video magnification	fr=2500Hz fs=25MHz fc= 5MHz Linear array (L7-4) (Scanner Verasonics Inc., Redmond, WA, USA) Reconstruction technique: Stolts	8 healthy volunteers	Motion magnification by a factor 1000

NRMSE= normalized root mean square error; fr=Frame rate, fs= Sample Frequency, fc=Center Frequency

Figure Captions List

Figure 1: Carotid wall longitudinal motion observed in ultrasound. (a) B-mode image of the common carotid artery. (b) Detailed region of the white rectangle in (a), showing the concentric anatomical layers. (c) Schematic representation of the general waveform pattern of longitudinal motion, corresponding to the white dot in (a), over three cardiac cycles. Here, positive curve deflections represent motion in the same direction as the blood flow. A1: first antegrade motion. R: retrograde motion. A2: second antegrade motion. Δ : peak-to-peak amplitude, generally corresponding to 0.5–1 mm. The electrocardiogram (ECG) signal is schematized on the bottom. The dashed line represents the zero level, which is arbitrarily placed by convention at the time-point of the ECG R-peak (when ECG is unavailable, the zero level can be placed at the time-point where the lumen diameter is minimal).

Figure 2 - Different patterns of longitudinal motion (solid line) of the IM (intima-media) of the carotid artery far wall, and the diameter change (dashed line). a) Backward-oriented Type I (29-year-old man), b) Type II (29-year-old woman), c) Forward-oriented Type III (20-year-old woman), d) Backward-oriented type IV pattern III (55-year-old woman), e) Backward-oriented type I/IV pattern (60-year-old man), f) Forward oriented type V pattern (62-year-old woman). Small circles mark the onset of the antegrade phase A in early systole. (Source: (Cinthio, et al. 2018))

Figure 3- (a) Biaxial hysteresis loop of wall displacement, at baseline (solid) and follow-up (dashed). Biaxial wall displacement starts at the reference position [0,0], with arrows indicating the direction of motion over time and the relative phase of the longitudinal motion trace. Motion traces were interpolated to a single cardiac cycle to present data as a group average for the entire sample. (b) Corresponding longitudinal motion (Source: (Au, et al. 2018b))

Tables

Table 1. Wall motion extraction techniques based on B-mode ultrasound imaging (chronological order).

Study	Year	Technique	Data	Accuracy evaluation	
				Criteria	Score
Golemati et al. (Golemati, et al. 2003)	2003	Block Matching (BM)	11 symptomatic subjects 9 asymptomatic subjects	No quantitative evaluation of the accuracy	-
Persson et al. (Persson, et al. 2003)	2003	Echo tracking	1 healthy volunteer	No quantitative evaluation of the accuracy	-
Cinthio et al. (Cinthio, et al. 2005)	2005	Echo tracking	1 healthy volunteer 1 agar phantom	Mean differences compared with two high-resolution triangulation lasers.	Longitudinal: $5.9 \pm 40.5 \mu\text{m}$ Radial: $28.5 \pm 19.5 \mu\text{m}$
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