

# The Soulscale Index

VOLUME

*I*

2026

An abstract graphic featuring a dynamic splash of ink in black, white, and grey against a black background. The ink forms intricate, swirling patterns that spread across the middle of the page.

# Scale Or Soul?

ONE HUNDRED  
BRANDS RANKED BY  
WHETHER THEY'VE  
SLAYED OR SAVED  
THEIR SOUL.

---

THE ONLY INDEX THAT PROVES YOU CAN SCALE YOUR BRAND WITHOUT SELLING ITS SOUL

[thesoulscaleindex.com](https://thesoulscaleindex.com)

*Hello.*

Welcome to  
The Soulscale Index.

# *Foreword*

The market has long operated under the assumption of an inverse relationship between volume and values: the belief that to scale a brand is to inevitably slay its soul. The Soulscale Index exists to prove that this choice between scale or soul is a false dichotomy.

This inaugural volume ranks one hundred iconic brands, with annual revenues ranging from \$1M to over \$100B, based on their ability to preserve their soul in the race to scale.

Soul is defined not as a marketing trick, but as a brand's foundational story made visible through every product and decision. While many brands have indeed struggled with the paradox of growth, the brands at the top of this index prove that you can achieve industrial scale and still preserve a founder-grade soul.

This index is an independent editorial project. We accept no advertising or sponsorships from the brands we score to ensure our stance remains objective. Our goal is simple: to provide the growth advice the market is currently missing, not just on how to grow, but what to protect while you do.

# An independent editorial project.

The Soulscale Index is published online and revised annually. It accepts no advertising and no sponsorship from the brands it scores.

## PUBLISHED BY

Born Good

## EDITION

Volume I · 2026

## WEBSITE

[thesoulscaleindex.com](https://thesoulscaleindex.com)

## METHOD

Five weighted pillars, tuned by category.

## SCOPE

100 brands, \$1M–\$100B+ in annual revenue.

## STANCE

No advertising.  
No sponsorship.

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# The choice between soul and scale is a *false* dichotomy.

The market assumes an inverse relationship between volume and values: that to scale a brand is to slay its soul.

The Soulscale Index proves otherwise.

With the right strategies in place, this need not be the inevitable outcome. The index ranks one hundred iconic brands, with annual revenues ranging from \$1M to over \$100B, based on their ability to preserve their soul in the race to scale.

The case for this index is simple. The market is full of growth advice, but short on advice about what to *protect* while you grow.

## FOUR TENETS

### *I.*

A brand exists in your products and spaces, not just in a strategy deck.

### *II.*

Scale should be a reflection of your standards, not the result of abandoning them.

### *III.*

The best brands expand their reach without sacrificing their character.

### *IV.*

Written standards are the only thing that can survive changes in leadership or ownership.

# Soul.

Soul isn't a marketing trick; it's a brand's founding story made visible through every product it makes and every decision it leads with.

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## INTEGRITY

Does the brand stay true to its founding story and values as it grows?

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## COMMUNITY

Does the brand maintain a genuine, reciprocal connection with its people?

---

## CHANGE

Can the brand evolve, adapt, and innovate without losing its essence?

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## COMMITMENT

Has the brand maintained its commitment to quality, detail, and craftsmanship even at scale?

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## MISSION

Is the brand's mission more than words on a wall?

# Scale.

True scale is growth without erosion; expanding your reach and revenue while keeping your cultural impact and standards intact over time.

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## COMMERCIAL SCALE

Profit built on uncompromised quality.

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## PHYSICAL SCALE

Global expansion without cultural dilution.

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## TEMPORAL SCALE

Decades of relevance over quarterly targets.

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## ADAPTIVE SCALE

Constant evolution in a way that protects the core essence.

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# The choice isn't one of scale *or* soul. It's both.

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## SOUL WITHOUT SCALE

The Niche Classic:  
Beloved by the few.  
Culturally potent but  
commercially constrained.

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## SCALE WITHOUT SOUL

The Commodity Machine:  
Everywhere but empty.  
Optimized for efficiency,  
devoid of affinity.

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## SOUL × SCALE

The Soulscale Ideal: Global  
reach, uncompromised intent.  
Founder-grade integrity  
at industrial volume.

# Can a brand cross a billion *dollars* in revenue and remain the thing its first *1,000* customers loved?

The Index does not answer this in the abstract. It answers it brand by brand, with a scorecard, a write-up, and a public record that's available for all to see.

# Ranked by the preservation of original identity under the pressure of scale.

One hundred brands, categorised from one million to one hundred billion plus US dollars in annual revenue. Each evaluated against the same five pillars: Integrity, Commitment, Community, Mission & Change.

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№ 01 · TOP OF INDEX

## Lego

Toys · Billund, Denmark · est. 1932

92.6/ 100

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№ 100 · BOTTOM OF INDEX

## Instagram

Software · Menlo Park, USA · est. 2010

35.0/ 100

---

A COMPOSITE OF FIVE  
WEIGHTED PILLARS

INTEGRITY · COMMITMENT ·  
COMMUNITY · MISSION · CHANGE

# Five Soulscale Pillars

Each brand is evaluated across five core pillars, that together determine their position on the Soulscale Index.

01 Integrity | Does the brand stay true to its founding story and values as it grows? Do decisions feel genuine or purely market-driven?

02 Commitment | Has the brand maintained its commitment to quality, detail, and craftsmanship even at scale? No cutting corners. No dilution.

03 Community | Does the brand maintain a genuine, reciprocal connection with its people; customers, employees, and the communities it operates within?

04 | Mission Is the brand's mission more than words on a wall? Do they walk the talk on values, sustainability, and the impact they claim to care about?

05 | Change Can the brand evolve, adapt, and innovate without losing the essence of what made it worth paying attention to in the first place?

# Scoring The Brands

Each brand is evaluated on a scale of 0–100 across the five Soulscale pillars. Their overall Soulscale Index score is the equally weighted average of all five pillars: all scores summed and divided by five.

Scores are not based on revenue, valuation, or market share. The revenue scale is derived from publicly available information about the brand's approximate revenue range. It's descriptive, not evaluative, and is not an input into any of the five pillar scores.

Scores are based on integrity; the gap between what a brand says and does. Hypocrisy is penalized. Consistency is rewarded.

Brands scoring 85+ have genuinely scaled without losing their soul. Scores between 80–84 show meaningful commitment with some compromise. Below 80, the gap between mission and practice widens.

All scores are based on publicly available research: B-Corp certifications, impact reports, supply chain documentation, founder mission statements, and third-party verifications where available. Verification depth varies by brand; some are fully transparent, others have limited public disclosure. Evidence is prioritized over narrative.

The scores in the index were AI-generated, using a general-purpose large language model, with a structured research prompt, using publicly available data as its source material.

# Data Sources

B-Corp certification and governance records.

Supply chain transparency reports and third-party audits.

Annual impact reports and financial disclosures.

Sustainability certifications (organic, fair-trade, regenerative, etc).

Founder mission statements and long-term behavior patterns.

Community feedback and verified customer sentiment.

Documented responses to growth inflection points and crises.

Industry awards and third-party recognition programs.

# The Top Ten.

*Ten brands that scaled without losing their soul.*

| RANK | BRAND       | CATEGORY          | FOUNDED | SCORE |
|------|-------------|-------------------|---------|-------|
| 01   | Lego        | Toys / Heritage   | 1932    | 92.6  |
| 02   | Leica       | Optics / Heritage | 1869    | 91.6  |
| 03   | Patagonia   | Apparel           | 1973    | 91.0  |
| 04   | Yerba Madre | Food & Beverage   | 1996    | 91.0  |
| 05   | Figma       | Software          | 2012    | 90.2  |
| 06   | Notion      | Software          | 2013    | 90.0  |
| 07   | Aesop       | Beauty            | 1987    | 90.0  |
| 08   | Veja        | Footwear          | 2005    | 90.0  |
| 09   | Red Bull    | Beverage          | 1987    | 90.0  |
| 10   | Lush        | Beauty            | 1995    | 89.0  |

A COMPOSITE OF FIVE  
WEIGHTED PILLARS

INTEGRITY · COMMITMENT ·  
COMMUNITY · MISSION · CHANGE

*Nº 01 of 100*TOYS · EST. 1932  
BILLUND, DENMARK

# Lego

The gold standard for preserving childhood wonder at a massive corporate scale.

*Lego's enduring soul is protected by its physical "system of play," ensuring every innovation remains backwards-compatible with bricks manufactured decades ago.*

## SCORECARD

# 92.6 / 100

|           |    |
|-----------|----|
| INTEGRITY | 98 |
|-----------|----|

|            |    |
|------------|----|
| COMMITMENT | 92 |
|------------|----|

|           |    |
|-----------|----|
| COMMUNITY | 95 |
|-----------|----|

|         |    |
|---------|----|
| MISSION | 90 |
|---------|----|

|        |    |
|--------|----|
| CHANGE | 88 |
|--------|----|

*Nº 02 of 100*OPTICS · EST. 1869  
WETZLAR, GERMANY

# Leica

The gatekeeper of photography's soul, charging a premium for the privilege of manual perfection.

*Leica scales by treating scarcity and mechanical friction as luxury features, ensuring that growth never dilutes the prestige or the tactile identity of the brand.*

## SCORECARD

## 91.6 / 100

|           |    |
|-----------|----|
| INTEGRITY | 95 |
|-----------|----|

|            |    |
|------------|----|
| COMMITMENT | 98 |
|------------|----|

|           |    |
|-----------|----|
| COMMUNITY | 92 |
|-----------|----|

|         |    |
|---------|----|
| MISSION | 88 |
|---------|----|

|        |    |
|--------|----|
| CHANGE | 85 |
|--------|----|

*Nº 03 of 100*APPAREL · EST. 1973  
VENTURA, CALIFORNIA

# Patagonia

A planetary mission encoded into the corporate structure to outlive its creators.

## SCORECARD

# 91.0 / 100

|            |    |
|------------|----|
| INTEGRITY  | 95 |
| COMMITMENT | 90 |
| COMMUNITY  | 85 |
| MISSION    | 95 |
| CHANGE     | 90 |

*B-Corp certification, transparent supply chain, and an ownership structure that ensures the mission remains integral as it scales.*

*Nº 04 of 100*

FOOD &amp; BEVERAGE · EST. 1996

SEBASTOPOL, CALIFORNIA

# Yerba Madre

Regenerative energy, rooted in commerce  
as a proven vehicle for regeneration.

*Proved that commerce can be a  
vehicle for regeneration (not just  
sustainability) by tying every sale  
directly to rainforest restoration  
and indigenous livelihoods.*

## SCORECARD

# 91.0 / 100

|            |    |
|------------|----|
| INTEGRITY  | 91 |
| COMMITMENT | 87 |
| COMMUNITY  | 93 |
| MISSION    | 96 |
| CHANGE     | 88 |

*Nº 05 of 100*SOFTWARE · EST. 2012 SAN  
FRANCISCO, CALIFORNIA

# Figma

The collaborative heart of modern design. Survived a corporate marriage proposal with its identity intact.

*Figma's soul is preserved by its multiplayer DNA, ensuring that growth facilitates collective creativity rather than just individual productivity.*

## SCORECARD

# 90.2 / 100

|            |    |
|------------|----|
| INTEGRITY  | 92 |
| COMMITMENT | 88 |
| COMMUNITY  | 96 |
| MISSION    | 85 |
| CHANGE     | 90 |

*Nº 06 of 100*SOFTWARE · EST. 2013 SAN  
FRANCISCO, CALIFORNIA

# Notion

The workspace that scaled on community love instead of sales-team aggression.

*Notion built a multi-billion-dollar company on product craft and community evangelism. The template gallery and ambassador program is its go-to-market.*

## SCORECARD

# 90.0 / 100

|            |    |
|------------|----|
| INTEGRITY  | 90 |
| COMMITMENT | 93 |
| COMMUNITY  | 96 |
| MISSION    | 78 |
| CHANGE     | 94 |

*Nº 07 of 100*BEAUTY · EST. 1987  
MELBOURNE, AUSTRALIA

# Aesop

Seek the remarkable in the everyday.  
Luxury that refuses to raise its voice.

*Aesop scaled through architecture  
and word-of-mouth, proving luxury  
at scale doesn't need to be loud.  
Every store is a one-off; every  
counter, a small thesis on materials.*

## SCORECARD

# 90.0 / 100

|            |    |
|------------|----|
| INTEGRITY  | 95 |
| COMMITMENT | 97 |
| COMMUNITY  | 82 |
| MISSION    | 85 |
| CHANGE     | 91 |

*Nº 08 of 100*FOOTWEAR · EST.  
2005 PARIS, FRANCE

# Veja

Fair-trade sneakers with zero advertising budget. The supply chain is the marketing.

*Their entire marketing spend goes into supply-chain integrity. The shoe sells the brand by being demonstrably built differently.*

## SCORECARD

# 90.0 / 100

|            |    |
|------------|----|
| INTEGRITY  | 97 |
| COMMITMENT | 88 |
| COMMUNITY  | 85 |
| MISSION    | 98 |
| CHANGE     | 80 |

*Nº 09 of 100*

BEVERAGE / MEDIA · EST. 1987

FUSCHL AM SEE, AUSTRIA

# Red Bull

A media empire and extreme-sports patron that uses a beverage to build its own universe.

## SCORECARD

# 90.0 / 100

*Red Bull scales not by chasing consumers but by making the brand synonymous with human achievement instead of just another SKU on a shelf.*

|            |    |
|------------|----|
| INTEGRITY  | 92 |
| <hr/>      |    |
| COMMITMENT | 80 |
| <hr/>      |    |
| COMMUNITY  | 96 |
| <hr/>      |    |
| MISSION    | 88 |
| <hr/>      |    |
| CHANGE     | 94 |
| <hr/>      |    |

*Nº 10 of 100*BEAUTY · EST. 1995 POOLE,  
UNITED KINGDOM

# Lush

Fresh, handmade cosmetics. 900+ stores later, still made by hand, still loud about it.

*Nine-hundred-plus stores globally, still handmade, still rejecting preservatives. Craft at scale in its most literal form, and an activist voice that has never been outsourced to an agency.*

## SCORECARD

# 89.0 / 100

|            |    |
|------------|----|
| INTEGRITY  | 92 |
| COMMITMENT | 90 |
| COMMUNITY  | 88 |
| MISSION    | 95 |
| CHANGE     | 80 |

## TEN MORE STANDARD-BEARERS

# More brands holding their soul at scale.

*Twenty more market leaders defending their first principles.*

| No | BRAND            | CATEGORY        | SCORE |
|----|------------------|-----------------|-------|
| 11 | Brompton         | Manufacturing   | 89.0  |
| 12 | Monzo            | Finance         | 89.0  |
| 13 | Arc'teryx        | Outdoor         | 89.0  |
| 14 | Rivian           | Automotive      | 88.8  |
| 15 | Rolex            | Horology        | 88.6  |
| 16 | Athletic Brewing | Beverage        | 88.0  |
| 17 | REI              | Outdoor / Co-op | 88.0  |
| 18 | Snow Peak        | Outdoor         | 88.0  |
| 19 | Dr. Bronner's    | Beauty          | 88.0  |
| 20 | Monocle          | Media           | 87.6  |

| No | BRAND            | CATEGORY | SCORE |
|----|------------------|----------|-------|
| 21 | Muji             | Home     | 87.4  |
| 22 | Penguin Books    | Media    | 87.4  |
| 23 | Bulgari          | Fashion  | 87.0  |
| 24 | Bellroy          | Fashion  | 87.0  |
| 25 | Liquid Death     | Beverage | 87.0  |
| 26 | Headspace        | Health   | 87.0  |
| 27 | Basecamp         | Software | 87.0  |
| 28 | Jellycat         | Toys     | 86.6  |
| 29 | e.l.f. Cosmetics | Beauty   | 86.6  |
| 30 | Chanel           | Fashion  | 86.4  |

## FIELD NOTES FROM THE TOP OF THE INDEX

# Four behaviors recur across the top of the Index.

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*i.*

## Values are foundational to the business.

The top brands don't just talk about their values; they bake them into the operational bones of the company (e.g. Patagonia's trust).

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*ii.*

## The product and the customer tell the story.

These brands don't rely on big ad campaigns. They let their community and their product tell their story (e.g. Notion or Aesop).

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*iii.*

## The harder path beats the easy route.

They choose "friction" over shortcuts. For example, Leica keeps manual focus because it's core to their identity, even if it's harder for the user.

---

*iv.*

## From the mission comes the money.

Social good isn't a side project. It's how they make money. Every sale directly fuels the mission (e.g. Red Bull owning the sports arenas their audience loves).

FROM THE BOTTOM OF THE INDEX

# Three missteps define the lower index.

## .01

### Over extension.

Trading your identity for quick licensing fees in categories you don't actually understand. The most common failure.

*In the 1980s, Pierre Cardin licensed its name to over 800 products, including frying pans, cigarettes, and baseball caps.*

MOST  
COMMON

## .02

### Profit over purpose.

Allowing new ownership or private equity to cut the standards that originally protected the brand's soul. Often a decisive blow.

*After acquisition, production was shifted to lower-cost regions, and Dr Marten's "Made in England" heritage became a tiny fraction of its business.*

MOST  
DECISIVE

## .03

### Algorithmic erasure.

Letting third-party platforms turn your voice into generic keywords and your brand into just another SKU. The hardest to reverse.

*When Casper stopped being a "sleep lifestyle" brand, its unique voice was replaced by SEO-optimized titles like "Memory Foam Mattress – Cooling Gel – CertiPUR-US".*

HARDEST  
TO REVERSE

## FIVE FROM THE BOTTOM

# The brands that show what scale has *cost* them when it comes to soul.

№ 96 · EST. 2010

35 / 100

## Instagram

Lost its creative community to the algorithm. It stopped being about connection and started being about consumption.

№ 91 · EST. 1994

52 / 100

## Supreme

Sold to a giant corporation (VF Corp). It stopped being a subculture and started being a commodity measured by quarterly targets.

№ 90 · EST. 1926

53 / 100

## Godiva

Traded high-end boutique quality for supermarket shelf space. They bought sales but lost their Belgian heritage.

№ 89 · EST. 1955

54 / 100

## McDonald's

Scaled a system, not a soul. Achieved global dominance by choosing universal reliability over unique character and craft.

№ 85 · EST. 2005

58 / 100

## Etsy

The shift from "I made this for you" to "I'm a middleman for a factory" reflects a brand prioritising industrial volume over original intent.

APPLY THIS QUARTER

# Three Soulscale principles you can apply this quarter.

## *Principle I.* Write the standard down.

The brief that protects the brand has to outlive any single person in the room. Make it boring, make it specific, make it a document anyone can quote back to you.

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## *Principle II.* Reject the easy opportunity.

There is always a license deal, a co-brand, a category extension that would close the quarter. Soulscale brands are the ones that have learned to say no to such temptation.

---

## *Principle III.* Own the whole experience.

Every interaction a customer has with the brand must be intentionally designed and "authored" by the brand itself, rather than handed off to a third party.

CODA

*"Don't sell your soul to  
buy the world. After all,  
if you don't have a soul,  
what will you do with  
the world?"*

*— A note left on the desk of the editor.*



## GORDON GERARD MCLEAN FOUNDING EDITOR

Originally from Dublin, Gordon has spent 20+ years at the intersection of culture and commerce as a brand and creative strategy leader at companies in Sheffield, London, Istanbul, New York, and Cupertino, CA. Most recently he served as the Global Head of Strategy for Mac, Values & Markets at Apple, where he learned firsthand what it takes to scale a brand in sync with its soul.

He's partnered with teams, big and small, to launch, build, and reinvent some of the world's best brands, including Apple, Bacardi, Bank of Scotland, Bing, Bombay Sapphire, EA Games, GE, Gillette, Google, Grey Goose, Guinness, Halifax, Hilton, Holiday Inn, HSBC, Perfect Day, Radisson, Sandy Hook Promise, SAP, ServiceNow, Vodafone, Wells Fargo, and Yerba Madre.

His work has been recognized for its commercial impact by the IPA and Effies, for its strategic thinking by the Jay Chiats and the ARF, for its cultural impact by the Emmys and TED, and for its creative excellence by The One Show, Cannes Lions, D&AD, and others.

Now based in LA, as the Founder & Principal Strategist of Born Good, he helps agency, start-up, and marketing leaders turn their foundational good into future growth. Whether acting as a Fractional Head of Brand Strategy for challengers like Yerba Madre, or advising established companies like Google, Hilton, and ServiceNow, his goal is to bring clarity, creativity, and impact to the boardroom.

Connect on [LinkedIn](#).

SCORE A BRAND

# The Index is free and *open* to all.

Anyone can submit any brand for scoring. The Soulscale Index is updated annually, and the public ledger is open all year round.

[thesoulscaleindex.com](https://thesoulscaleindex.com)

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# FIN

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