Introduction

Traditions, indeed, are abundant; but traditions are a mass of rubbish, from which it is always difficult to extricate truth.

—Rev. Sheldon Dibble, *History and General Views of the Sandwich Islands Mission*

The ukulele is a toy guitar and not worth a second thought.

—Hart Stilwell, *Esquire*, October 1940

When seventy-nine-year-old Manuel Nunes died in July 1922, the brief obituaries of the “inventor of the ‘ukulele” that appeared in Honolulu were quickly picked up by wire services and reprinted in newspapers nationwide. The ubiquity of the ‘ukulele, which had swept the mainland during the previous decade, ensured that news editors in Los Angeles, New York, Boston, and Philadelphia would find space for two or three paragraphs about the elderly musical entrepreneur who had arrived in Hawaii aboard an emigrant ship more than forty years before. While usually a brief item consigned to an inside page and quickly forgotten, the report of Nunes’ death provides a fascinating glimpse of the complex and often conflicted role this diminutive four-stringed guitar has played in popular culture in Hawaii, the United States, and abroad. The story reported as fact the myth that the ‘ukulele was invented in Hawaii, even as it sought to debunk the popular misconception that it was an instrument of Native Hawaiian origin. Headlines in several newspapers emphasized that a white man had invented the ‘ukulele, a reflection not only of an era that witnessed the national rise of the Ku Klux Klan but also of old mainland stereotypes of Hawaiians as ne’er-do-well, childlike savages. This crisis of authenticity also tapped into a widespread dislike of the ‘ukulele as a noisy nuisance, a reaction to its overwhelming, faddish popularity, its adoption by convention-defying youth, and its reputation—assiduously cultivated by music retailers—that it was the instrument anyone could play, a strategy that simultaneously increased sales and undercut its standing as a legitimate musical instrument.
Today, the ‘ukulele is enjoying what is often referred to as a third wave of popularity—the first being the Roaring Twenties, which made Manuel Nunes’ death a news item, and the second coming during the early fifties, when Arthur Godfrey’s lifelong enthusiasm for the ‘ukulele combined with the power of the new medium of television and the miracle of postwar plastics to sell millions more. Still, for all the ‘ukulele’s new visibility—festivals around the world, concert performances by such artists as Paul McCartney, tens of thousands of YouTube videos, record prices on the collectibles market, and an international surge of media coverage—for most people outside Hawaii it remains, as one headline recently put it, “the Dangerfield of instruments.” According to the Cleveland Plain Dealer, “The ukulele’s unhipness seems to be one of the pillars on which our modern civilization is built.” In the modern musical cosmos, the Boston Globe asserts, the ‘ukulele “ranks in most people’s minds somewhere between asteroid dust and space junk.” The ‘ukulele has been described as “a tiny four-stringed thingamajig” (Worcester [Mass.] Telegram & Gazette), “a comical little has-been guitar-wannabe” (Los Angeles Times), and “just plain silly” (USA Today). “Hard as it is to believe, there are people who take the ukulele seriously, or at least seriously enough to play it for other people,” Jon Pareles, the pop music critic for the New York Times, wrote not too long ago.

For modern audiences (and many journalists), the ‘ukulele conjures up images of Tiny Tim warbling “The Good Ship Lollipop” on Laugh-In, or George Formby singing “Leaning on a Lampost,” and there the story ends. As we hope to demonstrate in this book, there is a far more interesting—and meaningful—story to be told. Since the ‘ukulele’s introduction to Hawaii by Madeiran contract workers in 1879, it has functioned simultaneously on a number of different levels—musical, cultural, economic, and even political. As an instantly recognizable symbol of Hawaii, the ‘ukulele has been many things over the past 130 years: a promise of an island paradise; a tool of political protest; an instrument central to a rich and celebrated musical culture; a musical joke; a symbol of youthful rebellion; a highly sought-after collectible; a cheap airport souvenir; a lucrative industry; an early adapter to new technologies; and the product of a remarkable synthesis of Western and Pacific cultures. These multiple levels parallel what in Hawaii is known as kaona—the ability of the Hawaiian language to simultaneously convey both a literal meaning and an underlying layer of metaphor and allusion with an entirely different thrust. Consider, for example, the century-old tradition of playing Sousa marches on the ‘ukulele, a practice popularized by Jesse Kalima, who once confided to a Chicago newspaper reporter his ambition to be the best ‘ukulele player in the world. On the most basic level, this is an expression of the continuing tradition of adapting a challenging repertoire to demonstrate the ‘ukulele’s musical legitimacy. Yet this also is an instance of a Native Hawaiian artist performing music that epitomized U.S. imperial ambitions that led to the loss of Hawaiian sovereignty—music written by the son of a Madeiran father and played on an instrument originally
from Madeira that in less than a decade became a symbol of Hawaiian patriotism. The Madeiran immigrants who first manufactured ‘ukuleles relied on the patronage of the royal family to ensure its popularity, yet they quickly signed oaths of allegiance to the new revolutionary government after the overthrow of the monarchy in 1893.

This book, then, has the temerity to take the ‘ukulele seriously and examine some of its hidden meanings. Because the ‘ukulele was introduced to Hawaii in the modern era, it is possible to trace its development in contemporary records in a way that is impossible for many other older instruments. Yet over the years most historical accounts of the ‘ukulele have relied heavily on tradition, a few widely circulated and often repeated secondary accounts, and occasionally rank speculation. This book approaches its subject with a different agenda: We wanted to place the ‘ukulele in a broader historical and cultural context, relying whenever possible on contemporary sources. We wanted to know why and how: Why did Madeiran immigrants come to Hawaii in the first place? How did the machete become transformed into the ‘ukulele, the national instrument of Hawaii, in less than a decade? Why did ‘ukulele become explosively popular after the Pan-Pacific International Exposition in 1915? Why did it become a cliché of the mainland youth culture of the 1920s? Why, despite a renewed wave of popularity in the 1950s, was the ‘ukulele regarded as nothing more than a toy? In attempting to answer these and other questions, we cast a wide net for source material: books, newspapers, magazines, city directories; court, church, tax, immigration, passport, and census records; oral histories, business records, catalogs and brochures, sheet music, songbooks, copyright registrations, auction records, novels and short stories, and movies and newsreels. In particular, we took advantage of the digitization of newspapers in the United States and overseas to trace the career of the ‘ukulele—and Hawaiian music generally—not only in Honolulu, San Francisco, Los Angeles, Chicago, and New York, but in Anaconda, Montana; Duluth, Minnesota; Fort Worth, Texas; Valparaiso, Indiana; Pawtucket, Rhode Island; Winnipeg, Canada; Sydney, Australia; and Manchester, England.

It is a story that draws on such familiar figures as Queen Liliuokalani, Arthur Godfrey, and Tiny Tim, as well as Lewis Carroll, Rudyard Kipling, Malcolm Lowry, P. G. Wodehouse, Jack London, Al Jolson, Bing Crosby, George Gershwin, Irving Berlin, Aaron Copland, Jimmie Rodgers, Neil Young, the YMCA, Sears, SpongeBob Squarepants, and a host of remarkable Hawaiian artists rescued from obscurity: George Kia Nahaolelua, Nulhama “William” Aeko, Samuel K. Kamakaia, James Shaw, John Edwards, and Henry A. Peelua Bishaw, to name but a few. It is a story played out on an international stage, one that begins on the island of Madeira, a small dot off the coast of Morocco, travels halfway around the world to Hawaii, then recrosses the Pacific once more to the United States and Canada to the east, Australia, Java, and Japan to the west, and ultimately to Europe. We think it is a story worth telling.
A Note on the Text

In our own text, we use Hawaiian diacritical marks only in the word “ʻukulele.” In all quoted sources, we follow the authors’ original usage. All other Hawaiian words and names appear without diacritical marks.
CHAPTER 1

These Little Instruments, of Which They Are So Fond

On Summer eve to see the festive dance,
I’d take thee when the golden sun had set;
Methinks more soft would grow thy blue-eyed glance
While list’ning to the little dear machete.

The Dreamer: A Poem (1848), Ossian Macpherson

In the summer of 1923, the newly formed Hawaiian Legends and Folklore Commission brought anthropologist Helen Roberts to Hawaii to collect and publish the ancient songs and chants of the Islands. Over the following year, she visited the islands of Hawaii, Maui, Oahu, and Kauai, seeking out practitioners of the “old culture” and recording hundreds of mele and oli on wax cylinders. Yet one of the first local reports on her work had little to do with traditional music. Instead, it was her conclusion that the ‘ukulele “which one associates with Hawaiians and which has been carried far by tourists under the impression that it is an instrument of native invention, or if not that, an instrument invented in the islands,” had been introduced to Hawaii in 1879 by Portuguese immigrants from the island of Madeira.¹

Today it seems surprising that Roberts’ comments about the little four-string guitar should have eclipsed the rest of her groundbreaking, four-hundred-page report. But in 1924, the ‘ukulele had been an international, multimedia phenomenon for almost a decade. Mainland sales had reached an estimated four million instruments, and dozens of styles were available in big city department stores and mail-order catalogs for as little as two dollars each.² Hawaiian trios, quartets, quintets, and orchestras were playing across the United States, Canada, Europe, and Australia in vaudeville, chautauqua, tent shows, restaurants, and nightclubs. Mainstream artists such as Frank Crumit (whose recording of “Say It with a Ukulele” was released that year) and Johnny Marvin (soon to be known as the “Ukulele Ace”) accompanied themselves on the ‘ukulele as they sang popular hits in the recording studio and on the explosively popular new medium of radio.³
It was in 1924 that George and Ira Gershwin made their Broadway debut with the musical *Lady Be Good*, starring Fred and Adele Astaire and Cliff Edwards. Known professionally as “Ukulele Ike,” Edwards and his 'ukulele teamed up with the Astaires to introduce the Gershwins’ “Fascinating Rhythm” to the nation. It also was the year singer Wendell Hall began using his nickname—“The Red Head”—to market an eponymous line of 'ukuleles with scarlet pegheads. Sales of Hall's 'ukulele-driven recording of “It Ain't Gonna Rain No Mo” reportedly reached two million copies that year, prompting one newspaper to report “a virulent epidemic of ukelele has broken out. . . . Efforts to check it have proven unsuccessful and physicians say that it will probably run its course far into the winter or at least until 'It Ain't Goin' to Rain No More.”

By 1924, touring companies of Richard Walton Tully's Hawaiian potboiler *The Bird of Paradise*—each with its own troupe of Hawaiian musicians strumming 'ukuleles and guitars—had earned more than $1 million in profits in the United States, Canada, England, and Australia, inspiring a host of Hollywood imitations. More than three dozen films set in the South Seas—what some slightly called “ukulele dramas”—had been produced by the mid-1920s, featuring such stars as Mary Pickford, Tyrone Power, and a young Boris Karloff. European royalty also had been smitten: the *New York Times* reported that summer that Edward, Prince of Wales (who as Edward VIII would abdicate the throne in 1936 to marry an American divorcee), had “expressed a desire to learn to play the Hawaiian instrument.”

Although he was likely unaware of the fact, Prince Edward was only the latest in a long line of Englishmen and women to fall prey to the charms of the unassuming little guitar. Half a world away from Hawaii, Madeiran musicians had offered lessons on the instrument they knew as the machete to tourists for more than a century, including another royal, Elizabeth of Bavaria, empress of Austria, who visited in 1860–1861.

Largely unknown to each other until the last quarter of the nineteenth century, Hawaii and Madeira shared a number of striking similarities: Both were volcanic archipelagoes with tropical climates and spectacular scenery that delighted tourists (one Honolulu visitor noted that “the Sandwich Islands have been styled by Californians the Madeira of the Pacific”); both were dependent on a single cash crop, wine in Madeira and sugar in Hawaii; and both were dominated economically by foreign powers, England in Madeira and the United States in Hawaii, who regarded the natives with disdain. It was a single dramatic point of difference that ultimately led to the introduction of the machete to Hawaii: While Hawaii's native population was plummeting, leading to repeated predictions of inevitable extinction, Madeira was overcrowded—sometimes to the point of starvation. Demography defied geography to bring the machete to the Islands.

Lying more than 500 miles southwest of Lisbon and 360 miles off the Moroccan coast, Madeira was uninhabited and covered with thick forests—madeira
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means wood in Portuguese—when it was claimed by Portugal in the early 1420s. Superstitious seamen believed the dark mass of clouds that perpetually obscured the island masked the mouth of hell, and they were reluctant to venture near it. The small, steep island of 286 square miles quickly flourished as Europe’s first center of sugar production, a role reflected in the coat of arms of the capital city of

Austrian Empress Elizabeth of Bavaria, one of Madeira’s most famous tourists, poses with a machete and her ladies-in-waiting during an 1860–1861 visit to the island. Courtesy of Photographia Museu “Vicentes,” Funchal.
Funchal, which bears five pao de acuças, or sugar loaves.\textsuperscript{11} By 1500, Madeira had become the world’s largest sugar producer, and Funchal was a major international port, thanks to the use of slave labor and a cosmopolitan mix of entrepreneurs from Portugal, France, Flanders, Florence, and Genoa.\textsuperscript{12} It was in Madeira that the viability of slavery in commercial agriculture was tragically demonstrated to the rest of the world—a model later transplanted to Brazil, the Caribbean, and England’s American colonies.\textsuperscript{13}

Eventually eclipsed by cheaper and higher-quality sugar from Brazil and the West Indies, the Madeiran sugar industry withered in the last half of the sixteenth century, to be replaced by vineyards that produced the famous Madeira wines: sercial, malmsey, boal, and verdelho.\textsuperscript{14} Unlike wines from the European mainland, Madeiran varieties not only are heat resistant but actually improve in hot weather and with rough handling—unique qualities that made Madeiran wine a staple commodity in the New World and later in India.\textsuperscript{15} Madeira was a favorite of the North American elite, with George Washington, Thomas Jefferson, and Alexander Hamilton going to considerable trouble and expense to buy what Jefferson called “good and genuine Madeiran wine.” In 1783, John Adams assured the Portuguese envoy at The Hague that in America, “Madeira was esteemed above all other wine.”\textsuperscript{16}

Thanks to Portugal’s desperate need after 1640 for English support to preserve her newly recovered independence from Spain, British merchants dominated the Portuguese wine industry. A series of treaties between the two countries allowed Madeiran wine to be imported directly into British overseas possessions but gave the British the upper hand economically.\textsuperscript{17} By 1755, Portuguese prime minister the Marquis of Pombal lamented that the British had “conquered [us] without the inconvenience of a conquest. . . . England has become mistress of the entire commerce of Portugal.”\textsuperscript{18} Nowhere was this dominance more obvious than in Madeira. Garrisoned by British troops from 1807 to 1814 during the Napoleonic Wars, Funchal was home to a prominent colony of resident English merchants who ran more than twenty houses or firms and patronized their own club, schools, reading room, church, cemetery, and physicians. English and other foreign currency, not Portuguese, was the medium of exchange; even carpenters and cabinetmakers used English feet and inches to measure their work.\textsuperscript{19} “It is almost certainly anglicized to a greater degree than any other island that does not wear the British flag,” one visitor wrote in 1909.\textsuperscript{20}

It was the English who first broadcast the lush and balmy glories of Madeira, which by the early nineteenth century had become a popular haven for tourists and invalids. “O Madeira, Madeira, O thou gem of the ocean, thou paradise of the Atlantic,” Henry Nelson Coleridge, nephew of the poet, rhapsodized in 1826 after fleeing a cold, rainy English January. “Here I found what I used to suppose peculiar to the Garden of Eden.”\textsuperscript{21} By midcentury, English visitors could choose from among half a dozen island guidebooks and a score of other volumes, some lavishly illustrated, on its history, flora and fauna, climate, geology, and scenery.\textsuperscript{22} The reaction
of Isabella Hurst de França, who visited in 1853, was typical: She called the island “the most beautiful sight which it may perhaps ever fall to my lot to see.” Her first glimpse at dawn from off Funchal revealed “the beautiful island of Madeira, looking perfectly unlike anything that I had ever seen or imagined. . . . Within the bay, lay the city of Funchal, looking beautifully clean from the sea, with its white houses, and green gardens, now flowering with oleander, heliotrope, blue hydrangia, the white blossom of the coffee tree, and a thousand other flowers new to an English eye, and more brilliant in colour than can be described.”

Exotic flora, a warm climate, and “a most majestic landscape . . . [to which] I am sure no artist has ever done justice” were the chief attractions for tourists, all of whom were headquartered in Funchal, Madeira’s capital, chief port, and only city. Surprised by the steepness of its narrow, pebble-paved streets and by the lack of wheeled vehicles—carros de bois, or ox-drawn sledges, were the rule—visitors were less impressed by Funchal’s architecture, whether of the fifteenth-century cathedral or the city’s whitewashed stone buildings. “I never was in the town of 20,000 inhabitants so well built, so cleanly and prosperous, and so well situated, in which architecture as an aesthetic art had been so entirely ignored,” one visitor complained.

The showy display of Madeiran gardens and the island’s dramatic volcanic scenery often overshadowed the Madeirans themselves in the accounts of nineteenth-century visitors. While universally commended for their polite manners and sober, good-tempered behavior, the Madeirans were often described as lazy, ignorant, and superstitious—traits Protestant English and American observers attributed to the islanders’ Catholic faith and the balmy island climate. As early as 1772, Johann Reinhold Forster declared that “the heat of the climate; the easy way of getting a great price for the wine, which costs them but very little trouble; the little encouragement farmers meet with, if they even were willing to make any improvements; the few wants they are under against cold and the inclemencies of weather in a mild climate; the method of watching the vineyards leading a great number of hands towards a constant idleness and many more articles contribute towards confirming the people in laziness and indolence.” Islanders’ belief in feitiçeiros—witches—struck outsiders as medieval, and their resistance to modern innovations made them the butt of frequent jokes. Visitors who parroted such stereotypes often contradicted themselves, accusing islanders of ignorance while reporting that English-speaking servants were easy to find. Nevertheless, illiteracy was widespread. Despite a program of compulsory public education mandated in 1844, few islanders could read or write; according to one estimate made in 1856, less than 4 percent of the island’s 17,900 children were attending school regularly. More than half a century later, 80 percent of the population of Funchal were still unable to read or write.

While books were few, visitors to the island heard music everywhere: in the streets of Funchal, outside peasants’ homes in the evening, while being carried in redes (a kind of portable hammock), at parish festivals and other public holidays,
and in the drawing rooms of the Madeiran elite. The fact that most windows in Funchal were without glass no doubt made it more difficult to avoid hearing music. While the peasantry often sang while out of doors, the wealthy enjoyed balls and concerts in their city homes and quintas, or country villas. During a stop at Madeira in 1788, Maria Riddell attended several soirees at the homes of upper-class English and Portuguese residents, including that of the island’s governor, whose wife entertained “with an elegant ball and concert.” Riddell also described the “lower class of people” as being “very musical, and extremely gallant. You seldom pass a night at Madeira without hearing a serenade of guitars and mandolins in some part of the street.”

Although the pianoforte dominated the European and American musical landscape in the mid-nineteenth century, it was the sound of stringed instruments that filled the air in Funchal, including the Spanish guitar (viola françesa) and the guitarrra, described as an “old English guitar, with six double wires.” These instruments, as well as the violin (rebeca) and cello, received their due in the guidebooks of the day, but by all accounts the chief ornament of Madeiran music making was the machete, “a small guitar, with four strings.” Some Madeirans regarded the machete as an island invention, but on an island that had served as an international entrepot since the fifteenth century, it seems more likely that it was introduced—possibly
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by immigrants from northern Portugal, from which two-thirds of the island’s early settlers had come.34

The earliest known reference to the instrument, dated 1716, appears in Raphael Bluteau’s Vocabulario Portuguez e Latino: “Machete. Viola pequeña” (Small guitar). Bluteau notes that the alternate term machinho “também he viola pequeña” (is also a small guitar).35 Four- and five-string machinhos were included in the 1719 Regimento para o oficio de violeiros (Regulations for the luthiers guild) from the city of Guimaraes in the northern Portuguese province of Minho.36 Some scholars believe the Minhotan machinho, the Madeiran machete, and the cavaquinho found elsewhere in mainland Portugal are among the many descendants of the small, four-course guitar of Renaissance Europe.37

Because the term “guitar” often was applied generically during the eighteenth and nineteenth centuries to a family rather than a specific instrument, the first vague references to guitars in eighteenth-century Madeira suggest the instruments referred to could have included machetes as well as violas.38 In his account of Capt. James Cook’s 1772 visit to Madeira, George Forster described how peasants each evening “assemble from different cottages, to dance to the drowsy music of a guitar.”39 British tourist Fanny Anne Wood, née Burney, was the first to record the name of the little guitar that was heard so frequently in Madeira. As the great-granddaughter of musician and music historian Dr. Charles Burney and a member of a family celebrated for its literary and scientific achievements, it’s not surprising Wood paid attention to music in Madeira. “Most of the Portuguese,” she wrote, “can play the ‘Machete’ (a little instrument peculiar, I believe, to Madeira) by ear. In the evening they often amuse themselves with their Guitars (Violas) and Machettes, upon which they frequently perform well. On such days as this—Festas—the countrymen go about in parties, dancing, singing, and playing to the music of these little instruments, of which they are so fond.”40

Country playing and singing—that is, by farmworkers or vilãos outside Funchal—left most island visitors unimpressed. Holding their fingers loosely and striking the strings with their fingernails, peasants “never make any tune, but produce three or four notes, which they repeat over and over again for hours,” de França complained. Others compared Madeiran singing to “snatches of a funeral dirge very dolefully rendered” or “the howling of a dog in the moonlight” and described voices with “a nasal twang most distressing to anyone unaccustomed to such sounds.”41 Singers in Madeira, declared John Dix, a future American general, diplomat, and New York governor who visited with his ailing wife in 1843, “are almost invariably harsh and discordant. It is said to be a characteristic of the islanders; and from what we have seen, there is no reason to doubt it. There is singing enough in the streets, but not a particle of music in it. Nothing can be more grating to the ear.”42 Even today, country people continue the tradition of desafio or despique, an improvisational form of singing in which one or more performers trade rhymed insults or recount local gossip to the accompaniment of the machete
and frequent bursts of laughter from those listening. Desafio could be heard while peasants were at work in the vineyards, walking to or from town, or during religious processions and other public occasions. “The morning was delightful, and the groups of peasantry, coming into the market, which we met along the roads, made it quite enchanting,” wrote William Wilde in 1837. “Each little party was preceded by its guitar player. . . . At times the performer accompanied it with his voice, and the whole group joined in the chorus.”

In Funchal, string music also was the rule—the heavy duty placed on imported pianos made them scarce—but the musical technique found there was more to the liking of well-to-do visitors. “The generality of their island music is merely a succession of very simple chords; but [the machete] is said to boast of much higher capabilities when played by a masterly hand, and the most brilliant waltzes and mazurkas of the best German composers may be skillfully rendered on this toy-like instrument,” one visitor noted in 1854. In February of that same year, de França attended a soiree at the home of Dr. Antonio Luz Pitta, a prominent physician and president of the Funchal city council, or camara. “After tea some national music was provided for our entertainment; a machete exquisitely played, a viola, or large guitar, and a cavaquinho, a machete with six strings, instead of four, peculiar to Oporto. Their instruments were all well played, and harmonized well together, in the music peculiarly their own. I was much pleased with it.” John Dix was less than diplomatic, calling its music “thin and meagre” and predicting that “It is not
probable that the machete will ever emigrate from Madeira. It is the most common instrument here; but I doubt much whether it would be, if this were not its birthplace.”

Even Dix grudgingly admitted that there were “two or three performers in Funchal who have attained a wonderful proficiency in playing on it; their execution is astonishing.” Still, he hastened to add, he could not help thinking “with how much more effect their skill would be expended on the guitar, which is in all respects a finer instrument.”

Among the Madeirans whose execution might have astonished Dix was Candido Drumond de Vasconcelos, a descendant of a Scottish merchant who had arrived in Madeira in the fifteenth century. As early as 1841, Drumond offered a concert of virtuoso machete music for the Sociedade Philharmonica that was enthusiastically applauded, according to the Funchal newspaper O Defensor. The style and scope of Drumond’s repertoire only recently has come to light with

The “Rita Polka” is one of forty-one compositions included in Candido Drumond de Vasconcelos’ First Collection of Different Pieces of Music, arranged for machete and guitar by Manuel Joaquim Monteiro Cabral ca. 1846. Courtesy of Manuel Morais.
the publication of his *Primeiro Colecção de differentes Peças de Muzica* of 1846, a manuscript collection of forty-one waltzes, marches, polkas, and other drawing room dances, as well as themes with variations written for the machete with guitar accompaniment—music undoubtedly similar to that which delighted Dix and de França.49

Despite tourists’ complaints about the quality of Madeiran music, island teachers found them willing pupils for machete lessons. “English visitors sometimes attempt [playing the machete],” noted Sir Richard Burton in 1863, “but as they expect to be perfect after a dozen lessons—it takes about five years—they rarely succeed.”50 White and Johnson’s 1860 guidebook advised that “skillful instructors on the guitar and machete may be easily found”—a group of professionals that included Joaquim Monteiro Cabral, a teacher, composer, and performer who wrote a primer for the instrument, *Estudos para machete*. Cabral’s manuscript contains not only traditional Madeiran dances but arrangements of “Rule Britannia” and “God Save the Queen!” as well as exercises, scales, and cadences in eighteen major and minor keys.51 The author of an 1860 phrasebook included a section on a machete lesson, with such helpful phrases as “Take the machete so” (Pégue no machête assim) and “Now play—not so—this way” (Agóra toque—assim não—é assim).52 The machete’s small size, novelty, and portability also made it an attractive souvenir. The earliest known photographs of the machete were taken in England by Lewis Carroll, among them an 1858 portrait of Alice Liddell—the inspiration for Carroll’s *Alice in Wonderland*—and her two sisters decked out in Madeiran lace and cradling machetes.53 Unusual fish-, leaf-, and pear-shaped machetes with ten, eleven, and twelve strings in the Stearns collection at the University of Michigan suggest that more elaborate designs were created specifically for the tourist trade.54

Demand was enough to support at least half a dozen instrument makers on an island long known for the quality of its woodworking. Timber was a notoriously scarce resource in fifteenth-century Portugal, and chroniclers note that Madeiran lumber made it possible for the first time for the mainland Portuguese to routinely erect buildings more than one story high.55 Not surprisingly in a place dominated by the wine industry, “the coopers of Funchal are known to be excellent workmen and the pipes [barrels] made are very much admired for their perfect construction,” one observer wrote.56 Madeiran furniture, made of what became known as Madeiran mahogany (*Persea indica*, or *vinhatico* to the Madeirans), was one of the island’s early exports. *Vinhatico* is “of a fine grain and brown like mahogeny, from which it is difficult to distinguish it,” botanist Joseph Banks observed in 1768, citing as an example a bookcase made for an English resident that combined the two woods.57 One nineteenth-century visitor reported that local cabinetmakers had “entirely superseded the importation of foreign furniture.”58 Furniture shops were plentiful in Funchal in 1889, according to guidebook author Ellen M. Taylor, and in some, “excellent wardrobes, chairs, and tables may be found of Til, or Vinhatico, walnut, or plane.”59 Twenty years later, a British resident described how “good old English
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furniture” could be found in many houses in Funchal, some of it local copies. “And as the Madeira cabinetmakers have always been masters of their craft, the latter not to be despised,” he added—a reputation that lingers to this day.60

Taylor listed two shops where machetes, “both large and small,” could be purchased: from Rufino Telles in the rua da Carreira and from Vicente de Menezes in the calcada de Santa El. Prices ranged from 3,000 to 5,000 reis, or roughly $3 to $5. There were also at least four other fabricantes or artistas de instrumentos de corda active in Funchal in the nineteenth century, including Octaviano João Nunes da Paixão (1812–1870) on the rua de São Paulo; his son, João Augusto (also known as João Augusto Diabinho, 1850–1927); Augusto M. da Costa (1840–1915) on the rua de Joao Tavira (who made several of the instruments in the Stearns collection); and Antonio dos Reis Quintal on the rua do Tanoeiros.61

Lorina Liddell, sister of Alice, was photographed dressed in Madeiran lace and holding a machete by Alice in Wonderland author Lewis Carroll in 1860. Carroll’s photographs of Lorina and Alice are believed to be the earliest photographs of a machete. Courtesy of Princeton University Library.
An 1897 array of instruments made by Funchal luthier Augusto da Costa, including a five-stringed rajão (center), a machete (second from right), and a fish-shaped machete. Courtesy of Photographia Museu "Vicentes," Funchal.
British and American visitors viewed Madeirans’ love for music with a sense of complacent satisfaction, regarding it as a demonstration of “a high degree of cheerfulness, and contentment,” as Johann Forster put it in 1772. Madeiran music “is pleasing to the stranger chiefly because it indicates a cheerful, contented spirit,” agreed S. G. W. Benjamin in 1878. But the air of cheerful contentment tourists chose to see ignored an increasingly troubled island economy and chronic social problems. In the early part of the nineteenth century, Madeira and its wine trade prospered. “The increased demand for the wines of this island has so far advanced the prosperity of its inhabitants as to cause a total change in their mode of life, manners, and exterior appearance, both as to their persons and their dwellings,” an English observer wrote in 1821. By the next decade, however, prosperity evaporated when recession hit North America, the West Indies, and England, a downturn aggravated by the abolition of slavery in the British West Indies and throughout the British colonies in 1834. By 1842, Dix found Madeira’s commerce “exceedingly depressed. . . . Such a season of inactivity in business has never before been known. But for the influx of invalids, who come here to pass the winter months, and who expend, at the lowest calculation, $150,000 in Funchal, the suffering would be still greater.” This also was a period of great political instability in Portugal, a half-century of Napoleonic invasions, revolution, and civil strife between liberals and monarchists that did not end until 1851 and saddled Portugal, already one of the poorest countries in Europe, with crippling debts.

At the same time, what one historian has called “the pervasive tyranny of the island’s geography” began to be acutely felt. Only one-third of the mountainous island is inhabitable, and most farmland, in narrow poios or terraces that literally had to be carved out of its steep flanks, was devoted to vineyards. As a result, the island had never been able to grow more than half of the food it needed to sustain its growing population, which by the 1840s was believed to be approaching 120,000. Food shortages—and even famine—had been a regular feature of life throughout the island’s history. International recession, overpopulation, a British-dominated system of monocultural agriculture, and chronic political instability created a pervasive poverty that tourists often complained obscured the sublime scenery. “You no sooner put your foot on the stone stairs [at the landing in Funchal] than your winding way of ascent is beset by innumerable lazzaroni most offensive in habit and appearance, whose rabid importunities for alms will not permit you to say them nay,” J. W. Spalding complained in 1855. Aggressive beggars—men, women, and children—were “the great plague of Madeira,” de França lamented. “Before a child can utter any other word, its Mother teaches it to hold up its little hands and make a sound intended for ‘Dez reisinhos’—a little halfpenny—on the approach of a stranger.”

Poverty and famine triggered a massive wave of emigration in the 1830s and 1840s, despite the best attempts of the authorities to stop it. A trickle of emigrants to Trinidad in 1834 and to British Guiana (then known as Demerara) in 1835
became a steady stream in the 1840s as British sugar planters eagerly sought new sources of cheap labor in the wake of the abolition of slavery. O Defensor noted in January 1842 that the previous year had been "noteworthy for the large emigration to Demerara as a consequence of the invitation that would not have been accepted [by many] if their hunger and misery, necessary consequences of the stagnation of the economy, had not obliged them to." Painfully aware of the transformation of Madeirans from onetime slave owners to a cheap substitute for slave labor, government officials denounced emigration agents as "white slavers" and imposed fines and jail sentences in an attempt to stop the flow.

But the failure in 1846 of the potato crop—the chief source of food for most islanders since its introduction in the 1820s—raised the specter of real famine. That winter, while civil war raged on the mainland, food was so scarce that many Madeirans were reduced to eating sugar cane while the governor and British merchants scrambled to organize an international relief campaign. Although the worst of the food shortages were over by the following year, the crisis drove thousands of islanders overseas. So great was the exodus that in 1847, known as "o ano de fome," or the year of hunger, the Portuguese navy stationed ships off the island, and a shore patrol armed with bayonets was posted on the Funchal shoreline in a vain attempt to stem the tide of clandestinos—illegal emigrants—seeking to evade the heavy passport duty imposed by Lisbon. Although no reliable figures exist, Governor Jose Silvestre Ribeiro estimated that as many as forty thousand islanders fled between 1840 and 1850—as much as one-third of the island’s entire population.

As they fled, Madeirans took their machetes with them. "Fond of music, [Madeiran emigrants] enlivened their homes with the guitar, accompanied by the voice," wrote Henry G. Dalton in his 1855 history of British Guiana. "A small kind of guitar, called by them ‘michette,’ is a very favourite instrument, with which, playing the most pleasing airs, they often perambulated the street." By the end of the century, several Madeiran instrument makers were exporting machetes to emigrants in British Guiana, Trinidad, and other Caribbean islands. Rudyard Kipling also found machetes in Gloucester, Massachusetts, in early 1896 when he was researching the cod fishery as the setting for his next novel, Captains Courageous.

The 1846 famine presaged a tragic catalog of natural disasters visited on Madeira during the last half of the nineteenth century, each prompting new waves of emigration. By 1849, although the immediate crisis had passed, one English visitor wrote that he had "nowhere seen, not even in the worst part of Ireland, more intense misery than among the people of this island. A stranger is assaulted, wherever he appears near these destitute and overpopulated districts, with crowds of mendicants, whose emaciated and diseased appearance shows too plainly that their food is insufficient and unwholesome." In 1852, the Oidium Tuckeri fungus (known to the Madeirans as mangra) devastated the vineyards. "No one can form an adequate idea of the blasted appearance of the vines who has not seen them," wrote the Reverend John O. Choules, a visitor in 1853. "They look as if
they have been scorched by fire.” Wine production plummeted; by 1855, only fifteen of seventy shipping firms were still in business, and the island was again threatened with food shortages. The following year, an army regiment from Lisbon brought cholera to the island, triggering an epidemic that caused the deaths of an estimated seven thousand people. “The destitute condition of the island population cannot, however, be too strongly stated,” one visitor wrote that same year. “The truth is, the population of the island is disproportionate to the demand for labor. . . . Wages are insufficient to bare existence, and threaten to become lower.”

Efforts to rebuild the wine industry by introducing American grape stocks resistant to *Oidium* inadvertently resulted in another agricultural disaster—the introduction of *phylloxera*, a tiny aphid that once again devastated the vineyards. Production plummeted for a second time, from 16,000 pipes of wine annually to 3,500. By the spring of 1883, a *New York Times* correspondent reported, “Here the poverty has deepened into downright beggary. All the men you meet look limp and nerveless; all the women stunted, bowed, prematurely aged. Even among the children a rosy face or a well-knit frame is as rare as snow in July.” British consul George H. Hayward reported to London that the island “is not in a prosperous condition” and that without major changes in government policy, “it is useless to hope for any permanent improvement.”

By the late 1870s, many Madeirans likely would have agreed with Hayward’s pessimistic assessment of the island’s future. Forty years earlier, poverty-stricken Madeirans had left the island for Demerara “with nothing but a shirt, and trousers, and a carapuça [pointed cap] on their heads, but no shoes on their feet, and returned in satin waistcoats and gold chains, beaver hats and polished boots.” As had tens of thousands of islanders before them, many were looking for a way out—even if it meant taking a chance on a previously unknown destination called the Sandwich Islands, a tiny Pacific kingdom at the end of a six-month voyage.