

## Update and Addenda to

# "The Voyage Abstracts of the Cunard Line as a Source for Transatlantic Passenger Fares, 1883-1914,"

## *Business Archives History and Sources 96* (Nov. 2008)

by Drew Keeling, 20 December 2024

### C O N T E N T S

|  |         |
|--|---------|
| Introduction to the Update and Addenda of December 2024  | p. ii   |
| <b>"The Voyage Abstracts of the Cunard Line as a<br/>Source for Transatlantic Passenger Fares, 1883-1914"</b><br>(with minor corrections of December 2024) |         |
| The Cunard Voyage Abstracts  | p. 15   |
| The Voyage Abstracts and Migration Costs   | p. 16   |
| Passengers: Adult Equivalents versus "Souls"   | p. 17   |
| US head taxes and Agents' fees [revised, Dec. 2024]  | p. 18   |
| Consistency of Voyage Abstracts and Annual Reports   | p. 19   |
| Other Consistencies  | p. 20   |
| Other Observations and Concluding Comments   | p. 21   |
| Note on sources: Abstract Volumes and Columns  | p. 22   |
| <b>Appendices</b>  |         |
| 1. Quarterly Fares, Liverpool-New York, 1883-1914  | p. 24   |
| 2. Quarterly Passenger Figures, Liverpool-New York, 1883-1914  | p. 29   |
| 3. US Head Taxes, 1882-1914  | p. 34   |
| 4. Table of Adjustments to Quarterly Fares [added Dec. 2024]   | p. 34 b |
| 5. Uses of Cunard Derived Fares in other articles [added Dec. 2024]  | p. 34 d |
| <b>Notes</b>   | p. 35   |

### ABSTRACT (of 2008 article)

The Voyage Abstracts of the Cunard steamship line are an important, and in some respects unparalleled, source of accurate, detailed, consistent, and long-term financial and business data for the history of passenger shipping on the North Atlantic. As emphasized here, they can also be used to help fill a major gap in the history of travel and migration between Europe and the United States, by enabling the derivation of time series for average transatlantic fares.

*This update will be further updated later, as circumstances may suggest and provide*

## Introduction to this 2024 update

This article, corrected, updated and extended here for interested researchers using my website, [business-of-migration.com](http://business-of-migration.com), is based on data gathered from the Cunard "Abstracts of Accounts of Voyages," during multiple visits to the University of Liverpool's Special Records and Archives Collections between 1996 and 2011. A principal application of the data has been to divide figures in the six "passage money" columns (Cabin, 2nd Cabin and Steerage, "outward" [west] and "homeward" [east] by the respective six "No. of Passengers" columns, thereby "deriving" the effective "receipts" per "adult equivalent" passenger.<sup>1</sup> As such, the resulting time series (shown in Appendix 1 below), amounts to a rare consistent and complete time series of passenger fares on a dominant travel route during the peak years of mass transatlantic migration at the end of nineteenth and beginning of the twentieth centuries.

The original article with this 32 year data set was published in 2008. The immediate purpose of the update here is to address, with new information and insight, a gray area that results from the actual full "gross" payments incurred by passengers being somewhat higher than what was recorded by the Cunard Line in its Abstracts. (The full cost or "gross" fare is estimated to have ranged from between about 5% and 20% more than the net receipts to Cunard.)<sup>2</sup>

As a historical data source, such "revenue-derived" fares have a particular advantage in that they measure across all paid passengers, and also reflect deviations from the standard, official, publicized or advertised fares (which are otherwise typically relied on to gauge travel costs, etc). Furthermore, as this update suggests, the gross-net difference, essentially resulting from head taxes and agents' commissions (both, it turns out, effectively borne by the Cunard travel customer yet not reaching Cunard's accounting books) can be computed: quite accurately for the head tax and to a useful rough average or trend approximation for the agents' fees.

### Purposes and Approach

Extracts of the Cunard derived fares series (mostly for the principal Liverpool-New York route) were published (see Appendix 5 below) before and since the 2008 "Abstracts" article appeared. The purpose of that article was and remains to provide background information on the character and properties of the Cunard Abstracts, along with a more comprehensive quarterly record of the derived fares and respective passenger totals in the six class-directions over the entire pre World War I period of available consistent Abstracts records.

The 2008 article was submitted for publication late in the annual cycle, and published without benefit of pre-publication proofs. An accumulating number of errors have been detected over the years (although none significant individually). More importantly, the state of scholarly knowledge has advanced over the past decade and a half, such that questions of whether, how, and by how much to adjust the derived "net" fares upwards, in order to measure or estimate the full direct cost of the oceanic traverse, have gained in traction and relevance.

The journal *Business Archives History and Sources* ceased publication after 2014, although the sponsoring entity -Business Archives Council- maintains the archive of back issues, including #96, online and freely downloadable by the public. That original article will still suffice for some readers. For those desiring a more current and extensive edition, the update here consists of the following:

- The original 2008 published article remains mostly intact (including its pagination, footnotes, etc) within this update, with these alterations:
- Episodic errors, in text or numerics, have been corrected by hand on the respective pages which were scanned and reinserted. (An Errata list helpfully appeared in issue 99 but flags only a few of those errors).
- Introductory material (e.g. this very page, and a total of four) has been newly added to the front end, and two new appendices (3 new pages in toto) to the back end.
- Pages 18-19, encompassing the section "US head taxes and agents fees," were rewritten.

<sup>1</sup> As explained in the text below, p. 17, children age 1-12 travelled for half price and counted as 1/2 "adult equivalent," infants under age the age of on went free and were not counted. Re columns in the Abstracts, see "note on sources" below, pp. 22-23.

<sup>2</sup> The "adjustments" needed to convert the "derived" ("net") average fares of Appendix 1 into the actual average "gross" fares incurred by the purchasing passengers are shown in Appendix 4.

## Reinterpreting the locus and impact of head taxes and agents' fees

The rewritten section "US head taxes and Agents fees" concentrates on steerage (third class) rates. More tentative determinations on "cabin" (first and second) class fares are, however, taken up in the notes to the here newly added Adjustment table (Appendix 4). Other than correcting of isolated erroneous entries, there is no revision to any of the original "passage money" (net revenue) series (not shown in the 2008 article, or here now either, for space reasons) nor the (adult equivalent) quarterly passenger traffic volumes (shown in Appendix 2), nor their quotient (the derived fares of Appendix 1). New aspects of interpretation and context are brought out, however. The Appendix 4 table suggests by amounts British pounds) by which derived fares of Appendix 1 can be adjusted upwards to more accurately gauge the full "gross" passage cost of crossing the Atlantic between Liverpool and New York on a Cunard liner in the three decades before the Great War of 1914-18.

The 2008 conclusions on head taxes and agent's fees were fundamentally based on principles of balanced bookkeeping. Taking, as in the original article text, head taxes first:

Among many other roles, late nineteenth and early twentieth century Atlantic passenger shipping lines were, in effect, conduits through which US authorities recouped costs of immigrant processing from immigrants. Moreover, given no known evidence of Cunard (at least) recording the *paying out* of those head taxes, as an expense, it follows logically that there also should be no corresponding offset flow *into* Cunard's corporate revenue. Ergo, passenger revenues -and thus fares derived from them- did not incorporate head taxes. Nonetheless, passenger payments indubitably funded the head tax levies, and to properly reflect the full effective transatlantic travel price, those taxes must be added to the fares derived in Appendix 1. With limited exceptions, head taxes were essentially uniformly applied to all westbound steerage passages, well over 95 per cent of which were in fact made by "aliens subject to the tax" by federal law. They were also transparent: The tally of passengers "subject to the head tax" was hand-written in a summary box stamped on every arriving passenger manifest (from at least 1903 on). In sum, the 2008 conclusions on head taxes are reaffirmed here: Add the full head tax amount to the derived fare (at least for steerage) as part of capturing the full gross passage cost.

Upon closer examination, however, the 2008 conclusion regarding agents' fees (that they were incorporated into the passage money receipts of Cunard) is reversed. Ergo, an addition is also in order for those fees, analogous to the head taxes, to get to the full gross cost.

Where the 2008 logic went astray on agents' fees was with interpreting the Cunard "Expenditure" item, "Office and Agency Expenses at home and abroad" (prominently displayed on every annual -financial- report of Cunard after its 1880 incorporation). In hindsight, it was rather too convenient that the amount of that expense fell generally within a size range of about 5-10 per cent of passenger revenues, which is also roughly the anecdotal suggested range for agents' commissions from about the 1890s. However, the argument -with which Francis Hyde's "Cunard...history of shipping and financial management" also implicitly concurred (pp. 76-78)- that agents' commissions (by assumption fully reflected in the annual "Office and Agency" numbers), were therefore somehow *also added into the revenue* side of the company's ledger, fails to hold up logically or empirically.

Logically, given that "Office and Agency Expenses" amounted to barely five per cent of total overall corporate expenditures, and the remaining 95 per cent (coal and wages of voyages, repairs and insurance of ships, etc.) were closely associated to shipping revenues, why split passenger ticket commissions off into its own separate section of the annual report ("statement of accounts")? And even if such commissions amounted to something less than the full remaining 5 per cent of total expenses, how could that classification possibly leave a sufficient percentage to account for the "Home Office" subportion of "Office and Agency at Home and Abroad": the corporate planning, logistics, finance, negotiating with authorities, colluding with other lines, press relations, lobbying, etc? The annual "Office and Agency" expenditures item quite possibly did include payments to some non-passenger travel agencies, or even to passenger travel agents, but -in that case- more likely only to those hired on salaries, not those compensated by retaining part of the passage money as commission, and remitting the remainder to Cunard.

Empirically, wide and diverse examples indicate that although Cunard and its North Atlantic peers strove, with gradual success over time, to regulate and standardize the practices of agents on

commissions, and to some extent replace them with in-house passenger departments, they remained dependent on them. A persisting if not always dominant paradigm appears to have remained one of widely dispersed local agents, selling steamship line tickets and deducting commissions, *before* sending the net balance to the company (including Cunard even if somewhat less often than others). [See p. 19 below, Hvidt (1978), Feys (2013), part II, chapter 1.]

The case here is actually even clearer than for head taxes (where the monies were at least in the company *coffers* for a few days or weeks before being transferred, after vessel arrival and passenger inspection, to US authorities, even if those monies were never recorded in company *accounting* books). Overwhelmingly, if not one hundred per cent, agents' commission money never even touched the shipping line's corporate *hands* at all.

The issue to determine thus shifts from *whether* agent's fees should be added in (to track the full pattern of transit costs) to *how much* that upward adjustment should be. Answers, and/or at least best available estimates, are in the new Appendix 4 Adjustment Table and notes accompanying it, and in the revised main text section, on head taxes and agents' fees below.

In sum, with caveats against uncritical or wholesale application of specific metrics, assumptions and findings to other shipping line contemporaries of Cunard, or to specific and differentiated shorter sub-intervals, this update on the uses of Cunard Abstracts' data may help catalyze a better informed understanding of the scope and mechanics of increased long distance mobility and long term physical relocation during a critical historical epoch of economic development and globalization. Further updates and refinements may follow, and suggestions are welcome at this website, even if they cannot always be answered promptly.

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### **KEY SOURCES used for this update:**

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**THE VOYAGE ABSTRACTS OF THE CUNARD  
LINE AS A SOURCE OF TRANSATLANTIC  
PASSENGER FARES,  
1883-1914**

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The archives of the Cunard Steamship line in the Special Collections and Archives division of the Sydney Jones Library at the University of Liverpool, are one of the most important repositories of documents pertaining to the business history of transatlantic shipping and passenger travel! Some 700 linear feet of material was placed at the University of Liverpool by the Cunard Company beginning in 1971-72, although it then took a number of years to organize the items for public access. This process and a general introduction to the collection were described by the University of Liverpool archivist Michael Cook in a 1978 article in *Business History*.<sup>2</sup> A detailed formal catalogue was printed in 1987, and has been periodically revised and augmented since.<sup>3</sup> A project is currently underway to further correct, update and streamline the catalogue, and to add considerable further detail to the descriptions of its contents.

The University's Special Collections and Archives, recently relocated to refurbished and more spacious accommodation within the library, is a well-organised and well-used resource for historians. It is perhaps best known for its many rich sets of literary manuscripts, but also houses collections in the history of commerce, shipping, and the Liverpool merchant community, of which the Cunard Archives are clearly a mainstay.

The existence of this sizeable collection is, of course, well-known to readers of Francis Hyde's seminal history *Cunard and the North Atlantic*.<sup>4</sup> The transfer of most of Cunard's archives to Special Collections had been completed by the time Hyde's book was published, and most of the materials used for the book can now be accessed in the archives, although the classification scheme now used differs somewhat from that employed by Hyde.<sup>5</sup>

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### Cunard's voyage abstracts

The voyage abstracts are one of the most remarkable, and quite possibly unique, components of Cunard's surviving records from the pre-1914 era. Hyde and his student Robin Bastin used them, but did not examine them comprehensively.<sup>6</sup>

These abstracts have been sometimes referred to as 'voyage accounts', but that somewhat imprecise term rather understates their significance.<sup>7</sup> In maritime history, 'voyage account' tends to imply a set of notations closely related to, and sometimes specifically detailing, many of the individual transactions associated with a ship's voyage, possibly transcribed more or less directly from sequential records generated over the course of the voyage itself. The Cunard 'Abstracts of Accounts of Voyages', however, are a higher-level and more analytically potent set of records.<sup>8</sup>

In large, special-purpose leather-bound ledger books, the abstracts provide a couple of dozen important financial figures for every roundtrip transatlantic voyage (across the ocean and back). Instead of a voyage's finances being displayed across multiple pages, as might be expected in a more traditional set of 'voyage accounts', each voyage in these abstracts is summarised in neat consistent handwriting, on a single line.<sup>9</sup> A single double-page leaf in the abstracts thus typically displays separate line-by-line results from 20 to 30 voyages, plus quarterly or annual subtotals, either by route or by vessel.

The power of these records for historians is that they offer a rare intermediate financial history of the company's business activities in a concise, consistent and comprehensive format but with considerably more crucial detail than is available in the top-level annual (financial) statements. In particular, the Cunard voyage abstracts allow a voyage by voyage depiction of physical volumes, revenues, and prices (revenues per unit of volume) for eight key business sub-segments: freight, first cabin, second cabin, and steerage passengers 'outward' and 'homeward' for all major routes, completely, accurately, and consistently across many decades.<sup>10</sup>

### The voyage abstracts and migration costs

With rare exceptions, North Atlantic passenger steamships in this period carried travellers in three relatively distinct classes. In descending order of price, and on-board comfort, these were (1) the first cabin (first class), (2) the second cabin (second class or 'intermediate' class), and (3) steerage (third class). Subject to a few minor caveats, discussed below, dividing revenues given in the voyage abstracts for each class-direction (first,

second, steerage, eastbound and westbound) by the corresponding <sup>(net)</sup> number of full-fare equivalent passengers, yields the average price paid per passenger on any voyage or aggregation of voyages. Most migrants during the mass transatlantic relocations of the late nineteenth and early twentieth centuries crossed the Atlantic in steerage class, and most steerage passengers were migrants. Over time, however, a growing minority of migrants travelled in the less uncomfortable second cabin.<sup>11</sup>

The general causes of this mass migration are both over-determined and under-explained. The economic advantages of moving to North America from Europe were sizable, long-persisting, well-known by the late 1800s, and subject to legal restrictions that were negligible compared any time after the early 1920s. Yet, throughout the nineteenth and early twentieth centuries, the overwhelming majority of Europeans did not move to North America. Even within the regional and demographic subsets of Europeans most prone to overseas emigration, the great preponderance stayed in the continent where they were born.<sup>12</sup> What role the cost of travel might have played in the processes of migrant self-selection has long been a rather obscure issue in migration history, not least due to the lack of detailed and reliable long term statistics on cross-Atlantic ticket prices.<sup>13</sup> The Cunard voyage abstracts thus enable derivation of a rare yet consistent time series of fares across the North Atlantic.

#### **Passengers: adult equivalents versus 'souls'**

The general practice of children between one and twelve years of age being charged half fare and infants under one year old travelling free, means that determining fares by taking the quotient of revenues and number of passengers (or 'souls' in the terminology sometimes used by contemporary records) would understate fares to a small but somewhat variable extent.<sup>14</sup> This issue does not arise with the Cunard voyage abstracts, however.

The passenger numbers in the abstracts are clearly full-fare paying adult equivalents, not 'souls' based on the following observations: Firstly, in the early years of the 1883-1914 period, more than a few passenger totals in the voyage abstracts are not whole numbers, i.e. they total something and a half. For instance, the abstracts show the voyage of Cunard's steamship *Gallia* departing Liverpool on 13 June, 1884 with 208<sup>1</sup>/<sub>2</sub> passengers in steerage.<sup>15</sup> This, however, would be expected if one were tallying full-fare adult equivalents, namely, whenever there were an odd number of children abroad (each of which counted as half of a full-fare adult equivalent). Secondly, based on examination of 500 voyages on the Liverpool-New

York route during 1900-1914, Cunard's Voyage Abstract figures for steerage volumes (see Appendix 2) are a rather consistent five to ten percent below comparable by-voyage numbers from the Transatlantic Passenger Conferences records.<sup>16</sup> The average difference was seven per cent westbound, six percent eastbound. This is also what one would expect if Cunard had something roughly close to the average westbound ratio (given in the United States (US) Bureau of Immigration reports) of 13 per cent of passengers under 14 years old (counted as half, e.g. 6.5 per cent).<sup>17</sup> A small sample of U.S. passenger lists giving actual ages for each passenger further confirms that the difference between the passenger numbers in Cunard's Voyage Abstracts and those in general shipping statistics matches quite closely the difference that would be expected assuming the Cunard data to be "adult equivalents" (for which each adult counts as one, and each child between the ages of one and twelve counts as one-half, "adult equivalent").<sup>18</sup>

### **US head taxes and Agents' fees [this section revised for this update]**

An apparent anomaly of the Liverpool-New York route fares derived and displayed in Appendix 1 is that Cunard's eastbound rates *from* the US were somewhat more expensive on average than westbound tickets *to* America. This might seem counterintuitive given that there were fewer migrants going east than west (except during US recessions) and, by most accounts the travel market in steerage was more competitive eastwards. Most (about three quarters) of the east-west difference in Cunard's fares is eliminated, however, if it is assumed that there westward revenue ("outwards receipts) columns of Cunard Voyage Abstracts do not include US head taxes applied by US authorities on the arrival of foreigners.<sup>19</sup>

It seems indeed quite unlikely that the tax was included in the revenue columns of the Cunard Voyage Abstracts. Steamship companies were billed for the tax by the U.S. immigration authorities (it was, in fact, the U.S. Immigration Bureau's principal source of funding for most of the period!), so Cunard would have been erroneously measuring its voyage operating profits if it had included the tax in voyage revenues without also adding it to its voyage costs. But there is no Voyage Abstracts expense column for head taxes or even one within which it obviously fits (see Appendix 5). It can be confidently assumed that at least one purpose of Cunard Abstracts having all the costs and revenue columns set out across the double paged entries for each voyage of each vessel, with the ultimate far right column measuring the net voyage profit or loss, was to track with some specificity the components of those profits. What better way then to efficiently account for head taxes, than to, in effect, use the numbers in the tables stamped by Ellis Island inspectors or statisticians on the passenger list for every arriving vessel, thereby multiplying the number of "Aliens subject to the tax" for each of the three westbound travel classes by the prevailing tax rate, converted into pounds sterling, and subtract that amount from the passage money for that class before entering (eventually) the difference of the two into the appropriate "cell" in the Abstract book?

To maintain clearly traceable consistency with those Abstracts books in the Liverpool archives, the Appendix 1 numbers here are not directly adjusted for the head taxes, but it would seem abundantly appropriate to do so whenever using those derived fares to measure the full cost of the passage for passengers in steerage. Cunard does not appear to have followed the practice of a minority of agents or lines after 1907 in itemizing head taxes separately when collecting payment for a transatlantic ticket. But it would make no difference here if it had.



What matters here is how the tax was accounted for within the company, not vis a vis the passenger clients. The conclusion is that the westward passenger receipts in the Abstracts, and the derived fares of Appendix 1 based on them, had the head taxes deducted from them. Ergo, add them back in to accurately measure the full impact on the migrant passengers (which steeragers then overwhelmingly were).<sup>20</sup> *(These "add back" corrections are shown in Appendix 4 below.)*

Most turn of the twentieth century transatlantic travellers used the services of a shipping agent when purchasing a steamship ticket, whether for themselves or for a "prepaid" relative, and early in the period the agents' commissions typically averaged on the order of 10-15 per cent of the "gross" ticket price.<sup>21</sup> Towards the end of the period, these fees rather clearly ~~fees~~ declined, as a percentage of the overall fare, as did the fraction of tickets purchased through agents rather than directly from the shipping lines.<sup>22</sup> As with the head tax, the Abstracts revenues do not incorporate the commission cost and to capture the full cost of passage to the traveler the derived fares need upward adjustment. Unlike the head tax, which shipping lines were obliged to pay themselves, their agents were granted authority to effectively collect their commissions directly from the travelling client or other ticket purchaser. By shipping conference agreement, from 1908 on, UK lines were limited to allowing agents a maximum of 6 shillings in fees per ticket, about 8 1/2 shillings (\$2) on prepaid tickets from America, and somewhat more for passengers who boarded Cunard liners with tickets booked or issued in Scandinavia, or in continental Europe, or bearing tickets where a "head agent" commission was layered onto the fee of a "subagent."<sup>23</sup> A preponderance of other evidence (shipping line correspondence, instructions to agents, press report and testimony at governments hearings, etc) corroborates these general magnitudes as applicable across the period as a whole, at least from the late 1880s.

The adjustments recommended in the new Appendix 4 reflect these and similar arrangements, on a per head not a percentage of gross fare basis (at least for steerage), and divergence from those maximums during fare wars. A range of indications suggest that average ~~average~~ <sup>agents'</sup> commissions on Cunard fares were towards the low end of that range (c. 6-9 shillings), based partly on Cunard being less reliant than competitors on Continental traffic and US prepaids, and partly on Cunard using salaries instead of commissions to a greater extent than other lines. As noted in the new introduction to this update, the "Office and Agency Expense" on Cunard's annual financial statements probably mainly encompassed agency expenses *other* than commissions on passenger tickets. Those "Agency expenses" may provide reinforcement for a conceivable conclusion that Cunard paid more in salaries than in commissions to agents, at least towards the latter part of the period, but not that *commissions* were paid out of the passage money receipts in the numerator of the derived passenger fares computed here in Appendix 1 (revenues / passengers). Again, the passengers more or less directly compensated the steamship agents involved, the (Cunard) shipping line revenue did not reflect this, therefore adjust the derived fares to incorporate that effective additional component of cost to the passenger.<sup>24</sup>

### **Consistency of Voyage Abstracts and Annual Income Statements**

The historical value of the Cunard Voyage Abstracts is further enhanced by their consistency with the company's overall annual reports ("statements of account"). This consistency strengthens the comparability between cost and revenue data found only in the Abstracts (such as revenue per passenger class) and data found only in the annual reports (such as agency expenses).

The major expense item in the annual reports is "Coals, Wage, Provisions, Ship and Engine Stores, Port and General Charges," accounting

[ these pages, 18-19, revised for this Dec. 2024 update ]

*(later corrections on this page as of Jan 2025)*

during 1880-1914 for 83 per cent of all the company's expenses.<sup>25</sup> Adding together all voyage expenses given in the abstracts for the all routes (New York, Boston, Mediterranean, Havre, Fiume (from 1903) and Canada (from 1911), for the years 1885-90 and 1903-13, for which figures are readily available, yields a total very close to that annual report item. Only in 1912 was the difference between the two greater than two per cent (the annual report figure is three per cent higher, possibly due to 'superannuation fund' allocations). Over all these 17 years the average difference was only 0.7 per cent.

For revenues, Cunard's abstract totals were 13 per cent lower, on average, than its annual report figure. This difference seems to essentially reflect income items not directly associated or attributable to specific voyages. For example, in 1903 the annual report shows total income of £1,437,000, compared to the total from the abstracts of £1,278,000 (figures rounded to the nearest thousand). Most of the roughly £159,000 difference is accounted for by postal payments from the UK government of about £65,000, from the US government of about £50,000, and UK Admiralty subventions of about £15,000.<sup>26</sup>

### Other consistencies

In addition to the already-mentioned consistencies between the abstracts' passenger volume data and figures kept by shipping conferences and US immigration authorities, and between the voyage expenses in the abstracts and Cunard's annual reports, there is also consistency in the travel dates given in shipping conference statistics, in the Morton-Allan directory from 1890 on, and in newspaper announcements of arrivals and departures.<sup>27</sup> The dates given in the Transatlantic Passenger Conferences reports and the Morton-Allan directory are for US port arrivals and departures, whereas the abstracts' data on the Liverpool-New York, and Liverpool-Boston routes are for departures *from* and arrivals *at* Liverpool, but there is almost no variation in the implied transit times across voyages for any given vessel (of a given speed).

The abstracts are also internally consistent. These records were obviously made with considerable care and double-checking. Arithmetic errors are extremely rare as are corrected or cross-out entries. Where there is overlap between abstracts volumes, particularly between the by-vessel voyages of AC 12/1 and the by-route voyages of AC 12/3 and AC 12/4, the numbers are consistent. There is also a low risk of transcription error for historians entering these records into computer spreadsheets, as was done for this article, because every voyage (every row) lists subtotals for 'total receipts', 'total

disbursements' and the resulting net profit or loss, and every revenue or expense item (every column) is also subtotalled for the calendar quarter (or year in some cases).

Finally, the summary statistics presented here, especially the quarterly fares of Appendix 1, are broadly consistent with other published extracts. There are slight discrepancies between the tables in Keeling's 'Transportation revolution' and later extracts, due to rounding errors in the former. Small differences between these and Harley are probably also due to rounding in the latter, although varying cut-off dates between years may also have generated slight divergences. The fact that Harley's figures are for New York and Boston, versus New York only in most of other Cunard derived fare tables (including in this article) also contributes slightly and traceably to the discrepancies. The fares in Keeling's 'Transport capacity' article include an adjustment for the head tax levied by the US immigration authorities and effectively paid by migrant passengers. The derived fare time series elsewhere, including in Appendix 2 below, do not include any such adjustment (see also Appendix 3). These various summaries also differ in presentation, though not in underlying consistency, as to whether the derived fares are pounds (as here) or dollars (e.g. converted at an exchange rate of \$4.86 to the pound), whether the passenger figures are 'adult equivalents' (as here) or 'souls', and with respect to the time periods and intervals.<sup>28</sup>

### **Other observations and concluding comments**

The two-fold purpose of this article has been to outline the general archival context of Cunard's voyage abstracts, and to explain how passenger volume and revenue data from these voyage records can be used to illuminate trends in the costs of relocation between Europe and the US during the peak migration decades prior to the First World War. In further articles, the author intends to also describe other revenue and expense data from abstracts, to discuss routes other than Liverpool-New York, to develop still finer time series, e.g. on a monthly or by voyage basis, and to examine more thoroughly the broader implications of these data, particularly for the maritime, business, and migration history of the North Atlantic.

Two concluding remarks may also serve as an indication of some possible directions for future analysis. Firstly, the time series of oceanic fares presented here, and applicable to a major episode of long-lasting mass migration, is probably unique at least for this time period and geographic region. As such, it may be useful for historical research particularly concerning transportation, travel, and migration. Secondly, even a brief scan of the fare trends in

rose

Appendix 1 reveals the inadequacy and even inapplicability of traditional ideas that migration boomed across the pre-First World War Atlantic in response to falling fares. The fares did not decline over the period as a whole, even though passenger volumes ~~did~~, and short term fare drops, especially for third class westbound, were more often than not also associated with decreases, not increases, in third class passenger volumes (as in 1890, 1894 and 1908). It has been shown elsewhere already, at least for the early twentieth century, that the passenger and fare trends at Cunard were fairly typical of passenger shipping across the North Atlantic as a whole.<sup>29</sup> It remains to be seen to what extent trends in fares, and their relation to migration flows may have been different in earlier periods, particularly before the 1880s when the solid, consistent, and representative statistical picture provided by these Cunard voyage abstracts begins.

**Note on sources: the Cunard voyage abstract volumes**

| Archive volume | Main routes covered  | Totals   | Years covered |
|----------------|--|----------|---------------|
| D42 AC 12/1    | L'pool – New York<br>L'pool – Boston   | Year     | 1880-1912     |
| D42 AC 12/3    | L'pool – New York<br>L'pool – Boston   | Qtr/year | 1885-1892     |
| D42 AC 12/5    | L'pool – New York<br>L'pool – Boston   | Qtr/year | 1903-1910     |
| D42 AC 12/6    | Fiume – New York<br>L'pool – New York<br>L'pool – Boston<br>Fiume – New York | Qtr/year | 1911-1918     |

In the 1987 'Catalogue of the Archives of the Cunard Steam-Ship Company', these volumes are listed under 'Voyage Abstract Books and Summaries of Voyages': 12/1 and 12/3 as 'Abstracts of accounts of voyage', 12/5 and 12/6 as 'Abstract of account of voyages'. In the company's own numbering system, shown on the Voyage Abstract ledger books themselves, 12/5 is No 4 and 12/6 is No 5. There are handwritten indices in each of these volumes on or near the inside cover: for 12/1 by vessel, 12/3, 5, 6 by route and year.

Order of the voyage information recorded in these volumes: AC 12/1 is first by vessel, then by departure date. AC 12/1, AC 12/3, 5, and 6 are first by destination port, then by departure date.

Two further volumes, AC 12/2, AC 12/4 also cover the pre 1914 period, but they mostly duplicate the four above, or concern only minor routes (not

Europe-US). There are also additional volumes covering the 1920s and 1930s in considerable detail.

In the full designation of the Cunard Archives, 'D42' precedes the 'AC....' for each of these volumes.

### **Voyage abstracts columns**

#### *Left hand page*

Departure Date (e.g. from Liverpool)

Voyage # (for that vessel) (in most cases)

#### 'Outward Receipts'

Freight (separate columns for Tons and £)

# of Passengers (separate columns for Cabin, Second Cabin, Steerage)

Passage Money (separate columns for Cabin, Second Cabin, Steerage)

(Then the exact same set of accounts are listed for the 'Homeward Receipts' followed by the total receipts for the voyage)

#### *Right hand page*

#### 'Disbursements'

Alterations of Passenger Fittings

Provisions

Stores and Furnishings

Coals (separate columns for Tons and £)

Wages

Port and General Charges

Loading and Discharging Cargo

Total disbursements,

Net profit (or loss) for the voyage (Receipts minus Disbursements)

'Disbursements' are not broken down into 'Outward' and 'Homeward'.

A few pages have miscellaneous additional remarks

*Source:* Cunard Archives, D42 AC 12/1, 3, 5, 6.

## Appendix 1

## Cunard quarterly derived fares, 1883-1914, £

| Derived fares, £ |         | WESTBOUND<br>Liverpool -> New York |        |       | EASTBOUND<br>New York -> Liverpool |        |       |
|------------------|---------|------------------------------------|--------|-------|------------------------------------|--------|-------|
|                  |         | Travel class                       |        |       | Travel class                       |        |       |
| Year             | Quarter | First                              | Second | Third | First                              | Second | Third |
| 1883             | I       | 17.0                               |        | 3.9   | 17.2                               |        | 5.0   |
|                  | II      | 18.4                               |        | 4.1   | 19.0                               |        | 5.0   |
|                  | III     | 19.6                               |        | 4.8   | 18.5                               |        | 5.1   |
|                  | IV      | 20.3                               |        | 4.1   | 17.9                               |        | 4.9   |
| 1884             | I       | 17.4                               |        | 4.0   | 17.0                               |        | 5.5   |
|                  | II      | 17.5                               |        | 4.1   | 18.9                               |        | 3.0   |
|                  | III     | <del>12.1</del> 19.4               |        | 3.9   | 18.7                               |        | 2.5   |
|                  | IV      | 18.9                               |        | 3.0   | 17.5                               |        | 2.4   |
| 1885             | I       | 17.2                               |        | 3.2   | 16.3                               |        | 2.4   |
|                  | II      | 18.6                               |        | 3.0   | 18.8                               |        | 2.4   |
|                  | III     | 18.4                               |        | 2.7   | 17.7                               |        | 3.7   |
|                  | IV      | 19.0                               |        | 3.6   | 17.8                               |        | 4.1   |
| 1886             | I       | 17.4                               | 7.9    | 3.1   | 16.5                               | 7.0    | 3.5   |
|                  | II      | 18.0                               | 8.2    | 3.5   | 19.4                               | 7.2    | 3.2   |
|                  | III     | 18.9                               | 7.6    | 2.8   | 17.6                               | 6.4    | 3.5   |
|                  | IV      | 19.7                               | 7.5    | 2.8   | 17.6                               | 6.7    | 3.3   |
| 1887             | I       | 16.4                               | 7.7    | 2.5   | 16.7                               | 6.9    | 2.5   |
|                  | II      | 17.9                               | 7.6    | 3.2   | 19.0                               | 6.8    | 3.3   |
|                  | III     | 18.4                               | 7.9    | 4.3   | 17.4                               | 7.6    | 3.4   |
|                  | IV      | 19.7                               | 8.7    | 3.7   | 17.6                               | 7.1    | 3.3   |
| 1888             | I       | 16.0                               | 7.5    | 3.1   | 16.1                               | 6.8    | 3.3   |
|                  | II      | 17.8                               | 7.7    | 3.5   | 18.8                               | 6.7    | 3.5   |
|                  | III     | 18.7                               | 7.5    | 3.5   | 17.5                               | 6.7    | 3.5   |
|                  | IV      | 19.2                               | 7.5    | 3.6   | 16.9                               | 6.7    | 3.4   |
| 1889             | I       | 16.6                               | 7.7    | 3.3   | 17.1                               | 5.9    | 3.4   |
|                  | II      | 17.1                               | 8.3    | 3.4   | 17.5                               | 6.8    | 3.5   |
|                  | III     | 18.2                               | 7.4    | 3.4   | 16.7                               | 6.8    | 3.4   |
|                  | IV      | 18.4                               | 7.5    | 3.2   | 16.4                               | 6.7    | 3.3   |

| Derived fares, £ |         | WESTBOUND<br>Liverpool -> New York |        |       | EASTBOUND<br>New York -> Liverpool |        |       |
|------------------|---------|------------------------------------|--------|-------|------------------------------------|--------|-------|
|                  |         | Travel class                       |        |       | Travel class                       |        |       |
| Year             | Quarter | First                              | Second | Third | First                              | Second | Third |
| 1890             | I       | 16.2                               | 7.3    | 3.1   | 16.3                               | 6.7    | 3.2   |
|                  | II      | 16.8                               | 7.2    | 2.9   | 18.0                               | 6.9    | 3.1   |
|                  | III     | 17.7                               | 7.3    | 2.8   | 16.3                               | 7.0    | 3.0   |
|                  | IV      | 18.3                               | 7.4    | 2.6   | 16.7                               | 6.7    | 2.8   |
| 1891             | I       | 15.2                               | 6.8    | 2.4   | 15.4                               | 6.7    | 3.0   |
|                  | II      | 16.0                               | 7.0    | 3.2   | 17.4                               | 6.0    | 3.0   |
|                  | III     | 17.1                               | 7.4    | 2.5   | 15.9                               | 6.7    | 3.0   |
|                  | IV      | 18.2                               | 7.3    | 2.5   | 15.6                               | 6.6    | 3.1   |
| 1892             | I       | 14.2                               | 6.7    | 2.3   | 14.8                               | 6.7    | 3.2   |
|                  | II      | 15.6                               | 6.9    | 3.1   | 17.2                               | 6.8    | 3.3   |
|                  | III     | 17.0                               | 7.2    | 2.7   | 15.8                               | 6.7    | 3.4   |
|                  | IV      | 18.3                               | 7.5    | 3.0   | 15.3                               | 6.7    | 3.3   |
| 1893             | I       | 14.4                               | 7.2    | 3.6   | 14.9                               | 6.5    | 3.4   |
|                  | II      | 18.0                               | 7.9    | 4.1   | 18.4                               | 7.6    | 4.1   |
|                  | III     | 19.3                               | 8.4    | 4.1   | 17.4                               | 7.8    | 4.2   |
|                  | IV      | 18.6                               | 7.7    | 3.9   | 17.4                               | 7.5    | 4.1   |
| 1894             | I       | 14.8                               | 6.7    | 3.0   | 16.4                               | 6.9    | 4.0   |
|                  | II      | 18.5                               | 7.1    | 3.1   | 20.1                               | 7.7    | 3.9   |
|                  | III     | 19.1                               | 7.5    | 1.7   | 17.8                               | 7.4    | 2.3   |
|                  | IV      | 19.7                               | 7.1    | 1.6   | 17.6                               | 7.0    | 1.9   |
| 1895             | I       | 15.2                               | 6.6    | 1.4   | 16.1                               | 6.7    | 1.5   |
|                  | II      | 18.8                               | 7.0    | 2.3   | 21.1                               | 8.0    | 2.3   |
|                  | III     | 19.7                               | 7.9    | 2.3   | 18.8                               | 7.4    | 3.2   |
|                  | IV      | 21.0                               | 7.6    | 3.6   | 18.0                               | 6.9    | 3.3   |
| 1896             | I       | 16.0                               | 6.9    | 4.0   | 16.7                               | 6.8    | 4.3   |
|                  | II      | 21.1                               | 7.7    | 4.4   | 21.8                               | 7.9    | 4.7   |
|                  | III     | 20.1                               | 8.3    | 4.3   | 17.9                               | 8.5    | 4.6   |
|                  | IV      | 22.4                               | 8.4    | 4.2   | 18.5                               | 8.5    | 4.7   |
| 1897             | I       | 17.9                               | 8.0    | 3.8   | 19.0                               | 8.5    | 4.7   |
|                  | II      | 23.6                               | 8.3    | 4.3   | 24.8                               | 9.2    | 4.7   |
|                  | III     | 24.1                               | 8.5    | 4.3   | 23.6                               | 9.1    | 4.7   |
|                  | IV      | 23.9                               | 8.4    | 4.2   | 21.2                               | 9.3    | 4.7   |

| Derived fares, £ |   | WESTBOUND<br>Liverpool -> New York |                               |       | EASTBOUND<br>New York -> Liverpool |        |       |
|------------------|---|------------------------------------|-------------------------------|-------|------------------------------------|--------|-------|
|                  |   | Travel class                       |                               |       | Travel class                       |        |       |
| Year             | Quarter                                 | First                              | Second                        | Third | First                              | Second | Third |
| 1898             | <del>II</del> <del>I</del> <del>I</del> | <del>8.1</del> <sup>17.7</sup>     | <del>4.0</del> <sup>8.1</sup> | 4.0   | 18.4                               | 9.0    | 4.6   |
|                  | II                                      | 23.6                               | 8.3                           | 4.2   | 25.5                               | 9.3    | 4.7   |
|                  | III                                     | 24.4                               | 8.5                           | 4.2   | 24.8                               | 8.6    | 4.6   |
|                  | IV                                      | 23.7                               | 8.3                           | 4.2   | 20.6                               | 8.7    | 4.7   |
| 1899             | I                                       | 17.9                               | 7.9                           | 4.1   | 18.2                               | 8.2    | 4.6   |
|                  | II                                      | 18.9                               | 7.2                           | 4.2   | 21.2                               | 7.6    | 4.7   |
|                  | III                                     | 20.4                               | 7.6                           | 4.2   | 18.2                               | 7.7    | 4.7   |
|                  | IV                                      | 20.0                               | 7.3                           | 4.1   | 17.4                               | 7.6    | 4.7   |
| 1900             | I                                       | 18.1                               | 7.2                           | 4.1   | 19.2                               | 7.7    | 4.5   |
|                  | II                                      | 19.7                               | 7.3                           | 4.6   | 25.8                               | 9.1    | 4.7   |
|                  | III                                     | 22.4                               | 8.3                           | 4.3   | 21.2                               | 8.4    | 4.7   |
|                  | IV                                      | 22.9                               | 8.1                           | 4.6   | 18.3                               | 7.5    | 5.0   |
| 1901             | I                                       | 17.2                               | 7.4                           | 4.4   | 17.2                               | 7.7    | 4.9   |
|                  | II                                      | 17.4                               | 7.5                           | 4.6   | 24.1                               | 8.9    | 5.0   |
|                  | III                                     | 21.3                               | 8.3                           | 4.7   | 20.1                               | 8.5    | 5.2   |
|                  | IV                                      | 22.1                               | 8.2                           | 4.6   | 16.6                               | 8.0    | 5.1   |
| 1902             | I                                       | 13.4                               | 7.3                           | 4.1   | 14.9                               | 7.9    | 5.0   |
|                  | II                                      | 17.2                               | 7.6                           | 4.5   | 23.8                               | 9.1    | 5.1   |
|                  | III                                     | 22.4                               | 8.5                           | 4.7   | 22.0                               | 8.7    | 5.2   |
|                  | IV                                      | 23.4                               | 8.4                           | 4.4   | 18.8                               | 8.6    | 5.1   |
| 1903             | I                                       | 16.1                               | 8.0                           | 4.0   | 16.8                               | 8.6    | 4.9   |
|                  | II                                      | 18.7                               | 7.9                           | 4.3   | 23.5                               | 9.0    | 5.1   |
|                  | III                                     | 22.0                               | 8.6                           | 4.1   | 20.1                               | 8.7    | 5.0   |
|                  | IV                                      | 22.6                               | 8.3                           | 4.2   | 17.9                               | 8.9    | 5.0   |
| 1904             | I                                       | 15.0                               | 7.9                           | 3.7   | 16.6                               | 8.5    | 4.6   |
|                  | II                                      | 18.6                               | 8.0                           | 3.8   | 22.2                               | 9.0    | 4.6   |
|                  | III                                     | 21.9                               | 8.7                           | 1.6   | 20.2                               | 8.4    | 2.3   |
|                  | IV                                      | 20.8                               | 8.4                           | 1.9   | 15.6                               | 6.8    | 2.2   |
| 1905             | I                                       | 15.5                               | 7.9                           | 2.3   | 16.0                               | 7.9    | 3.7   |
|                  | II                                      | 19.9                               | 8.5                           | 4.3   | 23.8                               | 9.6    | 5.3   |
|                  | III                                     | 22.2                               | 9.0                           | 4.5   | 22.9                               | 9.5    | 5.3   |
|                  | IV                                      | 23.7                               | 8.8                           | 4.3   | 19.6                               | 9.3    | 5.2   |



| Derived fares, £ |         | WESTBOUND<br>Liverpool -> New York |        |       | EASTBOUND<br>New York -> Liverpool |        |       |
|------------------|---------|------------------------------------|--------|-------|------------------------------------|--------|-------|
|                  |         | Travel class                       |        |       | Travel class                       |        |       |
| Year             | Quarter | First                              | Second | Third | First                              | Second | Third |
| 1906             | I       | 18.7                               | 8.6    | 4.1   | 20.0                               | 9.4    | 5.4   |
|                  | II      | 21.4                               | 8.6    | 4.4   | 25.9                               | 9.6    | 5.2   |
|                  | III     | 24.1                               | 8.9    | 4.3   | 24.2                               | 9.6    | 5.4   |
|                  | IV      | 23.5                               | 8.7    | 3.9   | 20.2                               | 9.2    | 5.2   |
| 1907             | I       | 18.5                               | 8.5    | 3.9   | 19.5                               | 8.8    | 5.3   |
|                  | II      | 21.5                               | 8.7    | 4.6   | 26.2                               | 9.8    | 5.3   |
|                  | III     | 24.0                               | 8.8    | 4.5   | 23.9                               | 9.5    | 5.4   |
|                  | IV      | 22.8                               | 8.8    | 4.3   | 18.3                               | 9.4    | 5.1   |
| 1908             | I       | 19.1                               | 7.5    | 3.3   | 22.4                               | 9.0    | 4.3   |
|                  | II      | 25.0                               | 9.5    | 3.2   | 30.1                               | 11.2   | 4.5   |
|                  | III     | 28.1                               | 10.4   | 3.9   | 25.9                               | 10.5   | 7.2   |
|                  | IV      | 27.2                               | 9.8    | 5.4   | 26.3                               | 10.8   | 7.7   |
| 1909             | I       | 25.5                               | 10.0   | 5.4   | 27.4                               | 11.0   | 6.1   |
|                  | II      | 28.6                               | 10.0   | 5.6   | 32.6                               | 11.6   | 6.0   |
|                  | III     | 32.2                               | 10.9   | 5.7   | 28.7                               | 11.2   | 6.2   |
|                  | IV      | 29.7                               | 10.3   | 5.9   | 27.1                               | 11.1   | 6.4   |
| 1910             | I       | 26.6                               | 10.3   | 5.3   | 28.7                               | 11.4   | 5.9   |
|                  | II      | 31.8                               | 10.3   | 5.6   | 34.6                               | 11.9   | 6.1   |
|                  | III     | 32.9                               | 11.3   | 5.8   | 30.0                               | 11.6   | 6.3   |
|                  | IV      | 30.8                               | 10.7   | 5.6   | 28.5                               | 11.7   | 6.5   |
| 1911             | I       | 27.4                               | 10.5   | 5.4   | 29.1                               | 11.7   | 6.0   |
|                  | II      | 30.5                               | 10.3   | 5.8   | 34.9                               | 11.9   | 6.0   |
|                  | III     | 31.8                               | 11.2   | 5.7   | 31.3                               | 11.9   | 5.9   |
|                  | IV      | 31.3                               | 11.0   | 5.7   | 30.3                               | 12.3   | 6.0   |
| 1912             | I       | 25.6                               | 10.4   | 5.5   | 28.8                               | 12.0   | 5.9   |
|                  | II      | 30.0                               | 10.8   | 5.8   | 36.0                               | 12.4   | 6.2   |
|                  | III     | 33.5                               | 11.6   | 6.0   | 33.4                               | 12.1   | 6.1   |
|                  | IV      | 31.7                               | 11.1   | 5.4   | 27.7                               | 11.9   | 6.1   |
| 1913             | I       | 25.8                               | 10.5   | 5.2   | 27.5                               | 11.7   | 6.0   |
|                  | II      | 29.3                               | 10.5   | 5.6   | 34.3                               | 12.1   | 6.2   |
|                  | III     | 33.3                               | 11.5   | 5.2   | 32.5                               | 12.1   | 6.3   |
|                  | IV      | 31.6                               | 11.2   | 5.1   | 28.0                               | 12.1   | 6.3   |

| Derived fares, £ |         | WESTBOUND<br><u>Liverpool -&gt; New York</u> |        |       | EASTBOUND<br><u>New York -&gt; Liverpool</u> |        |       |
|------------------|---------|--|--------|-------|--|--------|-------|
|                  |         | Travel class                                 |        |       | Travel class                                 |        |       |
| Year             | Quarter | First  | Second | Third | First  | Second | Third |
| 1914             | I       | 26.3   | 10.7   | 4.6   | 29.2   | 11.8   | 4.3   |
|                  | II      | 29.5   | 11.0   | 4.1   | 33.8   | 12.5   | 5.0   |

*Sources and notes:* Cunard Abstracts of Accounts of Voyages. Re which abstracts books were used for which years, how quarter cut-offs were decided etc. see the notes to Appendix 2 below. The figures in this Appendix 1 were derived by dividing the quarterly passenger revenues for each travel class – direction (given in those books) by the quarterly passenger volumes (given in those same books and also shown in Appendix 2 below). Fare figures here are shown rounded to the nearest one-tenth of a pound. In the underlying data transcription used to gather the data for this table, rounding of passenger *revenues* was to the nearest pound, and there was no rounding of passenger volumes, except of half (adult equivalent) passengers to the nearest full passenger. The underlying passenger revenue figures in the abstracts that were used to derive these fares are incomplete or evidently erroneous in the eastbound direction for a few voyages made in the first quarter of 1883 and the second quarter of 1886. The eastbound fares shown here for those two quarters are therefore estimates based on the voyages in those quarters for which such 'passage money' tallies are complete and reliable.

## Appendix 2

Cunard quarterly adult equivalent passengers,  
1883-1914, '000s

| Year | Quarter | WESTBOUND<br>Liverpool -> New York |        |       | EASTBOUND<br>New York -> Liverpool |                    |       |
|------|---------|------------------------------------|--------|-------|------------------------------------|--------------------|-------|
|      |         | Travel class:                      |        |       | Travel class:                      |                    |       |
|      |         | First                              | Second | Third | First                              | Second             | Third |
| 1883 | I       | 0.9                                |        | 1.6   | 1.0                                |                    | 0.4   |
|      | II      | 1.6                                |        | 6.4   | 3.3                                |                    | 0.7   |
|      | III     | 2.8                                |        | 2.1   | 1.5                                |                    | 0.8   |
|      | IV      | 2.1                                |        | 1.4   | 1.3                                |                    | 1.2   |
| 1884 | I       | 1.2                                |        | 2.3   | 1.4                                |                    | 0.6   |
|      | II      | 1.8                                |        | 4.2   | 3.4                                |                    | 1.3   |
|      | III     | <del>6.1</del> 3.8                 |        | 3.0   | 2.0                                |                    | 2.8   |
|      | IV      | 2.4                                |        | 2.4   | 1.8                                |                    | 3.0   |
| 1885 | I       | 1.1                                |        | 2.3   | 1.0                                |                    | 1.3   |
|      | II      | 1.9                                |        | 7.7   | 3.9                                |                    | 1.4   |
|      | III     | 3.9                                |        | 3.5   | 2.7                                |                    | 1.8   |
|      | IV      | 2.9                                |        | 2.9   | 2.5                                |                    | 2.8   |
| 1886 | I       | 1.5                                | 0.4    | 2.9   | 1.5                                | 0.3                | 0.8   |
|      | II      | 2.0                                | 0.7    | 6.2   | 4.8                                | <del>0.3</del> 0.5 | 1.0   |
|      | III     | 4.3                                | 0.8    | 2.7   | 3.0                                | 0.6                | 1.3   |
|      | IV      | 3.4                                | 0.8    | 2.6   | 2.1                                | 0.5                | 2.3   |
| 1887 | I       | 1.0                                | 0.4    | 2.7   | 1.1                                | 0.2                | 1.1   |
|      | II      | 2.2                                | 0.9    | 8.1   | 5.0                                | 0.5                | 1.1   |
|      | III     | 4.6                                | 1.0    | 2.6   | 3.3                                | 0.6                | 1.6   |
|      | IV      | 3.9                                | 0.8    | 2.8   | 2.4                                | 0.6                | 3.5   |
| 1888 | I       | 1.3                                | 0.7    | 4.1   | 1.3                                | 0.4                | 1.4   |
|      | II      | 2.1                                | 1.4    | 14.4  | 4.5                                | 0.8                | 1.7   |
|      | III     | 4.8                                | 1.4    | 5.5   | 3.5                                | 0.9                | 2.7   |
|      | IV      | 3.1                                | 1.1    | 4.1   | 1.9                                | 0.8                | 4.2   |
| 1889 | I       | 1.5                                | 0.8    | 3.5   | 1.6                                | 0.6                | 1.9   |
|      | II      | 1.9                                | 1.1    | 13.7  | 5.4                                | 0.9                | 1.9   |
|      | III     | 5.1                                | 1.3    | 4.4   | 3.3                                | 1.0                | 2.8   |
|      | IV      | 2.9                                | 1.2    | 2.9   | 1.8                                | 0.9                | 4.2   |

X Adult  
Equivalent  
passengers, '000s

WESTBOUND  
Liverpool -> New York

EASTBOUND  
New York -> Liverpool

Travel class:

Travel class:

| Year | Quarter | First | Second | Third | First | Second | Third |
|------|---------|-------|--------|-------|-------|--------|-------|
| 1890 | I       | 1.1   | 0.7    | 2.7   | 1.2   | 0.5    | 1.9   |
|      | II      | 1.5   | 1.4    | 9.8   | 4.6   | 1.2    | 1.9   |
|      | III     | 4.6   | 1.5    | 3.4   | 3.1   | 1.1    | 2.5   |
|      | IV      | 2.8   | 1.1    | 2.9   | 1.6   | 0.9    | 3.7   |
| 1891 | I       | 1.2   | 0.9    | 3.8   | 1.2   | 0.7    | 1.8   |
|      | II      | 1.4   | 1.5    | 12.6  | 3.9   | 1.5    | 1.6   |
|      | III     | 3.6   | 1.8    | 5.1   | 1.9   | 1.0    | 1.7   |
|      | IV      | 2.5   | 1.3    | 3.6   | 1.1   | 0.8    | 3.1   |
| 1892 | I       | 0.9   | 0.9    | 3.9   | 1.0   | 0.6    | 1.6   |
|      | II      | 1.1   | 1.5    | 13.8  | 3.2   | 1.2    | 1.9   |
|      | III     | 3.7   | 1.7    | 5.1   | 2.4   | 1.1    | 1.8   |
|      | IV      | 2.7   | 2.6    | 1.5   | 1.1   | 0.9    | 2.1   |
| 1893 | I       | 1.1   | 2.0    | 3.7   | 0.8   | 0.7    | 1.2   |
|      | II      | 2.1   | 2.7    | 12.3  | 3.2   | 2.3    | 2.9   |
|      | III     | 3.5   | 3.1    | 5.3   | 2.6   | 2.0    | 3.6   |
|      | IV      | 1.5   | 1.6    | 2.3   | 1.6   | 1.8    | 4.3   |
| 1894 | I       | 0.9   | 1.4    | 2.6   | 1.1   | 1.2    | 2.5   |
|      | II      | 1.5   | 1.6    | 5.6   | 4.1   | 2.4    | 2.9   |
|      | III     | 5.0   | 2.9    | 5.5   | 2.8   | 1.9    | 6.2   |
|      | IV      | 2.6   | 1.6    | 3.7   | 1.5   | 1.1    | 6.0   |
| 1895 | I       | 1.0   | 0.9    | 3.3   | 1.2   | 0.6    | 3.2   |
|      | II      | 1.9   | 1.4    | 7.9   | 4.4   | 2.1    | 4.9   |
|      | III     | 5.1   | 2.8    | 4.9   | 2.6   | 1.7    | 3.3   |
|      | IV      | 2.8   | 2.0    | 4.2   | 1.6   | 1.2    | 3.4   |
| 1896 | I       | 1.1   | 1.2    | 3.5   | 1.3   | 0.9    | 1.6   |
|      | II      | 1.7   | 1.7    | 8.3   | 4.2   | 2.8    | 3.8   |
|      | III     | 4.5   | 3.2    | 4.5   | 2.5   | 1.7    | 3.8   |
|      | IV      | 2.2   | 1.6    | 3.2   | 1.3   | 0.8    | 3.3   |
| 1897 | I       | 1.0   | 0.8    | 2.1   | 1.3   | 0.7    | 1.5   |
|      | II      | 1.4   | 1.4    | 6.8   | 3.5   | 2.5    | 4.4   |
|      | III     | 3.4   | 3.3    | 4.5   | 1.8   | 1.5    | 3.2   |
|      | IV      | 1.8   | 1.5    | 3.0   | 1.2   | 0.9    | 3.0   |

X Adult Equivalent passengers, '000s

| Year | Quarter | WESTBOUND<br>Liverpool -> New York |        |       | EASTBOUND<br>New York -> Liverpool |        |       |
|------|---------|------------------------------------|--------|-------|------------------------------------|--------|-------|
|      |         | Travel class:                      |        |       | Travel class:                      |        |       |
|      |         | First                              | Second | Third | First                              | Second | Third |
| 1898 | I       | 1.0                                | 1.0    | 2.8   | 1.2                                | 0.7    | 1.7   |
|      | II      | 1.6                                | 1.6    | 7.1   | 2.9                                | 2.3    | 4.7   |
|      | III     | 3.3                                | 3.2    | 5.1   | 2.1                                | 1.9    | 3.5   |
|      | IV      | 2.1                                | 2.2    | 4.3   | 1.6                                | 1.0    | 3.0   |
| 1899 | I       | 1.1                                | 1.1    | 2.5   | 1.4                                | 0.7    | 1.3   |
|      | II      | 1.8                                | 1.8    | 8.5   | 4.7                                | 3.0    | 3.9   |
|      | III     | 4.6                                | 3.5    | 4.9   | 2.9                                | 2.0    | 2.8   |
|      | IV      | 2.2                                | 2.1    | 3.9   | 1.6                                | 1.2    | 2.8   |
| 1900 | I       | 1.0                                | 1.0    | 2.7   | 1.2                                | 0.6    | 1.1   |
|      | II      | 1.4                                | 1.8    | 9.6   | 2.8                                | 2.3    | 3.6   |
|      | III     | 3.8                                | 4.0    | 5.3   | 3.0                                | 2.5    | 3.4   |
|      | IV      | 2.7                                | 3.1    | 3.8   | 1.5                                | 1.3    | 2.7   |
| 1901 | I       | 1.3                                | 1.3    | 2.3   | 1.3                                | 0.7    | 1.2   |
|      | II      | 1.4                                | 1.9    | 8.0   | 2.9                                | 2.1    | 3.2   |
|      | III     | 3.1                                | 3.1    | 4.9   | 2.8                                | 2.2    | 2.9   |
|      | IV      | 2.5                                | 2.5    | 3.7   | 1.5                                | 1.1    | 2.3   |
| 1902 | I       | 1.1                                | 1.1    | 2.2   | 1.1                                | 0.6    | 1.2   |
|      | II      | 1.3                                | 1.9    | 10.2  | 2.5                                | 2.1    | 3.1   |
|      | III     | 2.7                                | 2.8    | 4.3   | 2.1                                | 2.1    | 2.5   |
|      | IV      | 2.3                                | 2.9    | 5.8   | 1.4                                | 1.0    | 2.4   |
| 1903 | I       | 1.0                                | 1.5    | 4.3   | 1.2                                | 0.8    | 1.3   |
|      | II      | 1.0                                | 2.4    | 12.8  | 2.4                                | 3.0    | 3.1   |
|      | III     | 2.8                                | 4.1    | 8.2   | 1.7                                | 2.6    | 3.5   |
|      | IV      | 1.7                                | 3.1    | 6.1   | 1.1                                | 1.1    | 3.6   |
| 1904 | I       | 0.8                                | 1.4    | 5.1   | 0.8                                | 0.8    | 2.5   |
|      | II      | 1.1                                | 2.6    | 8.1   | 1.9                                | 3.2    | 5.8   |
|      | III     | 2.3                                | 4.3    | 11.2  | 1.8                                | 2.8    | 6.2   |
|      | IV      | 1.7                                | 3.2    | 11.7  | 1.3                                | 1.6    | 6.6   |
| 1905 | I       | 0.9                                | 1.3    | 7.5   | 1.0                                | 0.7    | 1.8   |
|      | II      | 1.2                                | 2.2    | 11.0  | 2.8                                | 2.6    | 4.0   |
|      | III     | 3.6                                | 3.8    | 7.6   | 2.4                                | 2.5    | 4.0   |
|      | IV      | 2.3                                | 2.9    | 8.4   | 1.3                                | 1.2    | 3.6   |

*Adult*  
 Equivalent  
 passengers, '000s

WESTBOUND  
 Liverpool -> New York

EASTBOUND  
 New York -> Liverpool

Travel class:

Travel class:

| Year | Quarter | First | Second | Third | First | Second | Third |
|------|---------|-------|--------|-------|-------|--------|-------|
| 1906 | I       | 1.2   | 1.7    | 7.0   | 1.5   | 1.0    | 2.3   |
|      | II      | 1.6   | 3.3    | 19.5  | 3.1   | 3.2    | 6.0   |
|      | III     | 4.0   | 4.6    | 15.7  | 2.6   | 2.8    | 4.3   |
|      | IV      | 2.2   | 3.4    | 13.6  | 1.5   | 1.5    | 4.6   |
| 1907 | I       | 1.1   | 2.0    | 7.3   | 1.3   | 1.0    | 2.3   |
|      | II      | 1.6   | 4.0    | 20.3  | 3.1   | 3.7    | 7.3   |
|      | III     | 4.2   | 5.5    | 13.8  | 2.3   | 3.6    | 6.2   |
|      | IV      | 3.8   | 4.8    | 14.1  | 2.7   | 2.4    | 9.8   |
| 1908 | I       | 1.9   | 2.6    | 4.9   | 1.8   | 1.7    | 9.1   |
|      | II      | 2.8   | 3.9    | 9.7   | 4.5   | 4.9    | 13.7  |
|      | III     | 5.4   | 6.2    | 8.6   | 3.5   | 4.4    | 4.9   |
|      | IV      | 2.8   | 3.9    | 6.6   | 1.7   | 1.7    | 3.6   |
| 1909 | I       | 1.9   | 2.4    | 7.0   | 1.8   | 1.4    | 2.5   |
|      | II      | 2.9   | 3.5    | 14.6  | 4.5   | 3.9    | 7.8   |
|      | III     | 5.5   | 5.5    | 11.4  | 3.5   | 3.5    | 3.8   |
|      | IV      | 3.9   | 3.9    | 7.1   | 2.7   | 2.2    | 4.3   |
| 1910 | I       | 2.1   | 2.7    | 9.0   | 2.1   | 1.4    | 2.5   |
|      | II      | 3.3   | 4.5    | 17.3  | 5.3   | 4.6    | 8.5   |
|      | III     | 5.7   | 5.4    | 12.5  | 3.4   | 3.3    | 4.7   |
|      | IV      | 4.3   | 4.2    | 10.2  | 2.6   | 2.2    | 5.6   |
| 1911 | I       | 2.5   | 3.1    | 6.7   | 2.8   | 1.7    | 4.7   |
|      | II      | 3.0   | 4.4    | 11.7  | 5.0   | 4.5    | 9.9   |
|      | III     | 5.3   | 5.7    | 8.9   | 3.4   | 3.2    | 7.4   |
|      | IV      | 3.7   | 3.5    | 7.0   | 2.6   | 1.9    | 7.3   |
| 1912 | I       | 1.9   | 3.1    | 5.6   | 1.6   | 1.1    | 3.0   |
|      | II      | 2.9   | 3.8    | 11.7  | 4.4   | 4.0    | 9.3   |
|      | III     | 4.8   | 4.9    | 9.5   | 3.1   | 2.9    | 5.0   |
|      | IV      | 3.9   | 4.3    | 10.6  | 2.8   | 2.6    | 8.4   |
| 1913 | I       | 1.8   | 2.7    | 6.0   | 1.9   | 1.5    | 3.2   |
|      | II      | 2.9   | 4.2    | 14.6  | 3.3   | 3.0    | 7.0   |
|      | III     | 4.3   | 4.8    | 12.5  | 2.4   | 3.1    | 5.9   |
|      | IV      | 3.8   | 4.5    | 11.3  | 2.8   | 2.8    | 8.6   |

| Adult<br>Equivalent<br>passengers, '000s |         | WESTBOUND<br>Liverpool -> New York |        |       | EASTBOUND<br>New York -> Liverpool |        |       |
|--|---------|------------------------------------|--------|-------|------------------------------------|--------|-------|
|  |         | Travel class:                      |        |       | Travel class:                      |        |       |
| Year                                     | Quarter | First                              | Second | Third | First                              | Second | Third |
| 1914                                     | I       | 2.2                                | 2.9    | 5.3   | 2.2                                | 1.6    | 7.4   |
|  | II      | 2.6                                | 2.8    | 7.8   | 3.9                                | 3.5    | 10.6  |

note on sources, p. 22

Sources and notes: The quarterly subtotals in the 'Abstracts of Account(s) of Voyages' were transcribed for the years covered by volumes D42 AC 12/3, AC 12/5 and AC 12/6 (see Appendix \*). For other years, namely 1883-84 and 1893-1902, individual voyages from AC 12/1 were added up quarter by quarter, using Transatlantic Passenger Conferences reports and the Morton-Allan directory as a double-check that all voyages were included. Subject to the same difference due to 'adult-equivalents' versus 'souls' described in the text here, annual totals for these years 1883-84 and 1893-1902 are also consistent with sources of annual passenger volumes (as given for example, D. Keeling, 'Transatlantic shipping cartels and migration between Europe and America, 1880-1914', *Essays in Economic and Business History* 17 (1999), p.207). AC 12/1 assigns every voyage to a calendar year. Dividing passengers between quarters for those twelve years (48 out of 130 quarters) was done on the apparent basis used in the other abstract volumes: a voyage belongs to the calendar quarter in which the vessel returned to Liverpool. Figures here are shown rounded to the nearest 100 passengers. In the underlying data transcription used to gather the data for this table there was no rounding except of half (adult equivalent) passengers to the nearest full passenger.

### Appendix 3 US head taxes on immigrants

*August 1882:* Immigration Act of 1882, effective immediately, head tax established at 50c (£ 0.1)

From the text of that Act: '...there shall be levied, collected, and paid a duty of fifty cents for each and every passenger not a citizen of the United States who shall come by steam or sail vessel from a foreign port...by the master, owner, agent or consignee of every such vessel, within twenty four hours after the entry thereof...The money thus collected shall be paid into...the immigrant fund, and shall be used...to defray the expense of regulating immigration under this act and for the care of immigrants arriving in the United States...The duty imposed...shall be a lien upon the vessels which shall bring such passengers into the United States, and shall be a debt in favour of the United States against the owner or owners of such vessels....'

X *August 1894:* head tax raised to \$1 (£ 0.2), *effective immediately*

*March 1903:* Immigration Act of 1903, effective immediately, head tax raised to \$2 (£ 0.4)

*February 1907:* Immigration Act of 1907, effective June, 1907, head tax raised to \$4 (£ 0.8)

*Source:* US Reports of the Immigration Commission of 1907-1911, chaired by Senator William P. Dillingham, (1911), Vol. 39, pp.32, 45, 51, 60, 97-121.

X *Annual Report of the Commissioner General of Immigration, 1895, p. 19,*



**Table of suggested adjustments to Cunard's derived fares, to reflect head taxes and agents fees**

Amounts to add to the quarterly average (net) fares of the Cunard Line, on its Liverpool-New York route, shown here:

"The Voyage Abstracts of the Cunard Line as a Source for Transatlantic Passenger Fares, 1883-1914,"  
*Business Archives History and Sources* 96 (Nov. 2008)

"Appendix 1," pp. 24-28,

or as corrected (for a small fraction of Appendix 1 entries) in this update

in order to also incorporate US head taxes and agents' fees effectively part of the transatlantic passage cost

*Prepared by Drew Keeling 20 December 2024*

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| <b>Unadjusted ("net") fares</b><br>(averages of the derived fares of Appendix 1) | <b>I-W</b>   | <b>II-W</b> | <b>III-W</b> | <b>I-E</b>   | <b>II-E</b> | <b>III-E</b> |   |
|--|--------------|-------------|--------------|--------------|-------------|--------------|---|
| 1883 (i) - 1894 (iii)  | £18.2        | £7.5        | £3.3         | £17.7        | £7.0        | £3.3         |   |
| 1894 (iv) - 1903 (i)   | £20.8        | £7.9        | £4.0         | £20.7        | £8.3        | £4.3         |   |
| 1903 (ii) - 1907 (ii)  | £21.5        | £8.6        | £3.8         | £22.0        | £9.1        | £4.6         |   |
| 1907 (iii) - 1914 (ii)   | £29.6        | £10.5       | £5.2         | £30.2        | £11.5       | £5.8         |   |
| <b>FULL PERIOD</b>   | <b>£22.8</b> | <b>£9.1</b> | <b>£4.2</b>  | <b>£22.3</b> | <b>£9.5</b> | <b>£4.8</b>  |   |
|  |              |             |              |              |             |              | <u>As % of unadjusted (net) III-W fares</u> |
| <b>Addition for US head taxes</b>  |              |             |              |              |             |              |   |
| 1883 (i) - 1894 (iii)  |              | £0.1        | £0.1         |              |             |              | 3%  |
| 1894 (iv) - 1903 (i)   |              | £0.2        | £0.2         |              |             |              | 5%  |
| 1903 (ii) - 1907 (ii)  |              | £0.3        | £0.4         |              |             |              | 10%   |
| 1907 (iii) - 1914 (ii)   |              | £0.6        | £0.8         |              |             |              | 15%   |
| <b>Suggested Addition for agents' fees</b>                                       |              |             |              |              |             |              |   |
| 1883 (i) - 1894 (iii)  | £1.0         | £0.6        | £0.4         | £1.0         | £0.6        | £0.4         | 12%   |
| 1894 (iv) - 1903 (i)   | £1.2         | £0.6        | £0.4         | £1.2         | £0.6        | £0.4         | 10%   |
| 1903 (ii) - 1907 (ii)  | £1.2         | £0.6        | £0.4         | £1.2         | £0.6        | £0.4         | 10%   |
| 1907 (iii) - 1914 (ii)   | £1.5         | £0.5        | £0.3         | £1.5         | £0.5        | £0.3         | 6%  |
|  |              |             |              |              |             |              | <i>Full period (III-W) ≈ 9.6%</i>           |
| <b>Addition for both head taxes and agents' fees</b>                             |              |             |              |              |             |              |   |
| 1883 (i) - 1894 (iii)  | £1.0         | £0.7        | £0.5         | £1.0         | £0.6        | £0.4         | 15%   |
| 1894 (iv) - 1903 (i)   | £1.2         | £0.8        | £0.6         | £1.2         | £0.6        | £0.4         | 15%   |
| 1903 (ii) - 1907 (ii)  | £1.2         | £0.9        | £0.8         | £1.2         | £0.6        | £0.4         | 21%   |
| 1907 (iii) - 1914 (ii)   | £1.5         | £1.1        | £1.1         | £1.5         | £0.5        | £0.3         | 21%   |
| <b>"Gross" Fares if additions are made for both head taxes and agent's fees</b>  |              |             |              |              |             |              |   |
| 1883 (i) - 1894 (iii)  | £19.2        | £8.2        | £3.8         | £18.7        | £7.6        | £3.7         |   |
| 1894 (iv) - 1903 (i)   | £22.0        | £8.7        | £4.6         | £21.9        | £8.9        | £4.7         |   |
| 1903 (ii) - 1907 (ii)  | £22.7        | £9.5        | £4.6         | £23.2        | £9.7        | £5.0         |   |
| 1907 (iii) - 1914 (ii)   | £31.1        | £11.6       | £6.3         | £31.7        | £12.0       | £6.1         |   |

For sources and methods, see the accompanying notes to this table, and the Introduction to this update

## Appendix 4 (cont.): Notes to the Adjustment Table

1. The start and end points of the four periods in this table were chosen to distinguish the four levels of the head tax, not for historical representativeness or to highlight particular trends. Slight discrepancies may result from figures in Appendix 1, Appendix 2, and this Adjustments Table being rounded to the nearest decimal.

2. **US head taxes**, in this period on the North Atlantic, applied only to (westbound) arrivals of non-US citizens (see Appendix 3 below). Head tax additions for 1st class (I-W) are omitted from this table, as a simplification, because they averaged well below 1% of the (derived) fare. This was far below that of III-W for two main reasons: First, because I-W (net) fares averaged over five times III-W (net) fares, and second because the tax was charged for non-US-citizens only (= typically not more than about 1/4 of I-W passengers). Head tax additions shown for 2nd class (II-W) are based on an estimated average of three quarters of passengers in that class being non-US citizens.

3. For US-bound steerage (III-W) passengers, it is assumed, as a general simplification, that the head tax levy applied to 100% of passengers. (Available Ellis Island data for 1904-08 indicates that indeed, over 95% of III-W passengers were not US citizens). Head tax charges levied *per westbound non-US citizen* are precise apart from slight uncertainty regarding 1903, 1st quarter (because the tax step up then, from \$1 to \$2, e.g. from £0.1 to £0.2, occurred *part way* through that quarter; see Appendix 3).

4. For **agents' commissions**, most available pertinent information (and attention devoted) applies to **US-bound steerage (III-W)**. See the main text section "US head taxes and agents' fees" (revised for this update), and the sources listed at the end of the Introduction to this update. The adjustments in this table are assume that commissions for eastward steerage (III-E) were equal to westbound. They were actually probably slightly higher, but not necessarily exceeding rounding error differences. There are consistent indications of Cunard, late in the period, pro-actively shifting from agents to in-house passenger departments for ticket sales. This is reflected in the £0.1 reduction of the "addition for agents' fees" in the final 1907-14 sub-period, for III (and II), west and east

5. Available information on **cabin class ticket commissions** (for I-W, II-W, I-E, II-E) is so far limited to the final decade of the period, and used backwards in time here as a best guess. For convenience and consistency, the estimated adjustments are shown in this table as *£ per passenger* amounts, although the actual historical practice (for agents' commissions on I and II class tickets) seems to have been a varying mixture of *flat* per passenger amounts and *percentages* of standard "gross fares." Translated to a pure *percentage* rate, agents commissions for I and II class appear to have averaged around 5%, which is approximately what results from applying the *£ numbers* in this adjustment table across the 1883-1914 period as whole. For shorter time spans, particularly with I class travel, and especially if trying to gauge individual voyage averages or even individual ticket fares, from these quarterly averages, it would seem advisable to use 5% directly instead of the fixed amounts in the table (at least whenever the fixed amount is noticeably less than 5%).

6. The rightmost column of the table shows the impact of the two potential adjustments (for head taxes, for agents' fees) as a percentage of the unadjusted "*net*" fare derived in Appendix 1. In the historical literature, such commissions (if not shown as absolute amounts per passenger, as in the rest of this table) are more usually stated as a percentage of the "*gross*" fare (see the bottom section of the table for sub-period average gross fares). "Net" fares (Appendix 1 averages in the top section of the table) are used -in the rightmost column- to provide a consistent basis for separately comparing the relative quantitative impacts of the two possible adjustments (head tax, agents' fees).

7. When to adjust ?

For readers or researchers (probably a majority) interested in questions concerning transoceanic travel costs, there would seem little reason -apart from convenience- for *not* adding upwards adjustments for the US head tax, to the derived fares derived from Cunard revenues solidly assumed to not have incorporated those head taxes. Ellis Island undeniably received the tax proceeds, and there is no other credible ultimate origin for them other than the gross fares collected from paying passengers. And the timing and per passenger amounts are factually unquestioned. Ergo, the taxes can readily be "added back" to (the Appendix 1) Abstracts-derived fares, in order to fully measure the direct cost of the oceanic crossing. There are potentially (probably less frequent) applications, however, where the "pure" unadjusted Cunard revenue derived fares could be preferable.

For the agents fees, the estimated 1883-1914 average corrective adjustment to III-W rates (9%) is comparable to that for head taxes (10%), but there are greater error bars. Even for a single line (e.g. Cunard) such fees varied at least somewhat over time, place, direction of travel, whether the ticket was "prepaid" or purchased "spot," and not least, whether or a commissioned "head agent" or "sub agent" or non-commissioned (salaried) company passenger department or tourist bureau staffer booked the travel or issued the ticket and collected the payment. For those agents' fees, there is thus a trade off between better overall estimation than with the straight derived fares of Cunard, but with wider wide + or - caveats. Or vice versa. There are multiple possible responses to this choice, and the decision depends in part on the research orientation and/or personal preferences of the reader / researcher. If adjustment seems called, for the table recommends a general average amount to use, at least as a starting point or rule of thumb. Finally, although the approaches, measures and estimations here have wider implication, most determinations here are not necessarily reliably exportable to other time series. For example, at least as an initial default rule, contemporary official, advertised or published fares (unlike the Appendix 1 revenue derived fares here) should probably be taken as *inclusive* of both head taxes and agents' fees.

## Appendix 5

### Treatment of Head Taxes and Agents in other papers using Cunard Abstracts of Voyages derived (net) fares, Liverpool - New York

Added for Dec. 2024 update

|                                  |               |                               | Time span<br>and<br>class, direction | Head<br>Taxes         | Agents<br>Fees |
|----------------------------------|---------------|-------------------------------|--------------------------------------|-----------------------|----------------|
| <b>Transportation Revolution</b> | <b>(1999)</b> | <b>Table A.6, p. 64 *</b>     | <b>1885-1914</b><br>I,II,III W&E     | no                    | no             |
| <b>Migration Networks</b>        | <b>(2007)</b> | <b>Appendix 6, pp. 164-65</b> | <b>1903-13</b><br>I,II,III W         | no<br>(but mentioned) | no             |
| <b>Transport Capacity</b>        | <b>(2008)</b> | <b>Table A-3, pp. 271-72</b>  | <b>1901-13</b><br>III W              | Added                 | no             |
| <b>Time on the Crossing</b>      | <b>(2024)</b> | <b>Online Appendix</b>        | <b>1883-1914</b><br>III W            | Added                 | +7.5%          |

Keeling, Drew. "The Transportation Revolution and Transatlantic Migration, 1850-1914."  
*Research in Economic History* 19 (1999), pp. 39-74.  
["Transportation Revolution"]

Keeling, Drew. "Costs, Risks, and Migration Networks between Europe and the United States, 1900-1914."  
In *Maritime Transport and Migration: The Connections between Maritime and Migration Networks*, edited  
by Torsten Feys, Lewis R. Fischer, Stéphane Hoste and Stephan Vanfraechem, pp. 113-173. *Research in  
Maritime History* 33. St. John's: International Maritime Economic History Association, 2007.  
["Migration Networks"]

Keeling, Drew. "Transport Capacity Management and Transatlantic Migration, 1900-1914."  
*Research in Economic History* 25 (2008), pp. 225-283.  
["Transport Capacity"]

Hatton, Timothy J. "Time on the crossing: emigrant voyages across the Atlantic, 1853-1913"  
*European Review of Economic History* 28 (2024), pp. 120-33.  
["Time on the Crossing"]

The times series of derived fares in "Migration Networks" is quarterly; the other three listed above are annual.

\* Some entries in this table have significant rounding errors; for consistent accuracy, a time series later in a later publication is recommended.

### In comparison, this paper:

|   |               |                        | Time span,<br>class, direction   | Head<br>Taxes                    | Agents<br>Fees |
|---|---------------|------------------------|----------------------------------|----------------------------------|----------------|
| <b>Original, in</b><br><i>Business Archives History</i> | <b>(2008)</b> | <b>Appendix 1</b>      | <b>1883-1914</b><br>I,II,III W&E | no                               | no             |
| <b>This update</b>                                      | <b>(2024)</b> | <b>Appendices 1, 4</b> | <b>1883-1914</b><br>I,II,III W&E | no<br>(but adjustments provided) | no             |

- <sup>1</sup> The author would like to thank Adrian Allan and the staff of the Special Collections and Archives at the University of Liverpool for guidance in accessing the data used here and for helpful comments on an earlier draft of this article, and the Business Archives Council for a bursary award supporting the research on it.
- X <sup>2</sup> M. Cook, pp. 240-2. "*The Cunard Archive at Liverpool*," *Business History* 20(2) (July, 1978), pp. 240-2.
- <sup>3</sup> Cunard Archives: 'Catalogue of the Archives of the Cunard Steam-ship Company held at the University of Liverpool', University Archives, Liverpool, 1987.
- <sup>4</sup> F. E. Hyde, *Cunard and the North Atlantic, 1840-1973: A history of shipping and financial management*, (London, 1975), especially chapters 1-5; S. Marriner, 'Emeritus Professor F. E. Hyde', *University of Liverpool Recorder* 80 (1979), pp.110-11.
- <sup>5</sup> An unfortunate exception are the 'White Star Papers' for the pre-First World War era cited a number of times in *Cunard and the North Atlantic*. They are not part of the Cunard archive in Liverpool, notwithstanding Cunard's acquisition of White Star in 1934, and their whereabouts today is unknown (if they still exist at all, see M. Cook, 'The Cunard Archives at Liverpool', *Business History* 20-2 (1978) 245-6). Similarly, relatively few business records remain from North German Lloyd line ('NDL' in its German acronym) which merged with its leading German rival HAPAG in the 1930s and again in 1970 (N. R. P. Bonsor, *North Atlantic seaway: An illustrated history of the passenger services linking the old world with the new*. 5 vols. (Newton Abbot, 1975-1980), 115, 38,387). Thus, of the 'four great powers' of pre-1914 North Atlantic steam shipping - Cunard, HAPAG, White Star, and NDL (E. Murken, *Die großen transatlantischen linienreederei-verbände, pools und interessengemeinschaften bis zum ausbruch des weltkrieges: ihre entstehung, organisation und wirksamkeit*. (Jena, 1922), p.556) - sizeable quantities of records are extant only for the first two, and the Cunard archive is the stronger from a business and financial history standpoint.
- <sup>6</sup> See for example, Hyde, pp.82-89, R. Bastin, 'Cunard and the Liverpool emigrant traffic, 1860-1900.' M.A. Thesis, University of Liverpool, 1971, pp.151-153, 158-159, 171.
- <sup>7</sup> Hyde, chapter 3, footnotes 113, 129; Bastin, p.180; C. K. Harley, 'North Atlantic shipping in the late nineteenth century freight rates and the interrelationship of cargoes', in L. R. Fischer and H. W. Nordvik (eds), *Shipping and trade, 1750-1950: essays in international maritime economic history*, (Pontefract, 1990), pp.166, 171; D. Keeling, 'Costs, risks, and migration networks between Europe and the United States, 1900-1914', in T. Feys, L. R. Fischer, S. Hoste and S. Vanfraechem (eds), *Maritime transport and migration: the connections between maritime and migration networks*, Research in Maritime History 33. St John's, Newfoundland: International Maritime Economic History Association, 2007, p.123.
- <sup>8</sup> The voyage abstracts records begin in 1880 shortly after Cunard became a public company, but there are gaps in the data for many of the voyages in 1880-82, particularly in the numbers of steerage 'passengers' (e.g. full fare equivalents, see below). While one can still get a rough idea of trends for 1880-82, the accuracy is not on the level of 1883 onward.
- <sup>9</sup> Or, in the relatively infrequent instances where the roundtrip Atlantic transit consisted of the vessel journeying to one port, but later returning from a *different* port, every 'half voyage'.
- <sup>10</sup> For the Liverpool-New York route that is the main focus in this article, 'outward' meant westward to New York. On the Liverpool-Boston run, it meant westward to Boston. On the 'Hungarian-American' route between the Adriatic port of Fiume (present-day Rijeka) and the US, 'outward' usually meant eastward from New York.
- <sup>11</sup> Bonsor, pp. 1823, 1850-1853; D. Keeling, 'The transportation revolution and transatlantic migration, 1850-1914', *Research in Economic History* 19 (1999), pp.50, 56-7.
- <sup>12</sup> Keeling, 'Costs, risks, and migration networks', pp.114-16.
- <sup>13</sup> D. Baines, *Emigration from Europe, 1815-1930*, (London, 1991), p. 28; J. D. Gould, 'European inter-continental emigration, 1815-1914: patterns and causes', *Journal of European Economic History* 8 (Winter 1979), pp.610-15.
- X <sup>14</sup> See, for example, Murken, p.326. p. 327 (footnote).

- <sup>15</sup> Cunard voyage abstracts, D42, AC 12 / 1, p. 49. 'Half passenger' totals appear rarely in the voyage abstracts after the 1880s, probably due to numbers for later years being rounded to the nearest whole passenger.
- <sup>16</sup> 'Reports of the Trans-Atlantic Passenger Movement', Transatlantic Passenger Conferences, New York, 1899-1914.
- <sup>17</sup> US Bureau of Immigration, Annual Reports, 1895-1914.
- <sup>18</sup> Re immigrants' ages, see, for example, Dillingham Report, vol. 3, pp.88-94. Passenger lists sampled include Cunard voyages from 1903 and 1904. US National Archives: microfilmed passenger lists of arriving vessels, 1900-14.
- <sup>19</sup> See Appendix 3, Keeling, 'Costs, risks, and migration networks', p.165, 168; US Reports of Industrial Commission on Immigration and Education (House of Representatives document no.184, 57<sup>th</sup> US Congress, 1<sup>st</sup> session), 1901, pp.18, 105. Dillingham Report, vol. 39, p.61.
- <sup>20</sup> The adjustment for the head tax cost effectively incurred by the migrant passenger can be made by adding the head tax rates shown in Appendix 3 to the derived fares of Appendix 1.
- <sup>21</sup> ~~A. Bretting and H. Bickelmann, *Auswanderungsagenturen und auswanderungsvereine im 19. und 20. Jahrhundert*, (Stuttgart, 1991), pp.68, 71; M. A. Jones, *American Immigration*, 2nd ed. (Chicago, 1992), p.157; B. Brandenburg, *Imported Americans*, (New York, 1904), p.113; K. Hvidt, 'Emigration Agents: The development of a business and its methods', *Scandinavian Journal of History* 3 (1978), p.202.~~ pp. 189, 193, 200, Hvidt, p. 202.
- <sup>22</sup> Murken, p.664.
- <sup>23</sup> Keeling, 'Costs, risks, and migration networks', p.119. See also N. Evans, 'The role of foreign-born agents in the development of mass migrant travel through Britain, 1851-1924', and T. Feys, 'The battle for the migrants: the evolution from port to company competition, 1840-1914'. In Feys et al, *Maritime transport and migration*.
- <sup>24</sup> Cunard annual reports and voyage abstracts (for all routes, not just Liverpool-New York which however, accounted for well over half of Cunard's passenger revenue in the period). Cunard Annual Reports, 1883-1914: Cunard Archives, University of Liverpool, D42 A1/7.
- <sup>25</sup> 'All expenses' are measured by 'income' less 'balance transferred to profit and loss account'. This is the same as 'operating expenses', in the second column of Table 5-3 in Hyde, pp.149-50. For more on voyage costs, see also Keeling, 'Transportation Revolution', pp.44-5, 66, 67, Keeling, 'Costs, risks, and migration networks', pp.133-4, 164-7, and Keeling, 'Transport capacity management and transatlantic migration, 1900-1914', *Research in Economic History*, vol. 25, (2008), pp.256, 269-270.
- <sup>26</sup> V. Vale, *The American peril: challenge to Britain on the North Atlantic, 1901-04*, (Manchester, 1984), pp.146, 177; US Commissioner of Navigation, Annual Reports 1903, p.51.
- <sup>27</sup> *Morton Allan Directory of European Passenger Steamship Arrivals*. Baltimore: Genealogical Publishing Co., 1980 (originally published, 1931).
- <sup>28</sup> Harley, p.171. Keeling, 'Transportation revolution', pp.64-5; 'Costs, risks, and migration networks', pp.164-7; 'Transport capacity', pp.271-4.
- <sup>29</sup> See, for example, Keeling, 'Transport capacity', pp.228-230, 250, 271-74.

Report on Importation  
of Contract Laborers,  
US House of Representatives,  
50th Congress, 2nd session  
[Ford Commission]  
pp. 3-56