



# Tanzania Domestic Sports Tourism Market Insights







This is the first report analysing sport domestic tourism market in Tanzania. The report provides information on sport tourism market and it's potential. This report can be used by government in stimulating sport domestic tourism as well as potential investors in developing the new sports domestic tourism products.

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## Executive Summary

The current report is devoted to domestic sports tourism conducted by UWANDAE EXPO 2019 in February 2019 in Dar es Salaam to the U-17 AFCON 2019 competition. The rationale was to understand and explore the growth to excellence for Tanzania domestic sports tourism services sector for realization of potential welfare of the domestic sports travellers in boosting country's economic growth through job creation, income generation and assorted investments. The report employed primary data collected during the U-17 AFCON 2019 Competition hosted in Tanzania on 14th April to 28th of April, 2019 together with one to one interview with various key sport tourism potential players. A sample of 355 respondents were included during primary data collection where by 344 participants were directly recruited during U-17 AFCON 2019 Competition and eleven participants were purposely selected from Tanzania Investment Council, Ministry of Sports, Soccer club, accommodation service providers and ticketing agency. To understand and explore the growth the current study focused on exploring market opportunities and characteristics of the domestic sports tourism with key lens on spending habits and characteristics. Tourists place of stay, spending and supportive infrastructure were specifically sought to be explored. Findings generally revealed that domestic sports tourism in Tanzania is still evolving despite of the sports events in the country being old. Most sports tourists comes from age group 25-34 years with most spectators coming from Pwani and Morogoro. Women are also part of groups in domestic tourism (27%). There is high spending on transport, followed by accommodation and food. About 49% (169 spectators) travel in groups with friends or family, 48% (165 spectators) travel alone. When in the area of destination, there is a high likeability of spectators staying with families/relatives due to lack of information on affordable accommodation and food options. Of those reported to spend a night in hotel or guest house reported to face affordable and varied hotel or guest house options near national stadium.

There is a need to improve domestic sports tourism supportive infrastructure. This should be through making investments in transport, accommodation and food. Opportunities available includes food shop varieties There is also an opportunity for prior transport arrangement, creation of attraction entertainments and nearby shopping places. There is a need also to regulate existing policies to attract local Tanzanian investors to invest in the domestic sports tourist industry.

## Introduction

In the Tanzania Tourism Policy 1999 women are mandated to develop tourism projects that contribute to tourism growth in Tanzania. Association of Women in Tourism Tanzania (AWOTTA) organized a successful first Tanzania Domestic Tourism EXPO, UWANDAE EXPO2019 in February 2019 in Dar es Salaam. AWOTTA is now in the process of organizing the second UWANDAE EXPO 2020 with the aim of making UWANDAE EXPO an annual event. Among the targeted domestic tourism service entrepreneurs at UWANDAE EXPO are those who serve residents of Tanzania travelling for the purpose of participation or for enjoying sports. This area is referred to as domestic sports tourism.

The power of sports, especially soccer or football to pull people from various regions of Tanzania is displayed in the overwhelming enthusiasm and love that people have for soccer tournaments in the country. Recently an AFCON match between Tanzania and Uganda played on 22 March 2019, saw the 60,000 capacity National stadium in Dar es salaam filling to above capacity and to a point where fans had to watch the soccer match outside the stadium through a big screen..

The fact that people travel for sports in and around the country, means that there are touristic activities namely travel, accommodation, food, visiting an attraction(s) and buying souvenirs among others, which all have a big potential of generating substantial income, jobs and investment .

The present scenario is, this potential is uncoordinated and unrecognized in the tourism arena. For so long, in Tanzania mostly the focus has been mostly on tourists who come from outside the country who visit to see wildlife heritage through national parks and climbing the famous mount Kilimanjaro which is the highest in Africa. Due to lack of recognition and lack of coordination, this lucrative tourism sector is poorly served leaving its growth to be stunted and poorly attractive.

## STATE AND ROLE OF DOMESTIC SPORT TOURISM

Many countries focus on international tourism but domestic tourism remains the leading form of tourism, representing 73% of total global tourism spend(World Travel Tourism Council)

**Domestic tourism** is a distinct tourism industry group where residents of a given country traveling only within a country. These tourists are easily managed as they share same language and culture with their host. Characteristically this is a relatively very large group compared to inbound travellers that have come from outside to travel within that country. Research suggests that domestic tourism demands peak up as more people raise into middle class, as they can afford to travel. In general world Tourism council estimate domestic tourists make 70 percent of travellers within their country and constitute 70% of bed occupancies in the various accommodation facilities meant for travellers.

**Sport tourism** is one of the largest and fastest growing segments of the tourism industry. Sports tourism refers to travel to play sports, watch sports, or to visit a sport attraction including both competitive and non-competitive activities (Osu Edu-Delby 1998). According to GSI 2017 report, the 70 world championships and multisport games in 2016 combined generated 1,517,900 bed nights from athletes, team officials, technical officials and media alone excluding overseas spectators and accompanied athlete family members.

Globally olympic games are major sports events in the world cup competition while in Africa soccer is a major sports events in Africa. Its accessible in every country of Africa, from national to subnational level. In a recent African Cup of Nation, held in Egypt it was estimated that about 50,000 football spectators travelled to Egypt for the tournament. Despite its potential in boosting economy and domestic tourism in Africa, there is lack of information on its market that hinder investment in the sector to attract more sport tourists.

### Domestic Sport Tourism: A case of Tanzania

in Tanzania, just as in many African countries, soccer is the major sports event. This type of sport in tourism arena is channeled more on advertising Tanzania tourist destinations to the international community. Despite its importance in brings in foreign currency and promote international recognition to other countries . But the focus should not stop just there! It is time to also see the pulling factor that such matches have on the domestic front for people who travel from different corners of Tanzania to come and see or participate in the processes of the tournaments.

Serving travel for sports within Tanzania is more or less informal characterized with inadequate customer care. For instance this area lacks tour operators to serve these domestic sports tourists. There does not exist a business model for sports tourism and sports tourism brand does not exist unless it is linked with visiting National parks after the matches. There are no sports calendars so that people can plan their visits. A large gap is in information sharing from the sports fraternity to the sports enthusiasts around the country. Information pertaining to bookings and where people can easily get tickets is lacking,

Surroundings of major sports stadiums including the National stadium lack restaurants of matching caliber to the people who arrive in the area for sports, there are no accommodation facilities of segmented society characteristics such as the high end international players, low end youth groups who are fans coming from regions and so on. There are no services like "childminders" so that a visiting person with small children is able to leave children outside the sports stadium during soccer matches. There are no inquiry desks to assist with finding things and places around the stadium. There are no amusement places like sports museums, shopping centers and the like to keep people occupied near the stadium as they wait for matches to begin. The sports stadiums are not marketed so that they become famous branding icons of their cities. The stadium are usable for religious concerts, national celebrations, conferences, car parking, office space and many other events that can keep them busy generating their own funding and pulling crowds throughout the year.



## Why This Report?

**Domestic sport tourism** in Tanzania just as in many other african countries is undervalued and that it's true impact is not fully understood and thus rarely captured. The potential to invest in sports tour operations, lies in information and knowledge of what the traveller needs which they would rather someone organize for them, a service that they will be willing to pay for. When it is easier, cheaper and more enjoyable to travel to see sports the result will be more people from the far regions travelling to see matches. This will raise income, jobs and encourage more investment in accommodations, transport, food, entertainment and many more.

**This Report** undertaken with the mission to facilitate growth to excellence for the Tanzania Domestic Sports tourism services sector so that the maximum potential welfare of the domestic sports traveller is realized, in turn bring about greater job creation, income generation and assorted investments.

This report use primary data collected during the U-17 AFCON 2019 Competition hosted in Tanzania on 14th April to 28th of April, 2019 and data collected in one to one interview with various key sport tourism potential players. A sample size for primary data was 355 where by about 344 participants were directly recruited during U-17 AFCON 2019 Competition. Eleven participants were purposely selected from

- Tanzania Investment Council
- Ministry of sports
- Soccer club
- Accomodation service providers
- Ticketing agency

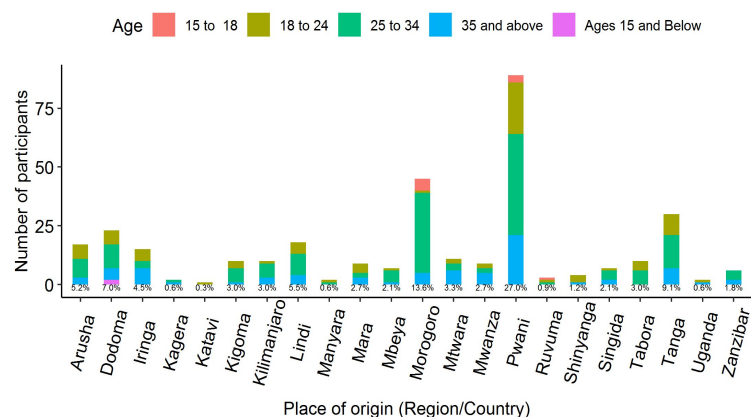
The report talk about

1. Tanzania Domestic sport tourism market potentials,
2. Market characteristics of Tanzania Domestic sports tourist.
3. Sports Domestic Tourism Demand and Supply
4. Domestic Sport Tourism Awareness Situational Analysis.

## Study Participants



● Soccer Fans 
 ● Soccer Admin 
 ● Business  
● Government 
 ● Media 
 ● Marketer



Source: Survey data collected during U-17 AFCON 2019 Competition, 2019

## Tanzania Domestic Sport Tourism Market Potentials

### Soccer A Major Sports Events In Tanzania.



It is estimated that in Tanzania there are about 25 Million active soccer fans. Each year about 30,000 Soccer fans travel to watch soccer events that are happening within Tanzania. Young African SC and Simba SC are the Tanzania top clubs. Often when these teams travel for a soccer match or play against, attract a good number of soccer supporters from all over the country.

Often, a soccer event that involves any of these teams pull out a large number of soccer spectators. For example, Simba and Yanga day event for 2019 it is estimated that pulled about 100,000 soccer fans and officials in total. Some of them travelled to Dar es Salaam purposely for these events.

According to information received during Interview, Morogoro receives many sports tourists than other regions due to its proximity with Dar es Salaam. Mostly are the day traveller soccer spectator. Younger African team, for example, travel with about 1000 soccer spectators for the matches played in Morogoro.

### **Tabora wasafiri 50 kuja kusherekea Simba Day**

TUESDAY AUGUST 6 2019

[Twitter](#) [Facebook](#) [LinkedIn](#) [Email](#)



Source: [Mwanaspoti news](#), August 6, 2019

With a motivation to visit a new destination, soccer spectators from Dar es Salaam are more likely to travel for soccer events compared to soccer fans of other regions. From data collected during Simba and Kagera sugar event in Kagera, about 80% of sports travellers came from Dar es Salaam.



# Tanzania Domestic Sport Tourism Market Potentials

## SPORT FACILITIES

Tanzania National Stadium where major soccer events occur is among of the largest and modern stadia in Africa. With capacity of 60,000 seats, car park for 600 vehicles, 114 closed-circuit television cameras, a VIP lounge and an extendable roof; the stadia has the potential to market



Tanzania as sports attraction destination. According to interview with stadium manager, the future expansion of the stadia will entail the construction of an indoor stadium, warm-up ground and a sports village.



Photo credit: Slide Visual, Posted at [facebook](#), January 2017

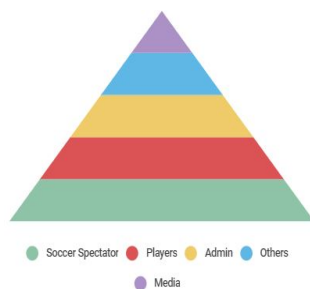
Jakaya Mrisho Kikwete youth park, non-profit, multi-sport facility located a few kilometres from the city centre used by tourists visiting Dar es salaam for evening walks around the soccer ground.

The park dedicated to providing sports and healthy lifestyle education opportunities to disadvantaged youth and the community potential can be used as a study tour destination.

## Market Characteristics of Tanzania Domestic Sports Tourist.

### Domestic Sport Tourism Participants

Globally, sports tourism include the spectator, team players, technical, officials, media and others who travel for business or networking purpose. For Tanzania, sports tourism include mostly the spectators, team players, technical and officials.



### Players and Officials

Teams in Tanzania premier league combined make about **350 domestic trips**, annual. In each trip, about 24 and 3 players and officials, respectively, travel with the team. Players and officials make a total of about **9450 sports travellers annually**. Most of their trips are overnights. On average they spend two nights at the destination. Depending on the budget most of the time, this group prefer premium accommodation.

### Soccer Spectators

Most of the soccer travellers are soccer spectators. The findings from U-17 AFCON study suggests that soccer spectators aged between 25-34 years are more likely to travel and watch games than fans from any other groups. It is suspected that the mentioned age groups have financial means and can allocate time for attending sports events when they need to. Most of these tourists often travel to watch soccer events that happen near to their place of stay. Despite that soccer sports is male-dominated, women also travel to watch soccer. About 27% of sport tourists during the U-17 AFCON tournament were women.

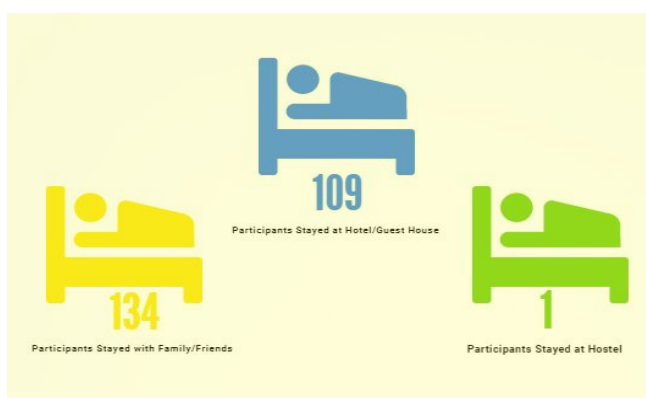


Close distance to where sports events occur influence the decision to travel. Findings from the AFCON Study shows that the majority of soccer tourists participated in AFCON -U 17 competition came from Pwani and Morogoro.

The findings from our study suggest that most of the soccer spectators prefer to travel in groups; however, due to lack of sports tour coordinators, they end up travel alone.

## Soccer Spectators Spending Habits

For the National league events, the average days of stays at destination is one night while for tournament events the average number of days tourist plan to spend in the destination is two to three nights.



### Where Do They Stay?

The research findings suggest that for soccer events that happen in Dar es Salaam travellers stays both in non-paying accommodation types (homes and friends place) as well as in paying accommodation types (hotels and guest houses).

It's assumed that for soccer events that happen outside of Dar es Salaam, most stays at paying accommodation or travel overnight back home. Dar es Salaam is a business capital of the country, with an influx of people from so many places across Tanzania living and working in the city makes it easier for people to know a person directly or indirectly to a point to be able to find accommodation. Since it is all about reducing cost, it is noticeable that regions with most participation lead in their people not staying in a hotel or guest houses thus they travel by large numbers.

### How Do They Spend?

Participants in our survey report high spending on transport followed by food and accommodation. For example, a participant from Uganda reports spending TZS 1,150,000 on transport only. The highest amount spent on food was TZS 180,000 spent by participants from Kagera, who stayed for two days.

Surprisingly, analysis on days stayed at the destination and spending shows that soccer spectators who stayed longer spend less compared to those who stayed only a few days. Why some stays longer and spend less? our intuition is that participants who spend more on average compared to the number of days pay for premium services on accommodation and transport which translate higher expenses while the others forced to live in more frugal alternatives for the days they spent in Dar es Salaam during Afcon U-17 tournament. This simply suggests the fans in the second group come financially prepared than in the first group.



## Sports Domestic Tourism Demand and Supply

### Accommodation

Quality and proximity of accommodation said to be an important factor in the decision to travel to attend a sporting event. The quality of hotel accommodation includes the size of the room, age of the property and other facilities such as hotel restaurants, pools, and fitness centres (Shonk and Chelladurai, 2008).

The findings show that many domestic sports spectators prefer low-cost accommodation as most pay for accommodation from their own pockets.

Lack of information on how to find the best accommodation results to the spectators pays so differently when it comes to the price of accommodation.

We surveyed various accommodation facilities close to the national stadium and city centre to find out the booking or check-in patterns of people arriving for sports so one can compare the accommodation types against choice by sports travellers as well as quality. Close to the national stadium there about five executive hotels and one hostel that could serve sport tourists. Accommodation price range from TZS 25,000/= to TZS 80,000/=.

In Dar es Salaam city centre, high-end hotels surveyed report that they rarely serve sport team players and their administration. They tend to focus on business travellers. Their accommodation price range from TZS 160,000/= to above. It is sports personnel who approach the hotels but hotels do not go out looking for opportunities to host visitors of sports.



### Perceived Quality of Accommodation Services



The quality of service provided along the national stadium including food and accommodation is of low quality with no appeal to attract sports travellers. Indeed even other potential users of these hotels such as those participating in festivals like JAMAFEST and other national celebrations, in general, do not use the nearby hotels. Common food is chips that can easily be accessed along with the stadium open spaces.

The accommodation facilities acknowledged the potential for serving sports tourist and even made observations that there was great potential for water sports in Dar es Salaam because of the proximity to the Indian ocean. But they have no formal way or package to cater for the accommodation of these sport tourists in the region. Hence they receive few tourists.

## Sports Domestic Tourism Demand and Supply

### Ticketing

The most competitive soccer events attract high number of soccer spectators and the risky of event to sold out early is higher. Lack of timely information on ticket price and where to buy said to be barrier in deciding to travel.

There is one ticket supplier in Tanzania. Ticket can be purchased online and to agencies who are everywhere in Tanzania. The system allow seasonal ticket buying, however frequently change of events date and culture of buying ticket at late hours make the feature inactive.

According to interview done with the supplier, the culture of buying ticket at late hours is due to the following

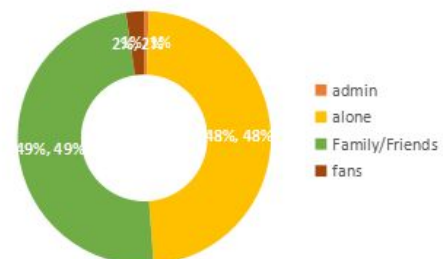
- Lack of secure income
- Fear to lose information saved on phone either from theft of human mistake.
- Poor quality of ticket paper - tend to fade overtime.

Due to high demand of ticket at late hours, the system tend to jam and this said to discourage those who plan to travel for the events.

### Transport



TRAVEL WITH



Participant interviewed preferred to travel in a group in arranged transport. According to the findings, participants perceive that travelling alone is costfull compared with travelling in group.

For matches happening in Dar es Salaam, participants feel that if there is an arranged transport will not only help them to save travelling cost but also save time from traffic jam.

Our findings suggests that currently there no transport suppliers who have package for sport tourists. For those who travel in group arrange their own transport and book buses/coaster that makes trips to the respective areas,

About 49% of participants interviewed travelled in groups with either family member or friends.

### Entertainments/Other Attractions



Studies shows that the availability of sport experiences or sport attraction enhance destination offers and experiences for visitors and is effective way to encourage visitors to increase spending outside of sport events. Such events include opportunities to meet players, before or after event activities, sport education opportunities, shopping malls, sports museum and special gathering places for event attendees.

Our study found that soccer events in Tanzania offer no other attractions more that soccer matches. This was raised in several interviews that we did.

We learnt that Live screening of soccer events has negative impact on domestic travel to watch such games. This, coupled with lack of any other attractions at the National stadium besides the soccer match, many would be travellers and spectators prefer to stay at Television screens at home. For shoppers, unfortunately there is nothing to shop while attending the events except sportswear (tshirts) laid on the grass and local vendors walking with bites and drinks along the grounds.

### Weather

May 25, 2019 / Football

#### Mvua zazuia sherehe za Simba Dar

Kutokana na mvua kubwa kunyesha leo jijini Dar es Salaam katika mchezo wa leo ambao ulikuwa maalumu kwa Klabu ya Simba SC kukabidhiwa Kombe la Ubingwa leo zoezi hilo limeahirishwa mpaka wiki ilayo Mei 28.

Simba SC sasa atakabidhiwa Kombe hilo kwenye mchezo wake dhidi ya Mtilbwa Sugar utakaochezwa Jumanne ilayo Mei 28 kwenye Uwanja wa Jamhuri mkoani Morogoro.

Msemaji kwa Klabu hiyo Haji Manara amesema kuahirishwa kwa sherehe hizo kumetokana na mvua hizo zinazoendelea kunyesha jijini Dar es Salaam.



unpredicted bad weather said to have a negative experience to sport tourism. Globally, weather is an important factor that pull sport tourism given the fact that most of sport events are outdoor events.

In Tanzania rainy occurrence tend to affect the event schedule. This said as barrier to travel to majority of sport tourist, avoiding disappointment of travelling and find out the match has been rescheduled due to weather.

Having facility that accomodate all weather will be and ideal in attracting more sport tourists.



## Domestic Sport Tourism Awareness Situational Analysis

Sport tourism is about understanding how to transform sport event participation into tourism experience and to convert tourism destination into sport practice venue. To gain stakeholder awareness of this practice, we did about 10 interviews with key decision makers responsible in transforming sport event into tourism experience. The main aim was to understand how they transform their sport participation into sport tourism experience. Their perspective are presented in the following themes:

### **Sport Tourism Administration..**

Stakeholders think that development of sound sport tourism requires clear policies and standards set by government specific for promoting sports events tourism. Government should ensure the sport policy and standard set encourage establishment of supportive infrastructure to enhance sport tourism experience. This includes government setting incentives in development of sport tourism infrastructure.

According to stakeholders, current Tanzania Sport tourism lack supportive infrastructure necessarily to transform sport participation into tourism experience. These include lack of standard sport facilities (full of leisure parks, parking availability, hygiene, weather accommodative facility); lack of ease and speed transport means to the sport venue, lack of other sport attraction facilities, lack of standard and affordable accommodation.

We learn that existing tax policy; discourage investors to establish necessarily infrastructure that can transform sports events into tourism experience. For example government does not offer import tax exemption in commercial sports and sports goods. This results in the need to rise substantial initial capital if one should invest in establishment of sport tourism infrastructure.

Lack of accessible centers to establish sports venues was mentioned to be a challenge in development of sports tourism. In Dar es Salaam for example, the national stadium is a sports attraction with big potential. It is located 7.5 Km via Kilwa road from city centre. Stadium is set to be a sport tourist village– an excellent step taken in development of Dar es Salaam as sport tourism destination. However we learn that the land has not been public released hence potential investors cannot use it.

In addition to policy to attract sound infrastructure, Stakeholders suggest that, government should set favorable policy necessary to allow relevant stakeholders to organizing sport events. This will boost up participation of many talented stakeholders in organizing competitive sports events.

## Domestic Sport Tourism Awareness Situational Analysis

### **Partnership: A case of SportPesa, Selcom, Diamond Tiffany.**

Developing a successful and unforgettable sport tourism experience requires strong partnership both from public and private sectors.

There is a good established relationship between the private and public sector in hosting International soccer events. We learnt that government through TFF work with various stakeholders such as SportPesa, Selcom and Diamond Tiffany Hotel.

TFF works with SportPesa to attract big world class soccer clubs for soccer tournaments in Tanzania, This is good and key step in fuelling sport tourism. For example through this partnership, Tanzania was able to host Everton and Kenya's Gor Mahia match happened in Dar es Salaam this year. The Ministry of Natural Resources and Tourism is usually invited to participate in planning the hosting of events with international content so that the event may get good exposure in being advertised. Despite that the focus was more on promoting Tanzania destination to the international market but the event attracted domestic traveller as well.

In ensuring efficiency in ticket sale, TFF works with [Selcom](#) to provide service of ticketing. Despite that, the partnership was formed on increase efficiency of revenue collection but provide opportunity for sport traveller to buy from their origin place.

TFF partners with Diamond Tiffany in providing accommodation service to the international team visiting Tanzania for soccer events.

Despite that, the mentioned partnership somehow bring positive outcome in domestic sport tourism but this is not clear manifested in the partnership hence difficult to measure its direct contribution in boosting domestic sport tourism.

### **Innovative Sport Tourism Products.**

For a successful and unforgettable sport tourism experience it's crucial to think about innovation and creativity in sports event production. UNWTO suggest that for destination to win in delivering sustainable economic and social sport tourism has to foster the 'inner sport tourism entrepreneur'.

In Tanzania, innovation particularly in soccer Tanzania has not been paid enough attention. There few innovative tourism products introduced into the market and none of it target sport tourists. This bring a call to innovators in Tanzania to come with disruptive ideas to make the sport events unforgettable.

Our research findings suggest that lack of innovative and interesting activities during sports events hosted in Tanzania discourage spectators to travel for the events and decide to sit for live streaming and enjoy the game.

One of the sport manager brought this up during one to one interview, according to him lack of creativity in soccer affect ticket revenue as many people prefer to watch the match live on TV. He said that after realizing this, as team they are now looking for disruptive ideas to attract more soccer spectators.

On other side, the innovation ecosystem in Tanzania has not realized the potential of sport tourism yet in coming up with innovative product that will make travelling and sport entertainment easy and unforgettable.

## Domestic Sport Tourism Awareness Situational Analysis

### Sport Tourism Marketing

Developing a successful and unforgettable sport tourism experience requires strong partnership from sports organization committee and tourism organization.

Unfortunately in Tanzania both parts have not realize the potential of this tourism segment.

Tourism organization have not yet embody sport tourism in their business and hence no effort has been done to seek partnership with sports organizations. Similar to sport organization.

For successful marketing of the sport tourism, it needs strong collaboration and coordination between the sport tourism organization and sport organizer committee.

Tourism organization here include tour operators, accomodation and food suppliers, travel agencies, government tourism departments and other suppliers.

### Sport Tourism Operation

Successful operation and management of sport tourism require honest effort from the whole sport and tourism value chain.

The Tanzania domestic sport tourism is uncoordinated and underutilized.

The profitable operation of the sector will require the following conditions:

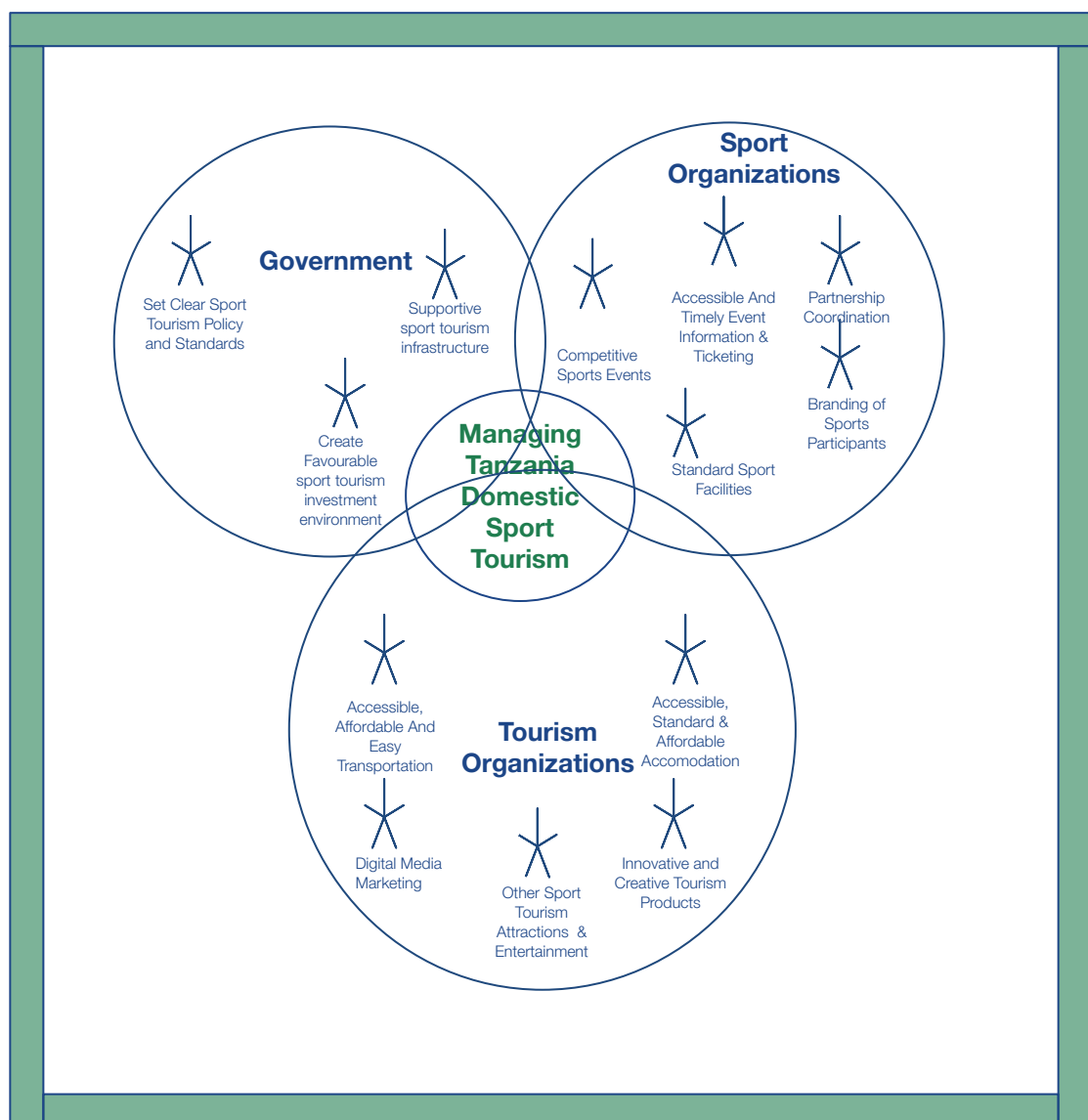
- Reliable and affordable transportation.
- Strong collaboration and partnership between tourism and sport organization/businesses.
- Competitive and well marketed sports events.
- Reliable and easily accessible of events information and sports calendar.
- Reliable and user friend ticketing system.
- Available, accessible and affordable standard accommodation nearby sport facilities.
- Intensive research on sport tourists needs.



## Managing Tanzania Domestic Sport Tourism Model

To reap the benefit of sport tourism, first we need to focus on selecting areas that will be an ideal destination to attract high number of sport tourist. Current, Dar es Salaam having a good number of favourable facilities and conditions can be ideal in attracting high number of sport tourist.

Effective management of Tanzania sport tourism require strong coordination between the key players. Every player has a role to play. The figure below presents proposed model for effective management of the sector.



## Acknowledgment

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