

*Full Length Research Paper*

# Household education expenditures in Turkey for higher education exam preparation

**Polat Husrevsahı Selda\* and Yeliz Öztürk**

Department of Educational Sciences, Ereğli of Education Faculty, Zonguldak Bulent Ecevet University, Turkey.

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The study explored the household education expenditures for higher education exam preparation in Turkey. The study employed the case study design, one of the qualitative research designs. The study group consisted of families whose children were preparing for the higher education exam. The families were living in the city of Zonguldak. While determining the study group, criterion sampling technique and snowball sampling technique were used. The study data were collected using a semi-structured interview form. The study showed that households had education expenditures for higher education exam preparation. These expenditures were in the form of exam books and private teaching institutions/private lesson expenditures. Educational expenditures of households affected the economic, social, and individual life of the household. This effect was in the form of postponing or abandoning the basic needs of the household. Families recommended a change in the education system in order to reduce/eliminate household education expenditures. In a period when neoliberal education policies are on the agenda, it can be stated that the contribution of households to education expenditures will continue. Pulling away from the marketized examination approach and strengthening public education expenditures instead of household education expenditures are not limited to education policies, but also depends on the change in political and economic policies.

**Key words:** Higher education, education expenditures, household education expenditures, neoliberalism.

## INTRODUCTION

Thinking about the question of "Do we have to have exams?" necessitates considering education at the global level together with different historical and social conditions. Since the past, education has been made sense of within the determination of economic and political conditions. The belief that economic development will be achieved with education, which emerged after the Second World War, brought the economic role of education to the agenda. As it is known, Human Capital

Theory (IHC) is the theory in which education is addressed with an economic approach. According to the theory, investment in education increases the individual's capacity and productivity. Individuals who increase their capacity in return increase the economic development by increasing national income (Schultz, 1971; Woodhall, 1994). In the 1960s, also known as the planned development period, education began to be designed to realize the sustainability of development and to be

\*Corresponding author: E-mail: seldapolat4@gmail.com. Tel: 00905433252377.

considered as a way to increase other human developments. In other words, while development, the magic word of the period, was identified with economic growth to a large extent, it was predicted that social welfare would be achieved with growth, as well as a modern social structure based on human rights dominated by democracy. In this context, national governments and national planning institutions have adopted the discourse of education and economic growth in order to benefit from the assistance of international organizations. Education has been regarded as public investment in the context of education expenditures.

In the 1970s, the golden years of planning started to decline, as expected, development could not be achieved in developing countries, and the increase in unemployment and poverty continued. Parallel to this, the objections that planning hinders intervention in the economy and hence freedom of enterprise started to shake the planned development. The problem of economic growth naturally expanded to include social aspects, and basic human needs began to be a problem for nation-states and the international community (Chabbott and Ramirez, 2000).

In this new period named globalization, which started in the 1980s and has continued up to the present, within the framework of neoliberal policies that started to replace developmental policies, public expenditures were reduced with education becoming an economic activity and public support began to be expressed in expenditures. Similarly, as a result of neoliberal policies in Turkey, privatization of schools was increased, the public spending on education was reduced, education services and services within education such as food, housing, sanitation, transportation, and exams were put on the market (Polat, 2013).

One of the reasons for the reduction of public expenditures, among the neoliberal policies implemented, is the argument that the individual is self-sufficient and must meet his/her economic/social needs (Kerman, 2006:53), while the other is that the contributions to education increase the quality of education (Polat, 2013). These discourses, on the one hand, make it easier for the public to contribute to education, on the other hand, they legitimize public's support of education, which is actually a public service. In reality, the public contribution to education means that education expenditures are covered by the households. Household expenditures are defined as the private cost of education (Ünal, 1996). The education expenditure or private cost of education consists of direct, indirect, and waiving costs. Direct cost refers to household expenses of a child such as school fees, books, stationery, uniform, school bag, and transportation. Indirect cost refers to expenditures on food, shelter, and clothing. Finally, the cost of waiving refers to an individual giving up earning income by attending an educational institution instead of working in a job where he/she can earn income by having an

economic activity. In this case, the waiving cost of attending an educational institution is the income that can be obtained by working in a job (Yolcu, 2011,13-14).

Globally, 20% of education expenditures are covered by households. The contribution of households to education in low-income countries is 29%, whereas this is 18% in high-income countries (UNESCO, 2019). Household education expenditures in some countries are 67% in Cambodia, 59% in Uganda, 54% in Guatemala, 49% in Peru, 30% in Vietnam 30%, 22% in Turkey, 14% in the UK, 12% in Italy 12, 8% in Canada 8%, 5% in Switzerland, 4% in Belgium and Denmark, 1% in Luxembourg, Austria and Cuba 1%, and 0% in the Netherlands and Sweden (UNESCO, 2019). These data show that the education expenditures of households are low in countries with high-income levels. This should be interpreted as low and middle-income countries having lower education expenditure and having a higher burden on households (Huebler and Legault, 2017; EIR, 2020, 31). Considering the income level of households in low- and middle-income countries, it will be inevitable that households will limit other expenditures in order to meet their expenditures on education.

Coming back to the question of "Do we have to have exams?", it can be stated that exams, which are among the education expenditures, have turned into an industry. For example, the preparation and evaluation of standardized K-12 exams in the USA is a multi-million dollar industry and standardized K-12 exams make a sale of approximately 1.5 billion dollars per year (Gluckman, 2002, as cited in McLaren, 2011, 70-71). Furthermore, Ollman (2010) explained why exams exist: Capitalists want schools to equip young people with the necessary knowledge and skills in line with the interests of the capitalists. However, besides such knowledge and skills, capitalists also want schools to teach young people the beliefs, attitudes, feelings, and habits necessary to obtain them easily. They need all of this not only to maximize profits but also to assist in reproducing the social, economic, and even political conditions and related processes enabling them to sustain profits. The entire capitalist system will collapse without workers, consumers, and citizens who have well memorized and accepted their roles in these processes. This is where the test culture has become indispensable, especially in the context of the behavioral and formal preconditions of capitalist direction (as cited in Demiral, 2016).

Higher education level is an important education level as it determines the job, position, and living conditions to be acquired afterwards. Therefore, it is possible to state that this determinant also has a significant share in household education expenditures and this share will increase more in the coming years. Although there are studies on household education expenditure in Turkey (Tural, 1998; Tansel and Bircan, 2006; Köktaş, 2009; TED, 2010; Duman, 2012; Yolcu, 2011; Algur, 2019; EIR; 2020), the lack of studies on the household education

expenditures during the higher education preparation process was the reason behind the present study. Accordingly, the study sought the answers to the following questions:

1. What are the household education expenditures during the higher education exam preparation process?
2. What is the effect of household education expenditures on the lives of households during the higher education exam preparation process?
3. What kind of solutions should be produced in order to prevent household education expenditures during the higher education exam preparation process?

## METHOD

### Study design

This study employed the case study design, one of the qualitative research designs. A case study allows one or more cases to be examined in detail. It investigates all the factors related to a case with a holistic approach, thus enabling the study to focus on how they affect the case in question and how they are affected by the case in question (Yıldırım and Şimşek, 2008, 77). This study was designed as a case study since the study aimed to address the household education expenditures made by families for their children with a holistic approach and focused on the expenditures' effects on the households.

### Study group

The study group consisted of a parent from 15 different families of 12<sup>th</sup> grade students (seniors) who were preparing for the higher education exam in the 2019-2020 academic year. In this context, mothers or fathers from 15 families living in Zonguldak participated in the study. While determining the study group, criterion sampling technique and snowball sampling technique, two of the purposeful sampling methods, were used. The criterion determined for the study was to be "making additional expenditure" during the preparation for the higher education exam. The reason for using the snowball sampling technique was based on the idea that parents who knew each other through their children could form a rich source of information pool on the subject.

The mean age of the participants was 46.33 and their mean income was 5.541 TL<sup>1</sup> (Turkish Liras, TL). Two of the parents had three children, whereas the others had two children. Seven of the participants were housewives, five were teachers, one was a nurse, and two were retired. Participants' demographic information is presented in Table 1.

### Data collection tool

The study data were collected using a semi-structured interview form. Before the development of the interview form, the literature was reviewed, the basic concepts determined related to the subject were associated with the purpose of the study, and a question draft was formed. The draft form was submitted for expert opinion, and the interview form was finalized in line with the opinions received. Six questions were included in the interview form. The pilot application of the form was conducted with two families who were

known by the researchers. After this pilot application, it was decided that the interview form was suitable for the study. The interview form also included questions about the participants' personal information (profession, age, income status, number of children) in order to get to know the participants more.

### Data collection

The data were collected face-to-face by the researchers between March 2020 and May 2020. The face-to-face interviews started with a parent of a student known by the researchers. With the name and contact information obtained from the first parent, other parents were reached using the same method. The interviews were carried out on a voluntary basis. Appointments were made with the parents before the interviews, and the interviews, which were recorded on a tape recorder, were conducted at the place and time determined by the parents. The interviews took between 45 and 60 min. During the interviews, researchers took care not to guide the parents. Different issues were talked about before the interviews so that an interview atmosphere was created. After the interviews, the transcripts of the responses received from the parents were sent to them by e-mail, thus preventing any erroneous data.

### Data analysis

Content analysis was used to analyze the data. In content analysis, data are summarized and interpreted according to predetermined themes (Yıldırım and Şimşek, 2008, 227). In the data analysis of the study, first, the study questions and the answers given by the parents were categorized and a categorical (thematic) framework was formed. Then, the data were processed according to this categorical framework. Afterwards, the findings were defined and interpreted. In order to facilitate comprehension, the responses to the questions were tabulated as frequency and direct quotations were also included from time to time. While giving direct quotations, each of the parents participating in the study was given a code with the letter "P" meaning "participant" according to the order of the interviews (such as "P1"). Since the participants specified more than one category, the sum of the frequencies in some categories was more than 15, the total number of participants.

### Validity and reliability

The assessment of the credibility (internal validity) of qualitative research is carried out using the methods of long-lasting interaction, depth-focused data collection, triangulation, expert review, and participant confirmation. While assessing the transferability (external validity), detailed description and purposeful sampling methods can be used, whereas consistency analysis method can be used while assessing consistency (internal reliability) and confirmation examination method can be used while assessing verifiability (external reliability) (Yıldırım and Şimşek, 2008, 264-272). Based on these, in the study, two expert opinions were taken for consistency (internal validity) and the study was reviewed according to the feedback received from the experts. A detailed description is included for transferability (external validity) in the study. As is known, in the detailed description, raw data are presented in their original form without any comments. Thus, readers can draw their own conclusions from the study (Yıldırım and Şimşek, 2008, 270). Therefore, direct quotations are presented in the study.

Qualitative research does not seek reliability like quantitative research, since it is based on the assumption that events and phenomena occur depending on the environment and time and therefore it is not possible to repeat them exactly. Reliability in

<sup>1</sup>During the period of the study, the average of 1 \$ was 6.40 TL

**Table 1.** Demographic information of participants.

Participant	Age	Profession	Family's total monthly income (TL)	Number of children in the family
P1	42	Teacher	6.0000	2
P2	46	Teacher	9.0000	3
P3	48	Housewife	5000	2
P4	39	Housewife	4200	2
P5	42	Housewife	6.000	2
P6	47	Nurse	6000	3
P7	51	Retired	10.000	2
P8	51	Teacher	6.000	2
P9	55	Housewife	6.000	2
P10	44	Housewife	1.520	2
P11	44	Teacher	10.000	2
P12	44	Housewife	1.900	2
P13	41	Housewife	--	2
P14	45	Professor	9.000	2
P15	56	Retired	3.500	2

qualitative research is also not a criterion for validity. For this reason, qualitative research attaches importance to consistency (Yıldırım and Şimşek, 2008, 271). In consistency, the aim is to determine whether the researcher is acting consistently in the research-oriented activities he/she conducts. Therefore, it is necessary to correlate the study data with the results. In the present study, the study data were compared with the results again after the study was completed to ensure consistency (internal reliability). In addition, for the reliability of the study, Miles and Huberman's (1994) reliability formula was used ( $\text{Reliability} = \frac{\text{Number of agreement}}{\text{Total number of agreement} + \text{Number of disagreement}} \times 100$ ) and the calculated result ( $43 / 52 \times 100 = 82.69\%$ ) was accepted as sufficient for reliability (Miles and Huberman, 1994; Şencan, 2005).

As it is known, the concept of verifiability (external reliability) is used instead of objectivity in qualitative studies, as in quantitative studies, objectivity is not met completely (Yıldırım and Şimşek, 2008, 272). In the study, it was decided to keep the raw data, voice recordings, and data collection tool for verifiability (so that other researchers and external experts can compare the study findings and results with the same data if necessary).

## RESULTS

Under this heading, the study findings are presented separately according to the study purposes. The themes, sub-themes, and codes formed regarding the types of household education expenditures during the higher education exam preparation process are given in Table 2.

As can be seen from Table 2, household education expenditure types during the higher education exam preparation process are expenditures for supplementary resources, private teaching institutions, and private lessons. All of the participants stated that they spend money to buy supplementary resources. P14, one of the participants, explained this by saying, "He went to a

private teaching institution, he used supplementary resources. He took private lessons. He did all three. He had gone to the private teaching institutions in previous years. He had rarely taken private lessons but he took in the last year. He only took private lessons for certain subjects". The aforementioned supplementary resources consisted of resources containing subjects books, test books, and mock exam books. P5 described the expenditure for the supplementary resources by saying, "Well, you should see the house right now ... The house is full of books right, even the wardrobes. We are constantly buying. I mean, we buy and buy. There is no limit to the amount of money we give to the books". Another participant (P8) drew attention to the amount of education expenditure made and said, "... You buy a test booklet for 40 TL. For example, the child does it in an hour or two hours. Imagine solving one or two every day. I mean, even the daily cost is like 150-200 liras. These are only mock exams only". Another participant (P13) talked about how the expenditures exceeded the family and went beyond to relatives. She stated, "My son gave 200 and 300 liras to books in a month. So, he gave his pocket money to books. We bought books with the allowances he received from his aunt, grandmother, and grandfather".

In addition, all of the participants stated that they spend money on private teaching institutions. In these centers, there are classes of 15-20 students as well as classes of five students, and prices vary accordingly. One of the participants (P4) explained how the family budget was strained because of the institutions and said, "Well, we send him to a place like a teaching institution, like a study center. We have a monthly installment there. This is half our monthly salary. It is not possible for us to afford this

**Table 2.** Household education expenditure types.

Theme	Sub-themes	F	Code
Expenditure types	Supplementary resources	15	Buying subject books
			Buying test books
			Buying mock exam books
	Private teaching institutions	15	Getting courses from private teaching institutions
	Private lessons	10	Getting individual lessons

**Table 3.** Effect of household education expenditures on the household life.

Theme	Sub-themes	F	Codes
The effect of household education expenditures on the household life	Economic	8	Choosing cheaper food Reducing/postponing household expenditures
	Socio-cultural	8	Postponing the needs of the house Not going out for recreational purposes Not to buy books other than textbooks Not to go to movies, plays, etc. Not to go on vacation
	Individual	4	Not to make individual spending Postponing individual needs Self-sacrifice Not to buy new clothes

space with our salary. My family is helping a little, my husband's family is helping a little. We try to manage it this way. He really wanted to go to a private teaching institution, and we sent him. We couldn't send him before, but we sent him this year because there is an exam this year."

Another type of education expenditure is getting private lessons. 10 of the participants also stated that they spend money on private lessons. On this issue, one participant (P6) said, "We started private lessons in the past years. We took private lessons from Math. Apart from those, we were buying supplemental resources. He is a senior now. Last year and the year before he always took private lessons from Maths." Similarly, P5 said: "We hired a private tutor for three subjects. So, I spend money on three private tutors. Plus, we signed up for the private teaching institutions. That money went to waste because of this pandemic."

The themes, sub-theme, and codes formed regarding the effect of household education expenditures on the life of the households during the higher education exam preparation process are presented in Table 3.

As can be seen from Table 3, household education expenditures during the higher education exam preparation

process affected the life of the households in economic, socio-cultural, and individual aspects. One participant explained this by saying, "We retrench, for example, we retrench our social life. I mean, from our clothing expenses, food expenses. I mean, we retrench from many things. So, we try to be restrained in everything we need to buy for home".

About half of the participants stated that they were economically affected by education expenditures. The effect of expenditures on households could be seen in participants choosing cheaper items or postponing household needs. On this issue, participant P3 stated, "First of all, we have been trying to find the cheapest of whatever need for two years. This is a time when we need to be economic. You only understand when you go through this, but you still succeed. You retrench, you travel less, you are more economical in your shopping. You give up stuff for the house that you really want."

Approximately half of the participants talked about how the expenditures affected their socio-cultural life. The participants stated they did not have a socio-cultural life because of the expenditures. For example, participant P5 said, "We didn't have weekends, we couldn't do anything. Social activity is zero. I haven't gone to a movie for years.

**Table 4.** Participants' solutions to reduce/eliminate household education expenditures.

Theme	Sub-themes	F	Code
Participants' solutions	Exam system	11	The exam system should be changed/eliminated
			University should be chosen according to high school scores
	Educational content	10	There should be extra courses for exams in high schools
			The content of high school education should change The senior year should be exam oriented

The most luxurious thing you can do is going to a picnic or cinema. Did we retrench? Yes, we did."

The individual effects of the expenditures manifested themselves as postponing the needs of family members, not making individual spending, and not buying new clothes. On the individual effects of the expenditures, participant P10 said, "We retrench from ourselves of course. We cut from everything. While we go to the market, we retrench, we can't look for new clothes for ourselves anyway." Another participant (P9) also said, "You don't retrench from food, but you retrench individually. I mean, you don't get to have a private life, you're attached to your child. You have to be economical. You even postpone some things, even your debts. I mean, we did all these, frankly, because my husband only has a pension. So, we postponed some things. We postponed them until after the exam because there is nothing to do. The system demands these."

The theme, sub-themes, and codes formed regarding participants' solutions to reduce/eliminate household education expenditures during the higher education exam preparation process are presented in Table 4.

The participants were asked about their solutions to reduce/eliminate household education expenditures. As can be seen in Table 4, these solutions were about the exam system and the quality of education. More than half of the participants believed that the expenditure issue was about the exam system. According to them, changing/eliminating the exam system, universities accepting students based on their high school scores, and providing extra courses for the exam to students in high school would solve the problem. On this issue, participant P4 said, "Of course, it would be better without the exams, but I don't know how that may happen actually. My daughter wants to be a doctor. If everyone could get into the department they want without taking the exam, there would be no exam. If there is to be an exam, then something must definitely be done to prepare the students for the exam".

The participants who associated the solution with the quality of education believed that the quality of high school education should be increased and the senior year of high school should be organized as a preparation year for the exam. P15 talked about this and said, "... how can I explain, I want the education in the school to

be a little more information-based. If the education is more in the form of preparation for the exam and if it provides more information, there would no expenses on private teaching institutions."

## DISCUSSION

In this section, the findings of the study that examined the household education expenditures during the higher education exam preparation process in Turkey are given.

The study put forth that households spend money on supplementary resources for exams, private teaching institutions, and private lessons during the higher education exam preparation process. Almost all households spend money on test books, which are supplementary resources. This result is similar to other study results. Since there is very little study on this type of expenditure for exams, an exact comparison cannot be made. However, the study conducted by the Turkish Statistical Institute (TÜİK, 2013), one of the first studies on the subject, revealed that 19.8% of the Turkish households' education expenditure is allocated to books. Another study determined that the amount of spending of households for tests, books, magazines, and similar materials for exam preparation is 2.160.968.761 TL in a year (TED, 2010, 51). Based on these results, it can be stated that households' spending on supplementary resources became widespread. This finding supports the Turkish Publishers Association (TPA) data. According to TPA (2020) data, exam preparation books has the 43.5% of the book market in Turkey, and the share of the financial sector is 389 million US dollars. It can be said that the exams are indispensable in these markets with huge profits.

In addition, the present study revealed that all of the households spend money on private teaching institutions/private lessons. The related literature (TED, 2010; Ulusoy, 2012; Köktaş, 2009; TÜİK, 2006) put forth that the households spend money the most on teaching institutions/private lessons. For example, the 2002 TÜİK study (2006), which was one of the first studies on the subject, determined that 8% of the education expenditures made by the households in 2002 were the expenditures for private lessons. In another study, approximately

9.350.164.083 TL (TED, 2010) was spent on teaching institutions/private lessons (TED, 2010).

In Turkey, 49.3% of parents believe that their children cannot get good scores on the university entrance exam without going to a private teaching institution (TED, 2010). In the literature, the concept of "shadow education" is used for out-of-school education activities such as private teaching institutions/private lessons. This concept was introduced to the literature for the first time in the early 1990s by Bray (2010) with studies on extra-school private lessons in Malaysia, Japan, and Singapore (Bray, 2010). According to Demirer (2016, 89-90), the shadow education system, which is a kind of shadow of the education system, creates a "parallel universe" for all parties involved in education. On the one hand, one of these two universes includes students attending schools to get a diploma. On the other hand, the other universe includes students getting an education from private teaching institutions/private lessons. The biggest effect of this parallel universe is that it transforms concepts and relationships such as students, teachers, and parents (Demirer, 2016; 89-90). In other words, this transformation, according to Demirer (2016), should be interpreted in today's neoliberal understanding as transforming individuals who serve to maintain the capitalist relations with shadow education within the examination system.

Furthermore, the present study put forth that the life of the household is affected economically, socio-culturally, and individually by education expenditures. There are some variables determining the education expenditures made by households. These variables are the subject of different studies (Tilak, 1988; Adem, 1997; ECR, 2005; Tomul, 2008; Yolcu, 2011) and are related to elements such as family income, education level, family culture level, and region of residence. These variables that affect education expenditures will also bring along being affected by these expenditures. Among these variables, income is an important variable. Studies revealed that there is a direct proportion between income level and education expenditure (Tilak, 1988; Köktaş, 2009; Kahveci, 2009). Studies conducted at the country level also confirm this. For example, the education expenditure of households in Canada in 2008 was on average 2,179 \$. The income distribution given differs according to the income brackets. Accordingly, the average expenditure of the household in the lowest income bracket is \$ 415 per year, while it is \$ 8,580 for the upper-income bracket (as cited in Yolcu, 2011). In Turkey, 63,6% of the household education spending is done by 20% of the highest income segment, whereas 2% of the household education spending is done by 20% of the lowest income segment (TÜİK, 2019). A similar situation exists for the socio-cultural variable. As it is known, Bourdieu explains with the concept of cultural capital that schools are suitable for students from higher socioeconomic levels. Cultural capital is determinant in the higher academic achievement

of upper-class children compared to lower-class children (Polat, 2009). There is a similar situation in the exam preparation and exam results. For example, the PISA results between 2003 and 2012 showed that the socio-economic structure was determinant in the exam achievement. Since these determinations are related to social structure/classes, the education expenditures of the households will inevitably be affected by their social position. As a matter of fact, considering that the income levels of the participating families were from middle and lower classes, it was revealed that the exam expenditures caused families not to be able to meet their basic needs such as food and clothing. Furthermore, according to Grant (2004), exams put socio-economically disadvantaged students in a position that is against them. The economic insufficiency of the students due to their families' income causes them to achieve less in exams than the students of higher socioeconomic level. Lack of adequate support to these students at schools to compensate for the family's inadequacies brings about failure in exams.

The participants recommended changing the examination system and the educational content to reduce/eliminate expenditures during the higher education exam preparation process. In other words, families believed that when the exam system changes or the content of the education changes (more qualified or compatible with the examination system), the expenditures will decrease/be prevented. Recommendations about changing the exam system or the content of education were also stated by researchers working on this subject (Arslan, 2004; Ergun, 2013; TED, 2010; Gürbüzürk and Kıncal, 2018). Students also think similarly about this issue. For example, 49% of the high school students believe that the exam preparatory works at schools are insufficient (TED, 2010,45). Undoubtedly, it is possible to list different recommendations for the solution of the problem. However, this issue can basically be solved with educational policies that can be produced within the framework of political and economic policies.

## Conclusion

Households make education expenditures during the higher education exam preparation process. These household education expenditures made mainly consist of exam preparation books and private teaching institutions/private lessons. The expenditures made have an effect on the economic, social, and individual life of the household. This effect is in the form of postponing or giving up even the basic needs of the household. The households recommend changing the education system in order to reduce/eliminate household education expenditures.

In a period when neoliberal education policies are on the agenda, the contribution of households to education



expenditures will continue. In addition, while exams provide an opportunity for screening in the transition to higher education, they provide an economic benefit for the sectors playing a role in the exam preparation process. Both the escape of exams from the market understanding and the strengthening of public expenditures instead of household education expenditures are not only limited to education policies but also depend on the change in political and economic policies.

## Recommendations

There is a need for different studies on household education expenditures during the higher education exam preparation process. These studies can be carried out with larger study groups using mixed methods. Teachers, school administrators, educational scientists should raise the demand for a change in the system with the awareness that exams create an economic sector.

## CONFLICT OF INTERESTS

The authors have not declared any conflict of interest

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