



## Demna's Balenciaga: The anatomy of disruption

For Demna to rise, three forces had to converge: Zeitgeist-leading design, consumers ready to defy, and a channel to bypass gatekeepers. Published July 11, 2025

At the end of a Balenciaga tenure plastered with logomania, Demna's final show as the house's creative director abandoned logos altogether. Even on handbags, the usual monogram Bs ceded space to the name of their models in a subtle cursive — Isabelle, Rain, Sonja.

The show's sound design, stripped of music, opened space for nostalgia. The only notes came from recorded voices of the models, speaking their own name as they entered the runway — Laurent, Jona, Kim.

In place of logos and music, Demna gave us people. Surrounded by minds that pushed Balenciaga through the billion-dollar threshold, it was a reminder that there are still individuals behind creative and commercial behemoths.

Garments ranged from minimal, severe tailoring to playtime pops of princess pink. True to his self-proclaimed *raison d'être*, Demna delivered couture for a modern wardrobe. Lightness was key: a silk bomber jacket, a summer taffeta blouson, and a roomy car coat.

With this lightness, came an appropriate release of the highs and lows that came with reinvigorating the brand. The clothes, Demna's vision, and the models stood in plain sight — no obscuring hats or full-face coverings (though Nosferatu-esque necklines, yes). The anonymizing styling characteristic of his Balenciaga was largely absent. Even sunglasses were sparse.

À la Demna, he didn't shy from a few final firsts, making corduroys cool again and debuting Balenciaga's first couture sneaker — a full circle moment for a design decade that began by redefining the anatomy of a sneaker and ultimately reshaped the industry.

For Demna to rise, make Balenciaga a billion-dollar brand and disrupt luxury's codes, three forces had to converge: Zeitgeist-leading design, consumers ready to defy, and communication channels that bypassed gatekeepers.

Demna's design non-dualism: Craft and commerce

As fashion influencer and devout “Balenciagite” Bryan Yambao (@Bryanboy) told Jing Daily at the show's after-party, “Demna's always been a designer's designer. He actually makes good clothes.” Styled in a hot pink 3D-printed Balenciaga top, Yambao embodies Demna's ethos: You can defy convention and still be serious about craft.

From the start, Demna was committed to both heritage and newness. A look back at his 2016 debut collection makes this clear. Out of 44 looks, two were structured-cocoon puffers, plus a few lightweight versions. Overall, the collection obsessed over tailoring, structure and proportion, couture attitude, skirts, coats, and archival florals. Yet, it was the puffers (which grew more exaggerated as the seasons went on) and their modern take on a Cristóbal silhouette that quickly entered mainstream consciousness, fueling a global trend.

Many came to know Demna for his puffers — some aware of the Cristóbal reference, some not. Likewise, when Triple S sneakers were introduced, they sat within a curated, garment-focused collection. The sneakers and their enormity, though, are what became viral fodder.



That Demna's collections had both commercial and editorial slants is of course not unique. The creative core of a designer's collection is often elevated, referential, experimental. But it's a brand and marketer's job to distill that vision down to an accessible touch point. While there are hyper-informed fashion consumers, a large-scale brand can't count on this to make shareholders happy.

Demna made this model his own, embraced every level of fashion's creation-to-marketing pipeline, and put them into one pot.

On an attention-grabbing level, there was design that pushed into satire and took advantage of internet culture, producing everything from trash bags to chip bags. These products pumped numbers, drew eyes, became celebrity favorites, and even sold out. And, they weren't any less art than Marcel Duchamp's Fountain urinal.

The center of Demna's design, though, was a dedication to tailoring, structure, references, and above all, Cristóbal's legacy. Whether people noticed is on them. In 2021, the revival of the house's couture and its modern take made this commitment clear.

But sandwiched between a hype vehicle and a couture core was a suite of products that blurred these two modes. In their non-dualism, they hit a commercial stride. Exaggerated sneakers were daring but reasonable enough for a creative at work, or an uptown mom on a matcha run. T-shirts, stilettos, hoodies became staples for a modern wardrobe. The Hourglass Bag became coveted by even the most conservative consumer.

Meme-worthy pieces were not the bulk of Demna's work; they were simply the loudest. Demna's design mastery was its ability to blur physical, digital, and mental space, making use of the tools of the time.

Some, including fashion elites, questioned this approach. But the market for Demna's Balenciaga, as it turns out, was waiting.

Market thirsty for subversion: APAC to Gen-Z

When the Georgian designer took the reins, luxury was already shifting. Collectively, his peers carved out space for an audience that defied luxury consumption norms.

Vetements, founded by Demna and his brother Guram Gvaslia in 2014, had already taken off, while the late Virgil Abloh was building Off-White. These brands, with others, proved there was an appetite for casual clothing at high-end price points. In 2017, Kim Jones brought Supreme to Louis Vuitton, collapsing the barriers between "high" and "low" as we knew them.

Although there was overlap, Balenciaga's more grungy consumer wasn't always the same as Off-White's. They had their own moods, edge, and style. What they did have in common was an alternative language that opened up luxury to new audiences.

The changes rippling through the industry were not just about the clothes. And this era's value was never that it fit neatly into the concept of a trend, but in a long track record of community-centered fashion, elevated by Black culture, intersecting music, hip-hop, skate, internet, and on.

Luxury fashion was opening up, it seemed. With it, Demna built a cult following. Early adopters of Demna's Balenciaga hopped over from Vetements. Others were excited about something subversive but actually smack in the middle of culture – millennials, Gen-Z, and the chronically online. Brand loyalists were always there, and with an offering of sneakers and hoodies, men also eased in.

Markets like China, where consumers embrace fashion newness, were also ready for Demna. In 2021, when Balenciaga's revenue had quadrupled in five years, reaching \$1.2 billion, the Chinese market accounted for \$300 million of the pie.



“China is where we have the highest share of top clients,” then-CEO Cedric Chaulbat, told Jing Daily in 2024, adding that it remained a growing market for the brand, even amid the luxury downturn.

Hardcore streetwear consumers, brand loyalists, and global markets alone, though, could not have tipped the brand into powerhouse status. And while Demna's design language was innovative, it wasn't completely new. There were always references — the ghost of Cristóbal, Margiela's deconstruction, grunge and “normcore” had come and gone.

Even the dad sneaker had been around since New Balance's 990s in the 1980s. What it had not done was land at a Kering-owned fashion house. On Demna's quest to convert the everyday into luxury, he and a community of early adopters needed an ally. They found it on social media.

Digital media: A means of influence that tipped the scales

When Balenciaga released the Triple S, I was an editor at Hypebeast, where a New York-office full of eager journalists worked around the clock to pump out articles and test the limits of the sneaker's virality.

With the onset of social and digital media like Hypebeast, traditional luxury glossies and top-down creative authority was largely dethroned. Online spaces created a new collective voice — composed of both people who bought luxury, and people who didn't.

Demna's Balenciaga always had naysayers. They're ugly. That's not fashion. This goes too far (sometimes it did). For some traditional consumers, the aesthetic was uncomfortable. But under the new model of a populous digital voice, this didn't really matter. Whether people liked or hated Kim Kardashian in Balenciaga, clicks were clicks.

The love-hate only helped the brand. And as we found out, people do like sneakers. Despite some groans, the Triple S brought the dad shoe into the luxury sphere, and with it, the idea that anything can be legacy-approved luxury.

Around that time, Demna and Abloh headlined a Vogue conference in an all-white room on the top floor of Milk Studios in New York. The topic was disruption. In that literal ivory tower, did the stiletto-heeled audience, who purchased thousand-dollar tickets, understand they were the ones being disrupted?

Ultimately, it didn't matter if they got it. A collective voice — comprising fashion fans, observers, and critics, some established, some new — were calling the shots. The disruption was happening and fashion, on a clear trajectory, was opening up.

A decade later, that trajectory has derailed. In the remnants of a disrupted industry, there is a leveling out. In parallel to rising socio-political movements, the collective voice has become fragmented, frustrated, confused, out-smarted by an algorithm.

At Demna's final Balenciaga show, where his collection let go of a decade of “disruption,” the audience seemed to hold on, or at least honor, the full range of Demna's Balenciaga canon — down to glittering logos, Matrix glasses, boot socks, and the infamous towel skirt.

As Demna wrote on handwritten cards left at the show, “Fashion lives on the edge of tomorrow, driven not by what we know but the thrill of discovering what comes next.” Now, we wait patiently to see what trinity of forces Demna converges with at Gucci, and if fashion does have a next.

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