

CITY OF PHILADELPHIA PENNSYLVANIA

OFFICE OF THE CONTROLLER

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Economic Impact Survey:

Philadelphia Business Community's Response
to the plans for the Papal Visit

August 2015



City Controller
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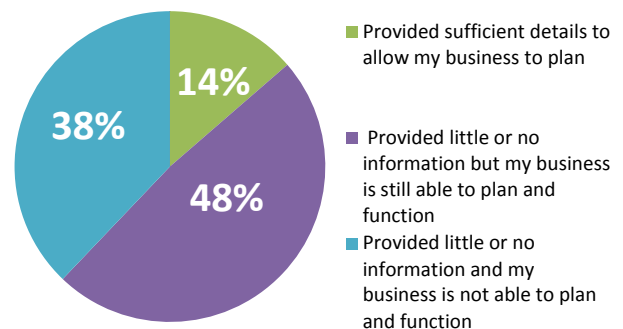
The Philadelphia City Controller's Office conducted an economic impact survey to gauge how the business community was balancing the expected 1.5 million pilgrims expected to travel to see the Pope against the security planning provided by the Mayor's Administration. This is a historic opportunity for Philadelphia as well as the business community.

The Controller's office hand delivered 250 surveys to hotels, restaurants and retail businesses inside the traffic box to learn what businesses were expecting and the problems where were facing. The response rate was higher than expected.

The Controller's survey found the following:

- 45% of those surveyed expected revenue to be somewhat above average the weekend of the Papal visit
- 91% said the Francis Festival Grounds formally known as the "Traffic Box" creates challenges to doing business
- 86% said the Nutter Administration has provided little or no detail
- Businesses listed their top three concerns as: Getting employees to work, getting supplies and deliveries and the removal of trash

In preparing the business community for the Papal Visit, the Mayor's Administration has:



Graph refers to survey question #4 on page 7

Along with answering the survey's questions, respondents also provided several comments regarding their concerns for the weekend the Pope visits, including the following:

"The communication has been sparse at best. The room night pickup for the entire hotel community has been sparse due to the lack of information provided to travelers." – *Hotel Manager*

"We still have no answers on how our staff can get through the security perimeter in a timely fashion... We are extremely worried that the buildup of trash will be a huge problem with pests. Will private companies be able to collect trash???" – *Restaurant Manager*

The detailed results of the survey and comments provided by businesses are included in the subsequent pages of this analysis.

THE PLAN FOR POPE'S VISIT FROM THE PERSPECTIVE OF THE PHILADELPHIA BUSINESS COMMUNITY

Background

Philadelphia is preparing for a historic occasion in late September. As a grand finale to the World Meeting of Families conference, Pope Francis will visit the city, where His Holiness will speak at Independence Mall and perform an open-air mass on the Benjamin Franklin Parkway. These two events are expected to draw 1.5 million pilgrims from all around the globe to Center City Philadelphia. The Papal event poses a tremendous opportunity for the City and local businesses, along with considerable challenges revolving around security and logistics. The ways in which plans are communicated will inevitably have an impact on expectations as well as behavior of both businesses and residents throughout the City.

Methodology

In order to gauge the efficacy of pre-visit communications and planning, the Controller has conducted a survey of hotels, retail establishments, and restaurants inside the security perimeter. More than 250 letters were hand-delivered to these businesses, requesting that they participate in an online survey. The survey was also distributed via social media in an effort to include any business that might not have received a letter. The letters were delivered on Tuesday, August 18, 2015 and businesses were asked to complete the survey by August 28. The Controller also plans to distribute a post-visit survey to gauge the alignment of expectations with reality.

The Survey

The survey was constructed to capture three data points. First, we wanted to establish a baseline – was summer 2015 good for business or not, and what were the expectations for business during the Papal visit. Second, we aimed to understand how well the City was communicating the impact of the increased security measures. And finally, we wanted to understand the sorts of adjustments, if any, businesses were planning in order to handle both the security restrictions and the influx of up to one million visitors.

In general, our survey suggests that businesses are cautiously optimistic about the economic opportunity the Papal visit represents. Typical tourist areas are expecting an onslaught of visitors and fear being overrun. Many see great economic potential from huge numbers of new consumers. Others are excited for the City, believing that the Papal visit thrusts Philadelphia into the global limelight, and this kind of exposure has long term ramifications. This will be an opportunity for Philadelphia to introduce itself to the world and hotel, restaurant, and retail establishments will play a pivotal role in shaping visitors' experiences. Multiple businesses stressed that the last weekend in September is typically a big revenue generator, as residents resume spending locally rather than elsewhere on vacation.

Unsurprisingly, the largest concerns for businesses are logistical. They are concerned about staff and with how employees will get to work. For those who rely on public transit and for those who live outside of the city in particular, getting in and out of the security perimeter will likely be very time-consuming or even impossible. With so much uncertainty regarding demand for that weekend, businesses face a conundrum: overstocking brings risk of wasted expense, but under stocking could lead to significant lost opportunity. This is particularly the case for restaurants, where many inputs are perishable and where freshness is paramount; for many this means daily deliveries.

Businesses also expressed concern in their comments about trash removal; commercial trash is usually hauled 6 days a week, and if huge demand materializes, the City will be overflowing with refuse. A strong secondary concern is the ability to get weekend deliveries; if the traffic box remains closed all night, neither private trash pickup nor deliveries will be possible. Finally, businesses are worried about security for both their employees and property.

By The Numbers

Number of businesses responding: 68

Response rate: 27%

The response rate for each category was between 20 and 30%, with retailers performing slightly better than hotels and restaurants. Additionally, the survey captured business size information - 0-9, 10-24, 25-49, 50-99, and 100+ employees – and each size was well-represented.

Businesses say that revenues during the summer of 2015 have been relatively good...

- Average or above average – 72%
- Below average – 28%

The final week of September is usually pretty important to Philadelphia businesses...

- Somewhat or significantly above average – 61%
- Somewhat or significantly below average – 12%

Expectations for revenues during the Pope's visit are split...

- Above average revenues – 46%
- Below average revenues – 43%

The City's effort to prepare the business community has been inadequate...

- The Nutter administration has provided little or no information – 86%
- Nutter admin has provided sufficient details – 11%

The Information provided has left many in the Business community uncertain...

- The Nutter Administration has neglected major details or been unclear creating high levels of uncertainty – 82%
- The Nutter Administration has provided clarity and or neglected minor details – 17%

The Francis Festival Grounds formally known as the “Traffic Box” has caused much confusion and concern...

- It creates challenges to doing business while the Pope is in the city – 92%
- It is immaterial to business – 11%

Most, but not all, of Philadelphia’s businesses are cautiously optimistic:

- Expect the increase in demand to offset the challenges– 65%
- Expect to close during the Pope’s visit – 24%

Overall, businesses inside the Francis Festival Grounds formally known as the “Traffic Box” are excited for the potential economic opportunity the Papal visit represents. By and large they plan to make accommodations to the best of their ability to help themselves and the City put the best foot forward. However, our survey suggests that insufficient outreach, inconsistent messaging, and lack of clarity have created unnecessary uncertainty and anxiety. For many businesses, the Controller’s letter was the first direct communication from a City official. This survey indicates an earlier and more proactive approach would clearly have been preferable.

Results from the Economic Survey

Pre-Visit Economic Impact Survey

| Type of Business (check one): | Responses | % of Total |
|-------------------------------------|-----------|------------|
| <input type="checkbox"/> Restaurant | 30 | 44% |
| <input type="checkbox"/> Retail | 9 | 13% |
| <input type="checkbox"/> Hotel | 27 | 40% |
| <input type="checkbox"/> Other | 2 | 3% |

Number of employees:

| | | |
|--------------------------------|----|-----|
| <input type="checkbox"/> 0-9 | 14 | 21% |
| <input type="checkbox"/> 10-24 | 18 | 26% |
| <input type="checkbox"/> 25-49 | 16 | 24% |
| <input type="checkbox"/> 50-99 | 10 | 15% |
| <input type="checkbox"/> 100+ | 10 | 15% |

1) Compared to previous years, revenue generated in the summer of 2015 has been (please check one):

| | | |
|--|----|-----|
| <input type="checkbox"/> Significantly below average | 10 | 15% |
| <input type="checkbox"/> Somewhat below average | 9 | 13% |
| <input type="checkbox"/> Average | 22 | 33% |
| <input type="checkbox"/> Somewhat above average | 21 | 31% |
| <input type="checkbox"/> Significantly above average | 5 | 7% |

2) Compared to the rest of the year, revenues during the last week of September are generally expected to be? (please check one):

| | | |
|--|----|-----|
| <input type="checkbox"/> Significantly below average | 4 | 6% |
| <input type="checkbox"/> Somewhat below average | 4 | 6% |
| <input type="checkbox"/> Average | 18 | 27% |
| <input type="checkbox"/> Somewhat above average | 31 | 46% |
| <input type="checkbox"/> Significantly above average | 10 | 15% |

3) What are your revenue expectations compared to normal for September 25-27, the weekend the Pope is in Philadelphia? (Please check one):

| | | |
|--|----|-----|
| <input type="checkbox"/> Significantly below average | 5 | 7% |
| <input type="checkbox"/> Somewhat below average | 15 | 22% |
| <input type="checkbox"/> Average | 9 | 13% |
| <input type="checkbox"/> Somewhat above average | 7 | 10% |
| <input type="checkbox"/> Significantly above average | 31 | 46% |
| <input type="checkbox"/> None - we will be closed | 0 | 0% |

| | Responses | % of Total |
|---|-----------|------------|
| 4) In preparing business the community for the Papal Visit, the Nutter Administration has: | | |
| <input type="checkbox"/> Taken a hands-on approach to helping my business | 0 | 0% |
| <input type="checkbox"/> Helped indirectly by pointing me toward relevant agencies | 0 | 0% |
| <input type="checkbox"/> Provided sufficient details to allow my business to plan | 9 | 14% |
| <input type="checkbox"/> Provided little or no information but my business is still able to plan and function | 32 | 48% |
| <input type="checkbox"/> Provided little or no information and my business is not able to plan and function | 25 | 38% |
| 5) The information provided by the Nutter Administration (please check one): | | |
| <input type="checkbox"/> Has provided clarity and certainty about what to expect from the Papal visit | 5 | 8% |
| <input type="checkbox"/> Has neglected minor details but is not a cause for concern | 6 | 9% |
| <input type="checkbox"/> Is immaterial to my business | 1 | 2% |
| <input type="checkbox"/> Has neglected major details and is a cause for concern | 19 | 29% |
| <input type="checkbox"/> Has been unclear and creates a high level of uncertainty | 35 | 53% |
| 6) The planned security perimeter (Please check one): | | |
| <input type="checkbox"/> Is immaterial to my business | 2 | 3% |
| <input type="checkbox"/> Creates minor disruptions that are easy to plan around | 5 | 8% |
| <input type="checkbox"/> Poses challenges but the expected increase in business will offset the challenges | 42 | 65% |
| <input type="checkbox"/> Is resulting in the closure of my business during the Papal visit | 16 | 25% |

7) What changes, if any, do you plan to make to your business operations in anticipation of the Pope's visit? (Please check all that apply): Responses

- | | |
|--|----|
| <input type="checkbox"/> We will be closed | 7 |
| <input type="checkbox"/> We are increasing staff | 13 |
| <input type="checkbox"/> We are decreasing staff | 9 |
| <input type="checkbox"/> We are scheduling earlier deliveries and stockpiling supplies | 31 |
| <input type="checkbox"/> We will be altering our normal range of services | 29 |
| <input type="checkbox"/> We will do nothing differently | 1 |
| Other: <u> 22 </u> Please see attached _____ | |

8) During the weekend of the Papal Visit to Philadelphia, what challenges do you anticipate? (Please check all that apply)

- | | |
|---|----|
| <input type="checkbox"/> Lack of business | 33 |
| <input type="checkbox"/> Staff shortages | 48 |
| <input type="checkbox"/> Running out of supplies | 36 |
| <input type="checkbox"/> Too many customers to handle | 19 |
| Other: <u> 21 </u> Please see attached _____ | |

Additional Comments from Questions 7-8

Comments appear as submitted

All Comments provided

Comments from Question 7

| |
|--|
| unsure if we will be able to open if my employees cannot get to work!! |
| adding security guard |
| We will not be able to provide the same quality of food that normal due to delivery restrictions and city closures |
| will lock and secure our hotel for any non guests |
| Not sure if we are going to open yet |
| concerned for security |
| we will limit our hours of operation |
| Very Concerned about Trash |
| We are still working with our corporate offices to make a plan of how the Pope's visit will affect business hours. Our main concern is the security perimeter will prevent the majority of our employee's from getting to work. If we do not have the number of employees needed to support the schedule, we will be unable to run our business appropriately. |
| We have no idea if we will be able to get deliveries |
| We do not know until we get more info from the City |
| We will have to close if we cannot deliver inside the perimeter from outside the perimeter |
| We will be altering our normal range of services, We expect no police support and will be mostly used as a public bathroom. |
| We have no clue because we are unsure how employees will be able to get to work |
| We are decreasing staff, By force. Staff can't commute |
| With the lack of information it makes it difficult for me to plan from a scheduling standpoint, being that half my staff commute from outside the city |
| staff will have to walk miles to get to work that would otherwise be able to take public transit or drive |
| I have no idea what to expect |
| Providing overnight accommodations for staff |
| we will be hiring a guard |
| Attempting to plan protein/perishable item delivery, but have no schedule from Nutter Admin that we are simply guessing. |
| still planning |

Comments from Question 8

| |
|--|
| Not sure if business will be slow or busy. |
| We are uncertain what to expect but are planning for what would be the worst situation possible. |
| Non guests trying to use the hotel facilities etc. |
| Trash pick up |
| WE DON'T KNOW |
| People not being able to get in and out |
| surviving Marshall Law |
| we do not know what to expect |
| non-guests using our bathroom facilities |
| Trash issues |
| Disruption in our delivery services |
| Facility upkeep; shoplifting, disruptive customers, no backup. |
| Trash Collection |
| Guest and staff can't access hotel |
| Fear of news being released |
| I don't think it's going to be busy at all without transportation |
| unprotected theft |
| Trash Collection |
| security |
| No Place to put trash |
| None 0 we are ready for a stellar weekend! |

Additional Comments from Businesses

Comments appear as submitted

All Comments provided

Restaurant Comments

1 the question to #6 could accurately be described as poses major challenges, but we will remained open because we have to.

2 We are very excited for this opportunity for our city. If this results in a lack of business for a period of days, that will be unfortunate, but we recognize the greater outcome for Philadelphia if we can pull off this world-class, monumental event. I highly doubt that we will have any uptick in business because we are a "fine dining" establishment, and based on our current reservations for that time period, we look like we will be slower than normal.

3 We will not be able to operate at normal capacity if a provision is not made to allow commercial vehicles to make deliveries over the weekend.

4 I truly think/ hope that we will have enough foods/beverages for the increased number of visitors. I am EXTREMELY concerned with trash removal. On a regular weekend, our containers are always filled up and need to be emptied daily. The City will face lots of street garbage, rodents and unsafe conditions if haulers are not let in during the night. Imagine Rittenhouse square filled up with trash from Le Cheri, Barclay Prime, Parc, Rouge, Devon, A kitchen, Serafina, La Colombe, Rittenhouse hotel and more ... looking good??

5 I have heard rumors that there may be late night deliveries allowed in the zoned off areas please let us know if that is going to be the case. One of our biggest concerns is trash removal. We already have very little space left in our trash area by the end of the weekend, and I hate to think of the smell and possible pest problems that could result in so much trash being left out for that amount of time.

6 We still have no answers on how our staff can get through the security perimeter in a timely fashion. Do they need credentials??? We are extremely worried that the build up of trash will be a huge problem with pests. Will private companies be able to collect trash???

7 We need to know what we can expect as far as deliveries, when is the last day trucks will be allowed to make deliveries? Is there any "go around" to delivery (i.e. have a government/checkpoint-approved-trucks bring in fish, vegetables, proteins so quality of food is high/risk of foodborne illness is low/serving perished items is avoided). Check points and security perimeter will hinder all traffic? Trash collection will remain the same schedule?

8 We still have no definitive plan. Trash, deliveries, etc. are all an issue especially being so close to the perimeter. Lack of communication is resulting in the majority of our clientele leaving for the weekend. This will have a significant impact on business.

9 Some employees cannot find a way to work, due to all the shut-down of Center City. How do you expect us to run a 24 hour restaurant.

Retail Comments

1 We are uncertain of the events of the Papal weekend. The week leading up to the visit will be very fruitful. The security walls will make it almost impossible for my staff to get to work within a reasonable time. IT IS A HORRID IDEA. Nutter seems to only care about the visitors and not the local people of the city. I don't want my store to be targeted by large groups of thieves during Saturday/Sunday. It will be very hard for Police to get here in a timely manner. We also feel that we have too many people coming in just to use our bathroom and take time away from the actual shoppers. It's a very confusing and difficult situation to understand.

2 Not sure what to expect during the Papal Visit. I wish the City would give clearer communication to the merchants in Center City. Perhaps someone sending defined info to the stores. Some stores are planning to close others are waiting to decide last minute. It's quite concerning and chaotic. The perimeters make it difficult and inconvenient for myself and staff to make it into work as we all live outside the city or in South Philly.

3 Concerns in front of store graffiti on lamppost/sign and newstands with graffiti, defacing and broken front with trash.

4 As a high end specialty retailer we have no idea what to expect. We hope the increase in traffic/people will result in sales but we do not know. During the crowds of the Rittenhouse Row festival we see no business. I think communication targeted at retailers/businesses would have been helpful. Maybe newsletter businesses could sign up for o get details related to doing business during this time. What will be done to ensure we can operate properly and SAFELY. Better idea of logistics, where will crowds be, etc. Also there is so much going around in the rumor mill that it is detrimental. I just heard today that the city is encouraging businesses to close due to safety concerns...

5 we may have to close as our staff drives to work from New Jersey. we don't know who to get them home on Saturday night. we are closed usually on Sunday. This is a crucial time for our business and we are disappointed at the plans. There should have been some sort of plan to staff business other than to tell them to walk. Shuttle buses to parking outside of the zone would have helped out staff plan their commutes. The bridge not opening until Monday at noon is impacting our business after the pope leaves.

6

3. We wanted to clarify our answer to this particular question. We expect to see significantly increased business on the day's leading up to the Pope's visit (September 23-25). We are unsure of what to expect for the days of the actual Pope visit... we feel it could either go one way or the other in terms of significantly increased business due to the influx of visitors in the city or it could be significantly decreased due all of the visitors specifically being here to partake in all of the activity surrounding the Pope's visit.

6. We wanted to clarify our answer to this particular question. We don't really feel that any answer best describes how we feel. We actually feel that the security perimeter is posing major challenges to our ability to run our business and will potentially have to close due to said security perimeter. Without knowing how positively the Pope's visit will actually affect business, we don't currently feel that this alone offsets the MAJOR challenges and complications this perimeter has created.

7

Our {Type of} production plant is outside the security perimeter in {Neighborhood}. We are unable to deliver to our stores or our wholesale customers unless we can cross the perimeter -even if it is in the middle of the night. Our bread and pastries are made fresh every day. If we cannot cross the perimeter, we will have to close our three locations and cease delivery.

Who do we speak to to get additional information?

8

Our production facility is located outside of the safety perimeter and we cannot make our daily deliveries to our three retail locations and wholesale accounts which are all located inside the perimeter.

We are willing to deliver in the middle of the night if we are allowed access inside the perimeter.

We would appreciate speaking with someone on how to conduct our business during the time the perimeter is in place.

9

In question 6, we will have major disruptions: banking, supplies, food delivery, trash removal, use of restrooms (no one else on Rittenhouse Square allows use of their facilities), inability for repairmen to address elevators and escalators as they go down (and they go down with increased use), employees who will not be able to make it to work, as they are partially disabled and cannot make the walk. Many of our customers come from outside the city and won't be able to visit us; regulars in the city have told us they are getting out of town. We anticipate losing business and having to pay 4 people per day for three days to be bathroom attendants, a significant cost.

10

I manage a small apartment building near {Location}. 100% of my tenants are planning to leave town and some would have liked to see the Pope. They have been scared off since I am blocks from the bridge. We may hire security to stay at the building if all the residents confirm they are leaving. Fortunately my guests have the means to leave but being chased from their home where they pay rent to me and taxes to Mayor Nutter is a disgrace. The administration blew this event.

11

I would like if someone could reach out to me as I have concerns about the overall operations/staffing of my business, being that I am very close to where the Pope will be.

12

With the anticipation of large crowds and the inability for staff to report to work we are proposing to decrease operating hours from 10a-5p on friday and saturday and to be closed completely on Sunday. We only have 3 staff members within a 30 minute walking distance as the rest of our staff takes public transit and/or drives to work. With security checkpoints we are anticipating an hour time for walking and getting through the checkpoint. We do not believe that these visitors will be spending money on frivolous clothing items/material goods while coming to see the Pope. We will also have to have a security guard in place during operating hours in order to be open to ensure staff safety.

13

We've got concerns about staff ability to get to work due to public transportation issues, especially in a timely manner, after going through 2 security checkpoints and requiring multiple IDs. We also have concerns about asset protection and personnel protection based on police force and focus and security issues.

14

We have not decided yet on hours and operations. We are planning using the recent information given by Septa. We are uncertain if we will have the number of associates required to operate.

Hotel Comments

1 We feel it is unsafe to open being as though many staff members live outside of the city leaving us with minimal staffing

The communication has been sparse at best. The room night pickup for the entire hotel community has been sparse due to the lack of information provided to travelers.

2 There also has not been a clear definition, in the public eye, between WMOF and the Papal visit. Subsequently, our regular travellers are avoiding Philadelphia for the entire week.

We anticipate that this week will cost our property between 100k and 200k in normal business.

Managing a hotel inside the perimeter that has been set is becoming increasing difficult to plan for. We have recently sent out a letter to all of our incoming guests for that weekend informing them that they will unfortunately have to probably walk for miles to get to the hotel.

3 Due to this information getting to our guests we have already seen a few cancelled rooms. We understand the necessity of the security for the Papal Visit, but with all of these blockages and closures getting staff inside the city to serve all of the 1.5 million guests that we are expecting is becoming close to impossible for many.

Many support businesses (restaurants, dry cleaners, food markets) in our neighborhood are indicating that they will close due to the travel restrictions inside and outside of the perimeter. We don't know how to answer questions coming from our guests: will elderly have to walk with luggage great distances?, will public garages be full?, will it stink with no sanitation services?, where will the port-a-pots be located?, will the law enforcement be able to control use of excessive force in crowd control?....etc.

4 We have several guests who have likened the situation with fences and snipes on rooftops as "The Philadelphia Hunger Games" or "The Philadelphia Divergent". Seems New York is not shutting down tunnels and bridges.

Mayor Nutter should be ashamed of his handling of this event. No information given and allowing too restrictive measures. I am tired of getting my information from the press. This event could and I hope still goes down as one that makes Philadelphia shine but only if the administration takes the last weeks of time and prepares for reality. Try telling a potential hotel guest "you'll have at least a 3.9 mile walk carrying your luggage and oh, I don't know where you will park". If those people are any sampling of how we are going to look the Monday then the news nationwide could move from politics to the "nightmare in Philly starring Mayor Nutter".

6 The lack of advance notice related to street closures and to date no plan for how employees will get to work and get home, if deliveries for supplies and trash removal will be available to hotels and restaurants has really put pressure on businesses to figure out how we will take care of the estimated 1.5 million people in the city. Many hotels are lacking reservation pick up due to negative press generated by the media related to the inability to get in/out or around in the city. We keep hearing that "this information is coming". With the Papal visit only one month away we need desperately to get the word out on how the city will operate to the people come!

7 Number one concern obviously transportation. We don't anticipate any disruptions to our business if we can figure out how to get staff to the hotel. Being a hotel right on the perimeter of the boxes is proving harder than we expected.

Acknowledgments

| | |
|---|--|
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